



Pipeline Recovery
Group

INDEPENDENT REVENUE DIAGNOSTICS

Revenue Risk Diagnostic

Optera Dynamics [Sample]

March 13, 2026

71

COMPOSITE EXPOSURE INDEX

CRITICAL EXPOSURE

Pipeline Recovery Group

Structural Revenue Risk Analysis

Revenue Risk Framework™ v1.3 · CM v2.1 · IP v1.0

SAMPLE ISSUANCE NOTICE

This document is a sample deliverable produced by Pipeline Recovery Group for public reference. The organization name, dataset, and all findings are illustrative. No engagement was conducted and no client data was used.

The analysis methodology, scoring framework, and report structure are identical to those applied in every paid diagnostic. Nothing has been shortened, simplified, or redacted. This sample reflects the complete scope and format of the Revenue Risk Diagnostic deliverable.

RRF v1.3 · IP v1.0 · CM v2.1

Pipeline Recovery Group · Independent Revenue Diagnostics

Structural Revenue Risk Diagnostic

Revenue Risk Framework (RRF) v1.3

Executive Summary

This organization has \$15,233,165 in estimated annual revenue exposure concentrated in Data Model and Pipeline.

The Composite Exposure Index (CEI) for this organization is **71**, placing it in the **CRITICAL EXPOSURE** classification tier (59-100).

This diagnostic evaluates the structural integrity of the CRM data provided, applying a deterministic, versioned detection architecture across five governance domains: Data Model Integrity, Pipeline Hygiene, Activity and SLA Compliance, Lead Management, and Reporting Reliability. The analysis identified 12 structural findings with an estimated combined annual revenue exposure of \$15,233,165. The finding distribution indicates systemic structural degradation consistent with a CRM environment that has operated without formalized pipeline governance. The majority of this exposure is addressable through configuration-level controls and governance policy — not system replacement or process redesign. The concentration pattern suggests governance friction rather than pipeline volume as the primary driver of structural risk.

8 Quick Wins identified — structural controls addressable in under 2 hours each, representing an estimated \$7,728,117 in recoverable exposure.

Finding Severity Distribution

Critical	High	Medium	Low
3	4	4	1

Revenue Exposure Assessment

The diagnostic identified **\$15,233,165** in estimated annual revenue exposure across 12 structural findings.

Exposure by Domain

Domain	Finding Count	Est. Annual Exposure
Pipeline	3	\$9,389,586
Lead Management	2	\$2,077,261
Reporting	2	\$1,452,981
Activity/Sla	1	\$1,320,328
Data Model	3	\$993,009
Data Quality	1	\$0

Exposure by Finding

Finding	Domain	Severity	Est. Annual Exposure
38 Open Deals Past Projected Close Date (60.3%)	Pipeline	Critical	\$1,919,538
Unassigned Leads and Deals	Lead Management	Critical	\$1,791,416
85 Stale Deals with No Activity in 30+ Days	Activity/Sla	Critical	\$1,320,328
76 Open Deals Missing Close Date	Reporting	High	\$910,109
Duplicate Records Detected	Data Model	High	\$526,905
Missing Required Contact Fields (4 fields)	Data Model	High	\$431,104
Poor Lead Source Hygiene	Lead Management	High	\$285,845
81 Deals Possibly Stuck or Regressed	Pipeline	Medium	\$4,990,496
Long Deal Cycle Times (204 days avg)	Pipeline	Medium	\$2,479,552
34 Open Deals Missing Amount Value	Reporting	Medium	\$542,872
Insufficient Activity Logging	Data Model	Medium	\$35,000
26 Deals with Temporal Data Anomalies (14.3%)	Data Quality	Low	\$0

These estimates are directional indicators based on structural patterns in the CRM export, calibrated against the organization's observable revenue tier. Actual impact depends on sales motion, deal velocity, and market conditions. Effort estimates referenced in this diagnostic reflect estimated administrative configuration time only and do not include internal adoption or change management.

Data Reliability Statement

Data Reliability Grade: HIGH

The dataset contains 240 contacts, 182 deals, and 1 pipelines, with 120 activity records. The schema mapping achieved 100.0% field coverage (12/12 expected fields mapped). A HIGH grade indicates strong field coverage, enabling full financial modeling with high confidence.

Dollar estimates represent directional indicators based on structural patterns in the CRM export, calibrated against the organization's observable revenue tier. Actual impact depends on sales motion, deal velocity, and market conditions.

Structural Findings

Severity Classification Guide: Critical = systemic structural failure requiring immediate governance attention. High = significant structural gap with measurable revenue impact. Medium = moderate structural drift with cumulative risk potential. Low = minor structural inconsistency or data quality observation.

Finding 1 of 12: 38 Open Deals Past Projected Close Date (60.3%)

CRITICAL Pipeline

38 of 63 open deals (60.3%) have passed their projected close date, representing \$3,839,077 in overdue pipeline. Aging breakdown: 7 within 30 days, 25 at 31–90 days, 6 over 90 days. This pattern indicates either forecast padding, stalled deal progression, or insufficient pipeline hygiene — all of which erode forecast reliability.

Estimated Annual Exposure: \$1,919,538

Confidence: high

Assumptions: Recovery rate: 50% of lapsed pipeline value; Deals past close date have significantly reduced conversion probability; Total overdue pipeline: \$3,839,077

Remediation Priority: Implement a close-date hygiene workflow: require disposition for deals 14+ days past close date (extend, close-lost, or re-forecast). Establish a weekly pipeline review cadence that flags overdue deals automatically.

Finding 2 of 12: Unassigned Leads and Deals

CRITICAL Lead Management

123 contacts and 73 open deals with no owner.

Estimated Annual Exposure: \$1,791,416

Confidence: high

Assumptions: Company tier: Growth Stage

Remediation Priority: Implement automatic round-robin assignment.

Finding 3 of 12: 85 Stale Deals with No Activity in 30+ Days

CRITICAL Activity/Sla

You have 85 open deals worth \$8,252,050 that haven't been touched in over 30 days.

Estimated Annual Exposure: \$1,320,328

Confidence: high

Assumptions: Baseline close rate = 20%; Stale deals: 4% close rate; Total stale value = \$8,252,050; Company tier: Growth Stage

Remediation Priority: Implement a 'stale deal' workflow that alerts reps after 14 days of inactivity. Require a disposition for deals over 30 days.

Finding 4 of 12: 76 Open Deals Missing Close Date

HIGH Reporting

76 open deals worth \$6,209,194 in pipeline value lack expected close dates, creating systematic forecasting blindness and resource allocation inefficiencies.

Estimated Annual Exposure: \$910,109

Confidence: high

Assumptions: Company tier: Growth Stage

Remediation Priority: Make 'Close Date' required at Qualification stage.

Finding 5 of 12: Duplicate Records Detected

HIGH Data Model

42 contact records with duplicate email addresses. 2 deal records with matching names and corroborating signals (similar value, shared contact, or close creation dates). Duplicates fragment activity history and inflate reported pipeline value. Some flagged deals may represent legitimate multi-opportunity accounts — verify before merging.

Estimated Annual Exposure: \$526,905

Confidence: high

Assumptions: Company tier: Growth Stage; Total duplicates: 44

Remediation Priority: Use CRM's built-in duplicate detection tool to merge duplicate contacts. Review flagged deal pairs to distinguish true duplicates from legitimate multi-opportunity accounts (e.g., renewal + upsell for the same company). Implement naming conventions that differentiate deal types.

Finding 6 of 12: Missing Required Contact Fields (4 fields)

HIGH Data Model

Your CRM is missing 4 critical contact fields. Estimated 120 contacts affected.

Estimated Annual Exposure: \$431,104

Confidence: high

Assumptions: Estimated 120 contacts affected; Priority: owner_id; Company tier: Growth Stage

Remediation Priority: Create required fields. Priority fix: owner_id.

Finding 7 of 12: Poor Lead Source Hygiene

HIGH Lead Management

38.8% of contacts have missing or generic lead sources.

Estimated Annual Exposure: \$285,845

Confidence: high

Assumptions: Company tier: Growth Stage

Remediation Priority: Make Lead Source a required field. Create specific options.

Finding 8 of 12: 81 Deals Possibly Stuck or Regressed

MEDIUM Pipeline

Found 81 deals 60+ days old still in early stages (worth \$7,129,280).

Estimated Annual Exposure: \$4,990,496

Confidence: medium

Assumptions: Company tier: Growth Stage; Proxy metric without historical stage data

Remediation Priority: Review these deals with reps. Implement stage history tracking.

Finding 9 of 12: Long Deal Cycle Times (204 days avg)

MEDIUM Pipeline

Average cycle time is 204 days. Industry benchmark is 60-90 days.

Estimated Annual Exposure: \$2,479,552

Confidence: high

Assumptions: Average cycle: 204 days; Company tier: Growth Stage

Remediation Priority: Review long-running deals. Consider deal desk for stalled opportunities.

Finding 10 of 12: 34 Open Deals Missing Amount Value

MEDIUM Reporting

34 of 139 open deals lack amount values, preventing accurate pipeline forecasting and deal prioritization.

Estimated Annual Exposure: \$542,872

Confidence: high

Assumptions: Company tier: Growth Stage

Remediation Priority: Make 'Amount' required when deals reach Qualification stage.

Finding 11 of 12: Insufficient Activity Logging

MEDIUM Data Model

Only 0% of recent leads have logged activities.

Estimated Annual Exposure: \$35,000

Confidence: medium

Assumptions: Activity coverage <50% indicates systemic logging gap

Remediation Priority: Implement consistent activity logging. Consider auto-logging from email/call systems.

Finding 12 of 12: 26 Deals with Temporal Data Anomalies (14.3%)

LOW Data Quality

26 deals (14.3% of evaluatable records) have temporal anomalies affecting \$2,812,988 in pipeline value: 22 have activity dates that predate their creation dates; 6 have close dates that predate their creation dates. This indicates CRM import errors, backdated records, data migration artifacts, or system clock issues.

Confidence: high

Assumptions: Activity anomaly: last_activity_at < created_at; Close date inversion: close_date < created_at

Remediation Priority: Audit the affected records to determine root cause (import errors, manual backdating, data migration artifacts, or integration sync issues). Establish data validation rules on record creation to prevent future temporal inconsistencies.

Classification Rationale

The Composite Exposure Index of **71** places this organization in the **Critical Exposure** tier (59-100). This classification indicates significant structural inconsistencies across multiple domains that are likely distorting forecast reliability and planning accuracy. Exposure patterns at this level typically reflect cumulative governance degradation rather than isolated anomalies.

At 71, this score is positioned within the CRITICAL EXPOSURE tier range of 59-100.

The dominant risk concentration is in Data Model and Pipeline, which together account for the majority of detected structural exposure.

Classification Model v2.1 — Tier Boundaries:

Tier	CEI Range	Governance Characterization
Integrity	0-25	Structural controls operating within expected thresholds
Emerging	26-44	Early-stage drift detectable; governance friction present
Material	45-58	Measurable inconsistencies affecting forecast reliability
Critical	59-100	Systemic degradation affecting decision-grade forecasting

What Happens Next

This diagnostic is a fixed-scope, version-stamped assessment of your CRM's structural posture. The findings and classification represent a point-in-time measurement. The following guidance is provided to support internal prioritization.

Interpreting Your Findings

Findings are ordered by severity and estimated exposure. Critical and High severity findings represent the most structurally significant gaps and typically warrant immediate governance attention. The 8 Quick Win(s) identified in this diagnostic represent the fastest path to measurable structural improvement, each addressable in under two hours of administrative effort.

Assigning Internal Ownership

Each finding maps to one of five governance domains. Organizations typically achieve the most efficient remediation by routing findings to the appropriate functional role: Revenue Operations for data model and pipeline findings, Sales Leadership for activity and SLA findings, and Marketing Operations for lead management findings. Executive sponsorship accelerates cross-domain initiatives.

Structured Remediation

For organizations seeking a structured control sequence mapped to these findings, the Complete Analysis Package includes a 90-Day Recovery Architecture with phased control prioritization, ownership role mapping, validation checkpoints, and structural KPI suggestions. The architecture is a specification document designed to be handed to your internal team or CRM partner for execution.

Requesting Clarification

Written clarification on any finding in this diagnostic is available at no additional cost. Reference your support token when submitting a clarification request to ensure efficient triage.

Methodology Note

This diagnostic was produced under Revenue Risk Framework (RRF) v1.3 using a deterministic, versioned detection architecture. The same CRM export will produce the same classification under the same framework version. Results are directly comparable only within the same version set (RRF / IP / CM).

The framework evaluates five governance domains: Data Model Integrity, Pipeline Hygiene, Activity and SLA Compliance, Lead Management, and Reporting Reliability. Each domain contributes to the Composite Exposure Index through a weighted aggregation of binary rule evaluations. Domain names and tier boundaries are public; individual rule mechanics and weight allocations are proprietary.

Appendix: Dataset Summary

Parameter	Value
Contacts Analyzed	240
Deals Analyzed	182
Pipelines Detected	1
Activity Records	120
Data Reliability Grade	HIGH
Schema Coverage	12/12 fields (100.0%)
Findings Produced	12
Framework Version	RRF v1.3
Classification Model	CM v2.1
Issuance Policy	IP v1.0

Glossary

Term	Definition
CEI	Composite Exposure Index. A 0-100 score measuring structural revenue risk across five governance domains. Higher scores indicate greater structural exposure.
Classification Tier	One of four governance classifications (Integrity, Emerging, Material, Critical) derived from the CEI score.
Domain	One of five structural categories evaluated by the framework: Data Model Integrity, Pipeline Hygiene, Activity/SLA Compliance, Lead Management, and Reporting Reliability.
Finding	A specific structural observation detected by the framework, with severity classification, domain assignment, and (when available) estimated financial exposure.
Severity	The governance urgency of a finding: Critical, High, Medium, or Low.
Data Reliability Grade	A confidence assessment (HIGH, MODERATE, LOW) of the schema mapping quality. Determines whether dollar estimates are produced or suppressed.
Quick Win	A finding addressable in under two hours of administrative effort, typically involving configuration changes rather than process redesign.
Support Token	A unique identifier (e.g., AUD-xxxx) assigned to this diagnostic for support triage and version tracking.

90-Day Recovery Architecture

Control Priority Sequence

Total Controls: 12 | **Estimated Implementation Effort:** 7.0 hours | **Aggregate Exposure Addressed:** \$15,233,165/year

Methodology Note:

The controls below are derived directly from the structural findings identified in the accompanying Revenue Risk Diagnostic. Revenue-at-risk figures represent directional indicators based on structural patterns in the CRM export, calibrated against the organization's observable revenue tier. Actual impact depends on sales motion, deal velocity, and market conditions.

Controls are sequenced by a composite of severity, estimated exposure, and implementation effort. Quick wins (under 2 hours of administrative effort) are prioritized to generate measurable structural improvement within the first 30 days.

Control 1: Review these deals with reps. Implement stage history tracking.

Estimated Annual Exposure: \$4,990,496 | **Effort:** ~30 min | **Domain:** Pipeline

Structural Impact: 70% of regressed deals close as losses. Estimated impact: \$3,493,347 - \$4,990,496 annually

Control Specification:

- 1 Audit the affected records to identify the scope and severity of the issue
 - 2 Implement corrective actions based on root cause analysis
 - 3 Establish preventive controls to avoid recurrence
 - 4 Document the remediation process for operational reference
 - 5 Schedule periodic reviews to verify sustained compliance
-

Control 2: Review long-running deals. Consider deal desk for stalled opportunities.

Estimated Annual Exposure: \$2,479,552 | **Effort:** ~30 min | **Domain:** Pipeline

Structural Impact: Long cycles reduce annual throughput. Estimated impact: \$1,735,687 - \$2,479,552 annually

Control Specification:

- 1 Segment open pipeline by time-in-stage to identify where deals stall most frequently — distinguish between legitimate complexity and process friction

- 2 Review deals exceeding 1.5x the average cycle time for common patterns: missing decision-maker access, unclear next steps, or pricing objections
 - 3 Implement stage-based time limits with automated alerts when deals exceed expected duration
 - 4 Create a fast-track process for deals that match high-velocity patterns (clear budget, single decision-maker, known use case)
 - 5 Benchmark cycle times by deal size, source, and segment to set realistic stage duration targets
-

Control 3: Implement a close-date hygiene workflow: require disposition for deals 14+ days past close date (extend, close-lost, or re-forecast). Establish a weekly pipeline review cadence that flags overdue deals automatically.

Estimated Annual Exposure: \$1,919,538 | **Effort:** ~45 min | **Domain:** Pipeline

Structural Impact: Overdue pipeline has significantly reduced conversion probability. Applying a 50% recovery assumption to \$3,839,077 in lapsed pipeline yields an estimated exposure of \$1,919,538.

Control Specification:

- 1 Identify all open deals with close dates that have already passed — segment by days elapsed and deal value
 - 2 Require deal owners to update disposition: advance with new close date, mark as lost, or archive
 - 3 Implement automated notifications when a deal's close date passes without a stage change
 - 4 Establish CRM workflow rules that flag lapsed close dates in pipeline reports and dashboards
 - 5 Include close date accuracy as a metric in sales operations reviews
-

Control 4: Implement automatic round-robin assignment.

Estimated Annual Exposure: \$1,791,416 | **Effort:** ~45 min | **Domain:** Lead Management

Structural Impact: Unassigned records have near-zero conversion. Estimated impact: \$1,253,991 - \$1,791,416 annually

Control Specification:

- 1 Audit all contacts and deals currently without an assigned owner — segment by record age, pipeline stage, and estimated value
- 2 Assign ownership based on territory rules, account size, or round-robin distribution — prioritize open-pipeline records first
- 3 Implement CRM validation rules or workflow automation to prevent future unassigned records at creation
- 4 Establish a weekly ownership hygiene check as part of sales operations cadence

- 5 Document ownership assignment criteria for team reference and onboarding
-

Control 5: Implement a 'stale deal' workflow that alerts reps after 14 days of inactivity. Require a disposition for deals over 30 days.

Estimated Annual Exposure: \$1,320,328 | **Effort:** ~45 min | **Domain:** Activity/Sla

Structural Impact: Stale deals have 80% lower close rates. Estimated impact: \$924,229 - \$1,320,328 annually

Control Specification:

- 1 Segment stale pipeline by time-since-last-activity and deal value — prioritize high-value deals with the longest inactivity
 - 2 Review each stale deal with the assigned owner to determine disposition: advance, close, or re-engage
 - 3 Implement automated stale deal alerts at 14-day and 30-day thresholds to prevent future accumulation
 - 4 Establish a weekly pipeline hygiene review to identify and address aging deals before they become stale
 - 5 Define clear criteria for when a deal should be marked as lost vs. re-engaged
-

Control 6: Make 'Close Date' required at Qualification stage.

Estimated Annual Exposure: \$910,109 | **Effort:** ~35 min | **Domain:** Reporting

Structural Impact: Cannot forecast revenue accurately. Estimated impact: \$637,076 - \$910,109 annually

Control Specification:

- 1 Audit contact records for field completeness — prioritize records in active pipeline and high-value accounts
 - 2 Implement progressive profiling to capture missing fields through ongoing engagement touchpoints
 - 3 Set up CRM validation to require core fields (email, phone, company, title) before marking a contact as qualified
 - 4 Ensure marketing campaign tracking (UTM parameters or equivalent) is active across all acquisition channels
 - 5 Establish source attribution standards and document them for team reference
-

Control 7: Make 'Amount' required when deals reach Qualification stage.

Estimated Annual Exposure: \$542,872 | **Effort:** ~30 min | **Domain:** Reporting

Structural Impact: Cannot produce accurate forecasts. Estimated impact: \$380,010 - \$542,872 annually

Control Specification:

- 1 Audit contact records for field completeness — prioritize records in active pipeline and high-value accounts
 - 2 Implement progressive profiling to capture missing fields through ongoing engagement touchpoints
 - 3 Set up CRM validation to require core fields (email, phone, company, title) before marking a contact as qualified
 - 4 Ensure marketing campaign tracking (UTM parameters or equivalent) is active across all acquisition channels
 - 5 Establish source attribution standards and document them for team reference
-

Control 8: Use CRM's built-in duplicate detection tool to merge duplicate contacts. Review flagged deal pairs to distinguish true duplicates from legitimate multi-opportunity accounts (e.g., renewal + upsell for the same company). Implement naming conventions that differentiate deal types.

Estimated Annual Exposure: \$526,905 | **Effort:** ~35 min | **Domain:** Data Model

Structural Impact: Duplicates reduce conversion efficiency by ~15%. Estimated impact: \$368,833 - \$526,905 annually

Control Specification:

- 1 Run duplicate detection across contacts, companies, and deals — quantify the duplication rate and categorize by severity (exact match, fuzzy match, suspected)
 - 2 Define survivorship rules for merge resolution (most recent activity, most complete record, or primary account designation)
 - 3 Merge or archive confirmed duplicates using CRM's built-in deduplication tools
 - 4 Implement validation rules to prevent future duplicates at the point of record creation
 - 5 Schedule quarterly duplicate audits as part of data governance cadence
-

Control 9: Create required fields. Priority fix: owner_id.

Estimated Annual Exposure: \$431,104 | **Effort:** ~35 min | **Domain:** Data Model

Structural Impact: Missing fields reduce conversion rates by 15-30%. Estimated impact: \$301,772 - \$431,104 annually

Control Specification:

- 1 Audit contact records for field completeness — prioritize records in active pipeline and high-value accounts
 - 2 Implement progressive profiling to capture missing fields through ongoing engagement touchpoints
 - 3 Set up CRM validation to require core fields (email, phone, company, title) before marking a contact as qualified
 - 4 Ensure marketing campaign tracking (UTM parameters or equivalent) is active across all acquisition channels
 - 5 Establish source attribution standards and document them for team reference
-

Control 10: Make Lead Source a required field. Create specific options.

Estimated Annual Exposure: \$285,845 | **Effort:** ~35 min | **Domain:** Lead Management

Structural Impact: Cannot measure marketing ROI. Estimated impact: \$200,092 - \$285,845 annually

Control Specification:

- 1 Audit the affected records to identify the scope and severity of the issue
 - 2 Implement corrective actions based on root cause analysis
 - 3 Establish preventive controls to avoid recurrence
 - 4 Document the remediation process for operational reference
 - 5 Schedule periodic reviews to verify sustained compliance
-

Control 11: Implement consistent activity logging. Consider auto-logging from email/call systems.

Estimated Annual Exposure: \$35,000 | **Effort:** ~30 min | **Domain:** Data Model

Structural Impact: Incomplete data prevents measuring speed-to-lead.

Control Specification:

- 1 Audit the affected records to identify the scope and severity of the issue
- 2 Implement corrective actions based on root cause analysis
- 3 Establish preventive controls to avoid recurrence
- 4 Document the remediation process for operational reference
- 5 Schedule periodic reviews to verify sustained compliance

Control 12: Audit the affected records to determine root cause (import errors, manual backdating, data migration artifacts, or integration sync issues). Establish data validation rules on record creation to prevent future temporal inconsistencies.

Estimated Annual Exposure: \$0 | **Effort:** ~25 min | **Domain:** Data Quality

Structural Impact: Temporal anomalies undermine the reliability of stale deal detection, cycle time analysis, and activity-based scoring across 26 records.

Control Specification:

- 1 Identify all records where activity dates predate creation dates — segment by record type and creation method (manual entry, import, API sync)
 - 2 Determine root cause: CRM import with incorrect date mapping, backdated manual entries, or timezone/system clock discrepancies
 - 3 Correct affected records where the true dates can be determined from source systems or audit logs
 - 4 Implement date validation rules to prevent future temporal inconsistencies at the point of data entry or import
 - 5 Document the correction methodology for audit trail and future reference
-