# The Upstream Audit Sheet

A working tool for the management team, from *Reports, Not Revenue* by Marc Wajsberg

Work through this in one session with your senior team. One sentence per row. Where you can't — where the honest answer is “unclear” or “we disagree” — that row is a priority. This isn't a strategy document. It's a diagnostic. The value is in the conversation it forces.

| # | DECISION | CH. | RESOLVED? (Y / N / Unclear) | OWNER | DEADLINE |
|---|---|---|---|---|---|
| **1** | Primary customer segment, who we're most for | 5 | | | |
| **2** | Customer segment we're NOT for | 5 | | | |
| **3** | Position we want to own, one sentence | 6 | | | |
| **4** | Proof that supports that position. One example with a number | 6 | | | |
| **5** | Offer structure. Can a buyer evaluate it without calling us? | 8 | | | |
| **6** | Core message sequence. Problem, mechanism, proof, offer, next step | 9 | | | |
| **7** | Primary channel where best clients formed their opinion of us | 10 | | | |
| **8** | Website, does it convert a cold visitor with genuine intent? | 11 | | | |
| **9** | Decision-support content, does it answer pre-purchase questions? | 12 | | | |
| **10** | Paid acquisition. Do we know cost per acquired customer by channel? | 13 | | | |
| **11** | Measurement. Do we have 3 numbers that connect to commercial outcomes? | 14 | | | |
| **12** | Account ownership; do all marketing accounts sit under our entity? | 18 | | | |
| **13** | Governance, if our agency disappeared tomorrow, does the commercial logic survive? | 18 | | | |
| **14** | Sales readiness, can we close a cold prospect without the founder in the room? | 18 | | | |
| **15** | Upstream decisions: documented clearly enough for a new hire to act on them? | 18 | | | |

**Count your confident YES answers. Below 10: this sheet is your starting point.**