Example case

Kelvia is a hypothetical company: its figures are simulated data generated for this example. The process is real: RevOS Lite produced the conversation, the diagnostic and the plan as they are, without edits. The competitors that appear are real.

DIAGNOSTIC

Revenue diagnosis — Kelvia

Kelvia · Closing deals

November 16, 2026 · `Version 2` Final

AI-generated `Method version: 3d94dd6+skills.fafb535317`

Document generated with AI by RevOS Lite (RevOps Studio's RevOS methodology).

RevOS Lite · November 16, 2026 · Part diagnosed: closing (proposal and close), including the pilot that comes before it and the stages that feed it

1. Thesis

> Kelvia's revenue breaks mainly between the 30-day pilot and the owner's decision (only 2 of every 6 pilots sign), because the pilot is handed over as unattended access instead of being run as a managed sales stage, so most deals end in "no decision" rather than in a loss to a competitor.

Confidence: medium. What supports it, as declared by the client: the funnel (6 pilots → 2 signatures), the pilot process (logins + 20-min video, AE check-ins around day 15 and day 30, no owner in between) and the AEs' recollection of the last 8 lost pilots (6 of 8 ended with no other vendor chosen, 4 of 8 with technicians logging in fewer than 3 times). What is my inference (low confidence, to confirm at the checkpoint): that pilots start with no success criteria agreed and no commitment from the owner, and that low usage comes from lack of guidance rather than from the app. Nothing is measured in HubSpot yet. The thesis would be limited if guided pilots still show low technician usage, which would point to the mobile app itself.

2. Executive summary

Kelvia receives about 15 demo requests a month and signs about 2 (~13%). The demo works: 82% of intro calls reach the demo and 67% of demos start a pilot. The process breaks after that. Of 6 pilots a month, 4 never sign (my calculation on declared figures).

The pilot is Kelvia's main sales tool, and it runs on its own. The AE sends logins and a video and checks in twice. Nobody on Kelvia's side owns it in between, and the only CSM works with paying customers. The AEs' recollection fits this. In 4 of the last 8 lost pilots, technicians barely logged in and the owner went silent. In 2, the service manager liked it but the owner said "not this year". Only 1 went to a rival (ServiceTitan) and 1 cited the QuickBooks integration.

There are two more leaks. 4 of every 15 demo requests never reach an intro call, and nobody knows why. And nothing gets recorded, which is why, in the CEO's words, "we do not know at which step we lose them."

Order of work: (1) start recording stages and loss reasons, (2) get the owner to agree success criteria and a decision date before the pilot starts, (3) give every pilot an owner on Kelvia's side and a simple adoption routine (about 4 hours a week in total, my estimate), (4) find out why requests never reach an intro call.

What is not the problem: price (none of the 8 cited it, and the one competitive loss went to a vendor reported to cost several times more), and probably not demand volume. The goal of 4 customers a month is arithmetically reachable from today's 15 requests if the pilot and the early leak improve.

3. The revenue chain



WHERE IT BREAKS

03 Capture — Friction

Demo request has to become a booked intro call; handled by the 2 AEs, no SDR

```
15 ⟶ 11 (declared)
```

3. A quarter of requests never reach a conversation — I×E M × B

04 Qualification — Friction

Intro call and live demo. [HIPÓTESIS: the owner's budget, timing and commitment are not confirmed before the pilot]

```
11 ⟶ 9 demos (declared)
```

2. The owner may not be committed before the pilot starts — I×E M × B

05 Opportunity — Bottleneck

30-day pilot with 3–5 technicians: logins + 20-min video, AE check-ins around day 15 and day 30, no owner in between

```
9 ⟶ 6 pilots ⟶ 4 proposals (declared)
```

1. The pilot runs on its own — I×E A × M

06 Proposal — Friction

Proposal sent after the pilot

```
4/month (declared)
```

1 and 2 (consequence: half of proposals don't sign)

07 Close — Friction

Owner decides

```
2 signed/month (declared)
```

4. Nothing records where and why deals are lost — I×E M × B

08 Onboarding and expansion — Friction

$1,500 onboarding fee; 1 CSM for paying customers

```
5 cancellations in 12 months, 38 active (declared)
```

— (5 cancellations, causes unknown)

THE REST OF THE CHAIN

01 **Visibility** No data

Google search/website (~40%), review sites Capterra and G2 (25%), trade shows and LinkedIn (15%). Website being rebuilt

`Lead-source split declared; no traffic or ranking data`

02 **Demand** No issue

Demo requests from contractors in the target segment

`~15/month (declared)`

Critical · Bottleneck · Friction · No issue · No data

Source: this diagnostic · severity as judged by the consultant

Derived conversions (my calculation on declared figures): request→call 73% · call→demo 82% · demo→pilot 67% · pilot→proposal 67% · proposal→signed 50% · **pilot→signed 33%** · overall request→signed ~13%. Cycle ~4 months, of which the pilot is 1.

Illustrative arithmetic for the goal (not a forecast): with the same 15 requests, reaching ~4 signatures a month needs roughly request→call at ~85% (13 calls) and pilot→signed at ~55% (≈7 pilots × 0.55), with the middle stages unchanged. Fixing the pilot alone (to ~55%) gets to ~3.3 a month. The early leak is needed too.

4. Where it breaks and why

1. The pilot runs on its own

- **Where:** Opportunity → Proposal/Close (from pilot start to the owner's decision).
- **What happens (symptom):** 4 of 6 pilots don't sign. In 4 of the last 8 lost pilots, technicians logged in fewer than 3 times and the owner stopped replying.
- **Why (cause):** Declared: the pilot is set up as self-serve access (logins + 20-min video) with no owner on Kelvia's side between the AE's check-ins. Inferred (low confidence): no success criteria are agreed with the buyer, and technicians and dispatchers who are mid-season don't start without someone walking them through it. The owner then has no evidence to decide on, and silence is the easy option. ASUNCIÓN low usage comes from lack of guidance, not from the app being hard to use; refuted if guided pilots still show fewer than 3 logins per technician
- **Revenue impact:** The largest in the chain. At ~$14k per deal, each extra pilot that signs is worth ~$14k in first-year contract value (my calculation). Two more signatures a month from the existing 6 pilots would double new customers.
- **Evidence:** Declared funnel. AEs' recollection of 8 lost pilots. Declared pilot process. External reference: a June 2026 buyer guide in *Contractor* magazine advises contractors to have

technicians judge the mobile app before buying and notes that many contractors use trials to "poke around" instead of running real jobs. This is a general reference, not data about Kelvia.

- **Confidence:** medium on the symptom and the process. Low on the inferred part of the cause.
- **Impact × Effort:** A × M

2. The owner may not be committed before the pilot starts

- **Where:** Qualification → Opportunity (from demo to pilot start).
- **What happens (symptom):** In 2 of the last 8 lost pilots, the service manager liked the product but the owner said "not this year". In the 4 low-usage pilots the owner also went silent.
- **Why (cause):** HIPÓTESIS the pilot starts once someone is interested, without confirming with the owner that this is a this-year decision, what result would earn a "yes" and when he will decide. Declared: the person running the pilot (service/ops manager) is not the one who signs.
- **Revenue impact:** Medium. It is consistent with about a quarter of recent pilot losses and likely contributes to the silent ones. It also uses up pilot capacity on deals that couldn't close this year.
- **Evidence:** AEs' recollection (8 pilots). Declared buying committee.
- **Confidence:** low on the cause (inferred). Medium on the symptom.
- **Impact × Effort:** M × B

3. A quarter of demo requests never reach a conversation

- **Where:** Capture → Qualification (demo request to intro call).
- **What happens (symptom):** 4 of 15 monthly requests (27%) never get an intro call. That's as many as the pilots lost each month.
- **Why (cause):** Unknown. HIPÓTESIS a mix of slow first response by two AEs who are also running demos and pilots, no-shows without a reminder or rebooking, and low-fit requests (e.g. residential or very small contractors arriving from review sites)
- **Revenue impact:** Medium. Per the arithmetic above, the goal needs part of this leak recovered.
- **Evidence:** Declared funnel only. No data on response time, no-shows or fit.
- **Confidence:** low (the cause). Medium (the size of the drop).
- **Impact × Effort:** M × B

4. Nothing records where and why deals are lost

- **Where:** Spans the whole chain from capture to close.
- **What happens (symptom):** HubSpot stages are not kept up to date, and loss reasons only exist in the AEs' memory.
- **Why (cause):** HIPÓTESIS no required stage criteria or loss-reason field, and no one owns pipeline hygiene

- **Revenue impact:** Indirect but decisive. Without it, the team can't tell whether changes to the pilot work, and the 12-month goal can't be tracked by stage.
- **Evidence:** Declared by the CEO.
- **Confidence:** medium.
- **Impact × Effort:** M × B

Causal pattern

Root cause: Kelvia sells through a pilot but appears to run it as access instead of as a managed sales stage. No one owns it, and HIPÓTESIS it has no entry criteria (owner commitment) and no exit criteria (what success looks like, when the decision happens). That would explain bottlenecks 1 and 2, and bottleneck 4 means nobody sees it. Confidence: medium on "no owner" (declared). Low on the missing criteria (inferred).

What is NOT the problem:

- **Price.** None of the 8 lost pilots cited price. The one competitive loss went to ServiceTitan, which a third-party aggregator reports at $245–398 per technician per month plus $5k–50k implementation (hvacsoftwarehub.com, consulted Nov 16, 2026), versus Kelvia's $45. Confidence: medium.
- **Competitors in general.** 1 of 8 losses went to a rival. 6 of 8 ended in no decision. Confidence: medium.
- **The demo.** 82% of intro calls reach a demo and 67% of demos start a pilot. Buyers are interested enough to try it. Confidence: medium.
- **Demand volume as the limiting factor for the goal.** The illustrative arithmetic reaches ~4/month from today's 15 requests. More demand would help, but it is not where the main loss is. Confidence: medium.

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5. What to intervene on first

Quick wins (1–3):

- **Record stage and loss reason in HubSpot** with a short required list (no usage / owner silent / not this year / competitor / integration / poor fit / other), for every deal lost from now on. About 2 minutes per lost deal for the AEs. Responds to bottleneck 4. Impact M, effort B.
- **Owner kickoff before handing over logins:** a 30-minute call with the owner and the service manager to agree 2–3 success criteria, the technicians involved, and a decision date and meeting at day 30. If the owner won't join, or it isn't a this-year purchase, the pilot waits. ~3 AE hours a month for ~6 pilots. Responds to bottlenecks 2 and 1. Impact A, effort B.
- **Faster follow-up on demo requests:** a self-booking link in the confirmation email, an automatic reminder the day before, and one rebooking attempt for no-shows, with a reason logged for each

request that doesn't reach a call. The automations take load off the AEs instead of adding it. A manual first response within one business day stays as the fallback. Responds to bottleneck 3. Impact M, effort B.

Structural investments (1–2):

- **A guided pilot with a single owner on Kelvia's side:** a live setup session with the pilot technicians in week 1 (~1 hour), a usage check at day 3 and day 7 (~15 minutes each: who has logged in, how many jobs went through the app), a 15-minute weekly touchpoint with the service manager, and a 30-minute day-30 decision meeting with the owner based on the agreed criteria. My estimate: ~2.5–3 hours per pilot, ~16–18 hours a month for 6 pilots (~4 hours a week). ASUNCIÓN the CSM or the AEs can free up ~4 hours a week without hiring. If not, use group setup sessions for several pilots and automated usage alerts, or run fewer pilots at once Responds to bottleneck 1. Impact A, effort M.

Proposed sequence and why: first, loss reasons and stages (weeks 1–2), so every later change can be measured against a baseline. Then the owner kickoff (from the next pilot), which costs little and filters out "not this year" deals before they use up capacity. Then the guided pilot, once capacity is confirmed and the first kickoffs show what to adjust. The early-leak fix runs in parallel from the start because it's independent, cheap and mostly automated.

6. Assumptions and limits

Assumption	What would confirm or refute it	What changes if false	Question for the client
ASUNCIÓN low technician usage in pilots comes from lack of guidance and time, not from the mobile app being hard to use	Usage in the first 5–10 guided pilots. If technicians still log in fewer than 3 times with a setup session and check-ins, it's refuted	The thesis shifts to product/UX. The plan would have to include fixing the app's core job flow	Do your paying customers' technicians use the app daily after onboarding?
ASUNCIÓN pilots start without success criteria or a decision date agreed with the owner	The AEs' account of how the last 10 pilots started	If criteria are already agreed, the cause sits in pilot execution only, and the kickoff quick win loses weight	Do AEs agree in writing what the pilot must prove, and with whom?
ASUNCIÓN the AEs' recollection of the last 8 lost pilots is representative of all lost pilots (~4/month)	Loss reasons recorded for the next 2–3 months	If competitor or integration losses turn out larger, the priority moves toward positioning or the QuickBooks integration	Does the split (4 silence, 2 not this year, 1 rival, 1 integration) feel typical?
ASUNCIÓN the monthly counts describe a typical month this year and are similar across lead sources	HubSpot totals by source for this year	If one source converts much worse (e.g. review sites), the early leak is a fit problem and the fix is different	Do referral deals close noticeably better than others?

Assumption	What would confirm or refute it	What changes if false	Question for the client
ASUNCIÓN the CSM or AEs can free up ~4 hours a week to own pilots without hiring	CSM and AE weekly hours available	If not, the guided pilot must be lighter or fewer pilots run at once	How many hours a week could your CSM give to pilots?

Missing data:

- FALTA DATO why the 4 monthly requests don't reach an intro call. AEs, from now on
- FALTA DATO reasons for the 5 cancellations in the last 12 months. CSM
- FALTA DATO usage data from pilots (logins, jobs dispatched through the app), if the product records it. Product team

Open contradictions: none detected.

Limits: The website (being rebuilt) and visibility stages were not analyzed. All funnel figures are rounded declarations, not HubSpot measurements. Retention is flagged as friction with low confidence: 5 cancellations against ~24 new customers a year is worth understanding, and HIPÓTESIS the same low adoption seen in pilots may also drive cancellations, but there is no data on causes. FALTA BENCHMARK a reliable public reference for pilot-to-paid conversion in B2B field service software was not found

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7. Chain chart (specification)

First

high impact, low or medium effort

#3 **1. The pilot runs on its own**

High · High impact × medium effort · Opportunity

Structural

high impact, high effort

Later

everything else

#1 3. A quarter of requests never reach a conversation
Medium · Medium impact × low effort · Capture

#2 2. The owner may not be committed before the pilot starts
Medium · Medium impact × low effort · Qualification

#4 4. Nothing records where and why deals are lost
Medium · Medium impact × low effort · Close

First high impact, low or medium effort **Structural** high impact, high effort **Later** everything else

Critical High Medium

Source: this diagnostic · consultant's judgement on impact and effort

Stage	Severity	Associated bottleneck	Impact × Effort
Visibility	sin datos	—	—
Demand	sin problema	—	—
Capture	fricción	3. A quarter of requests never reach a conversation	M × B
Qualification	fricción	2. The owner may not be committed before the pilot starts	M × B
Opportunity	cuello de botella	1. The pilot runs on its own	A × M
Proposal	fricción	1 and 2 (consequence: half of proposals don't sign)	—
Close	fricción	4. Nothing records where and why deals are lost	M × B
Onboarding and expansion	fricción	— (5 cancellations, causes unknown)	—

How to read the labels

HIPÓTESIS A likely explanation that has not been proven yet.

ASUNCIÓN Something the consultant takes for granted in order to move on. If it is wrong, correct it.

FALTA DATO A missing figure that could change the conclusion.

FALTA BENCHMARK There is no sector reference to compare against.

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