

The Four Rooms: A Field Guide

Where revenue quietly goes missing, and how to find it. By Gage Staruch.

What this is. The Four Rooms is the framework I open every engagement with: Map, Find, Fix, Prove. This field guide is the short version, written so you can run it on your own business in an afternoon. It works with any CRM or set of tools, including a spreadsheet.

Why four rooms

Revenue rarely goes missing in one dramatic failure. It leaks out in small, ordinary places: a lead nobody answered, a quote nobody followed up, a handoff where the details got lost, a report nobody believes. Each leak is easy to miss on its own.

The Four Rooms is a way to walk through your revenue system in order, so you find those leaks before you start fixing things, fix the one that matters most, and then prove it worked. Do the rooms in sequence. Most wasted effort comes from starting in Room 3.

Room 1: Map

How revenue moves today. Before anything changes, you need an honest picture of the current state. Not the process in the slide deck. The one your team actually runs on a Tuesday afternoon.

What to do

1. Pick five recent deals: two you won, two you lost, one still open. Walk each from first touch to today.
2. Write down every step, who did it, which system it happened in, and how long it sat before the next step.
3. Mark every place information was retyped, copied between tools, or passed along in a message.
4. Ask the people doing the work, not only the people managing it.

You leave this room with: A one-page map of how a deal really moves, with names and systems on every step.

The common mistake: Fixing before understanding. Most teams skip this room because they think they already know. The map almost always shows something leadership didn't know was happening.

Room 2: Find

Leak points and handoff gaps. Now look at the map for the places revenue quietly disappears. These are rarely dramatic. They are small gaps where nobody is clearly responsible.

What to do

1. Where do deals sit the longest with no activity? That is a stuck point.
2. Where does ownership change hands? Every handoff is a place context gets dropped.
3. Where does the CRM stop matching reality? Stages that mean different things to different people, fields nobody fills in.
4. Where does follow-up depend on one person remembering?

You leave this room with: A short list of leaks, ranked by what each one costs you, with an owner's name next to each.

The common mistake: Chasing the loudest problem instead of the most expensive one. Rank the leaks before you pick one.

Room 3: Fix

Process, CRM, ownership. This is where most advice stops at a document. A fix only counts when it is built into the system your team uses every day.

What to do

1. Fix one leak at a time, starting with the most expensive.
2. Define the process in plain words first: what happens, who owns it, what "done" means. Then build it in the tool.
3. Automate the handoff or the reminder so the fix doesn't depend on memory.
4. Train the people who will run it, and remove the old way so there's only one way.

You leave this room with: One leak closed, built into your system, with a named owner and a team that uses it.

The common mistake: Rebuilding everything at once. Big-bang rebuilds stall. One fix that sticks beats five that don't.

Room 4: Prove

Reporting leadership trusts. A change isn't finished until the numbers show it. If leadership still builds its own spreadsheet, the system hasn't earned trust yet.

What to do

1. Choose one number that the fix should move, and record where it stands today.
2. Make that number come straight from the system, with no manual cleanup.
3. Review it on a fixed rhythm, weekly or monthly, in the same meeting every time.
4. When someone disputes the number, trace it to the source and fix the source.

You leave this room with: A report people act on without double-checking it.

The common mistake: Declaring victory at launch. The work is done when the reporting reflects reality, not when the build goes live.

The 20-question self-audit

Answer each statement honestly for your business today. Count one point for every clear yes. "Sort of" is a no.

Map

- ☐ We have a written description of how a deal moves from first contact to paid.
- ☐ Everyone on the team would describe our sales stages the same way.
- ☐ We know how long deals typically sit in each stage.
- ☐ We know which system holds the true record for customers, deals and invoices.
- ☐ Someone has walked real deals end to end in the last six months.

Find

- ☐ Every new lead gets a response within an hour during business hours.
- ☐ Every quote or proposal gets followed up more than once.
- ☐ Every handoff between people or teams has one named owner.
- ☐ We record why we lose the deals we lose.
- ☐ Past customers hear from us at least twice a year.

Fix

- ☐ Follow-up happens automatically, not from memory.

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- ☐ There is one way to do each step, not one per person.
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- ☐ New team members can follow the process from the documentation.
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- ☐ When we change a process, the old way is switched off.
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- ☐ Our tools talk to each other without someone retyping data.
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Prove

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- ☐ Leadership uses the system's numbers without rebuilding them.
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- ☐ We can pull a clean list of open deals in under two minutes.
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- ☐ Our forecast is usually close to what actually closes.
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- ☐ We review the same few numbers on a regular rhythm.
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- ☐ When a number looks wrong, we fix the source, not the report.
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Reading your score

Score	What it means	A sensible next step
16 to 20	Your system is in good shape. You're tuning, not rebuilding.	Pick the one "no" that costs the most and close it.
10 to 15	The basics exist, but revenue is leaking at a few specific points.	Find the room with the lowest score and fix one leak there this month.
0 to 9	The system depends on people remembering. That's fragile, and it's fixable.	Start in Room 1. Map before you buy or build anything.

Whatever the total, the room with the lowest score is where to start.

If you want help

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- Do it yourself: single-automation blueprints from \$50 to \$99 for the most common leaks, such as slow lead response, quotes with no follow-up, missed calls and quiet past customers.
desertwestdigital.com/blueprints.html
 - Have one thing fixed: fixed-scope, fixed-price Rapid Fixes from \$997 to \$2,500, delivered by email.
desertwestdigital.com/rapid-fixes.html
 - Have the whole system assessed: the CRM & Revenue Systems Audit is the full Four Rooms audit, done with you, for a fixed \$3,500. desertwestdigital.com/contact.html

