THE PREPARE DIAGNOSTIC

Find out where you really stand, before you commit.

An independent, vendor-agnostic readiness assessment of your Opportunity-to-Cash landscape, run before or alongside any major quote-to-cash decision.

The problem

Companies buy major quote-to-cash technology before they're ready for it. The demo shows the destination. The implementation inherits the starting point: dirty data, undocumented process, unclear ownership, and expectations set in the excitement of buying. By the time an implementation partner arrives, the decisions that decide success have already been made, and the questions that would have prevented failure get asked too late.

What it is

Over two to four weeks, a senior Walpole consultant works with your team to assess your Opportunity-to-Cash landscape: current state, future state, and the gap. You get honest, evidence-based recommendations, including, where it's the truth, that you're not ready yet, or that you don't need the software you think you need. No obligation to implement with us. The diagnostic stands on its own.

TWO TO FOUR WEEKS · FIXED SCOPE · £21,000 FIXED PRICE · SENIOR-LED THROUGHOUT

What you receive

- **Readiness assessment.** A clear view of current strengths, gaps and priorities across the six areas, scored and visual.
- **RAID log.** A structured record of the risks, assumptions, issues, dependencies and decisions that need attention.
- **Priority list.** What to fix first, and what can wait.
- **Plan on a page.** A prioritised, practical roadmap showing the recommended next steps.
- **Executive read-out.** A clear discussion of the findings, implications and choices available to the leadership team.

All of it is written so you could hand it to any implementer, including one that is not us, and they could start on Monday.

Data · Commercial · Process · Architecture · Governance · Change

Who it's for

Revenue and Sales Operations leaders in mid-market B2B companies with complex lead-to-cash processes running on systems that have been outgrown. You'll recognise yourself in one of these moments:

- You've taken a senior RevOps role and inherited systems you didn't choose.
- You're PE or VC-backed and scaling, and what got you here won't get you there.
- You're facing an ERP or CRM upgrade, or a pricing or subscription shift, with quote-to-cash on the critical path.
- A demo looked compelling, and something tells you to check your own readiness before you sign.

How it works

1

Locate

A senior consultant maps your current Opportunity-to-Cash landscape: how you quote, order, bill and collect today, and where it's strong or fragile.

2

Chart

We assess your readiness across the six dimensions that decide success, set against the future state you're aiming for.

3

Plan

You get evidence-based recommendations and a plan on a page: what to fix first, what to buy, and what a realistic implementation looks like from here.

One diagnostic. Three ways to go further, or not at all.

Frame & Advise

We diagnose and advise. Your team executes the plan, with our findings in hand.

Shape & Co-deliver

We diagnose, then shape and deliver the fixes alongside your team.

Own & Prepare

We take ownership of the readiness programme end to end.

Every step is a separate decision. Nobody is locked in, including into working with us at all.

Why Walpole

We've seen the other ending

Over a decade of CPQ and Opportunity-to-Cash implementations means we know which unasked questions sink projects, because we've inherited the wreckage of them.

Vendor-agnostic

We implement across Oracle, Salesforce/Conga, Epicor, BillingPlatform and more. The recommendation is what fits you, not what we resell.

Senior-led

The diagnostic is run by senior practitioners, not delegated down to a checklist.

Mid-market native

When the person in front of you needs an answer from an engineer, there is one person between them and the engineer. Not fifteen.

Find out where you really stand, before you commit.

Book a 30-minute readiness conversation. No pitch, no obligation.