The Sales Manager's 3 Key Reviews

Three reviews. Three jobs. Run pipeline, deal, and forecast reviews that drive stronger results.

REVIEW	THE QUESTION IT ANSWERS
Pipeline Review	Do we have enough pipeline, and is it moving?
Deal Review	How do we improve our odds on this deal?
Forecast Review	What will close this period, and why do we believe it?

Mark "Confirmed" only when current evidence supports the answer. Treat an unverified assumption as a gap to resolve.

1 Pipeline Review

OBJECTIVE

Confirm each salesperson has enough qualified pipeline moving at the pace needed to hit their number, then agree on the action required.

RESEARCH INSIGHT

Companies that spend at least three hours a month managing each salesperson's pipeline grew revenue 11% faster than those that spent less.

SALESPERSON

DATE

CHECKLIST	CONFIRMED	GAP
1. **Coverage:** Do we have enough qualified pipeline that can realistically close in the target period, given our relevant win rates and sales cycles?	☐	☐
2. **Quality:** Does the pipeline meet our qualification standards: customer fit, a meaningful need, and evidence of willingness and ability to act?	☐	☐
3. **Flow:** Are deals progressing through sales funnel stages at the expected pace, and where are conversion or delays weakening the pipeline?	☐	☐
4. **Balance:** Is the pipeline top-heavy (early-stage) or bottom-heavy (late-stage)? Are we creating enough qualified opportunities now to support future targets, given conversion rates and sales-cycle length?	☐	☐
5. **Action:** What action will address the most important pipeline gap, who owns it, and what result will we check by when?	☐	☐

COACHING POINT

NEXT ACTION AND DATE

Deal Review

2 Improve the odds on key deals

OBJECTIVE

Improve the odds of winning one important opportunity at full value, while coaching the salesperson to improve their approach on future deals.

MANAGEMENT INSIGHT

Deal reviews lose their value when they become status reports or feel like an audit. Managers get more from the same time when they coach the salesperson's thinking and end with a specific next step.

SALESPERSON	DEAL	DATE

CHECKLIST	CONFIRMED	GAP
1. **Winning strategy:** Has the Bold Winning Strategy tool been completed to clarify their current state and all stakeholder needs, and list the next best questions to ask and actions to take?	☐	☐
2. **Full Value Gap:** Have we quantified the projected value of our solution from Current State to Immediate Results and demonstrated how it better equips them to achieve their long-term, Strategic Goals?	☐	☐
3. **Stakeholders:** Do we know who will champion our proposal, who influences the decision, who approves the final decision, and what each person needs to support it?	☐	☐
4. **Risks:** What could cause us to lose, stall, or win on unacceptable terms, and what will we do about the most important risk?	☐	☐
5. **Advance:** Have we confirmed the next best action that would meaningfully advance the deal, and who does what by when?	☐	☐

COACHING POINT

NEXT STEP AND DATE

Forecast Review

3 Give leadership a forecast they can trust

OBJECTIVE

Give leadership a forecast they can plan around by testing confidence against evidence.

RESEARCH INSIGHT

Only 45% of sales leaders and sellers have high confidence in their organization's forecast accuracy (Gartner). Presidents and CEOs make hiring, spending, and expansion decisions on that number.

PERIOD

DATE

CHECKLIST	CONFIRMED	GAP
1. **Evidence:** What current customer evidence supports the amount and timing of each deal (e.g., approved funding, agreed scope and price, a customer-confirmed decision date)?	☐	☐
2. **Changes:** What changed in forecast amount, timing, or confidence since the last review, and what explains the change?	☐	☐
3. **Path to close:** What approvals, procurement, legal, or signature steps remain, who owns each, and can they realistically be completed by the forecast close date?	☐	☐
4. **Upside and risk:** Which opportunities could increase or reduce this period's forecast, by how much, and what evidence or event would change our judgment?	☐	☐
5. **Leadership call:** What forecast does the evidence support, what could materially change it, and what does leadership need to know or decide?	☐	☐
6. **Calibration:** Where did our previous forecast differ from actual results, and what should change in our assumptions?	☐	☐

FORECAST WE STAND BEHIND

RISKS TO FLAG FOR LEADERSHIP

Find your sales leadership gap.

Read the full research briefing, The Sales Leadership Ceiling.

boldvaluepartners.com/bold-ideas/the-sales-leadership-ceiling →

Sources: Vantage Point Performance and Sales Management Association, pipeline management study of 62 B2B companies, reported by Jason Jordan (Entrepreneur and Harvard Business Review, 2015); Gartner, forecast confidence research; Dave Brock, sales management review cadence (CustomerThink).

Pro Tips for Sales Managers

4 Bring better evidence to every review

Use these tools and evidence sources to prepare faster, test assumptions, and focus the conversation on decisions and action.

TOOL OR EVIDENCE SOURCE	CHECKLIST POINTS	PRACTICAL USE AND LIMITATION
CRM funnel, conversion, and stage-duration reports	Pipeline 1-4	Assess coverage, conversion, replenishment, and aging using clear stage definitions. Compare similar opportunities to identify where the pipeline needs attention.
CRM deal-change history and close-date movement reports	Forecast 2-4	Track changes in deal amounts, stages, and timing. Reconcile the previous forecast to the current one and identify the customer evidence behind each material change.
Conversation intelligence and deal warnings	Deal 3-5; Forecast 1 and 3	Spot inactivity, limited stakeholder engagement, stalled stages, and customer concerns. Investigate the signals and confirm who has influence, authority, and commitment to act.
Shared customer action plan and value model	Deal 2 and 5; Forecast 3	Record customer-confirmed outcomes, assumptions, milestones, owners, and dates. A simple shared document can work. Customer participation matters more than elaborate software.

Use the evidence to improve the decision.

Review original customer statements and commitments before marking an item confirmed. Tool alerts are prompts to investigate.

Build the leadership that makes growth repeatable.

Explore the Professional Sales Manager Certificate training program to strengthen coaching, sharpen execution, and lead more consistent performance.

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