The Manager's Pipeline Review Checklist

Three reviews. Three jobs. Run pipeline, deal, and forecast reviews that drive stronger results and a forecast you can trust.

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?

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 reviewing each salesperson's pipeline grew revenue 11% faster than those that spent less.

SALESPERSON

DATE

CHECKLIST	CONFIRMED	GAP
1. **Coverage:** Is there enough qualified pipeline to reach the target at our current win rate?	☐	☐
2. **Quality:** Is enough of the pipeline coming from customers and prospects that fit our ICP?	☐	☐
3. **Flow:** Are deals moving between funnel stages at the expected pace, and where are they stalling?	☐	☐
4. **Balance:** Is enough pipeline entering early stages to support future targets?	☐	☐
5. **Action:** What specific prospecting or pipeline action will improve the gap, and 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.

RESEARCH 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:** Do we have a clear strategy for what it will take to win this deal?	☐	☐
2. **Full Value Gap:** Have we quantified the value from Current State to Immediate Results and connected it to the customer's Strategic Goals?	☐	☐
3. **Stakeholders:** Do we know who influences the decision, who makes it, and what each person needs to support it?	☐	☐
4. **Risks:** Have we identified what could stall or lose the deal and what we'll do about it?	☐	☐
5. **Advance:** Have we confirmed the next best action that would meaningfully advance the deal?	☐	☐

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:** Is each committed deal supported by evidence from the customer's decision process and our sales process?	☐	☐
2. **Changes:** Which deals entered, left, or stalled in the forecast since the last review, and why?	☐	☐
3. **Close dates:** Are close dates supported by what we know about the customer's decision and approval process?	☐	☐
4. **Upside and risk:** Which deals could move up or fall out, and what evidence supports that judgment?	☐	☐
5. **Leadership call:** Have we agreed on the forecast we will give leadership and the risks they need to know?	☐	☐

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).