

# The 7 Point Checklist for the Ultimate Sales Pipeline



When committed deals slip, it's often because you're relying on bad forecasting and tall tales from your sales reps. Follow these seven steps to better evaluate and segment opportunities to build a solid pipeline.

## #1 Who Is The Decision Maker?

Name:

Function:

Last touchpoint:  /  /

### WHY IT MATTERS

Your ideal customer profile would be the decision-maker. Non-decision-makers might love your sales pitches and encourage you to sell more, but they cannot help you go beyond the first step.

## #2 Are There Multiple Stakeholders?

Other Stakeholders:

Function:

Last touchpoint:

### WHY IT MATTERS

There is an average of 6.8 stakeholders involved in most purchase decisions<sup>1</sup>. So cast a wide net.

<sup>1</sup> Adamson, B. (2017, July 28). The Challenger Sale and The Challenger Customer.

## #3 Did We Discuss Pricing?

When:  /  /

Do they approve of the quote? ☐ Yes ☐ No

### WHY IT MATTERS

Unsurprisingly win rates go up when pricing is discussed on the first call. Your buyers know their budgets and don't want to lose time to the consideration phase.

## #4 Are They Engaged?

Emails sent in the past 7 days:

Emails received in the past 7 days:

### WHY IT MATTERS

Healthy deals have a significant increase in email activity before closing. If your estimated close date is coming up, increase your email velocity to seal the deal quickly.



Building a pipeline is a lot of work — we're not going to sugarcoat it. But with a repeatable set of actions, practiced habits, and shared learnings, you will convert opportunities faster and more often.

We combined all of our learnings and advice from the IT Channel in this guide.

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## #5 Did We Set Next Steps?

When:  /  /

With:  ,  ,

Did they confirm? ☐ Yes ☐ No

### WHY IT MATTERS

80% of sales require five follow-up calls, whereas 44% of salespeople give up after one follow-up call<sup>2</sup>. So don't forget to follow up. Clearly discuss outcomes in your calls. Put client's agenda first, but make sure you share your agenda as well.

## #6 Red Flags?

Did they mention a competitor? ☐ Yes ☐ No

Did they postpone recent meetings? ☐ Yes ☐ No

Did their priorities change? ☐ Yes ☐ No

### WHY IT MATTERS

Competitor mentions in late-stage deals often lead to a drop in win rates. They indicate your buyers are not bought-in to your services or process — so they're looking elsewhere.

## #7 What's Our Path To Close?

Does this lineup with our estimated close date? ☐ Yes ☐ No

What happens (for them) if the deal doesn't go through?

### WHY IT MATTERS

Strong sales habits and evaluating past wins get sales reps to approach deals strategically. For each stage, there is a set of actions that need to happen. Your sales reps should be well aware of each step that will lead them to convert the deal successfully.

<sup>2</sup> Ross, L. (2019, June 10). The Importance of Sale Follow Ups – Statistics and Trends. Investp.

### Indicators your forecast is mostly guesswork:

- Your sales reps rely on hunch or intuition when answering, "Will a deal close this month."
- You keep losing committed deals.
- You're coming in short of your predicted forecast.

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