RS-T04 / SCORECARD

Pipeline Health Scorecard

See which deals are real, and what to do about the rest.

BUILT FOR

Sales Managers, Founders & Revenue Leaders

STAGE

Improve, Scale

YOU LEAVE WITH

A scored pipeline and an action for every deal

INSIDE

01 Understand

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A full pipeline is not the same as a healthy one.

Forecasts miss when deals are judged on how they feel instead of what the buyer has done. This scorecard replaces opinion with evidence, deal by deal, so you can see what is real and act on the rest.

THE PROBLEM

Stale and hopeful deals inflate the pipeline, hide risk, and make the forecast a guess.

WHO IT'S FOR

Sales managers, founders, and revenue leaders who inspect pipeline or own the forecast.

WHEN TO USE IT

In a weekly pipeline review, before a forecast call, or at the start of a quarter.

Evidence, not opinion

OPINION SOUNDS LIKE	EVIDENCE SOUNDS LIKE
"They loved the demo."	"Their ops lead asked for a second session with finance on the 12th."
"This one's going to close."	"The economic buyer confirmed budget and the signature process last week."
"They're just busy."	"No reply to the last two follow-ups; the agreed meeting was cancelled without a new date."

How to use it

1. **Check each deal** against the ten evidence items. Only count what the buyer has said or done.
2. **Test each stage** against its exit criteria to see whether deals sit in the right place.
3. **Score the pipeline** deal by deal, then look at the totals.
4. **Act by score:** advance, recover, or close out. Every deal leaves the review with an action.

01
Deal evidence checklist
Ten items, buyer actions only.

02
Stage-by-stage tests
Is each deal in the right stage?

03
Score the pipeline
Deal grid and totals.

04
Actions by score
Advance, recover, or close.

The deal evidence checklist.

Score each item 1 if you can point to evidence, 0 if not. Partial credit hides risk, so there is none.

#	EVIDENCE ITEM	WHAT COUNTS	DEAL SCORE
1	**Problem confirmed**	The buyer described the problem in their own words, and agreed with a playback.	☐
2	**Impact understood**	The buyer has said what the problem costs them, in time, money, or risk.	☐
3	**Reason to act now**	A date, event, or goal makes this a priority this quarter.	☐
4	**Champion tested**	A named person is actively helping, and has done something to prove it.	☐
5	**Economic buyer engaged**	The person who signs has been in a conversation, not just named.	☐
6	**Decision process known**	You know the steps, people, and criteria between now and signature.	☐
7	**Dated next step**	The next meeting is in the buyer's calendar with a clear purpose.	☐
8	**Alternatives known**	You know what else they are considering, including doing nothing.	☐
9	**Mutual plan agreed**	For late-stage deals: a shared plan with dates through to start.	☐
10	**Commercials discussed**	Budget range and buying process (legal, security, procurement) are known.	☐

READING THE SCORE

8 to 10: real. **5 to 7:** at risk. **0 to 4:** not real yet. Early-stage deals will naturally score lower; use the stage tests on the next page to judge whether a score is normal for where the deal sits.

EXAMPLE

A B2B SaaS deal in Proposal stage. Problem, impact, champion, dated next step, and alternatives are evidenced. The economic buyer has been named but never met, and no one knows the procurement steps. **Score: 6, at risk.** The action: ask the champion to set up a 30-minute call with the economic buyer before the proposal review.

Stage-by-stage tests.

A deal belongs in a stage only when the buyer has done what that stage requires. Adapt the stage names to your own; keep the tests based on buyer actions.

STAGE	EXIT TEST (BUYER HAS...)	RED FLAGS	MINIMUM EVIDENCE
Qualify	Agreed there may be a problem worth exploring and taken a first meeting.	No problem named; meeting booked by a gatekeeper only.	1 to 2
Discover	Confirmed the problem and impact, and named others involved.	Only one contact; no reason to act now.	3 to 4
Validate	Seen the solution against their problem and agreed it could work.	Demo given without discovery; no follow-up questions.	5 to 6
Proposal	Engaged the economic buyer and shared their decision process.	Proposal sent to a champion who cannot sign.	6 to 8
Commit	Agreed a mutual plan and started legal, security, or procurement.	Close date set by the seller, not the buyer.	8 to 10

Common stage problems

- **Stage inflation.** Deals move forward when the seller acts (sends a proposal), not when the buyer does.
- **Stuck deals.** A deal sitting in one stage more than twice your typical time there usually needs a decision, not more patience.
- **Skipped stages.** Jumping from first call to proposal usually means discovery evidence is missing.

Your stuck thresholds

Fill in your typical days per stage from recent won deals. Double it to get the point where a deal needs a decision.

	QUALIFY	DISCOVER	VALIDATE	PROPOSAL	COMMIT
Typical days					
Stuck after					

Score the pipeline.

List every open deal. Score it, compare it to its stage, and give it a verdict. Use a spreadsheet beyond ten deals.

DEAL	STAGE	VALUE	DAYS IN STAGE	EVIDENCE /10	NEXT STEP DATE	VERDICT

Verdict: **R** real, **A** at risk, **N** not real yet.

Pipeline totals

MEASURE	THIS WEEK	LAST REVIEW	WHAT TO LOOK FOR
Total open value			Context only. Not a health measure on its own.
Value scored Real			The number to plan around.
Deals with a dated next step			Aim for every active deal.
Deals stuck beyond typical time			Each needs a decision this week.
Real value vs. target for the period			If low, the fix is new pipeline, not more pressure on old deals.

Actions by score.

Every deal leaves the review with one owner, one action, and one date.

VERDICT	WHAT IT MEANS	WHAT TO DO THIS WEEK
Real 8 to 10	Buyer is engaged and the path to signature is known.	Protect the timeline. Confirm the next two steps and any approvals still needed.
At risk 5 to 7	Momentum exists, but key evidence is missing.	Name the missing item and the one action to get it. Set a date; if it slips, downgrade.
Not real yet 0 to 4	Hope, not evidence.	Requalify with one direct conversation, or close it out. Removing a dead deal is progress.

A 30-minute weekly review

MINUTES	AGENDA
0 to 5	Totals: Real value vs. target, and change since last week.
5 to 20	At-risk deals first: missing evidence, action, owner, date.
20 to 25	Stuck and not-real deals: requalify or close out.
25 to 30	New pipeline: is enough being created for next period?

Action log

DEAL	MISSING EVIDENCE	ACTION	OWNER	BY WHEN

03 LEARN

A worked example, and what to avoid.

> EXAMPLE
>
> A sales manager at a B2B SaaS company with 24 open deals. Scoring took about an hour the first time. Nine deals scored Real, eight At risk, and seven Not real yet. Most at-risk deals were missing the same item: no contact with the economic buyer.
>
> **Actions:** the team closed out five dead deals, set up economic-buyer meetings on six others, and started reporting Real value alongside total pipeline. The forecast conversation moved from "how do you feel about it?" to "what evidence is missing?"

Common mistakes

- **Giving partial credit.** "Sort of" evidence is not evidence.
- **Scoring in the meeting from memory.** Score before the review; discuss in it.
- **Punishing honest downgrades.** If closing out dead deals is penalized, the pipeline stays inflated.
- **Inspecting without coaching.** Each missing item is a skill to work on, not just a flag.

04 EVALUATE

Check your work.

- [ ] Every open deal has an evidence score.
- [ ] Scores count buyer actions only.
- [ ] Stage placement matches the exit tests.
- [ ] Every deal has a verdict and an action.
- [ ] Dead deals were closed out, not left to age.
- [ ] Real value is reported next to total value.

05 GO FURTHER

REVENUE DIAGNOSTIC

Want to work through this on a live deal?

In a Revenue Diagnostic we score your live pipeline with you, find where deals stall and why, and build an inspection rhythm your team will keep using.

Book a strategy call: cal.com/revseries/strategy-call

Prefer email? advisor@revseriesadvisory.com