

Sales Pipeline Review

An example of how I would diagnose stalled opportunities and establish a 30-day operating plan

ERIC
ROSS-SHEFFIELD

Sales, Customer Success
and Business Operations

Sample deliverable. The company and all figures are illustrative.

The situation

Lead volume looks healthy, but the conversion pattern points to gaps in qualification and follow-up

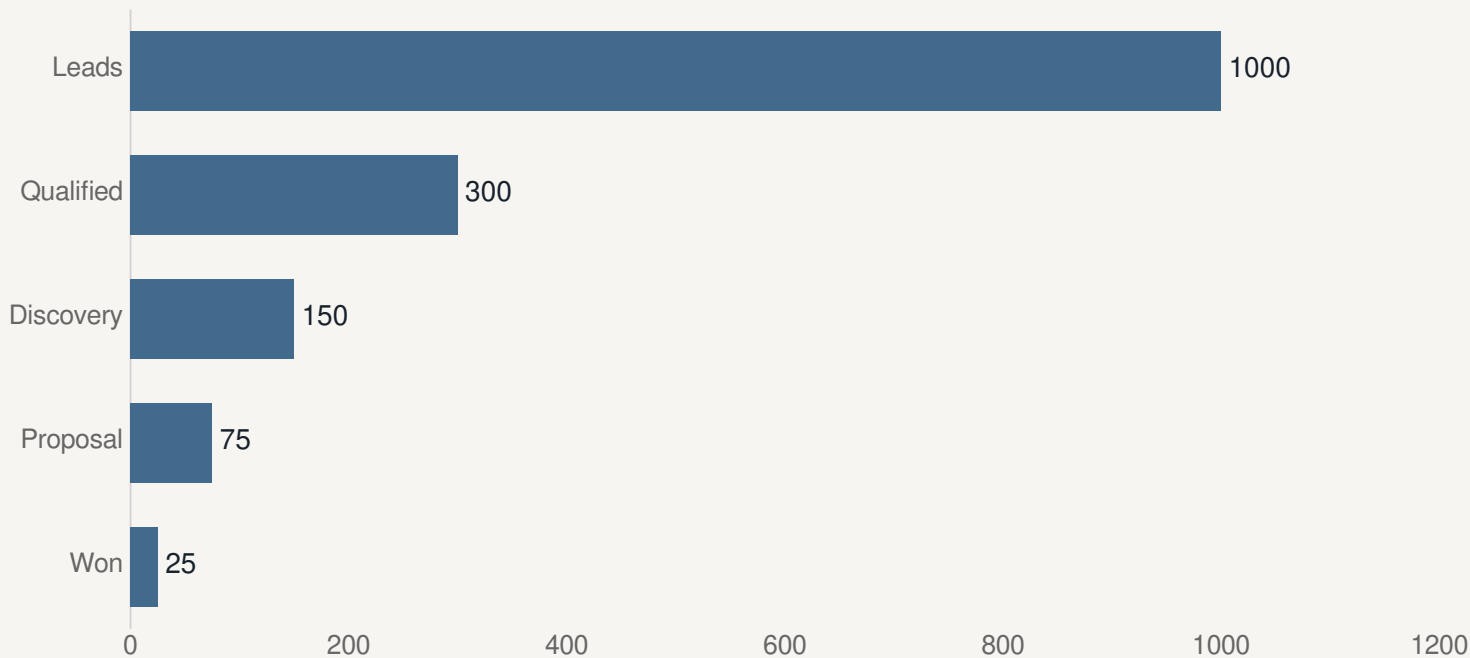
1,000

Leads entered during the review period

25

Closed-won deals

Baseline funnel



How I would run the review

The analysis combines CRM data with what representatives and managers are doing in practice

- Pipeline stages, ownership and exit criteria
- Lead response time, follow-up coverage and aging
- Conversion by source, stage and representative
- Call quality, discovery and objection handling
- Forecast accuracy and management visibility

Evidence I would request

CRM export

Activity report

Call recordings

Scripts and cadences

Manager interviews

Example findings

Each finding links an observed problem to a specific management action

PRIORITY	FINDING	IMPACT	FIRST ACTION
1	Aged leads lack a defined follow-up owner	High	Assign ownership and a 10-day cadence
2	Discovery completion varies by representative	High	Use one discovery framework and call review rubric
3	Proposal stage has no exit criteria	Medium	Require decision process and next meeting
4	Forecast relies on representative judgment	Medium	Tie confidence to verified customer actions

The first 30 days

The work starts with clean definitions, then moves into coaching and measurement

