Sales Pipeline Health Assessment

The Core Principle

Most sales teams are terrible at forecasting revenue because they don't have visibility into pipeline health. This checklist provides a diagnostic framework for assessing sales execution discipline, pipeline visibility, and revenue predictability.

Part 1: Pipeline Fundamentals

Do we have pipeline visibility?

- [ ] CRM system in place
- [ ] Deals tracked consistently
- [ ] Stages clearly defined
- [ ] Win/loss data captured

What are our pipeline stages?

- [ ] Stage 1: _____
- [ ] Stage 2: _____
- [ ] Stage 3: _____
- [ ] Stage 4: _____
- [ ] Stage 5: _____

How long is our sales cycle?

- [ ] Average days to close: _____
- [ ] Shortest cycle: _____
- [ ] Longest cycle: _____

Part 2: Pipeline Quality Assessment

Is our pipeline healthy?

Pipeline Composition:

- [ ] Opportunities in Stage 1: _____ (% of total: ___%)
- [ ] Opportunities in Stage 2: _____ (% of total: ___%)
- [ ] Opportunities in Stage 3: _____ (% of total: ___%)
- [ ] Opportunities in Stage 4: _____ (% of total: ___%)
- [ ] Opportunities in Stage 5: _____ (% of total: ___%)

Pipeline Metrics:

- [ ] Total pipeline value: $_____
- [ ] Forecast accuracy (actual vs. predicted): ____%
- [ ] Win rate: ____%
- [ ] Average deal size: $_____

Red Flags:

- [ ] Too many deals in early stages
- [ ] Too many deals stuck in middle stages
- [ ] Low win rate
- [ ] Deals slipping past close dates

Part 3: Sales Execution Discipline

Are deals moving through the pipeline?

- [ ] Deals move through stages on schedule
- [ ] Sales team follows process consistently
- [ ] Deal qualification is rigorous
- [ ] Pricing discipline is maintained

Deal Qualification:

- [ ] Clear qualification criteria defined
- [ ] Unqualified deals removed from pipeline
- [ ] Deal size aligns with target market
- [ ] Decision maker identified

Sales Activity:

- [ ] Activity metrics tracked (calls, meetings, proposals)
- [ ] Activity correlates with pipeline movement
- [ ] Sales team hitting activity targets
- [ ] Quality of activity is high

Part 4: Revenue Predictability

Can we forecast revenue accurately?

- [ ] Forecast accuracy within 10%: [ ] Yes [ ] No
- [ ] Forecast accuracy within 20%: [ ] Yes [ ] No
- [ ] Forecast accuracy within 30%: [ ] Yes [ ] No

Forecast Confidence:

- [ ] High confidence (80%+): _____
- [ ] Medium confidence (50-80%): _____
- [ ] Low confidence (<50%): _____

Forecast Drivers:

- [ ] Historical win rates by stage
- [ ] Sales cycle length by customer type
- [ ] Seasonality patterns
- [ ] Competitive win/loss rates

Part 5: Improvement Opportunities

What needs to improve?

- [ ] Pipeline visibility
- [ ] Deal qualification
- [ ] Sales execution
- [ ] Forecast accuracy
- [ ] Win rate

Action Plan:

Priority 1: _____

- [ ] Owner: _____
- [ ] Timeline: _____
- [ ] Success metric: _____

Priority 2: _____

- [ ] Owner: _____
- [ ] Timeline: _____
- [ ] Success metric: _____

Priority 3: _____

- [ ] Owner: _____
- [ ] Timeline: _____
- [ ] Success metric: _____
