

The Pipeline Review Cheat Sheet for New Sales Managers

A one-page guide to running pipeline reviews that find the truth. Print it. Keep it next to you in your next review.

The Five Health Checks (ask for every deal)

Check	Question	Red flag
Champion	Who inside the buyer is selling this for us?	"We have a good contact" with no proof
Economic buyer	Who signs, and have we met them?	Never spoken to the budget owner
Compelling event	What happens if they do nothing, and by when?	No date, no pain
Next step	What is scheduled, with a date?	"I'll follow up next week"
Competition	Who else is in, and why would we win?	"No competition" (usually means no insight)

Score each Yes as 1 point. A Commit deal with fewer than 3 points deserves a hard look.

Eight Inspection Questions

1. What has the buyer **done** (not said) that shows real interest?
2. Who else must say yes, and have they been involved?
3. What is the compelling event, and what is the date?
4. What is the next step, and is it on the calendar?
5. What happens if they do nothing?
6. What is the biggest risk to this deal, and what is the plan?
7. What would make you move this out of Commit?
8. Would you stake your own money on this closing this period?

A 45-Minute Pipeline Review Agenda

Minutes	Segment	What to do
0-5	Numbers	Closed, commit, best case, gap to target
5-15	Movement	What came in, slipped, or was lost since last week
15-40	Deep dives	Inspect the flagged deals only: three questions each, one action each
40-45	Actions	Who does what by when

Forecast Categories (define them in writing)

Category	Suggested definition
Commit	Buyer has confirmed decision path and date; paper in progress; passes the health checks
Best case	Likely but one or more checks missing; could close this period
Pipeline	Real opportunity, not expected this period
Omit	Not a real opportunity right now

Coverage Math in 30 Seconds

- Gap = target minus closed so far
- Pipeline needed = gap divided by your historical win rate (3x is a common starting assumption, not a law; check your own data)
- Example: target \$3,000,000, closed \$1,100,000, gap \$1,900,000. At 3x you need \$5,700,000 of open pipeline.

Five Habits That Keep Reviews Honest

- Review the **same way every week**.
- Inspect **deals**, not people.
- Ask for **evidence**, not opinions.
- Leave with **one action per deal**.
- Track whether your **forecast** was right.

Ready to build the whole operating rhythm? The Sales Leadership Coaching Program and the Sales Manager Toolkit cover pipeline reviews, forecasting, coaching, and team structure. theonlychoice.co