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Checklist:

# The Data You Need to Improve Your Pipeline Visibility





# 5 Change Data Points to Improve Your Pipeline Visibility

## 1. Close Date Movement

**Key data points:**

Current close date | Previous close date | No. of days pushed or pulled | Days since close date changed | No. times closed date changed

**Actioning the insights:** Looking at the change in close date at a deal level can help us understand the story behind how timelines are being managed with the prospect.

Crucially, this is the sort of information that can easily get lost and "brushed under the carpet" by your sales reps and will draw attention to very specific conversations that have recently taken place with the prospect.

A multitude of these examples under one rep will indicate a difficulty they have with these conversations, or an unwillingness to have them at the right time. Where seasoned reps may have too much pride to concede problems with the timelines, this insight will draw your attention to problematic deals.

## 2. Forecast Status Movement

**Key data points:**

Current forecast status | Previous forecast status | Days since change | No. of times status changed

**Actioning the insights:** For those who use forecast categories in Salesforce (or another cloud CRM), a forecast category is usually assigned when an opportunity meets certain qualifying criteria geared towards a likely win.

Keeping track of deals that have recently been downgraded will enable a conversation with your rep leading to specific reasons why.

Conversely, checking new deals that have been upgraded actually meet the criteria required ensures that on-the-job training is consistently assisting your forecast integrity.

## 3. Activity Assessment

**Key data points:**

Activity in current stage | Activity stage count for won opps | Activity stage count for lost opps | Days since last activity

**Actioning the insights:** For those of you thinking, "but activity isn't captured that well in our CRM", this mechanism is set up to enable you to draw insights regardless. Your reps are far more likely to fill out information if that information is something positive or noteworthy. Understanding the frequency of this at certain stages and therefore spotting the absence of this behaviour will undoubtedly uncover problems that were previously not visible.

More simplistically, looking at the number of days since any update was logged at all will give you a good steer as to how significant that opportunity is to the rep in question. And if not, they should either rule it out and keep their pipeline clean, or present an opportunity to progress the deal that was previously being ignored.

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With a growing trend of shared KPIs and goals for sales leaders and sales ops, it's time to review just how much pipeline visibility your teams have and how this could be improved to enable your sales leaders to help their reps close more opportunities.

Meanwhile, at rep level, confirmation bias plays a huge role in the story they tell about an opportunity. It's natural for a rep to highlight the updates that make an opportunity sound more likely, just as it is to ignore the data that says otherwise.

Pulling data that challenges this narrative will help cut through the noise and get to the bottom of a) what is really happening and b) what the best course of action is.

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Rory Brown  
Co-Founder & CCO  
Kluster



## 4. Stage Tenancy (time in stage)

### Key data points:

Current stage | Av. time in stage for won deals | Av. time in stage for lost deals | No. days in stage | High risk/low risk (flag system if approaching too many days)

**Actioning the insights:** Certain things happen at each stage in the sales process. So identifying deals that are taking too long in a stage will narrow the focus of your diagnosis. Let's break this down into two camps.

### Camp 1. Those who have rigid entry/exit stage criteria

Nice and simple for this camp. Which of the stage exit criteria are holding up the deal in that stage?

What can be done to ensure this criteria is met before the deal becomes too old?

### Camp 2: Those who are a little more relaxed with stages

This camp will see a greater trend toward how long an individual rep spends in each stage when successful vs. when not successful, rather than unified insights across the team.

Asking a rep why a deal has been stuck in a stage for longer than they usually are in it when they win will highlight areas in their own deal management process that are breaking down.



If you are in this camp, it might be time to implement a more scalable approach seen in camp 1.



## 5. Recent Deal Value Changes

### Key data points:

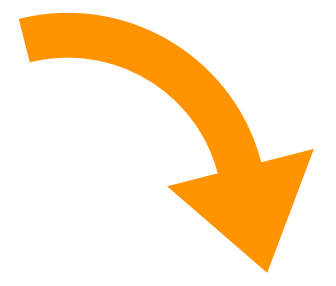
Current deal value | Old deal value | Days since value change | No. of times changed in total | Value difference

**Actioning the insights:** There are few things a rep will get specific with on Salesforce. Our analysis suggests that the value of an opportunity is 87% accurate on a CRM. Therefore, we can be confident that any recent changes in value come directly after a significant conversation about price. And we all know a conversation about price is a good sign, particularly late in the process.

This can be used as a fantastic coaching mechanism. Get into the specifics of the negotiations with the rep while the conversation is fresh in their mind, pull up the specific call if you record them.

There are also more general themes to consider here. An opportunity that has had a deal value change in one of the last two stages is 43% more likely to close for example. We can also use this system to spot deals that are perhaps too heavily discounted or where the entire scope of a project - and therefore value - has been altered.

# Flip your pipeline integrity on its head



Patrick Totty, Head of Sales at Ayming UK always made sure his team were accountable for their own pipeline and results.

But he was lacking insight into his team's performance.

Find out how Patrick **took control of his pipeline** and empowered his team with **accurate pipeline predictions** and **greater insight into their performance**.



[See Patrick's story](#)