FREE SCORECARD · SALES HOUSE

The Pipeline Leak Audit

An 18-point sales process scorecard across six sections — find the stage where your pipeline actually leaks, and run a 30-day fix on it.

How to run the audit

Score each statement: **0** = not true, **1** = sometimes true / depends on the rep, **2** = reliably true and visible in your CRM. Subtotal each of the six sections. Your lowest section is the leak — fix it before touching anything else, because pipeline problems compound downstream.

Section 1 — Lead flow (max 6)

1. We know exactly how many new qualified leads entered the pipeline last month — without running a report project.
2. Every lead has a source attached, and we know our top two sources by close rate (not by volume).
3. Leads are contacted within one business day of arriving, every time.

Section 2 — Qualification (max 6)

1. We use a written qualification standard (budget, authority, need, timeline — or equivalent) and log it.
2. Deals that fail qualification are actually disqualified, not left to age in stage 1.
3. Reps can articulate why the last three lost deals were lost, in the CRM record — not from memory.

Section 3 — Discovery & fit (max 6)

1. Discovery calls follow a question framework; two different reps would surface the same core facts.
2. The prospect’s problem, cost of inaction, and decision process are written in the opportunity record.
3. We walk away from bad-fit deals early — and can name one from last quarter.

Section 4 — Proposal & advance (max 6)

1. Every meeting ends with a scheduled next step on both calendars — “I’ll follow up” does not count.
2. Proposals go out within 3 business days of the meeting that requested them.
3. Each proposal names a decision date, and we follow up on that date, not “when we get to it.”

Section 5 — Pipeline hygiene (max 6)

1. Stage definitions are written down — a deal in “negotiation” means the same thing for every rep.
2. No deal sits untouched longer than 14 days without a logged activity or a downgrade.
3. Forecast comes from stage-weighted pipeline data, not from asking reps how they feel.

Section 6 — Follow-up & recovery (max 6)

1. A defined cadence exists for going quiet-deals (how many touches, over how long, through which channels).
2. Closed-lost deals get a recycle date and re-approach — lost ≠ dead.
3. Referrals and expansion are asked for systematically after every win, not when someone remembers.

Read your score

Total (max 36)	Verdict	Priority move
30–36	Tight ship	Optimize conversion rates stage by stage; your process holds.
22–29	One visible leak	Your lowest section is costing real revenue — run a 30-day fix on it alone.
13–21	Compounding leaks	Fix in order: hygiene → qualification → follow-up. Do not add lead volume yet.
0–12	Heroic selling	Deals close on individual effort, not process. Start with stage definitions + a qualification standard.

Why not add more leads? Pouring volume into a leaking pipeline raises cost per deal and hides the leak longer. A 10% improvement in mid-funnel conversion usually beats a 30% increase in lead flow — and costs nothing per month.

The 30-day fix cycle

1. Week 1: score with your reps individually, then compare — divergence between manager and rep scores marks the real leak.
2. Week 2: write or rewrite the standard for the lowest section (one page, examples included).
3. Week 3: instrument it in the CRM — required fields, stage exit criteria, overdue-activity views.
4. Week 4: review the first full week of data; coach to the two most common misses.

A worked example

A 6-rep services firm scores 24/36: Lead flow 5, Qualification 3, Discovery 5, Proposal 4, Hygiene 4, Follow-up 3. The pull to “fix everything” is strong; the leak logic says Qualification and Follow-up (tied at 3) come first, and Qualification wins because it is upstream. Their fix: a one-page qualification standard with three real examples, a mandatory disqualify reason field, and a Friday review of every stage-1 deal older than 14 days. Six weeks later, pipeline count dropped 22% — and forecast accuracy and close rate both rose, because the pipeline finally described reality.

The metrics that expose each leak

Section	One metric to watch weekly	Healthy signal
Lead flow	Median minutes-to-first-touch	Under one business day, every lead
Qualification	% of stage-1 deals with logged qualification	95%+, with real disqualifications happening
Discovery	% of opps with problem + cost + decision process recorded	You could write the proposal from the record

Section	One metric to watch weekly	Healthy signal
Proposal	Median days meeting → proposal sent	3 business days or fewer
Hygiene	# of deals with no activity in 14+ days	Trending to zero
Follow-up	% of closed-lost with a recycle date	100% — lost is a status, not a graveyard

Manager habits that keep the pipeline honest

- Review the **exceptions view** (stale deals, missing fields) in every 1:1 — not the whole pipeline.
- Ask “what did the customer say?” before “when will it close?” — verbatims expose thin discovery instantly.
- Celebrate clean disqualifications publicly; a shrinking, truthful pipeline is progress.
- Re-run this full audit quarterly; leaks migrate as the team grows.

Sales House builds the systems behind the scorecard — pipeline architecture, CRM instrumentation, and cadence design. See how at saleshousesoftware.com.

Educational resource only. Results depend on your market, team, and execution; nothing here is a guarantee of revenue outcomes.