



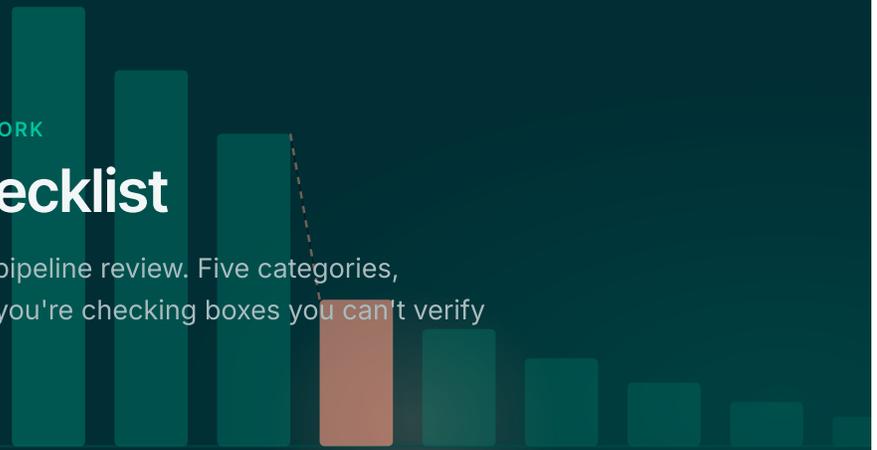
DEAL MANAGEMENT · INSPECTION FRAMEWORK

Deal Inspection Checklist

Run this on any active deal before your pipeline review. Five categories, twenty questions, under ten minutes. If you're checking boxes you can't verify with data, that's the finding.

Single-deal scope

~10 min per deal



DEAL / ACCOUNT NAME

CURRENT STAGE

REVIEW DATE

1 QUALIFICATION

IS THIS DEAL REAL?

- The opportunity meets our ICP criteria (company size, industry, tech stack, AE count). Disqualify if no
- There is a confirmed business problem — the buyer has articulated the cost or consequence of not solving it. Stall risk
- Budget exists and has been confirmed — not assumed, not "should be available." Verify now
- There is a named decision-maker and a realistic decision timeline attached to this deal. Verify now

2 STAKEHOLDER COVERAGE

SINGLE-THREAD RISK

- There are two or more active contacts at the buying company who have engaged directly with us — not just received a forwarded email. High risk
- We have identified the economic buyer — the person who will ultimately sign or approve the contract. Verify now
- The champion has executive cover — someone at VP level or above who is aware of and supportive of this purchase. Verify now
- We are not dependent on a single relationship: if the primary contact left today, the deal would survive. High risk

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- We know the specific concerns of each key stakeholder (legal, IT, finance, procurement) — not just the champion's summary of them. Ask directly

 - We have directly addressed each known objection with evidence, not just reassurance. Verify now

 - There is no pending security, legal, or procurement review that we haven't been introduced to or briefed on. Stall risk

 - The champion can name who is aligned and who has reservations — they have tested their internal support, not assumed it. Ask directly

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- There is a specific next action — not "follow up," not "check in." A meeting, a deliverable, a decision, a review. No next step = stalled

 - The next step has a committed date — agreed by the buyer, not set unilaterally by the rep. No date = stalled

 - The next step has a named owner on the buyer side — someone specific doing a specific thing by a specific date. Verify now

 - The close date reflects a real buyer timeline — confirmed with the decision-maker, not estimated by the rep. Verify now

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- Both sides have the same understanding of where the deal is — the buyer's description of current status would match the rep's. Misalignment = risk

 - Both sides agree on what needs to happen before a decision — remaining steps are documented and shared, not assumed. Create MAP if no

 - The buyer has actively engaged with shared milestones — completed actions, not just acknowledged a plan they received. Verify engagement

 - There has been buyer-initiated contact in the last 14 days — the buyer has reached out, responded substantively, or completed a committed action. 14+ days = zombie risk

POST-INSPECTION: NAME IT

PRIMARY RISK — THE ONE THING MOST LIKELY TO KILL THIS DEAL

SPECIFIC INTERVENTION — WHAT ACTION ADDRESSES THIS RISK

OWNER & DATE — WHO DOES IT, BY WHEN
