



Chief

Sales Process Audit Checklist

Use this checklist before your next leadership meeting or quarterly planning session. Score each statement 1–5. Total your score per layer, then read the diagnosis.

SCORING KEY

1 = Not at all 2 = Rarely 3 = Sometimes 4 = Usually 5 = Consistently

Layer 1

Pipeline

_____ / 30

Layer 2

Deal

_____ / 30

Layer 3

Forecast

_____ / 30

Layer 4

Performance

_____ / 35

LAYER 1

Pipeline Process

How opportunities enter, get qualified, and progress through stages.

- 1. Our pipeline stage definitions are documented in writing and based on specific buyer actions — not seller activities.
 1 2 3 4 5
- 2. If I asked five different reps what it means for a deal to be in Stage 3, I'd get the same answer from all five.
 1 2 3 4 5
- 3. Deals can only advance when specific criteria are documented in the CRM — this is enforced, not assumed.
 1 2 3 4 5
- 4. We have a formal process for identifying and removing zombie deals (no meaningful buyer contact in 45+ days).
 1 2 3 4 5
- 5. Late-stage pipeline deals all have a named economic buyer, confirmed budget signal, and specific next step with a date.
 1 2 3 4 5
- 6. Pipeline coverage ratio — excluding stale deals — consistently meets the benchmark for my segment.
 1 2 3 4 5

Layer 1 Score: _____ / 30

DIAGNOSIS

- 24–30: Pipeline process is solid. Move to Layer 2.
- 16–23: Stage definitions or qualification criteria need tightening.
- Below 16: Pipeline process is your primary failure mode.

LAYER 2

Deal Process

How individual deals are managed, inspected, and unblocked.

- 7. Every active opportunity has a documented next step with a specific action, date, and owner.
- 8. Deals above a certain size or stage must have relationships with more than one stakeholder.
- 9. I can identify the economic buyer by name for every late-stage deal; reps have spoken to them in the last 30 days.
- 10. We have defined inspection triggers that automatically surface deals for manager review.
- 11. Pipeline reviews are exception-based — focused on deals that need a decision, not status updates.
- 12. When a deal stalls, I have a diagnostic process for identifying why — not just asking the rep.

Layer 2 Score: _____ / 30

DIAGNOSIS

- 24–30: Deal process is working. Inspect Layer 3.
- 16–23: Deal inspection or multi-threading is inconsistent.
- Below 16: Reps are improvising where they should be executing.

LAYER 3

Forecasting Process

How deal data gets converted into a number the business can plan around.

- 13. Every deal in my forecast carries stage, close date, deal value, last buyer action, and next step.
 1 2 3 4 5
- 14. Forecast methodology weights deals on behavioral signals — not just CRM stage probability.
 1 2 3 4 5
- 15. I compare forecasted number to actual closes every quarter and document the variance.
 1 2 3 4 5
- 16. Forecast variance is consistently below 15%.
 1 2 3 4 5
- 17. Close dates are based on specific customer events — not end-of-quarter defaults.
 1 2 3 4 5
- 18. I can defend each committed deal with specific evidence — not rep confidence.
 1 2 3 4 5

Layer 3 Score: _____ / 30

DIAGNOSIS

- 24–30: Forecasting process is reliable. Move to Layer 4.
- 16–23: Input consistency or weighting methodology needs work.
- Below 16: You're guessing, not forecasting.

LAYER 4

Performance Process

How managers use process data to develop reps.

- 19. Coaching conversations are driven by deal-level behavioral data – not rep self-reporting alone.
- 20. I know which pipeline stage has the highest drop rate for each rep, and I'm coaching to it.
- 21. I can identify behavioral differences between top and average performers at the deal level.
- 22. Performance reviews are forward-looking, not just backward-looking on lost deals.
- 23. I have a documented ramp process for new reps beyond 'shadow a senior rep for 30 days.'
- 24. Coaching cadence is consistent: regular 1:1s focused on deal strategy, not status updates.
- 25. Layers 1–3 are functioning well enough that I can trust the data I'm coaching to.

Layer 4 Score: _____ / 35

DIAGNOSIS

- 28–35: Performance process is data-driven. You're in good shape.
- 18–27: Coaching inputs need improvement. Check Layers 1–3 data quality.
- Below 18: Performance process is reactive. Fix the foundation first.

Your Results

Layer	Your Score	Maximum
Layer 1: Pipeline Process	_____	30
Layer 2: Deal Process	_____	30
Layer 3: Forecasting Process	_____	30
Layer 4: Performance Process	_____	35
TOTAL	_____	125

OVERALL SCORE INTERPRETATION

- 100–125: Architecture is solid. Focus on incremental improvements.
- 75–99: One or two layers are significantly broken. Start with the lowest.
- 50–74: Multiple layers failing. Start with Layer 1.
- Below 50: Fundamentally broken. Stabilize pipeline stages and CRM hygiene first.

YOUR PRIORITIZED FIX

The highest-leverage action is almost always in your lowest-scoring layer.

Write it here:

The 90-day test – what does success look like?

Who owns it:

How you'll measure it:

[Request a Sales Process Audit with Chief](#)