

# What Your Pipeline Stages Should Be Telling You

30 data points across 6 stages — a checklist for what's measurable when your data foundation works.

## PIPELINE INTELLIGENCE

Which three deals close this month?

If the answer requires a phone call, your stages aren't talking.

Stages should answer questions. Yours have names — not criteria.

The data your pipeline should be producing but isn't.

**70%**

of B2B reps missed quota in 2024  
Forrester, B2B Sales Survey, 2024

**19-22%**

median B2B win rate  
Ebsta/Pavilion, B2B Sales Benchmark, 2024

designatesolutions.com

Your pipeline stages already exist. But are they capturing the data that makes them useful? Most teams define stages around probability or gut feel. Strong stages capture specific data points at each transition — data that feeds forecasting, coaching, and process improvement.

This checklist maps 5 data points to each of 6 common pipeline stages. For each item, check whether your CRM currently captures this data consistently. Your total tells you how much of your pipeline is actually measurable.

Note: These stages represent a common B2B pipeline structure. Your specific sales motion may require additional or modified stages. If you use a framework like MEDDIC, Challenger, or SPIN, map your framework's validation criteria onto the relevant stages. The data discipline principles apply regardless of your specific stage definitions.

Scoring: Check each item your CRM captures consistently today. Total your score on the last page.

---

## Stage 1: Lead / Prospect

- Lead source is captured and categorized (inbound, outbound, referral, event, partner)
- ICP fit score or qualification tier is assigned before routing to sales
- Budget authority indicator is recorded (confirmed Y/N, not assumed)
- Initial use case or pain point is documented in a structured field (not just notes)
- Time-to-first-contact is tracked from lead creation to first rep outreach

---

## Stage 2: Discovery / Engagement

- Discovery call completed date is logged (not just "call scheduled")
- Prospect's stated business problem is captured in their words (structured field)
- Decision-making process is documented: who else is involved, what's the approval path
- Competitive landscape is recorded: who else they're evaluating, current solution in place
- Next step and next step date are explicitly defined (not "follow up next week")

### Stage 3: Solution Fit / Demo

- Demo or presentation date is logged with attendees listed
  - Success metrics are defined by the prospect and captured in a structured field
  - Technical requirements or integration needs are documented
  - Deal amount is entered based on actual scoping (not placeholder or default)
  - Champion identified and recorded: the internal advocate driving the deal forward
- 

### Stage 4: Validation / Evaluation

- POC/trial start date and expected end date are set with defined success criteria
  - Prospect resources committed are documented (who on their side is engaged)
  - Evaluation criteria are captured: what specifically must be true for them to proceed
  - Risks and blockers are logged in a structured field (not buried in activity notes)
  - Stakeholder alignment is tracked: have all decision-makers seen the solution
- 

### Stage 5: Negotiation / Proposal






- Proposal or contract sent date is logged
  - Legal and procurement engagement status is tracked (not started / in review / approved)
  - Expected close date is based on the buyer's timeline, not the rep's quota deadline
  - Commercial terms (pricing, discounts, payment terms) are recorded in structured fields
  - Mutual action plan exists: both sides have agreed next steps and dates to close
-

## Stage 6: Closed Won

- Contract signed date and ACV are recorded accurately
- Implementation owner (internal) is assigned before the customer is notified
- Onboarding timeline and success criteria are documented before handoff
- Customer business outcome to be achieved is documented (not just contract signed)
- Win reason and competitive situation (if any) are recorded for win/loss analysis

# Your Data Foundation Score

Count the items you checked. This is the percentage of your pipeline that is actually measurable.

 <b>Data-Driven Pipeline</b> (26-30 items)	Your pipeline is measurable and reliable. You can forecast with confidence and coach with data.
 <b>Mostly Measurable</b> (20-25 items)	Most of your pipeline has data discipline. Identify the gaps and focus backfill efforts there.
 <b>Partially Measurable</b> (15-19 items)	You're capturing data sporadically. Large portions of your pipeline are still opaque.
 <b>Sparse Data</b> (10-14 items)	Most of your pipeline lacks consistent data. You're forecasting and coaching blind.
 <b>Data Blind</b> (0-9 items)	Your pipeline is unmeasurable. Reps are advancing deals without the data needed to assess risk.

## What's Your Next Step?

Already taken the 5-Minute Scorecard?

Schedule a Revenue Systems Diagnostic with our team. We'll review your current state, identify your biggest gaps, and create a prioritized roadmap for improvement.

[Schedule Your Diagnostic →](#)

Haven't assessed your revenue systems yet?

Take the free 5-Minute Scorecard to benchmark your revenue operations against the five critical dimensions.

[Take the Scorecard →](#)