

# Pipeline Management & Health Scoring

## Implementation Guide: How to Build and Operate Your Pipeline Review System

Julia Ormond / RevOps Toolkit

### 01 WHY PIPELINE MANAGEMENT FAILS — AND WHAT GOOD LOOKS LIKE

Most pipeline reviews are status meetings, not diagnostic sessions. Managers ask "where is this deal?" and reps answer with a story. Without defined health criteria applied consistently to every deal in the pipeline, the review becomes an exercise in rep confidence rather than data-driven diagnosis. The result: quarter-end surprises that were visible in the data weeks before anyone acted.

#### The Three Root Causes of Pipeline Failure

- No defined health criteria: deals are assessed by gut feel and rep narrative, not objective signals. A deal in Proposal with no buyer engagement in 21 days looks the same on a coverage report as a deal with a committed economic buyer and a signed mutual close plan.
- Reviewing total coverage instead of staged coverage: 4x pipeline coverage sounds healthy until you realize that 70% of it is stuck in early stages with no chance of closing in the quarter. Stage-weighted coverage is the only number that matters.
- No accountability between reviews: pipeline hygiene degrades between sessions. Stale deals accumulate, managers tolerate inflated pipelines because it looks better, and by the time a deal is removed it is too late to create a replacement.

#### What Good Looks Like

- Every deal in the pipeline is scored against consistent, CRM-backed health criteria — not rep narrative alone.
- Coverage is tracked by stage, not just in total. Late-stage coverage is the leading indicator of attainment; early-stage coverage is the leading indicator of next quarter.
- Stale deal thresholds are enforced by RevOps and actioned by managers before the weekly review — not surfaced during it.
- Pipeline reviews are 80% discussion of at-risk and critical deals, not status updates on deals that are already tracking fine.
- Forecast accuracy improves every quarter as a direct result of pipeline hygiene discipline.

### 02 HEALTH SCORING ARCHITECTURE

A health score is not a subjective rating — it is a set of objective, CRM-backed criteria applied consistently to every deal. The score has three tiers: Healthy, At-Risk, and Critical. RevOps defines the criteria and builds the scoring logic. Managers enforce it in every pipeline review. Reps are accountable for keeping the underlying CRM data current.

Scoring is based on four dimensions: engagement (last meaningful buyer contact), qualification completeness (required MEDDPIC fields populated), stage appropriateness (age relative to the benchmark for that stage), and next-step commitment (a defined next step with a date exists in CRM). A deal must meet all four criteria for its tier to hold its score.

#### HEALTHY — Deal is progressing as expected

##### Criteria

- Last meaningful buyer contact (email response, meeting attended, call logged) within 10 days.
- All required MEDDPIC fields for the current stage are populated in CRM.
- Age at current stage is within 1.25x the segment benchmark (e.g., if benchmark is 14 days, deal is within 17 days).
- A defined next step with a committed date exists and is within the next 10 business days.
- Economic buyer is identified and has been engaged at least once in the last 30 days.

##### Required Action

- No action required. Flag any single criterion that is at risk of slipping into At-Risk territory at the next weekly review so it can be addressed proactively.

#### AT-RISK — Deal needs manager attention this week

##### Criteria

- Last meaningful buyer contact between 11-21 days ago, OR
- One or more required MEDDPIC fields for the current stage are missing, OR
- Age at current stage is between 1.25x and 2x the segment benchmark, OR
- No next step with a committed date in CRM, OR
- Economic buyer has not been engaged in 31-60 days.

**Required Action**

- Manager must review in the weekly 1:1. Rep must have a specific re-engagement plan with a committed timeline — not "I'll follow up." If no improvement within 7 days, move to Critical. RevOps flags all At-Risk deals in the weekly leadership pack.

**CRITICAL — Deal is at serious risk of loss or slippage**

**Criteria**

- No meaningful buyer contact in 22+ days, OR
- Two or more required MEDDPIC fields missing for the current stage, OR
- Age at current stage exceeds 2x the segment benchmark, OR
- Close date has been pushed more than once without a documented reason in CRM, OR
- No champion identified or champion has gone silent.

**Required Action**

- Immediate manager intervention required. Either a concrete rescue plan with executive sponsor involvement is put in place within 48 hours, or the deal is moved to the correct stage, marked for re-qualification, or closed lost. Critical deals are reviewed by VP Sales in the bi-weekly leadership review. They are never quietly carried to end of quarter.

**03 CRM SETUP: REQUIRED FIELDS & PIPELINE CONFIGURATION**

Health scoring only works if the underlying CRM data is accurate and consistently maintained. The following fields and configurations are required before going live. RevOps owns this setup; Sales Operations is responsible for training reps on field maintenance standards.

**Required Opportunity Fields**

<b>Stage</b>	Every stage must have documented entry and exit criteria. If your CRM does not enforce entry criteria before a stage change, RevOps must build a validation rule or workflow. Stage changes without meeting entry criteria are the single biggest source of pipeline inflation.
<b>Amount (ACV)</b>	Required at opportunity creation and updated any time deal scope changes. Deals with an amount of \$0 or a placeholder value are automatically excluded from coverage calculations and flagged in the weekly audit.
<b>Close Date</b>	Required at creation. Changes to close date must be logged with a reason. Deals with more than two close date changes are automatically flagged as Critical — regardless of their other health signals. Sandbagged close dates destroy forecast accuracy.
<b>Next Step + Next Step Date</b>	A plain-text next step description and a committed next-step date. Both fields must be populated for a deal to be counted in any stage beyond Discovery. Deals without a next step date are automatically scored At-Risk in the weekly health calculation.
<b>MEDDPIC Fields (or equivalent)</b>	Metrics, Economic Buyer, Decision Criteria, Decision Process, Paper Process, Identify Pain, Champion, Competition. Each field should be a structured picklist or validated text field. Required fields per stage are defined by RevOps and enforced through CRM validation rules.
<b>Last Activity Date (system-generated)</b>	CRM should auto-populate from email integration, call logging, and meeting sync. If your CRM does not have native activity capture, implement an integration (e.g., Outreach, Salesloft, or Gong sync) before building the health score — manual activity logging produces unreliable data.
<b>Lead Source</b>	Required at creation and never changed. Lead source tells you where healthy pipeline comes from and where conversion rates differ. Changing lead source after the fact corrupts attribution data permanently.

**Stage Configuration Standards**

- Every stage must have a written entry criteria definition owned by RevOps. No stage should be named by outcome (e.g., "Verbal Commit") without a documented, verifiable entry criterion.
- Stage probability percentages should reflect actual historical close rates by stage — not aspirational targets. Run a close rate analysis by stage before setting these.
- Closed Lost requires a mandatory "Lost Reason" picklist field. Unclassified closed-lost deals are unusable for win/loss analysis and are excluded from competitive reporting.
- A "Nurture" or "Re-Qualify" stage should exist for deals that go cold but should not be closed lost. This prevents pipeline inflation while preserving real long-term opportunities.

## 04 PIPELINE REVIEW CADENCE

The review cadence creates accountability between scoring events. Without it, health scores are data — not action. Each review level has a defined owner, a specific focus, and measurable outputs. RevOps prepares the pipeline data and health score summary before each session. Managers and leaders are responsible for the decisions made during it.

CADENCE	PARTICIPANTS	FOCUS	OUTPUTS & ACCOUNTABILITIES
<b>Daily (RevOps Audit)</b>	RevOps	Data completeness, new deal validation, stage change review	Flag deals missing required fields. Validate stage changes against entry criteria. Alert managers to any deal that moved to Critical since the last review.
<b>Weekly 1:1 (Rep + Manager)</b>	AE/BDR + direct manager	Deal-by-deal health review; re-engagement plans for At-Risk and Critical deals	Manager reviews every At-Risk and Critical deal with the rep. Specific re-engagement plan required for each — not a status update. Next actions logged in CRM before end of day. Any deal that cannot produce a specific plan is actioned immediately (stage correction or close lost).
<b>Weekly (Leadership)</b>	VP Sales, RevOps, optional: CRO	Aggregate pipeline health, coverage by stage, forecast commit vs. best case	Review pipeline health distribution: % Healthy vs. At-Risk vs. Critical by team. Assess late-stage coverage vs. quarterly target. Confirm forecast commit numbers. Escalate Critical deals that need VP or executive involvement. Output: weekly pipeline health summary, deal escalation log.
<b>Bi-Weekly (Deep Dive)</b>	CRO, VP Sales, RevOps, Forecast owners	Top 10 deals, at-risk accounts, pipeline creation pacing for next quarter	Review all deals >\$X ACV in detail (set threshold by business). Review pipeline creation pacing against next-quarter targets. Identify structural gaps in coverage that require sourcing or territory interventions. Output: updated forecast, next-quarter pipeline gap analysis.
<b>Monthly (Quality Audit)</b>	RevOps + Sales Leadership	Pipeline hygiene audit, stale deal removal, benchmark calibration	Full pipeline hygiene audit: identify all stale deals exceeding 2x stage benchmarks. Remove or re-stage after manager confirmation. Review stage benchmark accuracy (compare to actual close data from last 90 days). Output: clean pipeline baseline, updated stage benchmarks if needed.

## 05 PIPELINE HYGIENE STANDARDS

Pipeline hygiene is not a one-time cleanup — it is a continuous operating standard. The following rules apply to every deal in the pipeline at all times. RevOps monitors compliance weekly and surfaces violations to managers. Managers are accountable for resolving violations within 48 hours of being flagged.

<b>Stale Deal Definition</b>	Any opportunity with no logged activity (email, call, meeting) in 14 days at any stage. Stale deals are flagged automatically by the CRM health score workflow and surfaced in the daily RevOps audit. A deal is not stale because the rep says it is not — it is stale when the activity data says it is.
<b>Stale Deal Response</b>	Manager reviews stale deal with rep in the next 1:1. Three possible outcomes: (1) Re-engage: rep produces a specific re-engagement plan with a date, or (2) Re-stage: deal moves back to the stage that reflects current buyer engagement, or (3) Close Lost: deal is closed if no realistic path to re-engagement exists. Carrying a stale deal without a plan is not an option.
<b>Coverage Thresholds</b>	The minimum pipeline coverage ratios that trigger a response from leadership: Below 3.5x total at quarter start = sourcing sprint required immediately. Below 2.5x at quarter midpoint = attainment is at serious risk; CRO is notified. Late-stage (Proposal+) coverage below 1.5x at 60% through the quarter = executive escalation on top-of-funnel sourcing; no QBR "hockey stick" plan is accepted.
<b>Close Date Integrity</b>	Close dates must reflect the rep's genuine best estimate of when the deal will close — not the end of the current quarter by default. RevOps audits close date clustering at quarter end monthly. Any rep with >50% of pipeline clustered at quarter-end close dates is flagged for manager review. This pattern almost always indicates inflated pipeline, not a real book of business.
<b>Opportunity Ownership</b>	Every opportunity must have a single named owner. Collaborative deals require a primary owner with collaborators listed separately. If an AE leaves, all their opportunities must be reassigned within 24 hours. Unowned opportunities are excluded from coverage calculations and attainment reporting.

## 06 IMPLEMENTATION SEQUENCE

Pipeline health scoring works best when introduced in phases. A full deployment from day one creates resistance — reps see it as surveillance before they see it as help. Start with the infrastructure, run a calibration period, then enforce the full model. The sequence below assumes you are building from scratch. If you have an existing pipeline review process, start at Step 3 and audit against the criteria above before changing anything.

<b>Step 1 (Week 1-2) Audit &amp; Baseline</b>	Run a full CRM audit: identify all required fields, map which are missing, and quantify the current data completeness rate. Do not build a health score on incomplete data — fix the fields first. Count your stale deal rate and coverage by stage as a baseline. These numbers will show improvement as the program takes hold.
<b>Step 2 (Week 2-3) Field Configuration</b>	Build or validate all required CRM fields: stage entry criteria, MEDDPIC fields, next step + date, last activity date integration. Set up validation rules for the highest-priority fields (stage progression, close date changes, lost reason). Train managers on the field standards before training reps.
<b>Step 3 (Week 3-4) Draft Scoring Criteria</b>	Define the Healthy / At-Risk / Critical thresholds for your business. The criteria in Section 02 are starting points — calibrate the activity and age thresholds to your actual average sales cycle data from the last 2 quarters. Do not guess; pull the data. Share the draft criteria with front-line managers for input before locking.
<b>Step 4 (Week 4-5) Soft Launch</b>	Run the health scoring model in parallel with the existing process for two weeks. Managers see the scores but are not yet required to act on them. This surfaces edge cases, calibrates thresholds, and builds familiarity before enforcement begins. Collect manager feedback and adjust criteria where the model produces false positives.
<b>Step 5 (Week 6+) Full Enforcement</b>	Health scores are now the operating language of every pipeline review. At-Risk and Critical deals require documented action plans in CRM before any review meeting. Hygiene violations are flagged daily by RevOps and acted on within 48 hours. Introduce the monthly quality audit cycle. Review forecast accuracy monthly to measure whether the health model is improving predictability.

**Step 6 (Quarter 2+)****Calibrate & Scale**

After one full quarter, run a retrospective: which health signals best predicted closed-won vs. closed-lost? Adjust threshold weights accordingly. Add deal-type specific criteria for expansion and renewal if not already in place. Build AI-assisted activity flagging if your tech stack supports it (Gong, Clari, or similar). Share quarterly results with the sales team — showing them the data improves buy-in faster than anything else.

---