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Commercial Excellence

Opportunity Management & Deal Progression Excellence Playbook

Making deal stage progression mean something, not just a field sales reps update to look active

- Practitioner
- Intermediate
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- Administrator
- 09 July 2022
- 3 minute(s)

Overview

A framework for opportunity management and deal progression excellence — grounding stage progression criteria in genuine buyer commitment signals, not activity-based proxies, ensuring pipeline stage data actually reflects deal maturity rather than becoming an administrative field disconnected from real progress.

What's the difference between activity-based and commitment-based

stage progression criteria? Activity-based criteria advance a deal based on seller-side actions (a demo was conducted, a proposal was sent); commitment-based criteria require genuine buyer-side commitment signals (budget confirmed, specific next steps agreed) — the latter more reliably reflects actual deal maturity and likelihood to close.

Why does this distinction matter for forecast accuracy

specifically? Activity-based progression can advance deals through stages regardless of genuine buyer commitment, producing pipeline data that looks mature but doesn't reflect actual close likelihood, undermining forecast accuracy even when stage data is diligently maintained.

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criteria?\nActivity-based criteria advance a deal based on seller-side actions\n(a demo was conducted, a proposal was sent); commitment-based criteria\nrequire genuine buyer-side commitment signals (budget confirmed,\nspecific next steps agreed) — the latter more reliably reflects actual\ndeal maturity and likelihood to close." } }, { "@type": "Question", "name": "Why does this distinction matter for forecast accuracy", "acceptedAnswer": { "@type": "Answer", "text": "specifically?\nActivity-based progression can advance deals through stages regardless\nof genuine buyer commitment, producing pipeline data that looks mature\nbut doesn't reflect actual close likelihood, undermining forecast\naccuracy even when stage data is diligently maintained." } }] }

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