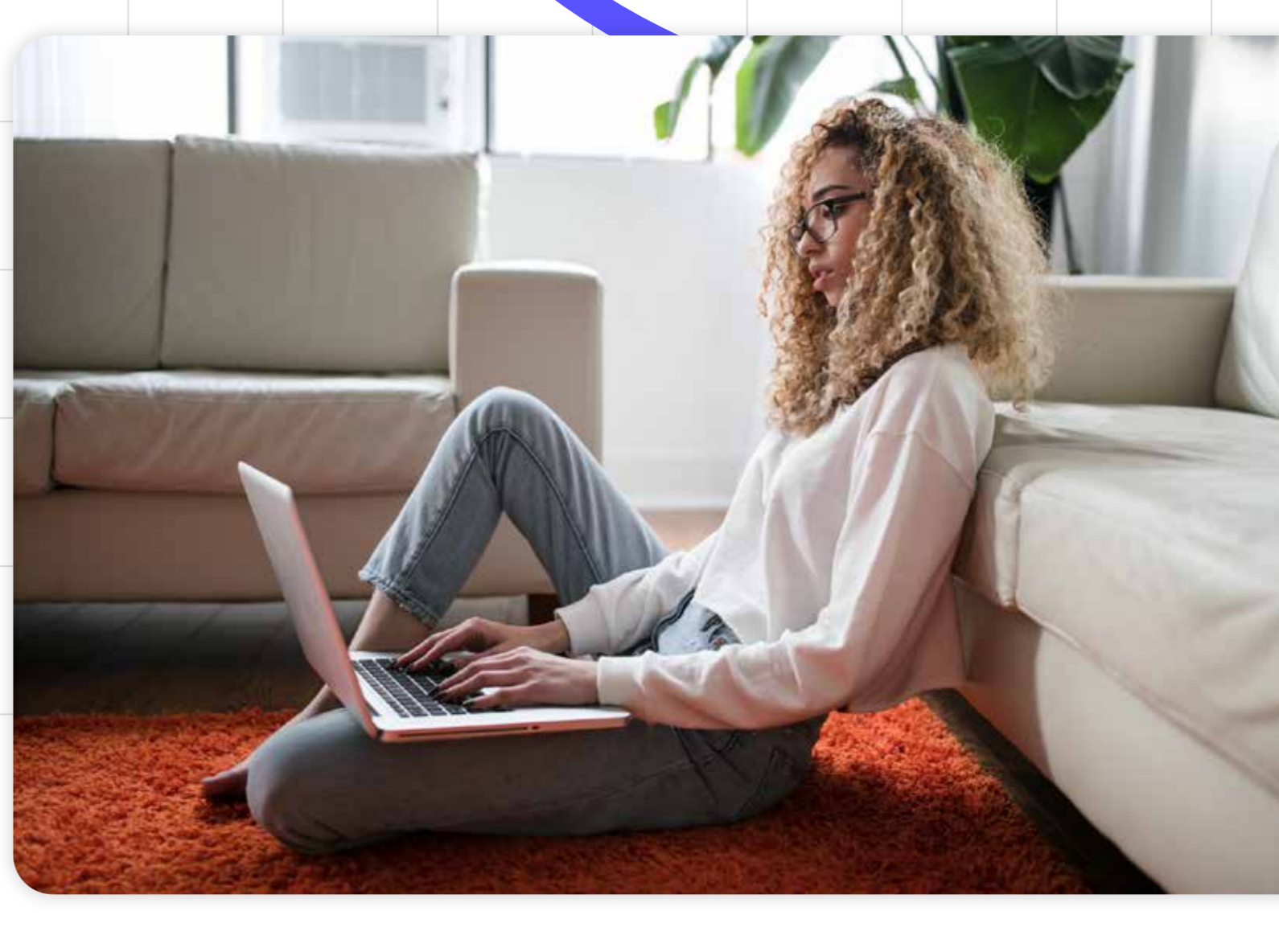


# Your Deal Health Checkup

12 risk factors and what to do next



Modern selling is getting tougher. Sales cycles are longer than ever, and today's buyers want more people involved and more digital touchpoints. Plus, economic uncertainty means sales leaders are responsible for both adapting to buying trends and meeting higher revenue targets, all without additional resources or budget.

Buyers communicate with a salesperson five or more times before making a purchase.

**56%**

of buyers surveyed

The average buying cycle time has increased in the last 24 months.

**75%**

of buyers surveyed

More stakeholders are more involved in purchasing decisions, such as finance (76%) and procurement (74%) teams.

**75%**

of buyers surveyed

Added time and complexity are some of the many risk factors impacting the health of your deals. But there might be even more happening under the surface that

you as a sales leader can't easily see in typical rep updates. So how can you determine whether or not the deals your forecast depends on will actually close?

Healthier pipeline is within reach. Use the self-guided checkup below or connect with Outreach today to [learn more](#).



## How to diagnose a deal, quickly

Use this 5-minute deal health checkup to gauge whether a deal is healthy, or if it needs an intervention.

### 01 How many people are involved in the deal?

- a) 7+ people.
- b) 3 - 6 people.
- c) 1 - 2 people.

### 02 Are multiple personas engaged?

- a) Yes.
- b) No.
- c) Don't know.

### 03 Are we engaged with stakeholders above the decision-making power line?

- a) Yes, some above the line.
- b) No, below the line only.
- c) Don't know.

### 04 Is the next meeting set? If so, when?

- a) Less than 2 weeks from now.
- b) Not set.
- c) More than 1 month from now.

### 05 Are there any other people you need to engage in your sequence?

- a) Yes.
- b) No.
- c) Don't know.

### 06 Are there any outstanding next steps or action items you, your team, or the buyer's team need to complete?

- a) Yes.
- b) No.
- c) Don't know.

### 07 Is the buyer's team clearly showing engagement through high-value interactions?

- a) Yes, we have regular calls or meetings.
- b) No, we correspond via surface-level short or sporadic emails.
- c) Don't know.

### 08 How recently did you or your team complete the last activity?

- a) This week.
- b) Less than 2 weeks ago.
- c) More than 1 month ago.

### 09 How many days has the deal been in its current stage?

- a) 1 - 5 days.
- b) 6 - 10 days.
- c) 10 - 20+ days.

### 10 Have you established a mutual action plan with the buyer's champion?

- a) Yes.
- b) No.
- c) Don't know.

### 11 Is the buyer's team taking action to keep the buying process moving forward?

- a) Yes.
- b) No.
- c) Don't know.

### 12 How many times has the close date moved or has the deal's value changed?

- a) 1 - 2 changes.
- b) 3 - 5 changes.
- c) 6+ changes.

## Scoring

### On Track

If you answered mostly A's, your deal is likely in good health.

What to do next: This deal is progressing well, so you can redirect your attention to deals that need review or are at greater risk. But remember that just because a deal is on track today, doesn't mean its status won't change over the course of a quarter. Stay vigilant as circumstances evolve.

### Needs Review

If you answered mostly B's, your deal might need extra care and attention.

What to do next: Keep an eye on this deal, because it could be trending toward stalling or slipping. Take a closer look at the details of this deal to identify opportunities to course-correct. Now is the time to coach reps and give them the resources they need to take action and save the deal.

### At Risk

If you answered mostly C's, your deal's health might be declining.

What to do next: It's time to evaluate whether this deal is worth your team's time and energy in the current quarter. If you determine the deal isn't salvageable or not a good use of your time, push out the close timeline. However, if you decide to pursue it in the current quarter, make sure you have a solid plan to bring it back to good health.



Not getting a clear answer? Try retaking the quiz or take a closer look at this deal.

## The bottom line:

Today's buyers demand more from sellers, and modern sales teams need technology to navigate complex deal cycles in real time.

“Most [buyer] respondents expect their sales rep to answer complex questions in the moment because it shortens the sales cycle (62%) and increases confidence in the seller and supplier organization (53%).”

Source: A Forrester Consulting study commissioned by Outreach, Generational Shifts Fundamentally Change B2B Buyer and Seller Dynamics, June 2022.



Sales leaders can't afford to waste time manually diagnosing every deal, especially in today's dynamic selling environment. For the sake of your forecast, you need an **efficient early-warning system that alerts you as soon as issues arise**.

### Outreach

combines automatic deal risk assessment with useful recommendations, so your team can **unlock seller productivity to efficiently create and close more pipeline**.

[Learn how](#)