Five key numbers for the week

Take the snapshot on the same day each week. Keep the counting rule next to every number.

Week: **Team:**

01
New leads
All new inquiries in the period

02
Qualified
Meets the written criteria

03
Meetings / proposals
Track separately; do not add them

meetings proposals

04
Contracts signed
Signed by both parties

05
Deals won
Payment or recognised sale — choose one rule

Stage-to-stage conversion

enter numbers; formula below

Stage change	Base	Next	Conversion, %
Leads → qualified			
Qualified → meeting/proposal			
Meeting/proposal → contract			
Contract → won deal			

`Conversion = next stage ÷ previous stage × 100%`

Trend without drawing charts

six comparable weekly snapshots

Metric	−5	−4	−3	−2	−1	now
New leads						
Qualified						
Meetings / proposals						
Contracts						
Deals won						

Decisions for the week

one action · one owner · one due date

Decision	Due date	Owner

Pipeline at the reporting date

This is a snapshot of open deals. It shows where deals are now, but does not replace period conversion.

Date: **Owner:**

Deals by stage

one deal · one current stage

Stage	Deals	Value	No next step	Overdue	Older than limit
Lead received					
Qualified					
Meeting / proposal					
Contract					
Approval / payment					
All open deals					

Data hygiene

check before the meeting

- [ ] Every deal has one owner
- [ ] Qualification criteria are written down
- [ ] Next step names the action, person and date
- [ ] The customer supplied the decision date
- [ ] Lost deals are closed with a reason
- [ ] Every won deal follows the same counting rule

Deals that need a decision

bring only the stuck deals

Deal	Decision	Owner	Due date

Rule: if a field does not help someone make a decision, leave it out of the basic report.

Monthly result and decisions

Use the same five numbers at a larger scale: flow, stage conversion and final result.

Month: Prepared by:

New leads	Qualified	Meetings / proposals	Contracts	Deals won

Six months in numbers

fill in the table; no chart drawing required

Metric	−5	−4	−3	−2	−1	current	target	gap
New leads								
Qualified								
Meetings / proposals								
Contracts signed								
Deals won								
Revenue								
Lead-to-win conversion, %								

Decisions for next month

testable actions, not wishes

What we saw	What we will change or test	Owner	Due date

How to calculate the five key numbers

Write the definitions first. The same term must mean the same thing to everyone on the team.

New leads

number of new inquiries in the period

Count a person or company once, even after several messages.

Qualified share

qualified ÷ new leads × 100%

Write the mandatory qualification criteria before reporting.

Meetings or proposals

meetings held OR proposals sent

Choose one main event. If you need both, use separate rows and do not add them.

Contract conversion

contracts signed ÷ meetings or proposals × 100%

The denominator must match the event chosen for the previous stage.

Won-deal conversion

deals won ÷ contracts signed × 100%

Define success: payment, delivery or recognised revenue.

Lead-to-win conversion

deals won ÷ new leads × 100%

Compare one lead cohort, not two snapshots from different periods.

Target attainment

actual revenue ÷ target revenue × 100%

Target and actual need the same period, currency and recognition rule.

Average deal value

revenue from won deals ÷ number of won deals

Do not mix contract value, cash received and recognised revenue.

Our rules

Qualification criteria	Main event: meeting or proposal	When a deal counts as won