

Key B2B Sales Metrics — Extended Tables & Templates

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A) Pipeline & Forecast Metrics (Intent → Timing → Trust)

Metric	What it tells you	Trigger (red flag)	Action
Weighted pipeline	Likely value, not hope	Big gap vs unweighted	Tighten qualification + stage exits; downgrade late-stage lacking proof
Coverage by stage	Can you close enough in time?	Late-stage coverage thin	Build PO path on top deals (budget, procurement, legal, signature); stop spending time on weak deals
Stage conversion rates	Where deals die	One stage collapses	Add checklist + exit criteria; coach that stage; fix process bottleneck
Stage aging (late stages)	Stale deals hiding in late stage	Late-stage deals sit too long	Force next step + date or downgrade/close; no next step = no stage
Slippage rate (\$ + #)	Quarter breaking early	Late-stage pushes spike	Run slippage review now; milestone-based dates or downgrade/close-lost
Close-date accuracy	Timing trust	% closing on forecasted date drops	No close date without customer-owned milestone (budget window, procurement slot,



legal review date)

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Forecast accuracy (commit)	Commit credibility	Commit misses repeatedly	Redefine commit; remove wish-deals; enforce hygiene
Commit coverage	Is commit enough to hit target?	Commit/target < 1.0	Build deal-level upside plan with actions (not 'more activity')
Budget-confirmed pipeline	What can be real commit	Low vs total pipeline	Keep deals out of commit until budget owner + decision window is clear
Forecast hygiene	Data quality behind forecast	Missing next step/date common	Weekly cleanup rule: update stage + next step/date or downgrade/close

B) Order Execution Metrics (Order Intake → Backlog → Invoiced)

Metric	What it tells you	Trigger (red flag)	Action
Order intake vs target (PO only)	Signed business pace	Behind plan	Attack PO blockers (budget approval path, procurement steps, legal review, signature sequence)
Gap to target (order intake)	How far off plan you are	Gap grows week over week	Shift focus to PO-ready deals; reduce distractions
Order intake trend	Momentum	Trend drops	Re-check late-stage quality + budget-confirmed pipeline; expect slippage next
Backlog coverage (open orders)	Execution buffer	Backlog thin	Prioritize PO-ready deals; align capacity constraints early



Backlog trend	Future delivery/invoicing	Trend down sharply	Joint plan: accelerate order intake, remove delivery constraints
Backlog aging	Stuck execution	Aging increases	Identify root cause (capacity/materials/approvals/change orders) and escalate early
Sales vs target (invoiced/recognized)	Financial plan tracking	Behind plan	If bookings are fine, treat as execution/billing blockers (don't 'panic prospect')
Invoice conversion (invoiced/intake)	Orders turning into invoices	Drops/stalls	Fix delivery/acceptance/billing bottlenecks; tag reasons
Blocked invoices	Revenue/cash stuck	Blocked value rises	Assign owners and clear blockers fast

C) Templates (Copy/Paste)

1) Weekly Metrics Scorecard

Targets

- Target (Month): \$____
- Target (Quarter): \$____

Results vs plan

- Order intake vs target (PO/contract only): \$____ / \$____ → Gap: \$____
- Sales vs target (invoiced/recognized): \$____ / \$____ → Gap: \$____

Pipeline & forecast

- Weighted pipeline (Month): \$____
- Late-stage coverage (Month): ____x
- Budget-confirmed pipeline: \$____ (____ deals)
- Slippage this week: \$____ (____ deals pushed)
- Close-date accuracy (rolling 30 days): ____%

Execution

- Backlog coverage vs remaining target: ____x
- Blocked invoices (value): \$____

This week's 3 decisions (max)

- 1) _____
- 2) _____
- 3) _____

2) Slippage Review Script

For each pushed deal:

- 1) What exactly moved (budget meeting, approval committee, procurement slot, legal)?
- 2) What is the new customer-owned milestone date and owner?
- 3) Is budget confirmed or still “expected”?
- 4) What is the next step on the calendar (with date)?
- 5) What changes in forecast right now (date/stage/amount/close-lost)?

Hard outcomes:

- No milestone date → push date now and downgrade stage.
- No budget confirmation → not commit.
- No buying process → close-lost.

3) QBR One-Slide (Quarterly Business Review)

- Sales vs target (invoiced): \$____ / \$____ (Gap \$____)
- Order intake vs target: \$____ / \$____ (Gap \$____)
- Forecast accuracy (commit): ____%
- Close-date accuracy trend: ↑ / ↓
- Slippage trend: ↑ / ↓ (top reason: budget decision delayed)
- Weighted pipeline trend: ↑ / ↓
- Late-stage coverage trend: ↑ / ↓
- Budget-confirmed pipeline trend: ↑ / ↓
- Backlog coverage trend: ↑ / ↓
- Invoice conversion trend: ↑ / ↓
- 3 decisions next quarter: 1) ____ 2) ____ 3) ____