Inverted Pyramid Framework

Invert the pyramid and work from top to bottom, asking - and acting on - these questions. Two primary questions to ask above all others:

- *Is all the relevant information in Salesforce?*
- *How badly do I want to win this opportunity?*

Closed Won deals

- What % have clear upsell or cross-sell potential?
- When is the earliest expansion opportunity?
- Can this customer provide a referral or testimonial?
- Have we asked for a case study or success story?
- Are we tracking adoption and usage metrics post-sale?
- What % of active pipeline opportunities are from the same industry?

Late Stage opportunities

- Is the contract vehicle confirmed?
- Are redlines or legal reviews underway or complete?
- Have they spoken with customer references?
- Did we conduct an executive briefing (onsite or virtual)?
- Have we completed a pricing review and secured verbal alignment?
- Has a scoping session occurred, and is a draft or final SOW in place?
- Have we involved IT, Product, or Services in technical due diligence?
- Are we aligned with the buying process and timeline?

Mid Stage opportunities

- Have we identified the economic buyer and champion?
- Have we documented the business pain and urgency?
- Is there a shared, mutual action plan or close plan in progress?
- Have competitors been named or eliminated?
- Are we tracking influence maps and buying committee roles?
- Have we shared a demo, pilot, or proposal?

Early Stage opportunities

- Is this account part of a priority segment or named list?
- Do we understand their strategic initiatives or current challenges?
- Have we connected with multiple stakeholders?
- Have we captured a clear problem statement?
- Have we shared thought leadership, insights, or a value hypothesis?
- Are there next steps scheduled?
- Is the opportunity logged with a realistic close date and amount?

No opportunities

- Are we actively engaging target accounts through outbound efforts?
- Have we defined ideal customer profiles (ICP) for this territory or segment?
- Are we leveraging intent data, referrals, or trigger events?
- Are reps using LinkedIn, events, and partner channels to uncover needs?
- Are openers and sequences personalized and value-driven?
- Are reps consistently adding new opportunities each week?

Every stage of the funnel presents an opportunity to improve focus, execution, and conversion.

By inverting the pyramid and asking the right questions at each level, we move from reactive selling to intentional pipeline management.

This framework isn't just about inspection - it's about direction. Use it to prioritize your time, challenge assumptions, and ensure that no deal - or potential deal - is left behind.