Deep Diagnosis Forms

From *Sell Like You Don't Need It* by Konstantin Tesov. These are the longer forms of the Sales Operating Workbook.

Use them only when you cannot yet name the verified constraint or need to inspect the path behind it. Use your own records. If something is missing, write **unknown**. When the diagnosis is done, return to the Ninety-Day Brief in the book.

You may photocopy or recreate these pages for use in your own business.

1. Define the Path Before You Count

Path scope

Business unit:

Buyer:

Offer:

Source:

Source-specific first input event:

Where the records live:

Closed-won rule:

Inbound, outbound, and referral paths may begin at different events. They can join at the first real two-way sales conversation, but their top-of-funnel rates should not be combined as if the first inputs were equivalent.

Stage definitions

Stage	Observable entry event	Evidence required	Allowed next states and owner
Source-specific input			
Real conversation held			
Problem and fit qualified			
Recommendation or priced proposal delivered			
Company decision recorded			
Closed-won			

Your path may differ. The stage must describe something a person can verify, not a feeling such as “warm,” “interested,” or “looks good.”

Decision distinctions

Contact support means:

Company approval means:

Closed-won means:

Approval is in motion when:

A decision is deferred when:

Disqualified means:

A clear no is recorded when:

For an inbound raw cohort, remove only internal tests and exact duplicates. Keep poor-fit and spam inquiries visible if they reached the team. Define an **eligible inquiry** separately before using it in a cost metric.

2. Minimum Opportunity Record

Keep one of these for every record you plan to count. A dashboard you cannot trace back to an opportunity is only a summary of assumptions.

Identity and context

Account or opportunity:

Contact and role:

Buyer type and fit evidence:

Offer:

Source:

Trigger, confirmed or unknown:

Date of the first defined input:

Stage evidence

Stage or state	Date entered	Evidence	Owner
Real conversation held			
Problem and fit qualified			
Recommendation or priced proposal delivered			
Company decision recorded			
Closed-won condition completed			

Current decision state

Contact's position:

Company decision:

Closed-won state under our declared rule:

Unresolved next action:

Owner:

Date or observable trigger:

Intended next decision:

Known loss or stall reason:

Unknown or missing fields:

Deal-pressure check

Use this when one opportunity starts carrying too much hope.

Seller time, energy, money, or emotion already invested:

Buyer commitment visible in the record:

Work we are doing because the buyer asked:

Work we are doing mainly because we hope it helps:

Our stop point:

Specific fallback action if the deal does not move:

If the opportunity becomes closed-won

Initial contract value under our definition:

Promised outcome:

Scope and exclusions:

Buyer responsibilities:

Assumptions, dependencies, and known risks:

Commercial terms:

Delivery owner:

Kickoff date or remaining kickoff condition:

This handoff does not replace the agreement. It prevents the sales record from losing the conditions delivery must now honor.

3. Period Activity View

Count events that happened during this period. The rows may contain different opportunities, so do not calculate stage conversion here.

Period:

Business unit or offer:

Record cutoff:

Notes owner:

Source inputs during the period

Source	Defined input event	New records	Note or limitation

Movement during the period

Observable event	Count	Record source	Note
Real conversations held			
Problems and fit qualified			
Recommendations or priced proposals delivered			
Company approvals recorded			
Declines or explicit deferrals recorded			
Closed-won events			
Open records without an owned next action			
Other defined operating event			

You may add response time or another operating measure if you define it from your own process. These forms supply no universal target.

4. Source-Specific Cohort View

A cohort is a group that began at the same defined point during the same period. Follow those same records through the path.

Cohort header

Cohort label:

Source:

Offer:

Defined first input:

Cohort entry period, start and end:

Review cutoff:

Maturity condition:

Stage definitions unchanged: Yes / No

Source and offer unchanged: Yes / No

If definitions, source, or offer changed materially, inspect the records qualitatively. Do not present the rates as a clean trend.

Stage movement

Stage	Raw count	Count divided by prior-stage count	Currently open here
Defined first input		Not applicable	
Real conversation held			
Problem and fit qualified			
Recommendation or priced proposal delivered			
Company approved			
Closed-won			

Reconcile the current states

These rows are mutually exclusive. Their total must equal the starting cohort.

Current state	Count	Known reason or note
Open before company decision		
Approval in motion		
Deferred to a named trigger		
Company approved; closed-won condition pending		
Declined or disqualified		
Closed-won		
Unknown		
Total: must equal starting cohort		

5. Business Outcomes and Metric Boundaries

Use this section only after the cohort has had enough time for the outcome you are judging.

Mature-cohort outcomes

Outcome	Value	Actual, estimate, unknown, or too early	Record source
Closed-won count			
Total initial contract value			
Average initial contract value, total initial contract value ÷ closed-won count			
Expected direct delivery costs under the stated cost boundary			
Expected delivery margin on the initial signed scope, total initial contract value minus expected direct delivery costs			
Time from defined start to defined decision			
Other decision-relevant outcome			

Direct delivery costs included:

Direct delivery costs excluded:

Define one acquisition metric

Decision this metric informs:

Exact label:

Numerator:

Costs included:

Costs excluded:

Denominator:

Eligibility rule:

Attribution rule, counting setting, and date basis:

Matching source, offer, and cohort:

Actual, estimate, or unknown:

Record source:

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6. Diagnose One Leak

Select the comparison

Business result causing concern:

Exact definition:

Comparison: prior mature cohort / documented internal plan using the same definitions / qualitative record review only.

Why the comparison is valid:

What remains non-comparable:

Compare the transitions

Transition	Earlier raw count and denominator	Recent raw count and denominator	First material change?

Then record:

First material transition that changed:

Raw-count difference:

Records that now need inspection:

What this row does not yet explain:

The row tells you where to look. The records tell you what may have happened.

7. Design One Test

Inspect the records

Record	Observable evidence	Stated reason or current state	Unknown or missing

Ask:

Did the buyer fit the intended profile?

What problem and reason to act did the buyer state?

Where did the handoff or conversation stop?

Was the next action clear, with an owner and a date or trigger?

Which price, risk, approval, timing, or delivery issue remained unresolved?

Test record

Observed break:

Evidence:

Cause hypothesis:

Primary controllable change:

Buyer, offer, source, and eligible situation:

Stage expected to move:

Evidence or maturity condition for review:

Other material changes that could not be avoided:

What will still be too early to judge:

What would make us continue, revise, or stop:

Finish with one sentence:

Among [defined cohort], [transition] changed from [raw count] to [raw count]. The records show [evidence]. We will change [action] for [scope] and review after [condition].

If you cannot complete the sentence, capture the missing evidence before inventing a cause.

8. Evidence and Change Log

Update this section when an opportunity moves, sales work pauses, or material evidence appears.

Date	Record or cohort	Observed evidence or current state	Next action, owner, date or trigger

Material changes

Date	What changed and why	Other variables affected	Effect on interpretation or review

If sales work pauses

Sales work paused because:

The operating foundation is under control when:

Prepared restart action:

Next real opening:
