

Why YTD 2026 close rates halved.

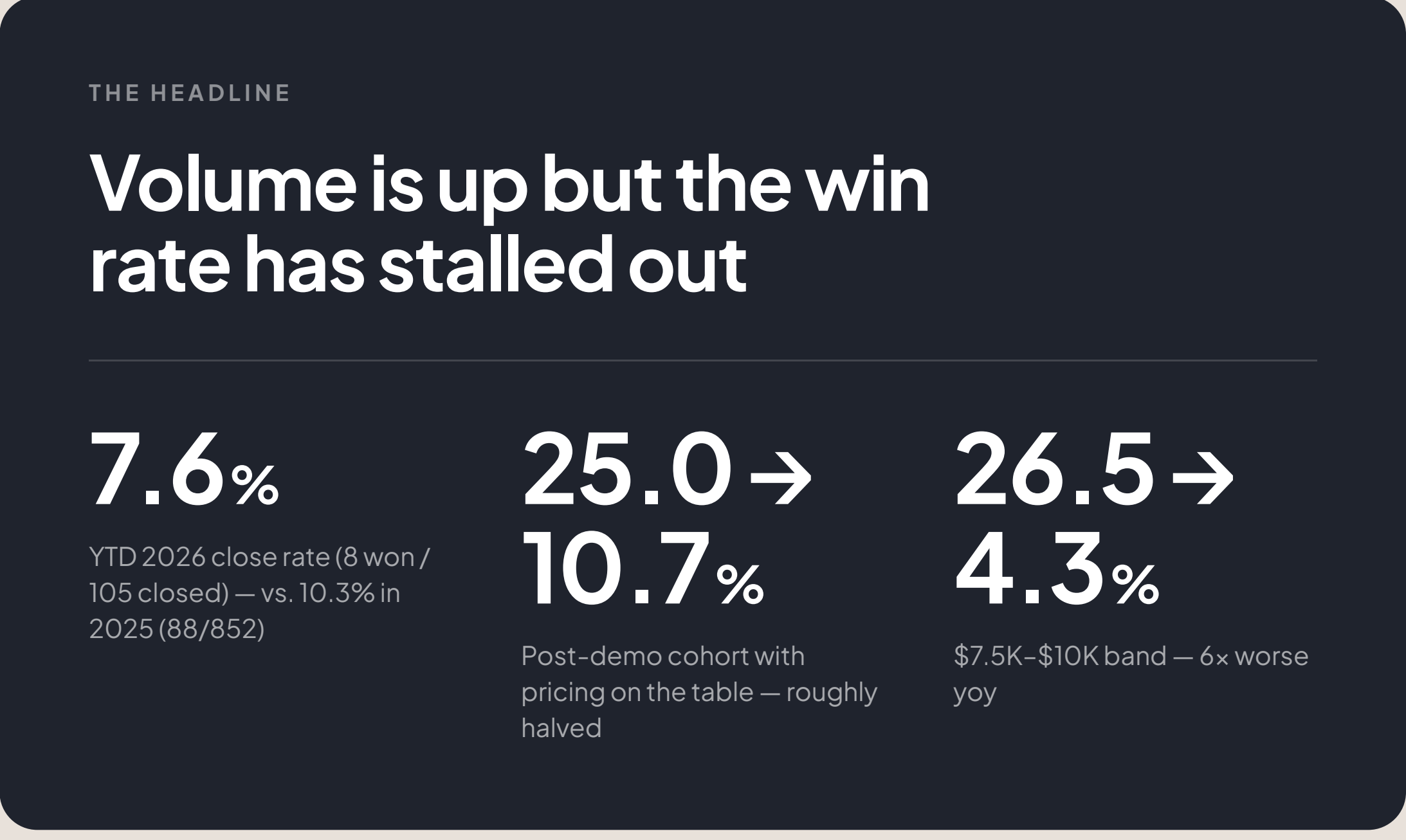
A scorecard-backed audit of 132 deals against the 2025 baseline. Pipeline volume held; close rate dropped from 10.3% to 7.6%. The regression is concentrated, structural, and traceable to a single post-demo motion introduced this year.

COHORT	SCORED	CALIBRATION	SOURCES
166 new-business deals created in 2026 (default pipeline)	132 per-deal scorecards, rubric v1.0	98.5% within-1 inter-rater agreement (n=13 blind re-score)	HubSpot account structured fields, AI call summaries, email/note bodies

SECTION 01

Executive Summary.

A rapid-cycle audit triangulating three independent lenses — structured fields on 166 deals, per-deal scorecards on 132, and verbatim email pulls. Field gaps may exist; the conclusions below are directional but cross-validated.



What's happening

The increase in deal volume is leading to poorly developed and managed deals. The data supports more rigorous qualification and closer monitoring of reps in several key behaviors:

Top behaviors to focus on — in order

01 The 3-package pricing slide is killing prospect engagement.

Replace it with a single recommended package, anchored to discovery — the package that fits what the prospect told you, not the menu of three.

An apples-to-apples split at the moment a pricing email is sent:

METRIC	3-PACKAGE SLIDE (N=37)	SINGLE PACKAGE (N=8)
Pre-pricing touches (median)	5	5
Win rate (closed)	12% (3/25)	67% (4/6)
Incoming emails from prospect after	avg 1.62	avg 3.38
Meetings booked / held after	avg 0.54	avg 0.88
% deals with ZERO incoming emails after	62%	25%
% deals with ZERO meetings after	73%	50%

- Discovery before pricing is similar in both groups (~5 touches). What differs is whether the rep used that discovery to recommend a single fit, or punted by sending the menu.
- After the 3-package slide is sent, **62% of prospects go silent** and **73% never take another meeting**. The conversation effectively ends.
- 87 cohort deals never received any pricing email at all (only 1 won) — the recommendation isn't "send pricing later," it's "when you do send pricing, recommend one package."
- Tier discipline (S2) is the largest gap in the rubric data: model winners **3.0/3**, closed-lost **0.54**. Δ+2.46.
- The 3-package email template is byte-identical across multiple 2026 deals (Brightpath, WGT, Lakeside Network) and **was not present in 2025 won-deal emails** — the motion that's failing is recent.

02 About half of all closed deals have only one contact associated. Win% jumps dramatically with 2+ contacts

CONTACTS ON DEAL	CLOSED	WON	WIN RATE
1 (single-threaded)	30	1	3.3%
2	14	1	7.1%
3+	12	4	33.3%

03 Deal quality dimensions like competitor and compelling need are "box-checking" exercises. Most deals don't describe either. The ones that do win far more often

Of 80 cohort deals where the rep flagged "yes, competition exists":

- 97.5%** name a specific competitor in the `incumbent` field (the box gets checked correctly).
- But only **49%** reference that competitor anywhere in actual deal work (emails, calls, notes).
- And only **14%** (8 of 57 closed competitive deals) score Q1=3 — named + deal-specific intel.

Q1 SCORE	N	WON	LOST	WIN RATE
0 — not mentioned	21	2	19	9.5%
1 — generic	7	0	7	0%
2 — named with context	21	1	20	4.8%
3 — named + deal-specific intel	8	4	4	50%

For deals opened in 2026 that progressed to demo, the vast majority were moved forward without a genuine, known compelling need:

OUTCOME	COUNT	%
Demo + tagged "less than Compelling Need" (<i>honest weak diagnosis</i>)	37	37%
Demo + tagged Compelling Need + actually described it (<i>real qualification</i>)	28	28%
Demo + tagged Compelling Need + did NOT describe it (<i>box-checked</i>)	33	33%
Demo + tag empty	1	1%

Field population is not evidence of discovery quality — there may be more information in call transcripts.

04 Of 5,692 SQLs, 94% have no clear disposition or next step.

The behavioral audit covers the 8,525 contacts at Opportunity stage. There are an additional **5,692 contacts at Sales Qualified Lead stage with no associated deal record** — meaning sales engaged with them but never opened pipeline. Of these:

- 94% have no `hs_lead_status` set** (no disposition signal at all)
- 99.6% have no planned next activity**
- 53% of the 5,692 have 5+ logged touches — meaningful rep time spent without disposition accountability