

Sales Manager Agent — per-deal scorecard

2026-05-22

DEALS SCORED

6 (3 + 3)

SAMPLE WINDOW

2026 newbiz, open

Cohorts. **A** — 3 most recently created open 2026 newbiz deals past Discovery but pre-demo. **B** — 3 most recently created post-demo open 2026 newbiz deals. Filter: discovery actually happened (≥1 logged contacted note); deal still open.

Methodology. For each deal the agent reads emails, calls, call summaries, meetings, notes and contact list from HubSpot, then asks one question per dimension — *did the rep explicitly develop and document this?* Three values: **Yes** (captured in deal-work — quote, field, or call note proves it), **Partial** (surfaced but not substantiated, or rep-set field with no conversation evidence), **No** (not in the record). The suggested coaching action is the agent’s recommendation for what the rep should do next — specific person, specific action, specific deadline.

SECTION 01

At-a-glance heatmap

DEAL	COHORT	OWNER	\$	DAYS IN STAGE	CURRENT SOL.	TOP PAINS	PROSPECT OUTCOME	ORG OUTCOME	STAKE-HOLDERS	BANT	NEXT STEP	PROOF-POINT
The Banyan Group	A	Daniel	—	2	○	○	○	○	○	○	➔	○
DriveCore	A	Priya	—	2	○	○	○	○	○	○	●	○
Kestrel Labs	A	Priya	—	3	○	○	○	○	○	○	➔	○
Integrated Data Systems	B	Daniel	\$15,750	1	●	●	➔	➔	●	➔	○	○
VRG	B	Daniel	\$11,000	7	●	➔	➔	○	➔	➔	●	○
WaveTrack Technologies	B	Daniel	\$8,500	4	➔	○	○	○	➔	○	○	○

● Yes — substantiated ➔ Partial — surfaced, not substantiated ○ No — not in the record

ONE-LINE READ

- Cohort A (pre-demo) is almost universally blank. Reps are booking demos before any documented discovery on current state, pain, outcome, or BANT — even when discovery calls have happened. The single Y across all 3 pre-demo deals is the next-step booking for DriveCore (the demo itself).
- Cohort B (post-demo) shows discovery only on the structured fields, and only on Current Solution + (sometimes) Top Pains. Outcome conversations (personal champion + organizational), proof-point definition, and clear forward-step commitment are blank on 2 of 3 post-demo deals. IDSC has 7 stakeholders on the demo but no proof-point and no next meeting booked — the highest-signal deal in the cohort is the one most at risk.

SECTION 02

Per-deal detail

DEAL 01 • COHORT A

PRE-DEMO

The Banyan Group — Daniel Reyes

Stage Product Demo Scheduled • 2 days in stage • Created 2026-05-20 • [Open in HubSpot](#)

DIMENSION	SCORE	EVIDENCE
Current Solution	○ No	Elena (prospect) cites their own GridScan platform and "AI-driven workflows internally" — no procurement-tool incumbent ever probed.
Top pains/goals	○ No	Elena explicitly, "we're not evaluating procurement tooling in the immediate term." Rep proceeded with demo scheduling anyway.
Prospect key outcome	○ No	Nothing personal-level for Elena captured in any touch.
Org-wide key outcomes	○ No	No business outcome named. Rep is reconnecting based on Elena's prior role at a different company.
Other stakeholders	○ No	Only contact is Elena (CEO). Justin Grant was CC'd on original outbound but never engaged or added as contact.
BANT	○ No	None documented. Elena explicitly stated no need + no timing.
Clear next step booked	➔ Partial	Calendar times re-sent today (May 22); no confirmed slot yet.
Ideal proof-point	○ No	Nothing captured re: what Elena would need to see to consider buying.

SUGGESTED COACHING ACTION

Before scheduling another demo slot, send Elena a 2-sentence email: "You mentioned you're not evaluating procurement tooling and that GridScan is doing federal contractor intelligence internally — given that, is there a specific question I can answer in 15 minutes that would make a 30-min meeting worthwhile?" If she can't name one, close-lost and re-engage Q4 2026. Don't run a generic demo into an explicit no-need.

DEAL 02 • COHORT A

PRE-DEMO

DriveCore — Priya Nair

Stage Product Demo Scheduled • 2 days in stage • Created 2026-05-20 • [Open in HubSpot](#)

DIMENSION	SCORE	EVIDENCE
Current Solution	○ No	existing_solutions field empty. Post-call email refers to "your current BD processes" but never names a tool.
Top pains/goals	○ No	Email mentions "task orders" and "multiple contract vehicles" generically — no specific pain or goal John articulated.
Prospect key outcome	○ No	Nothing captured for John Devlin (VP Strategy and Innovation) personally.
Org-wide key outcomes	○ No	No company-level outcome documented. eBook sent referenced "trends we've seen" not DriveCore-specific.
Other stakeholders	○ No	Only John on deal. will_dm_be_on_the_demo=Yes (John IS the DM), but no expansion plan named.
BANT	○ No	Budget blank, Need blank, Timing blank. Only Authority documented.
Clear next step booked	● Yes	Demo locked: "BlueprintPortco Demo — John Devlin and Priya Nair" on 2026-06-03 19:00 UTC.
Ideal proof-point	○ No	No proof criteria identified. Email said "help in the future when you are ready to make a change."

SUGGESTED COACHING ACTION

Demo with John (the DM) is locked for June 3 but you've captured nothing about current state, pain, or timing. Send John a 3-question email by EOW: (1) what tool/process today for task order tracking, (2) what triggered taking this call, (3) is there a deadline driving the eval. If he answers, run discovery + demo June 3. If not, hold the first 20 minutes for discovery — don't open with a feature dump.

DEAL 03 • COHORT A

PRE-DEMO

Kestrel Labs — Priya Nair

Stage Product Demo Scheduled • 3 days in stage • Created 2026-05-19 • [Open in HubSpot](#)

DIMENSION	SCORE	EVIDENCE
Current Solution	○ No	No incumbent or current process captured anywhere on the deal.
Top pains/goals	○ No	No pain articulated. icp=true but no problem named in any note or email.
Prospect key outcome	○ No	Nothing personal captured for Rohan Mehta (CEO).
Org-wide key outcomes	○ No	No company outcome documented.
Other stakeholders	○ No	Only Rohan Mehta on deal. No other stakeholders identified.
BANT	○ No	All four slots blank.
Clear next step booked	➔ Partial	Demo scheduled today (2026-05-22 13:30) but Rohan appears to have no-showed. Rep emailed calendar link 13:43: "I'll follow up on Tuesday if I have not heard from you."
Ideal proof-point	○ No	No proof-point identified.

SUGGESTED COACHING ACTION

Rohan (CEO) no-showed today's demo. Avoid the breakup-email loop — calendar link + "follow up Tuesday" is the same script for every cold prospect. Try a different channel: phone Rohan once, then a LinkedIn DM citing one specific Kestrel Labs fact (e.g., "Saw Kestrel Labs is on HHS task-order vehicles — are you tracking those manually today?"). If no reply by EOD next Wednesday (2026-05-27), mark closed-lost "no engagement post-creation" and move on.

DEAL 04 • COHORT B

POST-DEMO

Integrated Data Systems Corporation — Daniel Reyes

Stage In Review • 1 day in stage • Created 2026-05-13 • Demo 2026-05-21 • \$15,750 • [Open in HubSpot](#)

DIMENSION	SCORE	EVIDENCE
Current Solution	● Yes	Demo notes: "they still went with the next stage a couple months ago and they hate it. They can't track activities... and the data is limited coming from GW."
Top pains/goals	● Yes	Demo summary: "Matt Donnelly discussed dissatisfaction with Next Stage's reporting capabilities. Concerns were raised about integration limitations with incumbent."
Prospect key outcome	➔ Partial	Wendy's email: "we signed with a different company, and I am not very happy." Frustration clear; specific personal desired outcome not articulated.
Org-wide key outcomes	➔ Partial	Demo summary: "need for better control over CRM and contact management" — directional but not tied to \$/program/deadline.
Other stakeholders	● Yes	4 contacts on deal (Tara Foster Sr Capture Mgr, Arman Malik CEO, Thomas Avery VP BD, Wendy Stafford Dir BD). Demo notes: "There were like 7 people on the call. Most of the same, but several new people as well."
BANT	➔ Partial	B=Adequate, A=known not on demo (CEO Malik not engaged), N=clear, T=Some urgency. Authority is the gap.
Clear next step booked	○ No	3-tier pricing email sent post-demo with no booked next meeting; demo notes end ambiguously: "not sure if they can dump next stage, but that is what it is looking like."
Ideal proof-point	○ No	7 people on the demo + clear "they hate Next Stage" — but no proof criteria captured. Pricing follow-up was a 3-package menu, not a recommendation tied to a decision criterion.

SUGGESTED COACHING ACTION

Classic 3-tier-menu-no-next-meeting pattern from the audit. Email Wendy and Matt Donnelly by EOD Friday: "Given Next Stage doesn't track activities the way you need, what's the single workflow you'd need to see working live to make the case to leadership? Let's book 30 min Tue/Wed to focus on exactly that." Force one proof-point conversation and narrow to ONE recommended package (Navigator @ \$13,050 looks right for the named pain). The 3-tier menu is what's putting this deal at risk despite the strong demo signal.

DEAL 05 • COHORT B

POST-DEMO

VRG — Daniel Reyes

Stage In Review • 7 days in stage • Created 2026-05-07 • Demo 2026-05-15 • \$11,000 • [Open in HubSpot](#)

DIMENSION	SCORE	EVIDENCE
Current Solution	● Yes	existing_solutions="workbook IQ"; Sam confirmed in demo: "locked into a subscription until March next year."
Top pains/goals	➔ Partial	Demo summary: "Sam expressed concerns about workbook's data accuracy and customer support" — named but no \$ or program tied.
Prospect key outcome	➔ Partial	Demo notes: "his wife is due to give birth any day" — personal context noted; no professional outcome captured.
Org-wide key outcomes	○ No	Demo notes: "They are in no hurry, so that is the problem" — explicit no urgency, no compelling business outcome named.
Other stakeholders	➔ Partial	Sam mentioned "follow-up demo with President and COO" — they exist verbally in the call summary but neither named nor added as contacts. Single contact today.
BANT	➔ Partial	B=Adequate, A=Sam needs leadership (named but unengaged), N=interested in CRM, T=No urgency, locked-in until March 2027 — timing is the killer.
Clear next step booked	● Yes	Trial active; demo notes: "checkin wednesday on trial". Sam responded May 16: "I look forward to working through the trial and setting up another call w/ our leadership team to discuss."
Ideal proof-point	○ No	3-tier pricing email sent. No criterion defined for what a successful trial looks like. Demo notes: "he wanted a follow up in 2 weeks, he also wanted to do a trial the next week, told him why they dont work... he agreed, but still wanted one." — trial running without a defined success bar.

SUGGESTED COACHING ACTION

Sam is locked into workbook until March 2027 — that's 10 months. Two paths: (1) disqualify now, mark close-lost "revisit Feb 2027" and stop sending pitches; or (2) use the trial period to engage the President and COO. Sam already volunteered. Email Sam this week: "For our next call, can you add [President] and [COO]? I'd rather not run a leadership demo until they're in the room — otherwise we're repeating work." If Sam can't surface them by 2026-06-01, treat that as the disqualification signal.

DEAL 06 • COHORT B

POST-DEMO

WaveTrack Technologies Inc — Daniel Reyes

Stage Product Demo Completed • 4 days in stage • Created 2026-05-04 • Demo 2026-05-04 • \$8,500 • [Open in HubSpot](#)

DIMENSION	SCORE	EVIDENCE
Current Solution	➔ Partial	existing_solutions="F80/SAM/EPDS" + Salesforce in demo summary. Reflects manual SAM gov searches, not a paid incumbent. Rep didn't probe further.
Top pains/goals	○ No	Pre-demo call notes (rep self-admit): "I didn't ask any questions... just scheduled the demo." Demo notes: prospect "gave me a stupid keyword" — discovery never landed.
Prospect key outcome	○ No	Nothing personal captured for Jack Conway.
Org-wide key outcomes	○ No	Demo summary: "Jack is interested in state and local opportunities due to new funding" — generic; rep notes contradict this ("that's not what they do").
Other stakeholders	➔ Partial	Demo notes: "he wants a follow up demo with Jimmy" — named but never added as contact and never engaged since.
BANT	○ No	B=unknown, A=unknown (Jack said involve another), N=weak (rep notes "he wasn't super sold"), T=No urgency / timeline unknown.
Clear next step booked	○ No	Last meaningful touch was demo on 2026-05-04. Three follow-up emails May 8 / May 13 / May 18 ("Yea or Nay?") — all ghosted. No confirmed next meeting. notes_next_activity_date is empty.
Ideal proof-point	○ No	3-tier pricing email sent. No proof criteria identified. Demo notes acknowledge Jack "wasn't super sold" but no diagnosis of what would convert him.

SUGGESTED COACHING ACTION

Jack has ghosted 3 nudge emails since the May 4 demo and you self-noted you "didn't ask any questions" before scheduling it. Stop the breakup-email cadence. One final move: LinkedIn outreach to Jimmy (Jack named him as the second decision-maker) plus a final email to Jack — "Jack, haven't heard back which usually means timing's off. Closing the loop here unless I hear otherwise by Friday." If no reply by 2026-05-30, close-lost as "no qualified need surfaced; returned to prospect-led timeline." This deal is consuming pipeline weight it doesn't deserve.

SECTION 03

Patterns the CEO should notice

- 01

Discovery is happening on field-fill, not in conversation. Cohort B reps populate existing_solutions, budget_of_client, urgency, timing after the demo — but the outcome and proof-point dimensions (the ones that actually predict closing) are blank on every deal. This is the substantiation-gap pattern from Principle 6 of the audit: hygiene without quality.
- 02

The 3-tier pricing template is on every Cohort B deal — even when the deal explicitly needs a single recommended package. IDSC (\$15,750 Wayfinder offered) most clearly fits Navigator at \$13,050 based on the named pain (activity tracking, GW data integration). VRG and WaveTrack got identical 3-tier emails despite very different deal profiles. The audit's empirical brief flagged this pattern as the strongest predictor of post-demo silence.
- 03

Cohort A reps are scheduling demos before documenting any discovery. All three Cohort A deals have dealstage=Product Demo Scheduled with effectively no captured discovery. The demo will be a feature-dump-into-a-vacuum unless an intervention happens before it.
- 04

No deal documents an ideal proof-point. This is the single dimension that scored "No" on all 6 deals. If a coaching investment had been picked, this would be it: "What specifically would they need to see working to want to buy?" It anchors the demo, the trial, the pricing recommendation, and the follow-up — and reps aren't asking it.
- 05

Kestrel Labs and Banyan are likely no-need deals being treated as live opportunities. Both Elena (Banyan) and Rohan (Kestrel Labs) have given disengagement signals (Elena explicitly said "not evaluating"; Rohan no-showed). Continuing to invest cycles here inflates pipeline and trains the rep that no-engagement = "still warm."

SECTION 04

What v1 would do with this output

COACHING COLUMN →
Slack DM to the rep within 1 hour of the change that triggered re-scoring (e.g., demo just completed; prospect just replied; no-show happened today).

NO CELLS →
HubSpot tasks with specific prompts ("Capture incumbent before next touch") with a due date.

WEEKLY DIGEST →
Which dimensions are most-often blank per rep, which deals slipped from "Yes" to "Partial" (rep regression), which deals have ≥3 dimensions still blank past the demo (Cohort B failure mode).

The POC above is the data shape v1 would write to those surfaces.