EXECUTIVE BRIEFING | BIG ROCK REVIEW

The One Report Most Sales Leaders Don't Have

What happened to the big deals you counted on last quarter to hit your number? Not the deals you finished the quarter with... the big ones you built your forecast on?

Big Rock Review is the management discipline I developed—and now help enterprise sales leaders put in place through a fixed-fee, one-quarter consulting engagement.

You Have Plenty of Reports. Just Not This One.

If you run an enterprise sales organization, you're not short of data. Your CRM and AI can produce pipeline reports, forecasts, stage reports, win rates and more.

But try answering this one question:

What happened to the 10 to 20 biggest deals you were counting on at the start of last quarter?

Not just the ones that closed. All of them.

I couldn't answer it either—until my boss challenged me to explain why we kept missing our forecast despite claiming we weren't losing many big deals.

So I sat down with sales ops, and we went back to the 20 biggest deals from the previous quarter and dug in.

Our win/loss ratio looked pretty good: five wins for every loss. But when we included all our big deals, the picture changed.

25%	5%	45%	25%
WON	LOST	DEFERRED	NO DECISION

Fourteen of those top 20 deals (70%) were deferred to next quarter or ended in No Decision. The win/loss ratio didn't tell the whole story because it focuses only on deals that actually closed (won or lost).

As the forecast changed, the **original** opportunities became harder to track. New deals were added, but what happened to all the big deals we started the quarter with?

Your forecast tells you what you expect to close going forward. It doesn't track what happened to the deals you originally counted on.

The 20-deal example comes from my sales leadership experience, described in my book Winning the Six-Figure Sale. Percentages are based on the number of deals.

THE LIST I KEPT ON MY DESK

One Page. This Quarter and Next.

The tool I built is almost embarrassingly simple. I call it the Big Rock Tracker. It tracks the most important deals for this quarter and **next** in one place. Enterprise deals take time, so you need to be looking over the horizon at next quarter's deals as well.

This is the list of deals I kept on my desk.

Three rules make it work:

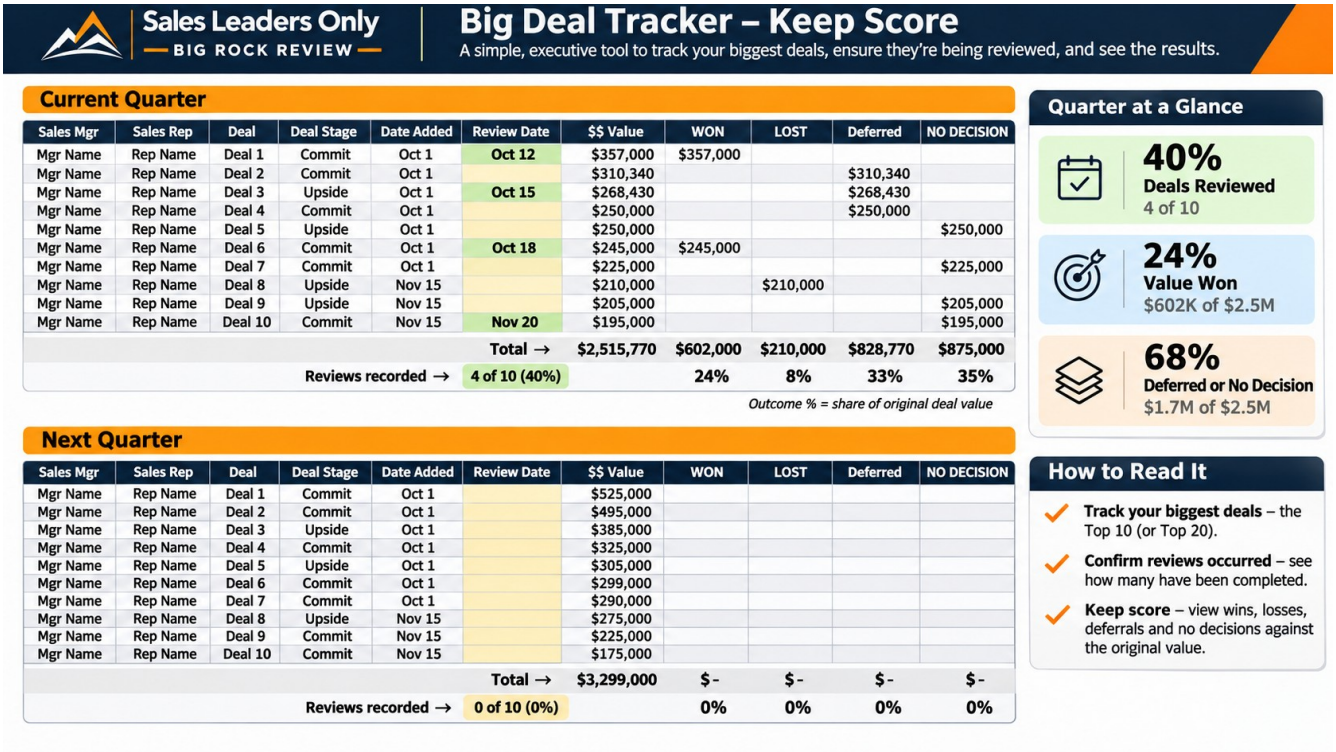
1. Agree on the top 10 to 20 Big Rocks for this quarter and next. Keep that list intact; you can add new deals as the quarter progresses, but no original deals come off the list.

2. Record when a structured deal review takes place. A Starbucks conversation is not a deal review.

3. Keep score—Won, Lost, Deferred or No Decision—and review the outcomes at the end of the quarter against the **original list**.

You might be surprised at what you learn about your business!

The Tracker and Scorecard work together as a single tool. Here's an example:



In about 30 seconds, you get a feel for what's going on with your biggest deals.

- Only four of ten deals have a recorded management review date. What about the other six? Were they reviewed and not recorded, or did the reviews never happen?
- 24% of the original deal value was won; 68% was Deferred or No Decision.
- Three deals appeared on the list in mid-November. Why weren't they included at the start of the quarter?

- Which managers or reps keep deferring deals quarter over quarter?

Want to know what your own list would show? Book a 30-minute conversation.

THE MANAGEMENT VIEW

What This Reveals About Your Sales Leaders

Here's what surprised me. I expected the list to tell me about deals. Over time, it also helped me spot patterns in how our sales leaders were managing their business.

Are your managers in command of their business?

Some commit deals that have little chance of closing. Others are so conservative that major opportunities appear in the forecast only when they have a PO in hand. A fixed starting list makes those differences easier to spot and discuss.

Are structured reviews actually taking place?

Maybe you've invested heavily in MEDDPICC or another deal management methodology. Is it really being used? You think it is, but how do you know? Ask one of your managers to show you a deal review and watch what happens!

What keeps happening quarter after quarter?

Which deals are repeatedly being deferred? Which teams keep running expensive sales campaigns that end in No Decision? The data may already be in your CRM. But unless someone brings it together and asks the right questions, these patterns can easily go unnoticed.

Sometimes simple is best!

Could you build this yourself? Sure. The spreadsheet is the easy part. The harder part is establishing the rules, making the discipline stick and knowing what the results and insights are telling you about your business.

One of my former bosses used to remind me all the time: **My job wasn't to report the news. It was to make the news.** The forecast reports a number. The Big Rock Tracker helps identify deals that need management attention while there's still time to do something about it. That's making the news.

The goal is to help you get intentional and deliberate about how your sales leaders Inspect, Assess, and Coach their biggest deals.

The Scorecard tells you what happened. The real value is knowing which deals need management attention before the quarter is over.

THE ENGAGEMENT

How I Help You Put It in Place

Big Rock Review is a fixed-fee, one-quarter engagement designed to install this discipline alongside your existing CRM and sales methodology. No replacement system. No new sales methodology.

1. Install the process

A 60-minute working session to define what Big Rocks are in your organization, who maintains the list, what counts as a formal review and how outcomes are recorded. We set up the Tracker and its built-in Scorecard.

2. Keep it on track

Two 30-minute check-ins at the end of Months 1 & 2 to answer implementation questions and ensure the Tracker and review process are used consistently.

3. Uncover the insights

A 60-minute executive review at quarter-end. We review outcomes together, identify management patterns worth investigating, and discuss where to direct attention next quarter. These insights are hiding in plain sight.

What you receive: The Big Rock Tracker & Scorecard, an Operating Playbook, the installation session, two check-ins and the quarter-end executive review. Your managers continue to conduct their own deal reviews, and you (or your sales ops team) keep the process running after the engagement.

The investment: US$5,000 fixed fee for the quarter, plus applicable taxes. My work is guaranteed: if the engagement doesn't deliver what we agreed, I'll refund your fee.

Let's Talk

If you need to add more focus to your biggest deals and don't have a simple way to keep score and hold your leaders accountable, let's talk.

I'd welcome a 30-minute conversation about how you manage your Big Rocks today—and whether this approach would add value to your business. No preparation required.

Book a 30-minute executive conversation

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