

# The 7 Dead Deal Signals

## A CRM Pipeline Review Playbook

From the Mastery Podcast — Episode 8: Why Most Deals Should Be Killed Earlier

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**How to use this playbook:** Run every deal in your active pipeline against these seven signals. Be honest. If a deal triggers three or more signals, it needs either an immediate direct conversation to re-establish reality, or it needs to come out of the pipeline.

### 1 The Next Step Is Seller-Owned

**What to look for:** You sent the last email. You're chasing. The buyer hasn't committed to any next action on their side.

**Why it matters:** A deal where only the seller is moving is not a deal — it's a pursuit. Those are different things.

Check CRM: is the next action assigned to you or the buyer? If it's you, flag the deal.

### 2 You Can't Name the Decision-Maker

**What to look for:** You don't know who signs. You haven't been introduced to them. You're engaging a contact, not the authority.

**Why it matters:** If you can't answer "who signs?" with a name, a role, and a plan to engage them, the deal is structurally fragile.

Write down the decision-maker's name and role. If you can't, that's your answer.

### 3 There Is No Problem With a Cost Attached

**What to look for:** The prospect can't articulate what happens if they do nothing — what it costs them in time, money, or risk.

**Why it matters:** Without a cost of inaction, urgency doesn't exist. Decisions get deferred indefinitely.

Can you state the buyer's cost of inaction in one sentence? If not, discovery isn't done.

### 4 Budget Is Unclear or Assumed

**What to look for:** "They said they have budget" but you don't know: OPEX or CAPEX? Allocated or unbudgeted? Approved or still being requested?

**Why it matters:** Budget conversations are political. Money is owned by departments, protected by FDs, and competed for by projects.

Confirm: is budget confirmed, allocated, and approved? If you can't answer all three, revisit.

### 5 The Close Date Has Moved More Than Once

**What to look for:** The expected close date has shifted two or more times. Each time there was a reasonable-sounding explanation.

**Why it matters:** One movement is legitimate. Two is a pattern. A pattern tells you the deal is not a priority for the buyer.

*Check CRM history. If the date has moved twice, have a direct conversation about what's really happening.*

## 6 No Meaningful Change in 3+ Weeks

**What to look for:** No new stakeholders introduced. No new information shared. No documents requested, reviewed, or returned. Nothing has moved.

**Why it matters:** Static deals are dead deals in slow motion. Three weeks of silence isn't patience — it's stalling.

*Ask: what has substantively changed in the last 21 days? If the answer is nothing, act on it.*

## 7 You're Telling the Story More Than the Buyer

**What to look for:** The energy is entirely coming from your side. You're filling silences, re-explaining value, re-establishing the relationship each time.

**Why it matters:** A buyer who wants to buy is an active participant. A buyer who is being sold at is a polite prospect who hasn't said no yet.

*In your last three interactions, who was doing more of the talking? If it's you, that's the signal.*

### Quick Scoring Guide

**0–1 signals:** Deal is active. Continue working it with clear next steps.

**2 signals:** Deal is at risk. Address the gaps within one week or escalate internally.

**3+ signals:** Deal should be challenged directly. Have the honest conversation — or remove it from the pipeline.

**Remember:** *A clean pipeline is not a smaller pipeline. It's a more honest one. And an honest pipeline is a better one to lead from.*