A GUIDE FOR CHIEF REVENUE OFFICERS

Pipeline Health: Forecast Every Deal on Customer Health

From stage-based forecasts to health-weighted growth.



A practical guide for revenue leaders: weigh every deal by the customer's experience, explain every number, and find the expansion your pipeline is missing.

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THE BIG IDEA

Expansion is won or lost on the customer's experience long before the stage changes.

Your CRM records where a deal is. Your service data shows how the customer is doing. A pipeline that sees both forecasts better, sells at the right moment, and finds growth the CRM cannot.

Your forecast is missing half the story.

A rep marks an expansion deal at 70 percent because the stage says so. Meanwhile the customer has three cases past their SLA, CSAT has fallen two months in a row, and the renewal is six weeks away. Support knows. The forecast does not.

FOUR GAPS THAT COST REVENUE TEAMS GROWTH

Stage without context. Probabilities come from the sales stage, not from how the customer is doing.

Pressure on struggling accounts. Offers land on customers who are unhappy, and push them further away.

Advocates treated like everyone. Customers who love you sit at the same probability as the rest.

Deals that never get opened. Healthy customers ready to grow have no deal in the pipeline at all.

SIGNALHOT RECOMMENDATION

Make service health part of every pipeline review. Weigh each deal by the customer's experience, show the evidence behind the number, and list the healthy customers who should have a deal but do not.

Read every deal through service health.

Each deal keeps its CRM probability and gets a second number: a win likelihood adjusted by what the service record says about the account.

Marked down

Churn Risk rates the customer High or Medium. High is marked down further.

Unchanged

No churn risk and no advocacy signal. The CRM probability stands.

Marked up

Success rates the customer a Champion or Strong. Champion earns more.

The lift is deliberately smaller than the markdown: a struggling account predicts a lost deal more reliably than a happy one predicts a win. Churn risk always comes first, and the likelihood never reaches zero or certainty.

SIGNALHOT RECOMMENDATION

Review deals on at-risk accounts with your customer success lead before the forecast call. Steady the account first; the expansion will be easier afterwards.

THE TAKEAWAY

The stage says where a deal is. Service health says where it is going.

Make every number explain itself.

A number nobody can check is a number nobody trusts. Every win likelihood should show how it was reached: the CRM probability it started from, whether it moved and why, and the evidence on the account.

EVIDENCE A REVENUE LEADER SHOULD SEE

- CSAT low or falling, or a recent poor rating
- Cases overdue or at risk of missing their SLA
- Negative tone in customer messages
- A build-up of open cases, or no recent resolution
- A renewal date coming up

SIGNALHOT RECOMMENDATION

Calculate the explanation from the same figures as the number, never write it afterwards. Then the two can never disagree, and "at risk" reads as evidence, not opinion.

THE TAKEAWAY

Less debate about the number. More action on the account.

Forecast on a health-weighted pipeline.

Multiply each deal's amount by its health-adjusted win likelihood and you get a forecast that already accounts for the customer's experience. Put the service view next to it.

SAMPLE DATA

$2.4M Total pipeline	**$1.1M** Health-weighted forecast
6 Deals on at-risk accounts	**9** Deals on advocate accounts

Add the 90-day win rate from your closed CRM deals, counting losses as well as wins, and how many deals came from the CRM versus from SignalHOT.

SIGNALHOT RECOMMENDATION

In the forecast call, ask why a deal is marked down and what support is doing about the cases behind it, not only whether the rep thinks it will close.

Find the deals that should exist.

Some of the best deals are not in the pipeline yet. Look for customers with strong growth signals, what they ask for in their cases matched to products they do not own, and no open deal. Leave out customers at high churn risk: steady them first.

SAMPLE DATA

Customer	Growth	Health	Need
Riverbend Manufacturing	Strong	Advocate	Remote monitoring
Lakeside Equipment Co.	Strong	Champion	Fleet analytics
Summit Health Partners	Medium	Healthy	Added locations

- **Add to Pipeline** in one click, then **Copy for CRM** to open the deal with Lead Source "SignalHOT Growth Signal", so sourced pipeline shows in your own reports.
- **No double pitching:** when a deal is already open, the Growth Advisor does not suggest a second one.

THE TAKEAWAY

Your next deal is often already asking for help.

OPERATING GUIDE

A five-step health-weighted growth motion.

01 **CONNECT**
Read your CRM deals and your service data together. Read-only: your CRM stays the system of record.

02 **WEIGH**
Adjust every deal's win likelihood by churn risk and advocacy.

03 **EXPLAIN**
Show the evidence behind every number, from the same figures.

04 **ACT**
Steady at-risk accounts, accelerate advocate deals, open the whitespace.

05 **MEASURE**
Track SignalHOT-sourced pipeline by Lead Source and your 90-day win rate. Growth signals learn from the expansions you close.

SIGNALHOT RECOMMENDATION

Run it as a loop every week: signal, owner, action, outcome. Revenue and service work from one set of facts.

THE LEADERSHIP CHECKLIST

Five questions to ask this quarter.

- [ ] **Does our forecast change when a customer's service experience gets worse?**
- [ ] **Can a rep see the evidence behind a deal's win likelihood?**
- [ ] **Do we know which open deals sit on accounts at churn risk?**
- [ ] **Are our advocates' deals moving faster than the rest?**
- [ ] **Which healthy customers with a clear need have no deal open today?**

If the answer is "not consistently", the opportunity is to connect the service view to the revenue view, not to add another report.

SIGNALHOT RECOMMENDATION

Start with a focused set of accounts. Compare the stage-based forecast with the health-weighted one each week, review the differences with your customer success lead, and refine the process.

MEASURE WHAT MATTERS

Truer forecasts. Better timing. More growth from the customers you have.

Grow the customers you already have.

Expansion should not depend on a stage field and a hunch. It should be a steady discipline: weigh every deal by the customer's experience, explain every number, and open the deals your customers are already asking for.

PIPELINE HEALTH BRINGS FOUR CAPABILITIES TOGETHER

01 **Health-weighted win likelihood.** Every deal marked down, up or unchanged by service health.

02 **Explainable deal insight.** The evidence behind every number, never a black box.

03 **Whitespace discovery.** Healthy customers with a clear need and no deal yet.

04 **Growth Advisor next steps.** What to offer, to whom, with the outreach drafted.

SEE SIGNALHOT GROW IN ACTION

Watch the 2-minute overview at signalhot.com, or write to hello@signalhot.com to walk through a health-weighted pipeline with your revenue team.

Forecast on what is really happening in the account.