



SUNCOAST SPARK · ACTIVATE

Stage Advancement Checklist

Move an opportunity because the evidence changed — not because another meeting happened.

Suncoast Spark · Free Resource for B2B Account Executives

CORE PRINCIPLE

A meeting happened. What changed?

CRM stages should reflect evidence and buyer progress — not seller activity. Before advancing any opportunity, distinguish between what *you* did and what the *buyer* revealed.

These are activities

- Discovery call completed
- Demo delivered
- Proposal sent
- Follow-up sent
- Legal introduced

Evidence may include

- Buyer confirmed material problem
- Impact articulated
- Decision process understood
- Stakeholder engaged
- Buyer supplied information
- Technical requirement validated
- Commercial terms discussed
- Decision milestone agreed

❏ **Do not advance a deal because you completed your task.** Seller activity is an input. Buyer evidence is the standard.

EARLY STAGE

Before moving beyond initial qualification

Confirm that the fundamentals exist before investing further.

☐ Specific business problem has been identified

☐ Buyer can describe their current approach to the problem

☐ Problem has meaningful business impact

☐ At least one credible reason to investigate change exists

☐ A relevant stakeholder has been engaged — not just contacted

☐ Seller understands what still needs validation before the next stage

If several of the above are unknown: stay in discovery or reconsider whether this is a qualified opportunity.

MID STAGE

Before moving into deeper evaluation

The opportunity should be taking shape. Buyer behavior — not seller optimism — should support the move.

☐ Problem and impact are clear enough to justify continued evaluation

☐ Relevant use case is defined and connected to the buyer's context

☐ Buying group is beginning to emerge — not just one contact

☐ Champion potential has been tested, not assumed

☐ Technical or operational concerns have been identified

☐ Buyer is contributing time, information, or access

☐ Next milestone has a clear purpose — not just a calendar slot

LATE STAGE

Before treating the deal as commercially mature

Late-stage confidence must rest on what has been verified — not what has been assumed or hoped for.

☐ Economic buyer or decision authority is understood

☐ Decision criteria are known and documented

☐ Decision process has been mapped

☐ Business case is credible and grounded in the buyer's numbers

☐ Commercial scope is understood by both sides

☐ Technical and security risks are addressed or formally owned

☐ Procurement and legal path is understood

☐ Decision timing is connected to an actual business event

☐ Mutual actions are explicit and agreed — not implied

DECISION

Hold · Advance · Exit

Use the evidence to determine the right disposition — not the age of the opportunity or the pressure of the quarter.

Advance

- Evidence became stronger
- Buyer commitment increased
- A major uncertainty decreased

Hold

- Promising opportunity
- An important condition remains unverified
- Keep in current stage until that condition clears

Exit / Nurture

- No meaningful problem confirmed
- No credible reason to act now
- No buyer commitment or path to decision



Holding a deal in the right stage is better than manufacturing pipeline progress.



AE ON DEMAND

Stage movement should follow the evidence.

AE on Demand helps account executives review known facts, assumptions, missing evidence, stakeholder coverage, and recommended next action — before deciding whether an opportunity should advance.

It turns ChatGPT or Claude into a company-specific sales operating system, so you can think clearly about what to do next and get help doing it.

[Explore AE on Demand at aeondemand.com](https://aeondemand.com)

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