A CONVERSION DIAGNOSTIC FOR B2B SaaS SALES TEAMS

THE CONVERSION LEAK REPORT

Why B2B SaaS companies with a healthy pipeline still miss their number — and what actually fixes it.

OSCAR CHAVEZ
Creator of The PITCH Method

INTRODUCTION

You Don't Have a Pipeline Problem

Most B2B SaaS founders read a missed target the same way: not enough pipeline. So the instinct is always the same — spend more on marketing, hire another BDR, push the team to book more demos.
But if you pull the numbers, most sales-led SaaS companies between $2M–$20M ARR aren't short on opportunities. They're short on conversion. Pipeline is healthy on the dashboard and thin by the time it reaches the bank account, because somewhere between "opportunity created" and "deal closed," revenue is quietly leaking out.

This report walks through where that leak shows up, why the common fixes don't work, and gives you a short self-diagnostic to find out — in about ten minutes — roughly where your own revenue is leaking.

What's inside

SECTION 1 — THE SYMPTOM

Revenue Problems

These are the exact sentences we hear on the first call, almost word for word, from founders and revenue leaders before they bring us in:

“We're generating enough pipeline, but revenue isn't following.”
“Our pipeline looks healthy until you look at what's actually closing.”
“We're missing targets despite having enough opportunities.”
“Our growth has stalled.”
“We're putting more money into sales but not getting proportional revenue growth.”

What these have in common

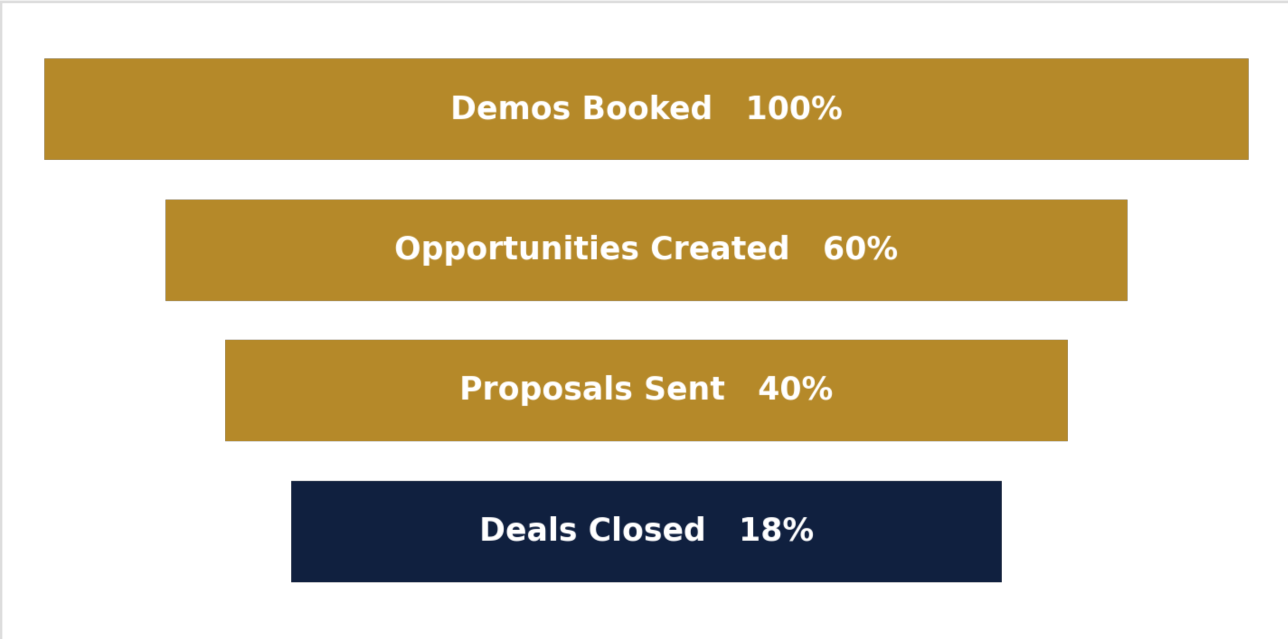
Every one is a lagging symptom, not a diagnosis. And the instinctive place most teams look first — more leads, more reps — is almost never where the actual problem sits.

If any of these five sound familiar from your last board meeting, the leak isn't top-of-funnel. It's in the middle — how opportunities move, or fail to move, through your process. That's next.

SECTION 2 — WHERE IT SHOWS UP IN THE NUMBERS

Conversion Problems

Stop looking at pipeline volume and start looking at conversion rate by stage — this is roughly where it drops off across a typical sales-led SaaS motion:



Illustrative funnel — the shape, not your exact numbers.

Low demo-to-opportunity conversion	Low opportunity-to-close conversion
Deals slipping into next quarter	High proposal volume, low close rate
AEs struggle late-stage specifically	Conversion varies wildly rep-to-rep

When two reps sell the same product to the same ICP and one closes at twice the rate — that's not a market problem. It's a process gap living in one person's head instead of the whole team's workflow.

SECTION 3 — WHY IT'S HAPPENING

Sales Execution Problems

Conversion numbers are the symptom. These are the root causes we find once we sit in on live calls and pull recordings:

Discovery isn't uncovering real pain	Reps pitch too early
Poor qualification lets dead deals advance	Weak control — the buyer sets the pace
Discounting instead of building value	Reps default to “I'll follow up” on objections
No urgency, so deals drift	Forecasts don't reflect what's actually true

The pattern underneath the list

Almost every one traces back to the same root: reps are improvising a process instead of running one. Talented individuals can out-perform this for a while — but it doesn't scale, isn't coachable, and collapses the moment your best rep is on leave or hired away.

This is also why generic sales training rarely moves the number. Training changes what people know for a week. It doesn't change what they do on the next live call.

SECTION 4 — THE COMPOUNDING COST

Scaling Problems

Left alone, a conversion leak doesn't stay the same size. It gets more expensive every quarter you scale around it instead of fixing it:

“We need more AEs to hit the number.”
“We're spending more on acquisition every quarter.”
“Our CAC is increasing.”
“Our sales team is growing faster than our revenue.”
“The founder still has to rescue important deals.”

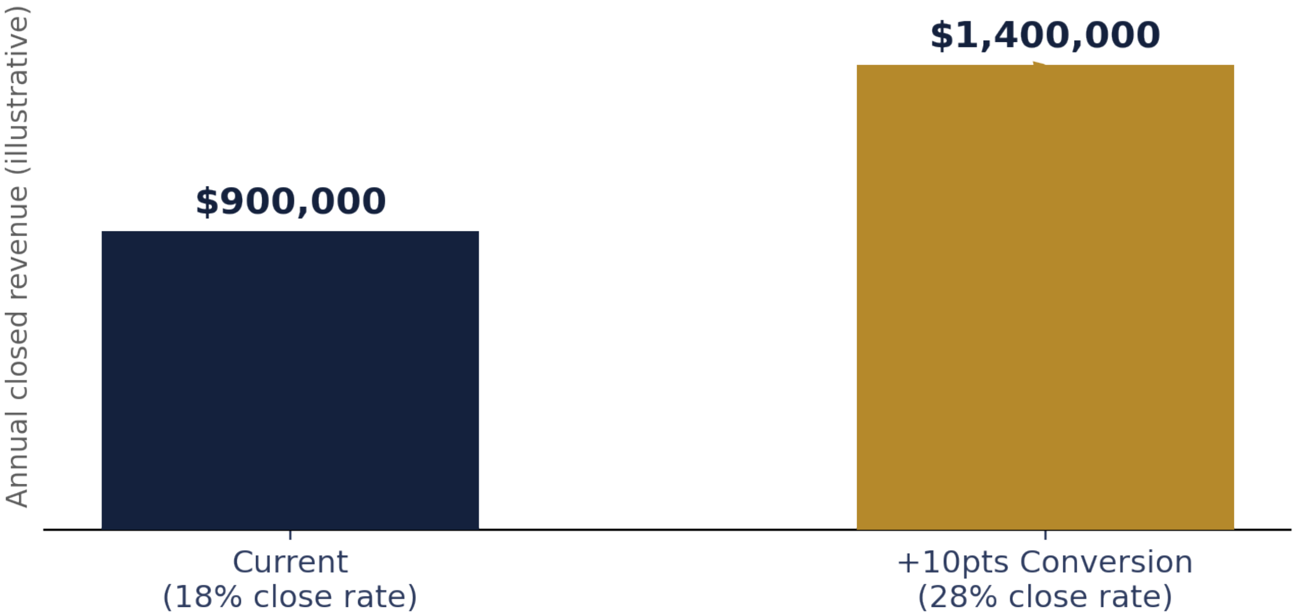
Why headcount makes it worse, not better

Hiring more AEs onto a broken process just runs more pipeline through the same leak, at a higher fixed cost. CAC climbs because you're paying to acquire opportunities that convert at the same low rate. And the founder stays trapped closing the deals the team can't.

SECTION 5 — THE MATH

The Real Cost of the Leak

Here's an illustrative example of how small a conversion gap has to be before it's worth six or seven figures a year. On an audit call, we'd build this with your actual numbers.



Metric	Current	+10 Points
Annual pipeline value	$5,000,000	$5,000,000
Opportunity-to-close rate	18%	28%
Closed revenue	$900,000	**$1,400,000**

Notice what didn't change: marketing spend, headcount, opportunities created. A 10-point conversion lift on the exact same pipeline produced half a million dollars — with no added CAC.

SECTION 6 — YOUR OPTIONS

Six Ways Companies Try To Fix This

Before the audit, it's worth being honest about what's already on the table — because most of these have probably already been tried, or are being discussed right now.

Option	What it does	Where it falls short
Do nothing	Hope conversion improves naturally.	*It doesn't. The leak continues at the same rate, or worsens as the team scales.*
Hire more salespeople	Generates more activity and pipeline.	*More pipeline through the same broken process just leaks more revenue, faster.*
Generate more leads	Increases marketing/SDR spend.	*You're pouring more water into a bucket that already has a hole in it.*
Hire a sales consultant	Delivers recommendations, frameworks, a report.	*Advice doesn't change rep behaviour on the next live call.*
Hire a CRO / VP Sales	Brings in senior sales leadership.	*Expensive, slow to ramp, and often overkill for a specific conversion gap.*
Train the sales team	Runs a workshop or sales training.	*Creates temporary enthusiasm, rarely measurable behavioural change.*
Fix the conversion engine	Diagnose exactly where revenue leaks, rebuild the broken parts of the process, and coach the team directly on live deals.	*This is the option most companies haven't tried — because until now, nobody showed them where the leak actually was.*

SECTION 7 — SELF-DIAGNOSTIC

Is Your Sales Process Leaking Revenue?

Tick every statement that's true for your team right now. Four or more ticks in any one box is usually where revenue is leaking first.

QUALIFICATION	**DISCOVERY**
☐ Deals reach late stage and die without warning.	☐ Reps pitch within the first 10 minutes of a call.
☐ Reps can't explain why a deal was “qualified.”	☐ Notes rarely capture a specific business cost.
☐ Win rate varies wildly by rep, not segment.	☐ Prospects go quiet after the demo.
PITCH	**OBJECTIONS & PRICING**
☐ Same demo regardless of what discovery found.	☐ Discounting is the default response to hesitation.
☐ Reps lead with features before confirming priority.	☐ Reps say “I'll follow up” instead of resolving live.
☐ Deals stall right after the pitch most often.	☐ Price surfaces late instead of addressed early.
FORECASTING	**COACHING CADENCE**
☐ Forecast missed by 15%+ in the last two quarters.	☐ Deal reviews cover stage/date, not what was said.
☐ CRM stages don't match what's actually true.	☐ No regular cadence of reviewing live/recorded calls.
☐ Deals slip to next quarter more than they close.	☐ Founder or senior rep still closes the biggest deals.

SECTION 8 — THE ALTERNATIVE

What A Fixed Conversion Engine Looks Like

Every symptom in this report — missed targets, inconsistent win rates, rising CAC, the founder still rescuing deals — comes back to one root cause: the team is running on instinct instead of a system. When the process is actually fixed:

Every rep runs the same qualification standard	Discovery surfaces a costed business problem
The pitch is built around what discovery found	Objections are handled live, not parked
Forecasts hold within a normal margin of error	Deal reviews cover what was actually said

And the founder stops being the only person who can close the biggest deals.

This is what The PITCH Method rebuilds

The PITCH Method exists to give SaaS founders the sales process, pitch, training and coaching of a senior sales hire — without having to hire one. It's built directly into how your team already sells: a diagnostic of exactly where your revenue is leaking, a custom playbook (qualification, discovery, pitch, objection handling), and hands-on coaching against your team's real deals until conversion actually moves.

Not another sales course. Not another CRM template. Not another seven-step framework the team forgets in two weeks.

THE OFFER

Let's Find Out Where Your Sales Process Is Actually Leaking Revenue

Not another sales course. Not another CRM template. Not another "7-step framework" your team forgets in two weeks.

I'll give you a free 20-minute Sales Process Audit. We'll look at:

Your current sales process	Where opportunities are getting stuck
Your qualification	Your conversion points
Your pitch	Your coaching cadence

And I'll tell you what I'd fix first. If we can help, I'll tell you. If we can't, I'll tell you that too.

The promise

Double your sales conversion — or I keep coaching your team for free until you do.

If you're running a 5–10 person sales team and you're still heavily involved in managing the machine — it's probably worth 20 minutes. Book your call here