Appendix G: Leader-Facing Metrics Scorecard

Purpose

Coach from structure, not frustration — let the numbers open the conversation.

Agent Name: _____ Week Of:

_____

Activity Review

Conversations Held: _____ Target Met? ☐Yes ☐ No

Follow-Up Completion Rate: _____ % Target Met? ☐ Yes ☐ No **Coach Prompt:** If conversations are low, is this a time problem, a priority problem, or an avoidance problem?

Pipeline Health

Overall Pipeline Status: ☐ Balanced ☐ Front-Heavy ☐ Mid-Heavy ☐ Thin

Coach Prompt: Which stage is weakest right now, and what behavior would change that over the next 30 days?

Conversion Review

Lead → Signed Conversion Rate: _____ %

Contracts Written This Week: _____ **Coach Prompt:** If conversion is low, is it a follow-up problem, a consultation problem, or a lead qualification problem?

Cycle Time

Average Days from First Contact to Contract:

_____

Coach Prompt: Where in the process does momentum typically slow down?

Coaching Observations

Is this a consistency issue or a capability issue? ☐ Consistency ☐Capability ☐ Both

Primary Adjustment for Next Week

One specific change this agent will make:

_____