

THE RCA 4 SALES CHECKLIST



A STRUCTURED APPROACH TO FINDING THE REAL CAUSE, NOT THE SYMPTOM

STEP 1 NAME THE SYMPTOM, NOT THE CAUSE

Write down the actual number or behaviour you're looking at (not your theory about why it happened yet).

What's the specific symptom? (e.g., missed quota, dropped close rate, stalled pipeline, rising attrition)

Who or what does it affect: one rep, a segment, or the whole team?

STEP 2 PICK THE RIGHT FRAMEWORK FOR THE PROBLEM

IF THE PROBLEM LOOKS LIKE...	USE THIS FRAMEWORK	BECAUSE IT TELLS YOU...
One rep's numbers suddenly dropped	5 Whys	Which specific behaviour broke first: activity, outbound, playbook adherence, etc.
A specific deal was won or lost	Win-Loss Analysis	The real reason from the buyer's side: price, competitor, trust, etc. (not your guess)
Deals are stalling at a stage	Funnel Math	Exactly where the leak is: lead quality, demo conversion, or cycle time, etc.
Revenue or losses are lopsided / concentrated	Pareto Analysis	Which 20% of accounts or reps are driving 80% of the result or the miss
Team has skill / competency gaps	7 Pillars (Competency Scoring)	Which specific competency is weak: pitch, objections, negotiation, closing, etc.
The whole team is missing target, multi-cause	Fishbone	Whether it's People, Process, Platform, Price, Product, etc.

STEP 3 PUSH PAST THE FIRST ANSWER

Asked "Why" at least 4-5 times, across different dimensions and not just the first obvious reason

Checked whether the cause is behavioural (rep), structural (process/playbook), or environmental (market)

Resisted the urge to stop at a convenient, comfortable answer

STEP 4 VALIDATE WITH EVIDENCE, NOT A GUESS

Pulled the actual CRM / funnel data behind the claim

Talked to at least 1-2 real people - the rep, or a won/lost buyer - not just the dashboard

Cross-checked the finding against a second framework where possible

STEP 5 TURN THE ROOT CAUSE INTO ONE COACHING ACTION

Root cause identified in one sentence:

Action owner:

Target date:

How you'll know it worked (the metric that should move):