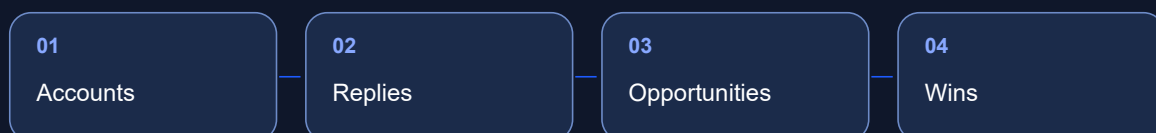


Which outreach is creating qualified opportunities?

An Excel campaign scorecard and measurement guide. Compare the same account cohort from outreach through replies, opportunities and wins.

PIPELINE & AI



A practical worksheet for the next account, campaign or conversation.

The problem

Reports show sends, opens and clicks, but the team cannot trace an article, list or campaign into qualified demand.

What it costs the team

Budgets and content decisions follow activity counts while useful conversations and opportunities remain hard to attribute.

What you will have at the end

A consistent campaign scorecard with visible denominators and an agreed opportunity definition.

01 / THE METHOD

How do you measure whether outreach is working?

Follow a defined cohort of contacted accounts into human replies, qualified opportunities and wins. Use the same account unit and review window for each rate. Report cost per opportunity only where costs and opportunity counts are known, and keep sourced and influenced outcomes separate.

1. Define the unit and cohort

Use unique accounts contacted for the supplied workbook. Keep one campaign or segment per row, with its start and review dates. Do not mix message counts with account outcomes. Deduplicate multiple people at one company.

2. Agree what counts as an opportunity

Write the criteria before reviewing results. For example, a relevant company has described a problem and agreed a substantive next step with the person responsible. A download alone is not automatically a qualified opportunity.

3. Keep costs and outcomes comparable

Record costs allocated to the same cohort, using your chosen documented policy for tools and staff time. Record won revenue only once. Do not compare a new cohort with a mature cohort without allowing for the sales cycle.

4. Calculate the five measures

The workbook shows accounts contacted, human-reply rate, opportunity rate, cost per opportunity and won revenue. Blank cost inputs produce an unavailable cost result. Zero opportunities produce no cost-per-opportunity figure.

5. Use the review to choose an action

Inspect the accounts behind the result. A weak reply rate may involve delivery or relevance; a weak opportunity rate may involve fit or qualification. Write one change and a review date. Keep article-sourced and article-influenced pipeline as separate CRM fields.

02 / PUT IT TO WORK

Worked example: compare the same denominator

Illustrative cohort: 80 accounts contacted, 12 accounts replying and 4 qualified opportunities, with £600 of documented campaign cost. Reply rate is $12/80 = 15\%$. Opportunity rate is $4/80 = 5\%$. Cost per opportunity is $£600/4 = £150$. These are invented arithmetic examples, not benchmarks or Adapt customer results.

Questions to work through

Situation	Which cohort, account unit and review window are we measuring?
Problem	Where do accounts stop progressing?
Implication	What cost or missed opportunity does that create for the team?
Need-payoff	Which change would help us learn whether the bottleneck improves?

Before you use it

- Numerators and denominators use the same cohort.
- The team can trace outcomes to accounts.
- Missing inputs remain unavailable.
- A download and a qualified opportunity are reported separately.

These examples are illustrative. They are not customer results or recommended performance benchmarks.

03 / YOUR WORKSHEET

Apply it to your next piece of work

Use the editable worksheet in this download, or write your answers here. Keep facts, decisions and unresolved questions visible.

Campaign name and cohort start

Sector and channel

Unique accounts contacted

Accounts with human replies

Qualified opportunities using our definition

Won accounts and won revenue

Known campaign costs and allocation policy

Review date, finding and next experiment

Sources and further reading

[Salesforce: State of Sales 2026](#). Sales operations research provides context for data quality and AI adoption. No industry conversion benchmark is assumed here.

Use the same work in Adapt

Keep the company context and the next step together as the team moves from research into a conversation.

[Explore reporting and analytics in Adapt](#)