

The CRM where a deal is *fact*, not fiction.

A prospect-management platform built on Robert Roseberry's Prospect Management System™, the Sales Fiction Index™, and the Fall-Down principle. Every opportunity earns its place in the forecast — or it falls out, in plain sight.

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Executive summary

AccountabilityWins™ is a prospect-management CRM that only forecasts what a rep can prove. Every active opportunity must hold a confirmed next meeting — date and time, in both diaries — or it visibly falls out of the number into a Fall-Down strip that counts how long it has been stalled. The result is a forecast leaders can trust and a board that coaches the behaviour behind the number.

Built on Robert Roseberry's Prospect Management System™, the Sales Fiction Index™, and the Fall-Down principle, the product ships as a single, offline-capable file that installs on iPad and Mac in minutes. It includes a nine-stage weighted pipeline, board and list views, a live Fall-Down day counter, eight coaching archetypes with demonstrative boards, editable accounts and contacts, calendar-enforceable tasks, an admin console, performance-to-target with Excel import, and role-based access. This document specifies the product and shows the shipped screens.

1 • Vision & positioning

Most CRMs are belief engines. They record whatever a rep types and then roll it into a forecast as if typing made it true. The result is a number no one trusts — inflated pipeline, happy-ears deals, and a Monday review spent arguing about which opportunities are real.

AccountabilityWins™ inverts the default. A deal does not count because someone believes in it. It counts because it can prove itself: a confirmed next meeting, with a date and a time, in both parties' diaries. No confirmed next step, no place in the forecast — the deal **falls down**, visibly, in front of the rep and the manager.

POSITIONING STATEMENT

For VP Sales, CROs and sales managers who can't trust their pipeline, AccountabilityWins is the CRM that only forecasts what's provably real — because every opportunity must earn its place with a confirmed next meeting, or fall out of the number automatically.

AccountabilityWins

THE PIPELINE THAT'S ALL FACT

Welcome back. Let's go win the number.

A deal earns its place in the forecast by proving it — a confirmed next meeting, date and time, in both diaries — or it **falls out of the number automatically.**

robert@salesachievements.com

Continue

Role detected from your credentials: **Robert Roseberry • Manager**

TODAY'S FUEL • MANAGER *Coach the behaviour, not the deal — and the behaviour is the next meeting.*

Enter the SalesBoard →

Screen 1 — Welcome & login. Role is detected from the credential; a rotating, original motivational line greets the user on every sign-in.

What makes it different

- **Fact over fiction.** The forecast is built from confirmed next steps, not optimism.

- **Coaching built in.** The board surfaces behaviour — stalls, no-next-step, sandbagging — so managers coach patterns, not just deals.
- **Radically simple.** One screen tells the truth. No 40-field forms, no training week.

2 · Guiding principles

Prospect Management System™ (PMS)

Roberts Roseberry's discipline: an opportunity advances only when the seller secures a specific, mutually-agreed next action. Activity is measured by **booked future**, not logged past.

Sales Fiction Index™ (SFI)

A per-deal and per-rep read on how much of the pipeline is unsupported by a confirmed next step. The higher the SFI, the more of the forecast is story rather than fact.

The Fall-Down principle

When a deal has no confirmed next meeting, it doesn't quietly linger inside a stage pretending to be healthy. It **falls down** into a dedicated Fall-Down area, tagged with the stage it fell from and a live counter of how long it has been down. Fall-Down is not a punishment; it's an honest holding area that makes drift impossible to hide and easy to act on.

DESIGN RULE AGREED IN THIS SERIES

Fall-Down is **manual, never automatic**. A deal without a next step turns **red** to demand attention, but the rep — or manager — decides when it falls. The system exposes the truth; the human owns the call.

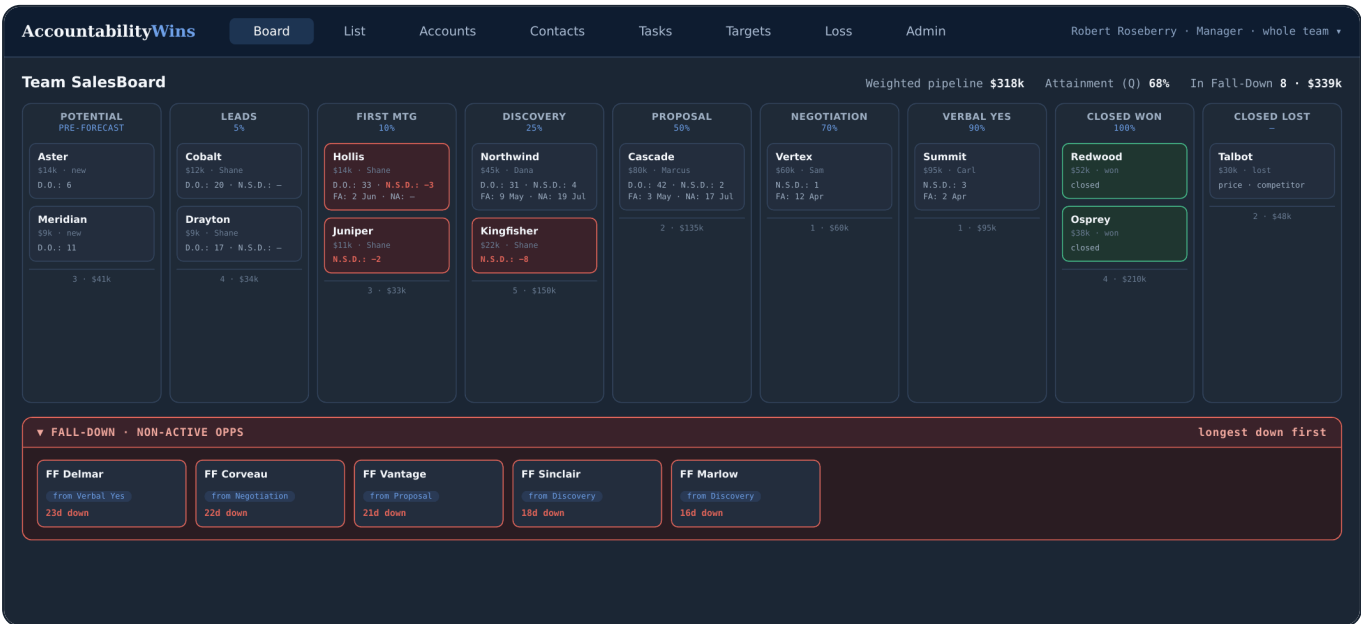
3 · Target users & roles

Role	What they need	What the product gives them
CRO / VP Sales	A forecast the CEO can trust; visibility into where the number is real vs. fiction.	Team-wide board, performance-to-target, Fall-Down exposure across all reps.
Sales Manager Admin	To coach behaviour weekly and protect the forecast.	Every rep's board, archetype signals, admin controls, snapshots.
Sales Rep	To know their real number and what to do next.	Their own pipeline, next-step prompts, tasks that hit their calendar.

Managers are administrators by default. Role is derived from the login credential — not chosen at sign-in.

4 · The pipeline: nine stages + forecast weighting

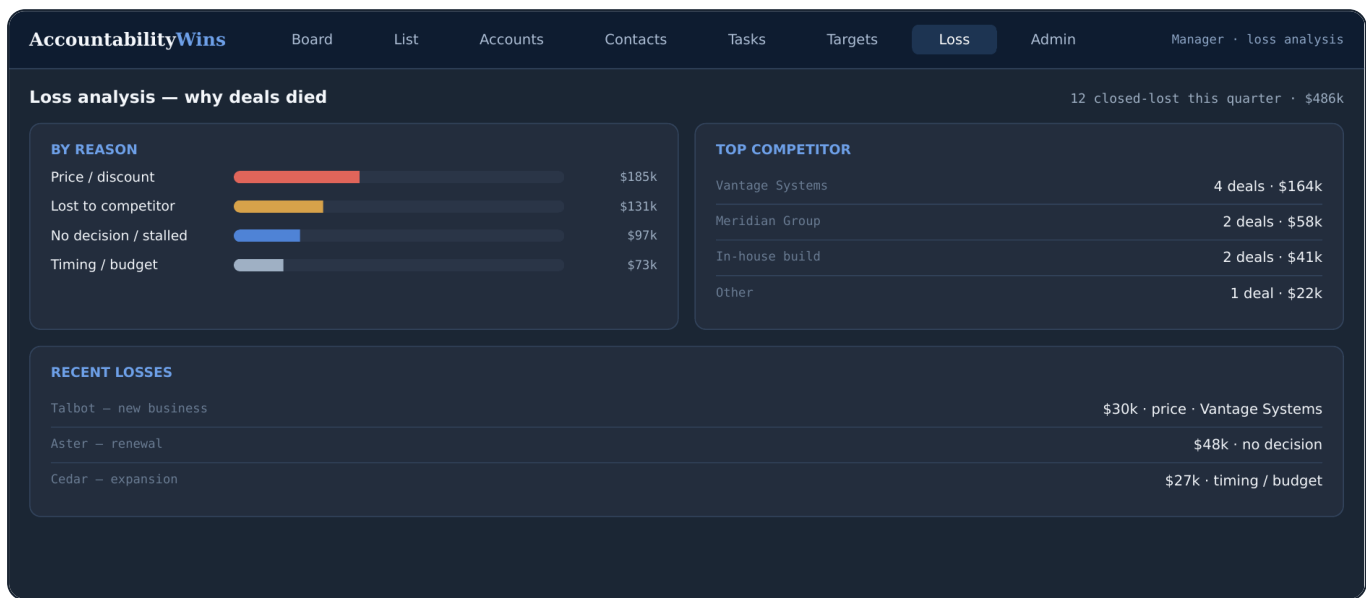
The board runs nine named stages. Six of them are **forecastable** and carry a weighting used to compute weighted pipeline. Potential is pre-forecast; Closed Won/Lost are terminal.



Screen 2 — The team SalesBoard. Nine stages with forecast weighting, red overdue cards, a green closed-won column, and the single Fall-Down strip with live day counters beneath.

#	Stage	Meaning	Forecast probability
1	Potential	Identified, not yet worked. Pre-forecast.	—
2	Leads	Engaged, earliest qualification.	5%
3	First Meeting	First real conversation booked/held.	10%
4	Discovery	Needs, stakeholders, and fit established.	25%
5	Proposal	Solution and price on the table.	50%
6	Negotiation	Terms being finalised.	70%
7	Verbal Yes	Committed, pending paperwork.	90%
8	Closed Won	Signed.	100%
9	Closed Lost	Dead — with a captured loss reason.	0%

Weighted pipeline = Σ (deal value $\times$ stage probability) across the six forecastable stages. Closed Lost deals capture a **loss reason, competitor, and note** that feed a Loss Analysis view.



Screen 7 — Loss analysis. Closed-lost value broken down by reason and by winning competitor, so patterns in why deals die become coachable.

5 · The Fall-Down mechanic

Behaviour

- An active deal is expected to hold a **confirmed next meeting** (date + time).
- When the next step passes or is missing, the card's next-step days (**N.S.D.**) go negative and the card turns **red**.
- The rep or manager then drops the deal into **Fall-Down**. It keeps its value and history, and is tagged `from [stage]` so its origin is never lost.
- A live "**days in Fall-Down**" counter starts at 0 and ticks up each day until the deal is re-engaged with a real next step — at which point it returns to its stage and the counter clears.

PRESENTATION — CORRECTED IN THIS SERIES

Fall-Down is rendered as **one single strip** of cards beneath the pipeline, sorted longest-down first. It is **not** a second row of stage columns (which read as a duplicate pipeline). Each card carries its `from [stage]` tag and its day counter, so stage context is preserved without mirroring the whole pipeline.

Why it matters

Fall-Down turns the most dangerous thing in a pipeline — the silently-stalling deal — into the most visible. A manager can open any rep's board and instantly see how much of the "pipeline" is actually sitting in Fall-Down, and for how long.

6 · The SalesBoard & card anatomy

Two views

Board view — Kanban columns for the nine stages, plus the Fall-Down strip. Column footers show **count · total \$ · average days open**. **List view** — the same deals as a dense, scannable table for pipeline reviews and sorting. A toggle switches between them.

AccountabilityWins	Board	List	Accounts	Contacts	Tasks	Targets	Loss	Admin	Manager · whole team
Pipeline — list view									sortable · 46 open opps
OPPORTUNITY	STAGE		VALUE		NEXT STEP				
Cascade — expansion Marcus Reid	Proposal		\$80,000		in 2d				
Summit — renewal Comfortable Carl	Verbal Yes		\$95,000		in 3d				
Northwind — rollout Dana Cole	Discovery		\$45,000		in 4d				
Kingfisher — expansion Shotgun Shane	Discovery		\$22,000		-8d overdue				
Hollis — pilot Shotgun Shane	First Meeting		\$14,000		-3d overdue				
Delmar — renewal Falldown Fred	Fall-Down		\$60,000		23d down				
Talbot — new Big Deal Bob	Closed Lost		\$30,000		price / competitor				

Screen 4 — List view. Every open opportunity in one sortable table, with next-step status colour-coded green (on track), red (overdue / in Fall-Down), and amber (lost).

Card metrics (matched to the DEI-style board Robert supplied)

Code	Metric	Behaviour
D.O.	Days Open	Total age of the opportunity.
N.S.D.	Next-Step Days	Days until the next meeting; red when negative (overdue).
FA / NA	First / Next Appointment	The anchoring dates for the relationship.
d in stage	Days in current stage	Amber > 21 days, red > 40 days (stall signal).
d down	Days in Fall-Down	Live counter on fallen cards.

Closed cards render a minimal footprint (value + "closed"); no next-step metrics apply.

AccountabilityWins

Board

List

Deal record

DISCOVERY · 25% WEIGHTING

Kingfisher — expansion

\$22,000 · owner: Shotgun Shane

Stage

Discovery ▾

Next meeting

set date + time

Account

Kingfisher ▶

Primary contact

Sam Cole ▶

Source

Referral

Referral partner

type / select ▾

Timing & accountability

D.O. 40 · N.S.D. -8 (overdue) · 14d in stage

Notes

Most-wrong forecast entry — cold, still forecast. No decision-maker engaged.

Book next meeting

Fall down

Screen 3 — The deal record. Editable stage, next-meeting, account/contact links, referral partner, and a red timing panel that surfaces an overdue next step.

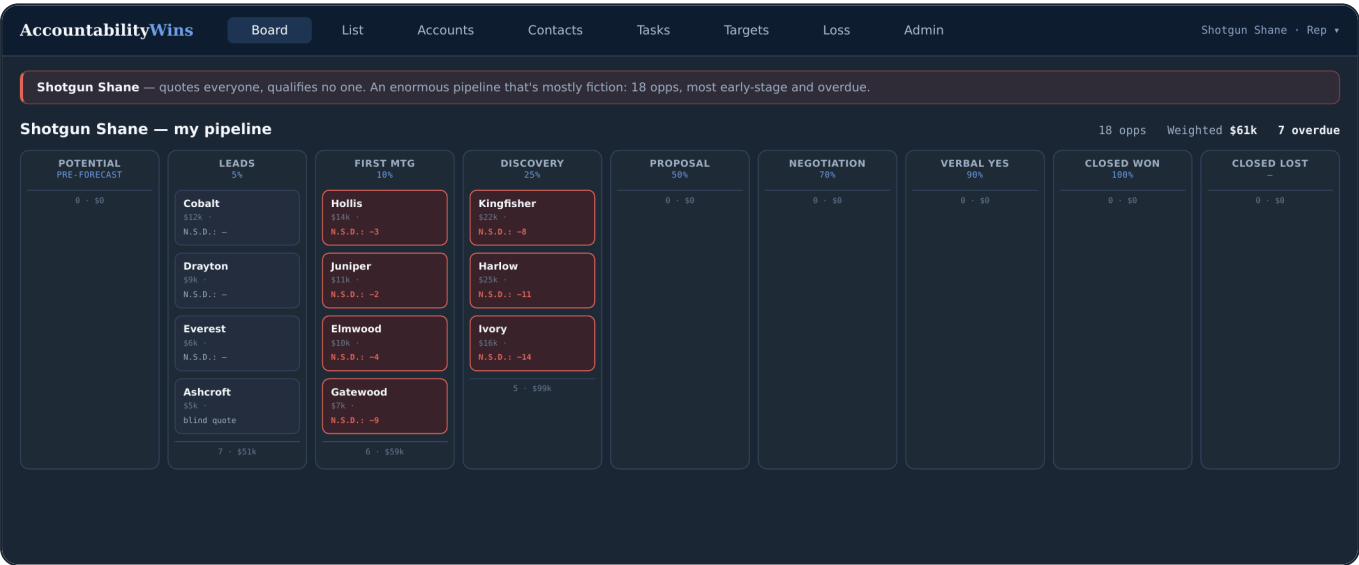
7 · Behavioural archetypes

The product ships with eight coaching archetypes (named per salesachievements.com) whose boards are populated to **demonstrate the behaviour** — a living training set for managers. Each carries a coaching note.

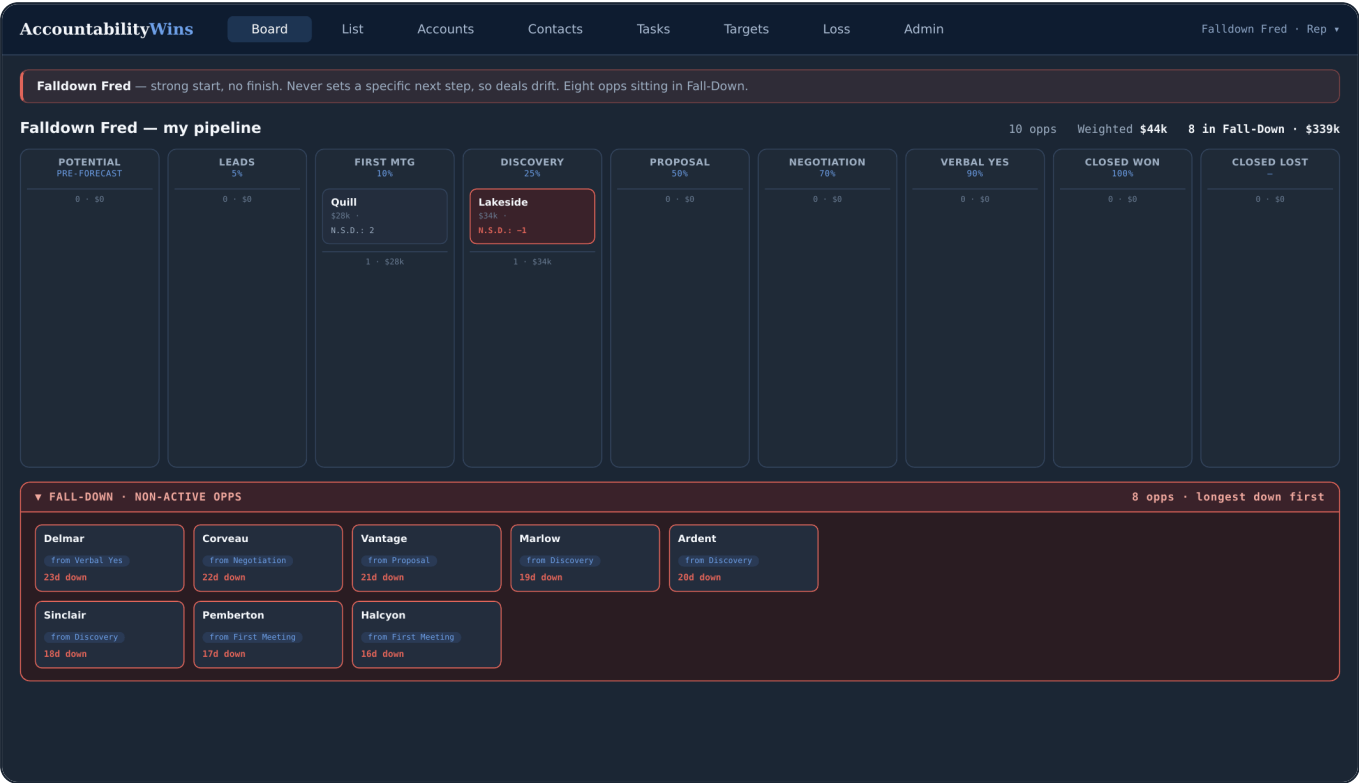
Archetype	Pattern the board shows
Rollercoaster Rachel	Feast-or-famine — stacked closes and late-stage, but an empty top of funnel.
Big Deal Bob	One whale is ~60% of the forecast; nothing else being built.
Falldown Fred	Strong starts, no finish — eight deals sitting in Fall-Down.
Success Vacation Marty	Hit the number and stopped — only closed wins, empty forward pipeline.
Comfortable Carl	Steady mid-stage on inherited accounts; zero net-new.
Shotgun Shane	Quotes everyone, qualifies no one — the largest, messiest board (18 mostly-early, mostly-overdue deals).
Discount Joe	Discounts first — small wins ($\leq$ \$20k) that kill margin.
Sandbagging Sam	Late-stage deals deliberately lowballed to beat an easy forecast.

Archetype gallery — the board tells the story

Each archetype's board is populated to **demonstrate** its behaviour, so a new manager can learn to read the pattern at a glance. Two examples:



Shotgun Shane. Eighteen opportunities, nearly all in Leads / First Meeting / Discovery, most overdue (red) — an enormous pipeline that is mostly fiction.



Falldown Fred. A near-empty active pipeline above a Fall-Down strip carrying eight drifting deals worth \$339k — strong starts, no finish.

8 · Feature requirements

Accounts & contacts

- **Create and edit** accounts (name, industry, revenue, employees, owner).
- **Create and edit** contacts with **first / middle / last name**, title, buying role, email, phone.
- Deals link to an account and a primary contact; the record drawer exposes all fields inline.

AccountabilityWins

BoardListAccountsContactsTasksTargetsLossAdmin

Dana Cole · accounts & contacts

Accounts & contacts

create & edit · first / middle / last

ACCOUNT

Name

Kingfisher Distribution

Industry

Distribution

Revenue

\$325M

Employees

575

Owner

Shotgun Shane

+ New account

PRIMARY CONTACT

First

Sam

Middle

—

Last

Cole

Title / role

VP Operations · EB

Email

sam@kingfisher.com

Phone

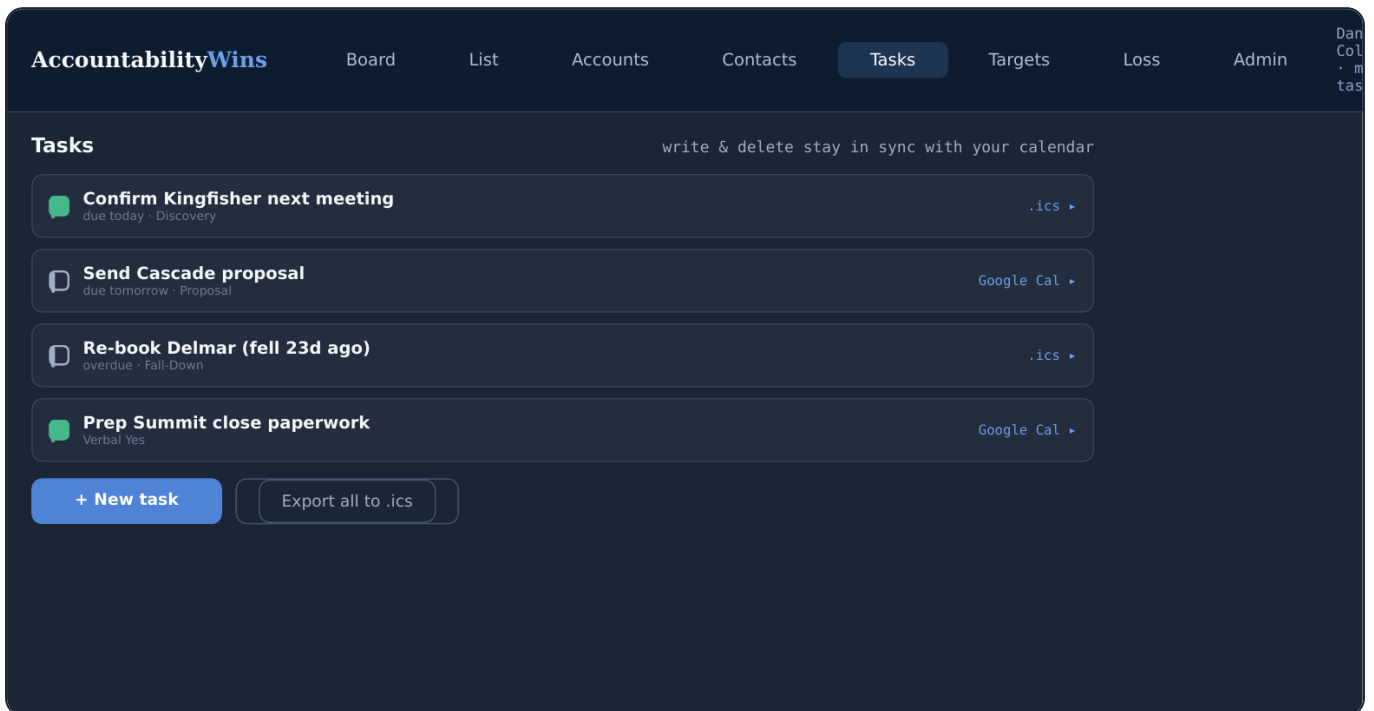
514-555-1035

+ New contact

Screen 8 — Accounts & contacts. Fully editable account and contact records, with first / middle / last name and buying role, creatable inline.

Tasks & calendar

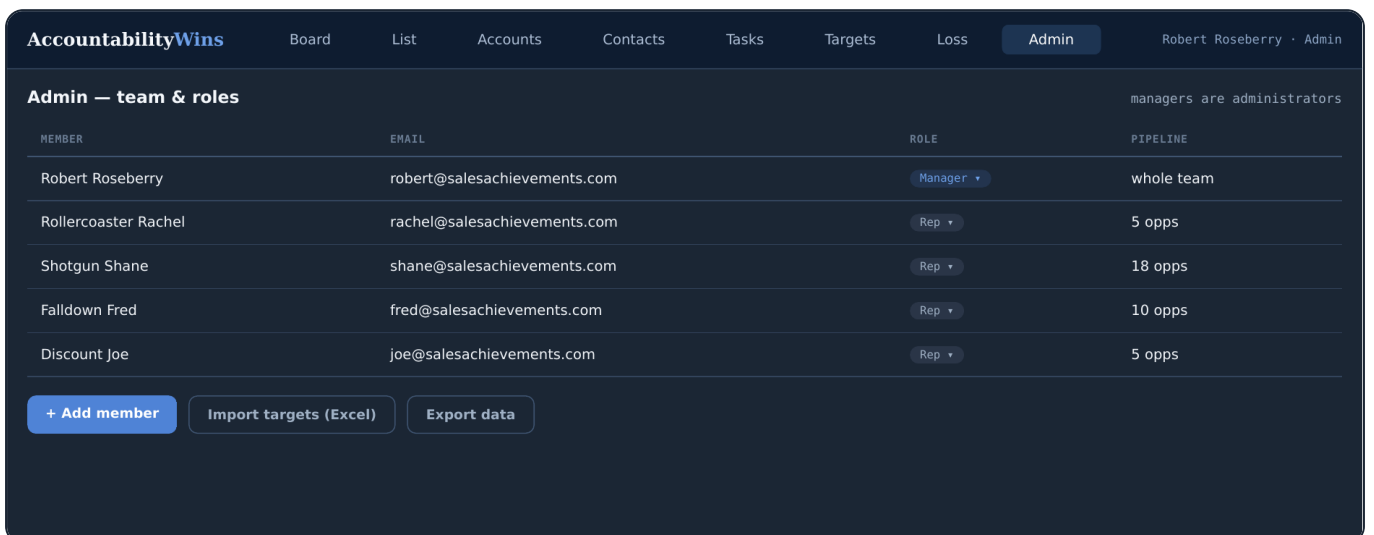
- Tasks attach to any deal, with due dates and completion state.
- **Calendar-enforceable:** export to **.ics** (write) and push to **Google Calendar**; tasks are **write- and delete-enforceable** so the diary and the CRM stay in agreement.



Screen 6 — Tasks & calendar. Deal-linked tasks that write to .ics and Google Calendar; completing or deleting a task keeps the diary and the CRM in agreement.

Admin interface

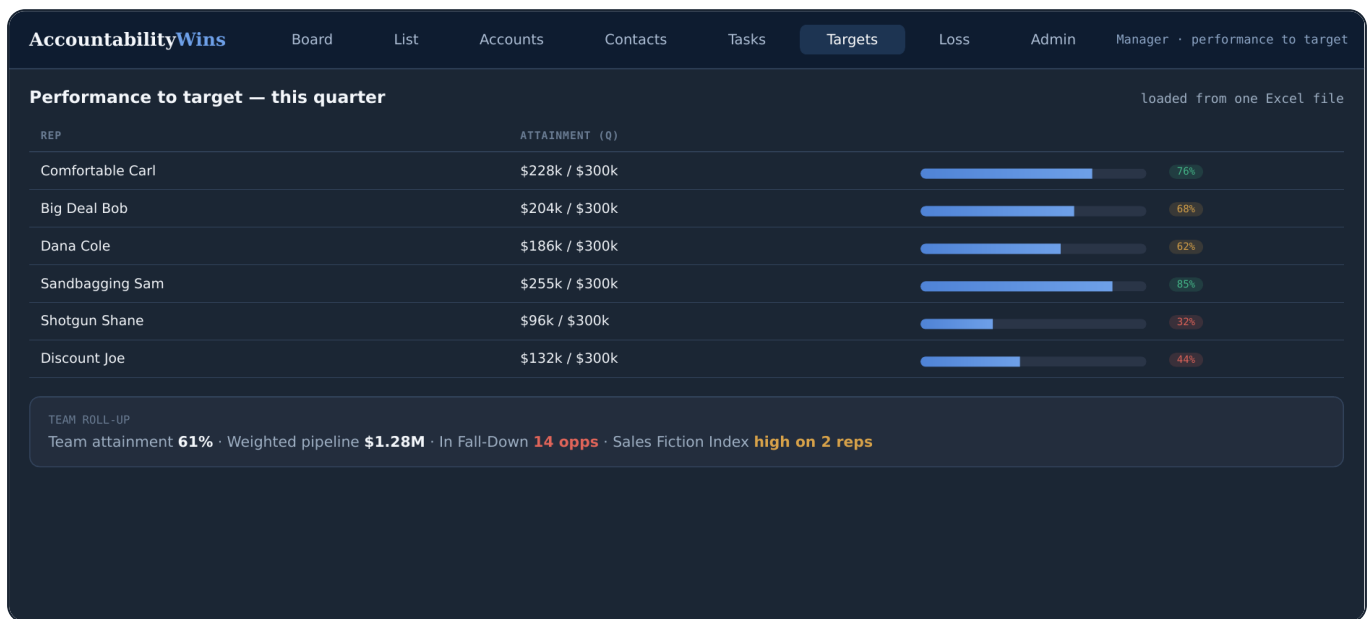
- Managers/admins register team members, set roles, remove users, and export data.
- Role gating: reps see their own pipeline; managers see the whole team and the Admin tab.



Screen 9 — Admin console. Managers register team members, set roles, import targets from Excel, and export data.

Performance & import

- Monthly / quarterly / yearly attainment against target, on login.
- **Excel import** (SheetJS) to load targets for the whole team from one file.
- Weekly **snapshots** of the board for trend and history; PDF export of the board.



Screen 5 — Performance to target. Quarter attainment per rep with progress bars, plus a team roll-up that flags where the Sales Fiction Index is running high.

Prospect signals

- LinkedIn activity on the contact record, so the next meeting is easier to justify and book.

Welcome & motivation

- A branded welcome screen rotates an **original** motivational line on every login — one voice for managers (coaching), one for reps (activity).
- Lines are written in the spirit of great sales motivators but are original; no quotes are attributed to real people.

9 · Data model

Object	Key fields	Relationships
User	name, initials, role (Manager/Rep), archetype, coaching note	owns Accounts, Deals; has Targets/Actuals
Account	name, industry, revenue, employees, owner	has Contacts, Deals
Contact	first/middle/last, title, buying role, email, phone, last-spoke	belongs to Account; primary on Deals
Deal	name, value, stage, next-meeting date, days-open, days-in-stage, days-to-next, FA/NA dates, source, referral partner, notes, loss fields, fellFrom , fellDate , fdDays	links Account + Contact; owned by User
Activity	type, date, note	logged per Deal
Task	title, due date, done, calendar link	attached to Deal / User
Target / Actual	monthly, quarterly, yearly	per User

Stage probabilities are stored on the stage definition and are editable, so weighting can be tuned without code changes.

10 · Access, roles & onboarding

- **Credential-based role.** The login email determines identity and role; managers land on the team board, reps on their own.
- **Self-serve accounts.** Anyone can create an account and start using the system.
- **Demo access.** An "Explore as manager" path lets an evaluator see the full team board without setup.
- **Reset guard.** Destructive reset is behind a confirmation to prevent accidental data loss.

11 · Platform, persistence & install

- **Single file.** The entire app is one HTML file — no build step, no server, no dependencies to install.
- **Save to device.** State persists locally between sessions; a versioned save-key lets shipped updates load cleanly over old data.
- **Install anywhere.** Add-to-Home-Screen / Add-to-Dock with a custom navy icon and splash for **iPad and Mac**; touch tap-to-move for stages where drag-and-drop isn't reliable.
- **Offline-first.** Works offline once open; web fonts and Excel import use a CDN when online.
- **Branding.** Navy #1b2634 , nav #0e1c30 , accent blue #4f83d6 , IBM Plex Sans/Serif — matched to salesachievements.com.
- **Hosting path.** Deployable free to GitHub Pages for a shareable URL and clean install.

12 · Non-goals & roadmap

Deliberate non-goals (v1)

No auto-fall (human owns the call)

No 40-field data entry

No server / login wall by default

No fabricated quotes from real people

Roadmap candidates

- Two-way calendar sync (beyond .ics / Google export).
- Team-level Sales Fiction Index dashboard and trendlines.
- Collapsible deal record with tabbed sections; list-view column sorting.
- Accessibility pass — font scaling, focus states, contrast AA.

13 · Competitive positioning

AccountabilityWins is not trying to out-feature the incumbents. It competes on a single axis they can't easily follow: **a forecast built only from provable next steps.**

Dimension	Salesforce / NetSuite	HubSpot	AccountabilityWins™
Forecast basis	Rep-entered stage & close date	Rep-entered stage & probability	Confirmed next meeting or it falls out
Stalled deals	Sit in-stage, invisible	Sit in-stage, invisible	Fall-Down strip with live day counter
Coaching	Reports & dashboards to build	Sequences & reports	Behavioural archetypes on the board
Time to value	Weeks of config + admin	Days	Minutes — one file, one screen
Data entry burden	High (many fields)	Medium	Low — the next step is the point

WHERE WE WIN

For a VP Sales or CRO who has a full CRM but still can't trust the number, AccountabilityWins is the honesty layer — the board that makes fiction fall out and coaches the behaviour that fills it back with fact.

14 · Success metrics

The product succeeds when the forecast becomes trustworthy and behaviour changes. Proposed measures:

Metric	What it captures	Target direction
Forecast accuracy	Committed vs. actual close, quarter over quarter	up
Sales Fiction Index	% of pipeline value without a confirmed next step	down
Fall-Down recovery rate	% of fallen deals re-engaged within 7 days	up
Avg. days in Fall-Down	How long stalled deals sit before action	down
Next-meeting coverage	% of active deals holding a confirmed next step	up
Weekly active use	Managers running the board every review	up

15 · A week in the life

The manager

Monday. Opens the team board. Scans the Fall-Down strip first — who has the most value stalled, and for how long. Coaches the behaviour, not the deal.

Midweek. Lenses into Shotgun Shane's board, sees 18 unqualified opps and seven overdue, and works one qualification habit with him.

Friday. Checks performance-to-target and the team roll-up; the weekly snapshot captures the board for trend.

The rep

Every morning. Opens their pipeline; red cards demand the next step. Books meetings to clear them.

After every call. Sets the specific next meeting — date and time — so the deal holds its place in the forecast.

When a deal drifts. Drops it into Fall-Down honestly, and a task (with a calendar entry) is created to re-engage it.

THE LOOP

Fact in → forecast you can trust → coaching on the one behaviour that matters → more fact in. The whole product exists to keep that loop turning.

16 · Build log — shipped in this series

Area	Delivered
Naming	Product set to AccountabilityWins™ (accountabilitywins.com).
Pipeline	Nine named stages with forecast probabilities (5/10/25/50/70/90/100%).
Fall-Down	Single strip (not a second pipeline); from [stage] tags; live day counter ; manual-only, red-on-overdue.
Card metrics	D.O., N.S.D. (red when overdue), FA/NA, days-in-stage, days-in-Fall-Down.
Views	Board + List toggle.
Archetypes	Eight profiles with boards matched to each stereotype; Shotgun Shane expanded to 18 deals; Falldown Fred with 8 in Fall-Down.
Records	Editable & creatable accounts and contacts (first/middle/last).
Tasks	Calendar-linked (.ics + Google), write/delete enforceable.
Admin	Manager admin interface: register, set role, remove, export.
Access	Credential-based roles; self-serve account creation; demo path; reset guard.
Performance	Attainment to target; Excel import; weekly snapshots; PDF export; loss analysis.
Welcome	Role-aware rotating motivation (original lines).
Platform	Single-file, offline, versioned persistence, iPad/Mac install, GitHub-Pages ready; synced to Desktop & iCloud.

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