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Where Do Prospects Drop Out? A Funnel Analysis of Field-Based B2B Prospecting by a New Distributor in Pune's Facility-Management Supplies Market

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ABSTRACT :

Purpose. Small distributors in fragmented business-to-business (B2B) markets depend on field prospecting for new accounts, yet few record where prospects are lost. This study describes stage progression in the cold-visit prospecting of one new distributor of facility admin consumables in Pune, India, and examines whether the role of the first contact and the location of the prospect are associated with progression.

Design. Retrospective analysis of the row-level prospect register kept by one sales specialist between 14 May and 30 September 2026. The register holds 304 entries, which reduce to 281 unique establishments after de-duplication. Stages are treated as recorded outcomes. Wilson confidence intervals and Fisher's exact tests are used. No regression model is fitted because segment and size have not yet been coded and events are few.

Findings. A meeting was recorded for 25.3% of establishments (95% CI 20.5–30.7), a shared company portfolio for 37.4% (31.9–43.2), a quotation for 9.3% (6.4–13.2), and 12 customer establishments for 4.3% (2.5–7.3). Where no contact designation was recorded, 9.2% of establishments received a portfolio, against 58.0% where one was recorded, which describes gatekeeping at first contact. Differences by contact role ($p = 0.47$) and by industrial versus commercial location ($p = 0.08$ to 0.76) were not conclusive. Stage flags under-recorded outcomes: four of the 12 customer establishments carry no quotation flag, and the firm's cumulative field summary could not be reproduced from its rows.

Originality and limitations. The paper documents a de-duplicated funnel for a small distributor in an emerging-market city and shows how unaudited stage flags limit conclusions drawn from sales records. It rests on one seller, a non-probability sample and flags that were not independently audited. Segment and size coding and a buyer interview study are specified but not yet carried out.

Practical implications. Firms should define stage events, date them, record the mode of first contact and verify that headline funnel totals can be rebuilt from rows before using them for planning.

Keywords: **B2B sales; sales funnel; prospecting; lead qualification; gatekeeping; organizational buying; facility management; India**

1. Introduction

Business-to-business selling differs from consumer selling in ways that matter for field practice: buyers are fewer, purchases are larger and recur, several people take part in the decision, and the buying process can be long. Weitz and Bradford (1999) argue that these conditions require personal selling and sales management to support a partnering role for the salesperson rather than a purely transactional one. For a young firm with little brand recognition, the field salesperson is the public face of the firm and often its main source of new accounts, so a basic management question follows: how many prospects does it take to win one customer, and at which stage are prospects lost?

Frameworks for diagnosing sales effectiveness exist. Zoltners, Sinha and Lorimer (2008), for example, present a framework that organises the complexity of sales organisations so that practitioners can diagnose issues and researchers can extend their focus. Yet small distributors in emerging markets rarely keep records that allow such a diagnosis, and the evidence that is kept is seldom examined for its own reliability. A funnel reported in a management summary may be impossible to rebuild from the rows that supposedly support it.

This paper examines one case: a Pune-based distributor founded in 2022 that supplies tea and coffee vending, snack vending, tissue and washroom products, housekeeping supplies, gifting and stationery to corporate offices and manufacturing plants. One sales specialist visited establishments in the

Pune territory, recorded each approach in a prospect register, and moved interested prospects through meeting, portfolio sharing and quotation towards a sale. The register is used here as research data.

The study addresses four research questions.

1. *RQ1.* What proportion of approached establishments reach each recorded stage, with interval estimates?
2. *RQ2.* Is the recorded role of the first contact associated with progression?
3. *RQ3.* Is the location of the establishment, grouped as industrial belt or commercial area, associated with progression?
4. *RQ4.* How reliable are the recorded stage flags as a record of outcomes?

The contribution is threefold. First, the paper offers a documented and de-duplicated funnel with interval estimates, which is rare for firms of this size. Second, it provides a measurement finding: stage flags kept for sales management under-record outcomes, and a headline funnel in the firm's own summary cannot be rebuilt from rows. Third, it supplies exploratory evidence on contact role and location and a design for explaining the losses with buyer interviews. The paper is deliberately cautious. It reports what the records support and states what they do not.

Section 2 reviews the literature. Section 3 describes the setting. Section 4 sets out the method, Section 5 the results, and Sections 6 to 9 discuss implications, limitations and future work. Appendices give the variable definitions, a data audit, the duplicate structure, a coding protocol and an interview guide for the planned second study.

2. Literature review and conceptual framework

2.1 The selling process and the funnel

Textbook treatments describe selling as a sequence of steps from prospecting and qualifying through approach, presentation, handling objections, closing and follow-up. Moncrief and Marshall (2005) trace how the seven steps of selling have evolved as technology and relationship thinking changed the task of the salesperson. The funnel is the practical expression of such a sequence: a large pool of prospects narrows at each stage, and the proportion that survives each stage indicates where the process is strongest and weakest. The funnel is a management description, not a causal theory, and its usefulness depends on whether stage events are defined and recorded consistently.

2.2 Relationship selling and adaptive selling

Weitz and Bradford (1999) argue that personal selling and sales management must change to support the role of the salesperson as a partner to the customer. A related stream studies adaptive selling, the adjustment of selling behaviour to the situation. Spiro and Weitz (1990) conceptualised and measured adaptive selling and tested the validity of their scale, and a recent review by Chaker, Epler, Moreno, Amiri and McDougal (2025) covers 188 articles across twenty-seven journals. The review reports that, after four decades of work and mixed findings on impact, a comprehensive understanding of the construct is still missing. For a new distributor the implication is practical: the salesperson's adjustments during a first visit are not visible in a register that records only stage flags, so the register can describe outcomes but not the behaviours that produced them.

2.3 Organizational buying and gatekeeping

Webster and Wind (1972) model industrial and institutional buying as an organizational decision-making process, which underlies the idea of a buying centre in which several people with different roles influence a purchase. Johnston and Lewin (1996) reviewed twenty-five years of organizational buying research across 165 articles and proposed an integrated model. Lau, Razzaque and Ong (2003) argue that gatekeepers in organizational purchasing influence the information that reaches decision makers and report that little was known about how they behave. That literature concerns gatekeepers inside the buying organisation. The obstacle recorded in the present setting is related but distinct: reception-level screening of visiting salespeople, which determines whether a salesperson reaches any buyer at all. This paper uses the term gatekeeping for that second meaning and treats the absence of a recorded contact designation as an indicator of failure to reach a person.

2.4 Lead qualification and lead scoring

Monat (2011) proposes a lead-scoring model for industrial sales built on sixteen lead characteristics and argues that earlier lead-characterisation models lacked sound theory and field validation. A 2025 study in *Frontiers in Artificial Intelligence* builds a machine-learning lead-scoring model on customer-relationship-management data from a B2B software company and reports that lead source and lead status improved prediction. Both bodies of work assume that stage and status fields are recorded reliably. If flags under-record outcomes, as the present register suggests, any scoring model trained on them inherits the error. The measurement question in RQ4 is therefore a precondition for lead scoring in small firms and not a side issue.

2.5 Research gap and conceptual framework

Among the sources reviewed here, lead-scoring evidence comes mainly from CRM data in software and industrial settings, gatekeeping is studied mainly

inside buying organisations, and we did not identify empirical work on field cold-visit prospecting for low-involvement admin consumables in an emerging-market city. This is a statement about the sources examined and not proof of absence, and a systematic database search would be needed to claim a gap formally.

The conceptual framework is deliberately simple. Prospecting is treated as an ordered sequence of recorded stages: first approach, meeting held, portfolio shared, quotation issued, customer. Contact role and location are examined as correlates of moving to the next stage, with buying-centre theory motivating the role variable. The framework is exploratory, and no causal paths are asserted. A planned extension adds segment and firm size once they are coded, and a qualitative study of why prospects stall.

3. Research context

The firm is a private limited company founded in 2022 and headquartered in Pune. It describes its model as distribution-as-a-service: one relationship, one contract and consolidated invoicing for categories that corporate administration teams would otherwise buy from separate vendors. Its categories include tea and coffee vending machines, snack vending, tissue paper and washroom dispensers, housekeeping consumables, corporate gifting, stationery and plant rental. Detailed financial statements are not public, so no financial analysis is attempted.

The salesperson's territory covered commercial towers and industrial clusters in Chakan, Bhosari, Chinchwad, Kharadi, Yerwada, Viman Nagar, Talegaon Dhabade, Pimpri and Shivaji Nagar, with a few entries elsewhere. The process ran from territory mapping and a field approach through identification of a relevant contact, needs assessment, portfolio sharing, follow-up, quotation and negotiation to closure and handover. At any stage a prospect could leave the funnel.

Three obstacles recur in the seller's field notes. First, reception and security staff often declined entry or a connection to an administrative or HR contact unless a meeting had been fixed beforehand. Second, decision cycles at prospects were long and involved several people. Third, price competition came from unorganised local suppliers and from incumbent suppliers already installed on site. These are practitioner observations from the placement. They were not recorded as variables and are not treated as findings.

4. Methodology

4.1 Design

The study is a retrospective, cross-sectional analysis of operational records with an exploratory stance. The first author worked in the role that generated the records, so the design is a case study with participant observation. The unit of analysis is the establishment approached.

4.2 Data source and observation window

The data are the prospect register kept by the sales specialist, with one row per approach, covering 14 May 2026 to a data cut-off of 30 September 2026. The placement formally runs to 13 November 2026, but only records up to the cut-off are analysed. The register was reproduced in an appendix to the placement report as nine area-wise tables and was transcribed into a structured spreadsheet. The transcription reproduces the per-area counts printed in the source (84, 56, 46, 40, 28, 19, 11, 11 and 9 entries, 304 in total) and was verified by the first author. The original tracking spreadsheet was not available. A further 12 entries described in the placement report as lying outside the nine main areas are not part of the transcribed register.

Six establishments confirmed by the first author as customers do not appear in the transcribed register. They are described in the text and excluded from stage rates, because their stage flags are unknown and not absent.

4.3 Unit of analysis and de-duplication

Several firms appear more than once, for example under variant spellings or as separate rows for different contacts. Forty-five rows fall into 22 groups of possible duplicates, identified by name and checked by the first author (Appendix C). Rows in a group were merged into one establishment, which is coded as having reached a stage if any of its rows did. A group that spans two areas was assigned to the area of its first row. Three entities of one large industrial group are treated as separate establishments because they are separate sites. After merging, 281 unique establishments remain.

4.4 Variables

Table 1 defines the variables. The register column that records "C" or "M" follows the first author's definition: C means a cold call or in-person visit only, and M means that a meeting took place with the concerned person. It is therefore a stage indicator and not a classification of the firm. Blank cells in the source are treated as not recorded, and not as a negative answer.

Table 1
Variables and operational definitions

Variable	Role	Operational definition	Status
Meeting held	Outcome	Register code M (meeting with the concerned person) against C (cold call or visit only)	Available
Portfolio shared	Outcome	Company portfolio shared with the prospect, flag "Yes"	Available
Quotation issued	Outcome	Formal quotation issued, flag "Yes"	Available
Customer	Outcome	On the first author's confirmed customer list and present in the register	Available
Contact role	Predictor	Keyword coding of the printed designation: admin/HR, procurement, senior management, other, none recorded	Provisional
Location cluster	Predictor	Industrial belt (Chakan, Bhosari, Chinchwad, Talegaon Dhabade, Pimpri) or commercial area (Kharadi, Yerwada, Viman Nagar, Shivaji Nagar)	Available
Segment, size	Predictors	Corporate, manufacturing or other; SME or key account (over 300 employees), from public company pages	Not yet coded

Note. The location grouping is an analyst classification of printed area names. Chinchwad is treated as industrial although it also contains commercial towers.

4.5 Analysis plan

Stage rates are reported with 95% Wilson intervals and with their denominators. Conditional rates give the proportion reaching a stage among those that reached the previous one. Associations of contact role and location with each outcome are tested with Fisher's exact test and are labelled exploratory, with no correction for multiple tests. A multivariable logistic model is not fitted. With 26 recorded quotations and 12 customers, a common heuristic of about ten events per predictor would allow only two or three predictors for quotation and none for customer status, and segment and size, which would be the natural predictors, are not yet coded. Two sensitivity analyses are run: one on raw rows instead of merged establishments, and one that recodes customers as having passed the earlier stages, which assumes each received a portfolio and a quotation.

4.6 Reliability, validity and data integrity

Contact role was coded by one coder from truncated printed designations and requires a second independent coder before the coding is treated as final. Stage flags were not audited against a second record such as message or e-mail logs. The placement report also contains a cumulative field summary with larger counts for leads, portfolios and quotations. Those totals could not be reproduced from the row-level register, one monthly row in the same report lies beyond the data cut-off, and the report's reading of the C/M column differs from the definition used here. For these reasons the cumulative summary is not used as evidence. Appendix B sets the register beside the summary.

4.7 Ethics and positionality

The firm permitted use of the records. Contact names and telephone numbers were excluded from the analysis file, and firms are not named in the paper. Written confirmation covering publication and any naming of firms should be held on file. The first author was an intern at the firm and the participant observer who generated the data. This is both a strength, because the data are contemporaneous, and a limitation, because the author has an interest in how the firm's funnel appears. Public company information is to be used only at company level in the planned coding.

5. Results

5.1 The analysis dataset

Table 2 shows the entries and unique establishments by area. Chakan, Bhosari and Chinchwad account for 180 of the 281 establishments.

Table 2
Register entries and unique establishments by area

Area	Entries	Unique	Meeting	Portfolio	Quotation	Customer
Chakan	84	80	10	26	9	2
Bhosari	56	54	17	20	6	4
Chinchwad	46	46	26	25	7	3

Area	Entries	Unique	Meeting	Portfolio	Quotation	Customer
Kharadi	40	38	7	11	2	2
Yerwada	28	28	4	12	1	0
Viman Nagar	19	12	3	7	1	1
Talegaon Dhabade	11	11	0	3	0	0
Shivaji Nagar	11	10	3	0	0	0
Pimpri	9	2	1	1	0	0

Note. Counts are recorded flags. Establishments that appear in two areas are assigned to the first. Unique establishments sum to 281.

5.2 Stage rates (RQ1)

Of 281 establishments, 71 (25.3%) had a recorded meeting, 105 (37.4%) a shared portfolio, 26 (9.3%) a quotation and 12 (4.3%) were customers (Table 3, Figure 1). All counts are lower bounds because flags under-record outcomes, as Section 5.6 shows.

Table 3

Stage rates among 281 unique establishments

Stage	Establishments	Rate (%)	95% Wilson CI
Meeting held	71	25.3	20.5–30.7
Portfolio shared	105	37.4	31.9–43.2
Quotation issued	26	9.3	6.4–13.2
Customer (in register)	12	4.3	2.5–7.3

Note. Customer counts the 12 customer establishments present in the register, with three entities of one industrial group counted separately.

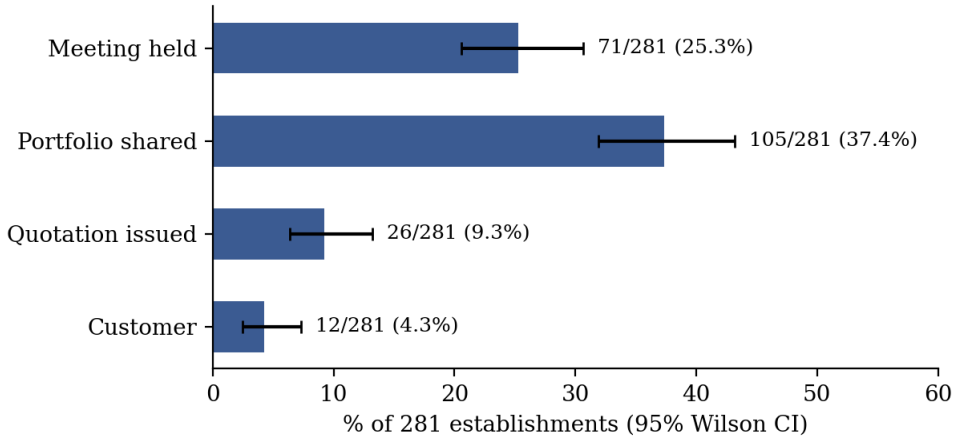


Figure 1. Recorded stage rates among 281 unique establishments with 95% Wilson confidence intervals.

5.3 Conditional progression

Given a recorded meeting, 67.6% of establishments (48 of 71) also had a portfolio. Among the 210 establishments without a recorded meeting, 57 (27.1%) had one. Given a portfolio, 23.8% (25 of 105) had a quotation. Given a quotation, 30.8% (8 of 26) were customers, with a wide interval (Table 4). In absolute terms, 176 of 281 establishments had no portfolio recorded, so the largest loss in the register occurs before any portfolio is shared.

Table 4

Conditional stage progression

Transition	Numerator	Denominator	Rate (%) [95% CI]
Meeting to portfolio	48	71	67.6 [56.1–77.3]
Portfolio to quotation	25	105	23.8 [16.7–32.8]
Quotation to customer	8	26	30.8 [16.5–50.0]

Note. Four of the 12 customer establishments carry no quotation flag, so the quotation-to-customer rate of 8 of 26 understates progression among

customers.

5.4 Contact role (RQ2)

A designation was recorded for 162 of 281 establishments. Admin or HR personnel made up 117 of these (72.2%), with 29 in other roles, 10 in senior management and 6 in procurement. Portfolio sharing was 58.0% (94 of 162) where a designation was recorded and 9.2% (11 of 119) where none was. This contrast is close to definitional, since a portfolio cannot be shared without reaching someone, and it should be read as a description of gatekeeping and not as a role effect. Among establishments with a recorded designation, quotations were recorded for 21 of 117 admin/HR contacts and for 1 of 16 procurement or senior contacts (Fisher p = 0.47). With 16 contacts in the second group the comparison has little power and no role effect can be claimed (Table 5).

Table 5

Stage flags by contact role

Contact role	n	Meeting	Portfolio	Quotation
Admin/HR	117	53	67	21
Procurement	6	2	3	0
Senior management	10	1	4	1
Other	29	2	20	1
None recorded	119	13	11	3

Note. Role is a keyword coding of printed, truncated designations by a single coder.

5.5 Location (RQ3)

Industrial-belt establishments (n = 193) had higher recorded rates than commercial-area establishments (n = 88) for each of the three stages (Table 6, Figure 2), but none of the differences was conclusive. The quotation difference was the largest (11.4% against 4.5%, Fisher p = 0.08). No designation was recorded for 33 of 88 commercial establishments (37.5%) and 86 of 193 industrial ones (44.6%; p = 0.30), so gatekeeping, as indicated by the absence of a contact, did not differ conclusively between the two settings. These tests are exploratory and no multiplicity correction was applied.

Table 6

Recorded stage rates by location cluster

Outcome	Commercial (n = 88)	Industrial (n = 193)	Fisher p
Meeting held	17 (19.3%)	54 (28.0%)	0.14
Portfolio shared	30 (34.1%)	75 (38.9%)	0.51
Quotation issued	4 (4.5%)	22 (11.4%)	0.08
Customer	3 (3.4%)	9 (4.7%)	0.76

Note. Industrial: Chakan, Bhosari, Chinchwad, Talegaon Dhabade, Pimpri. Commercial: Kharadi, Yerwada, Viman Nagar, Shivaji Nagar. Cross-area duplicates are assigned to their first area.

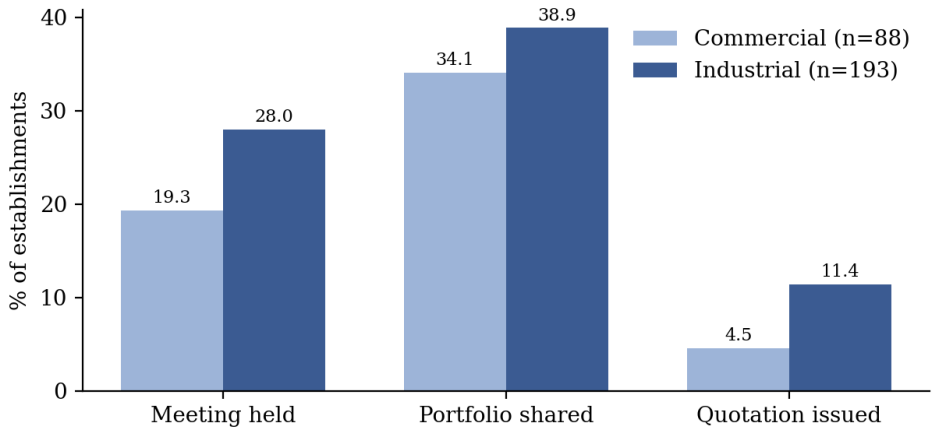


Figure 2. Recorded stage rates by location cluster (percentage of establishments in each cluster).

5.6 Customers and the reliability of stage flags (RQ4)

Twelve customer establishments are present in the register, counting the three entities of one industrial group separately. Counting that group once, and adding six customers confirmed by the first author but absent from the printed register, the firm had 16 customer firms. The paper's rates use only the 12 in the register, and the total number of customers the firm won is not claimed to be 12.

Four of the 12 register customers have no quotation flag, and several are rated only Medium or High on the probability field, which means that neither the stage flags nor the probability rating can be relied on as a complete record of outcomes. A flag-based funnel therefore understates progression for exactly the establishments that matter most. The cumulative field summary in the placement report cited 250 portfolios and 150 quotations. The register records 107 portfolio flags and 26 quotation flags across its 304 rows, and the difference is too large to be explained by rounding. The cumulative figures are not used here, and Appendix B sets the two sources side by side.

5.7 Sensitivity analyses

Rates on raw rows (n = 304) are lower than on merged establishments because duplicates dilute the denominator, while recoding the 12 customers as having passed the earlier stages raises the quotation rate from 9.3% to 10.7% and the quotation-to-customer rate to 40.0% (Table 7). The substantive picture does not change: most establishments stop before a portfolio, and a minority reach quotation.

Table 7
Stage rates under alternative treatments

Stage	Merged establishments (n = 281)	Raw rows (n = 304)	Customers recoded (n = 281)
Meeting held	25.3% [20.5–30.7]	23.4% [18.9–28.4]	27.0% [22.2–32.5]
Portfolio shared	37.4% [31.9–43.2]	35.2% [30.0–40.7]	38.4% [32.9–44.2]
Quotation issued	9.3% [6.4–13.2]	8.6% [5.9–12.2]	10.7% [7.6–14.8]
Customer	4.3% [2.5–7.3]	3.9% [2.3–6.8]	4.3% [2.5–7.3]

Note. Recoding assumes every customer received a portfolio and a quotation, which is not documented in the register.

6. Discussion

The records describe a funnel that narrows early. More than six in ten establishments had no portfolio recorded, and among those with none, a large share had no contact designation recorded. This is consistent with gatekeeping at first contact, in the sense used in Section 2.3, although the register cannot separate a refused entry from a visit that was never followed up. The seller's field notes describe reception-level screening as the most frequent obstacle, and the register is consistent with that account without proving it.

Beyond first contact, roughly one in four establishments with a portfolio had a quotation recorded, and roughly three in ten with a quotation were customers. Both rates have wide intervals. The conditional pattern should not be over-read, because the quotation and customer stages rest on small counts and on flags that demonstrably under-record outcomes.

Admin and HR staff were the first contact in 117 of the 162 establishments with a recorded designation, and procurement or senior contacts were rare. Buying-centre theory (Webster & Wind, 1972; Johnston & Lewin, 1996) suggests that contacts nearer spending authority should matter, but the 16 such contacts here are too few to test that expectation. The absence of a conclusive difference should not be read as evidence that role is irrelevant. It reflects a sample that was assembled by visiting reception desks, which tends to produce administrative first contacts.

Location showed higher recorded rates in industrial belts, most clearly for quotation, but the evidence is weak ($p = 0.08$). The pattern is plausible, since industrial belts allow many visits in one trip and plants may buy consumables in larger volumes, but the data cannot confirm either mechanism. The earlier reading of the C/M column as a corporate or manufacturing classification should not be used to support a segment effect, because the column records engagement and not firm type.

The most robust finding is methodological. A firm that keeps a daily register for management purposes can still be unable to rebuild its funnel from that register. Customers lacking quotation flags, a probability rating that is blank for most rows, duplicates and an aggregate summary that departs from the rows all point to the same lesson: stage definitions, event dates and audit routines matter more than the sophistication of any later model. This echoes the call by Monat (2011) for field validation of lead-scoring models and qualifies the optimism of data-driven lead scoring (*Frontiers in Artificial Intelligence*, 2025) for small firms whose records have not been checked.

6.1 Theoretical implications

The paper contributes a small piece of descriptive evidence from an understudied setting and a reminder that funnel studies depend on the quality of stage records. It also clarifies a terminological point: gatekeeping at the seller's door and gatekeeping inside the buying organisation (Lau et al., 2003) are related but should be measured separately. Adaptive selling research (Chaker et al., 2025; Spiro & Weitz, 1990) concerns what the salesperson does during an interaction. A register of stage flags cannot observe this, so the study cannot link outcomes to selling behaviour.

7. Managerial implications

Four implications follow directly from the data and not from any untested model.

5. *Define events.* Write down what counts as a meeting, a portfolio shared, a quotation issued and a customer, and apply the definitions consistently, so that headline totals can be rebuilt from rows.
6. *Date every stage.* Without dates, cycle length, ramp-up and decay cannot be studied, and no claim about a learning curve or decision time can be tested.
7. *Record the mode of first contact.* Whether the first approach was an appointment or an unannounced visit is the cleanest variable for testing whether appointment-first outreach reduces gatekeeping losses. The present register does not hold it, and recommendations on appointment-first outreach cannot be drawn from these data.
8. *Audit before scoring.* Reconcile flags with message and billing records, and de-duplicate firms, before using the register to rank leads or set targets.

Recommendations about value-based pitches, targeting manufacturers or changing territory mix would require evidence this study does not contain.

8. Limitations

- One salesperson, one city and one firm. Results describe this territory and cannot be generalised.
- Stage flags are recorded outcomes and are demonstrably incomplete, so every rate is a lower bound.
- The sample is non-probability and reflects where one seller chose to go and whom to follow up.
- Contact role was coded by keyword from truncated designations by one coder. Duplicate merging relies on names.
- The original tracking spreadsheet was not available, so dates, headcounts, requested categories, quotation values and the mode of first contact could not be analysed.
- The observation window ends on 30 September 2026, shorter than many B2B decision cycles, so later conversions are not captured.
- The first author was a participant in the setting and has an interest in how the firm's funnel appears.
- Tests are exploratory, with no multiplicity correction and few events. No multivariable model is reported.
- Six customers absent from the register are excluded from the rates, and the firm's total customer count is therefore not the 12 used here.

9. Future research

Three extensions would convert this descriptive case into an explanatory study. First, coding segment and firm size for all 281 establishments from public company pages, independently by two coders with agreement reported, would allow the segment and size questions to be tested properly (Appendix D). Second, the original tracker should be obtained from the firm and extended with stage dates and a mode-of-contact field, which would permit time-to-stage analysis and a comparison of appointment-first and unannounced visits. Third, a qualitative study of buyers would address why prospects stall after the portfolio and quotation stages. A purposive sample of about twelve to fifteen administrative, HR or procurement managers, drawn from customers, quotation-stalled, portfolio-only and no-meeting groups, would be interviewed until new interviews add no new themes (Appendix E). Comparing several salespeople across firms would test generalisability.

10. Conclusion

Among 281 establishments approached by one salesperson, 25.3% reached a recorded meeting, 37.4% a shared portfolio, 9.3% a quotation and 4.3% were customers in the register. The largest recorded loss occurs before a portfolio is shared and is consistent with gatekeeping at first contact. Contact role and location showed no conclusive association with progression at this sample size. The main supported contributions are a documented, de-duplicated funnel with interval estimates and a warning that unaudited stage flags can misstate a funnel. Explaining why prospects stall requires the coding and interview work set out above.

Declarations

Ethics and permission. The firm permitted use of its operational records. Individual contact names and telephone numbers were excluded and firms are not named. Written confirmation covering publication is to be held by the authors.

Conflict of interest. The first author was an intern at the firm and generated the records analysed. The firm had no role in the analysis or the conclusions reported here, to be confirmed by the authors before submission.

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Data availability. An anonymised version of the register, without contact names or firm names, can be shared subject to the firm's permission.

Use of AI tools. An AI assistant was used to help check the transcription structure, run the statistical calculations, prepare figures and draft text. The authors verified the data and the interpretation and take responsibility for the content. Authors should check the target journal's AI-use policy before submission.

Author contributions. To be completed by the authors.

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