[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Sales Pipeline Review Sheet

Reviewing the sales pipeline as a team: value by stage, forecast to close, the deal register, and review actions.

Document: Sales Pipeline Review Sheet **Version:** 1.0

Prepared by: _____ **Owner:** _____

Date: _____ **Review date:** _____

Review header: Review date: _____ **Review chair:** _____

Review period: _____ **Pipeline total:** _____ **Forecast close value:** _____ **Pipeline by stage:**

Stage	Number of deals	Total value
New lead		
Contacted		
Qualified		
Proposal sent		
Negotiation		
Closed won		
Closed lost		

Deal register

Client company	Opportunity	Owner	Stage	Value	Expected close	Days in stage	Action

Forecast discussion 1. Walk through the deal register, starting with deals in negotiation. 2. Challenge every deal forecast to close in [Review period] and record the evidence for it.

3. Move deals with no activity for 30 days back one stage and assign a recovery action. 4. Agree the forecast close value ([Forecast close value]) before the meeting ends. **Review actions:**

Action	Owner	Due date

Completion checklist: [ ] The pipeline total ([Pipeline total]) equals the sum of the stage values.

[ ] Every deal stuck over 30 days has a recovery action.

[ ] The forecast close value ([Forecast close value]) was agreed in the meeting chaired by [Review chair].