[Company name]

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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
Prepared by	[Name and role]
Owner	[Name and role]
Version	1.0
Date	[DD Month YYYY]
Review date	[DD Month YYYY]

Review header

Field	Entry
Review date	[Review date]
Review chair	[Review chair]
Review period	[Review period]
Pipeline total	[Pipeline total]
Forecast close value	[Forecast close value]

Pipeline by stage

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

[Company name]

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].