**[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. Add or remove table rows to fit your needs. 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 |
|---|---|
| **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 | | |
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**[Company name]**

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## Deal register

| Client company | Opportunity | Owner | Stage | Value | Expected close | Days in stage | Action |
|---|---|---|---|---|---|---|---|
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## 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 |
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## [Company name]

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## 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]. |