Ashford Business Services Ltd

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
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Version	1.0
Date	9 November 2026
Review date	9 November 2026

Review header

Field	Entry
Review date	9 November 2027
Review chair	Review chair
Review period	November 2026
Pipeline total	£45.00
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		

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 November 2026 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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Completion checklist

	The pipeline total (£120.00) 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.