

Pipeline Planning Worksheet

Draft stages and exit conditions before building.

Related week: Week 1 | Related SOP: Design a sales pipeline | Estimated use time: 30-45 min

Use this worksheet before building inside the CRM. Plan the path first, then build only what the plan supports.

Purpose

Use this worksheet to draft pipeline stages, entry rules, exit rules, and movement logic before building inside the CRM. A pipeline should show how an opportunity moves from first interest to a final outcome.

When to Use This Template

- [] Before creating a new sales or intake pipeline
- [] Before rebuilding a messy pipeline
- [] Before connecting workflows to opportunity stages
- [] When reports do not show where deals are stuck
- [] When the team uses vague stages differently

How to Use It

Work through the sections in order. Do not open the pipeline builder until you can explain each stage, what moves an opportunity into it, and what moves the opportunity out of it.

Pipeline Inventory

Pipeline name	Purpose	Audience/process	Owner	Keep, rebuild, or remove

Stage Planning Map

Stage name	What it means	Entry condition	Exit condition	Manual or automated	Reporting value

Won, Lost, and Follow-Up Later Rules

Decision	Definition
Won means	
Lost / Not a Fit means	
Follow-Up Later means	

Decision	Definition
Who is allowed to move opportunities to final outcome stages?	
What note, reason, or field should be completed?	

Automation Readiness

- ☐ Each stage has a clear entry condition
- ☐ Each stage has a clear exit condition
- ☐ Team agrees on what Won means
- ☐ Team agrees on what Lost / Not a Fit means
- ☐ Duplicate opportunity risk has been reviewed
- ☐ Workflow movement should wait until stage rules are approved

Before You Finish

- ☐ The pipeline can be explained to another person
- ☐ No vague stages remain
- ☐ Reporting stages and holding stages are intentional
- ☐ Manual versus automated movement is documented
- ☐ A test opportunity can move cleanly from start to final outcome

Related Training and SOPs

Related training: Week 1 - Pipelines and Opportunity Stages

Related SOPs: Design a sales pipeline; Move opportunities cleanly; Build a safe first workflow; Baseline reporting view