

Not Just for Sales

Pipeline Worksheet

A pipeline is a set of repeatable steps that your organization uses to develop relationships with new contacts. Use this worksheet to define your team's efforts and get everyone on the same page.

INSTRUCTIONS

① Write down the key activities, milestones, and decisions that **need to take place** throughout the course of every relationship.

② Choose a series of **stages** to support that process—between 3–7, depending on the complexity of the relationship. Typical stage names include:

- Initial Contact
- Set Appointment
- Research
- Send Contract
- Get Signature
- Receive Payment
- Schedule Consultation
- Re-Engage

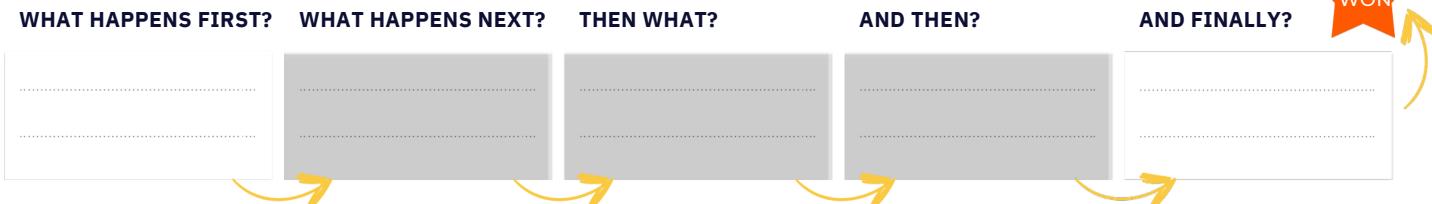
Note: Each stage should have a **goal** that your team must complete before the contact moves forward. What's the specific action or agreement that must be reached in each stage?

③ For each stage, **list the tasks** that your team must complete to accomplish the stage goal. Some typical tasks include:

- Review application
- Call new contact
- Prepare for meeting
- Deliver contract

Optional: Do you assign new contacts to different members of your team based on territory, relationship type, value, or other criteria? **Think about the rules** you currently use to distribute each new lead to the person who's best equipped to handle it.

Your Contact's Decision Process



Your Sales Stages (aka Your Pipeline)

* You can add pipeline stages, lead assignments, goals, tasks, and automated email sequences.

