



CRM Sales Pipeline Management Checklist 2026

Lead Qualification & Entry Criteria

Define the specific benchmarks and criteria that a lead must meet to move from initial contact to a qualified opportunity within the CRM.

Lead Source

- ☐ Inbound Organic
- ☐ Paid Advertising
- ☐ Outbound Prospecting
- ☐ Referral
- ☐ Event/Webinar

Estimated Annual Contract Value (ACV)

Enter a number...

Qualification Criteria Met

- ☐ Budget Confirmed
- ☐ Authority Identified
- ☐ Need Established
- ☐ Timeline Defined

Primary Pain Point

Write something...

Initial Contact Date

Enter date...

Qualification Notes

Write something...

Pipeline Stage Definition & Standardization

Audit and standardize all pipeline stages to ensure consistent movement, clear milestones, and uniform terminology across the sales team.

Standardized Stage Name

Write something...

Stage Probability Percentage

- ☐ 10%
- ☐ 25%
- ☐ 50%
- ☐ 75%
- ☐ 90%
- ☐ 100%

Entry & Exit Criteria

Write something...

Required Data Fields

- ☐ Contact Person
- ☐ Budget Confirmed
- ☐ Decision Maker Identified
- ☐ Pain Points Documented
- ☐ Competitor Analysis

Last Stage Standardization Review

Enter date...

Lead Scoring & Prioritization Rules

Establish automated or manual scoring parameters based on firmographics, engagement levels, and intent signals to prioritize high-value deals.

Primary Scoring Method

- ☐ Demographic-Based Scoring
- ☐ Behavioral-Based Scoring
- ☐ Hybrid Scoring

Minimum Lead Score Threshold

Enter a number...

High-Priority Lead Attributes

- ☐ C-Level Decision Maker
- ☐ High Annual Revenue
- ☐ Recent Website Interaction
- ☐ Completed Demo Request

Scoring Logic Documentation

Write something...

Last Scoring Logic Review Date

Enter date...

Sales Activity & Engagement Tracking

Set requirements for logging essential touchpoints, including emails, calls, meetings, and follow-up tasks, to maintain a complete historical record.

Last Contact Date

Enter date...

Interaction Type

- ☐ Email
- ☐ Phone Call
- ☐ Video Meeting
- ☐ In-Person Meeting
- ☐ LinkedIn/Social Media

Interaction Summary

Write something...

Key Topics Discussed

- ☐ Pricing/Budget
- ☐ Technical Requirements
- ☐ Timeline/Deadline
- ☐ Competitor Mentioned
- ☐ Pain Points Identified

Next Follow-up Date

Enter date...

Meeting Notes or Call Recording

 Upload File

Deal Velocity & Bottleneck Identification

Implement monitoring steps to track how long deals reside in each stage and identify specific friction points causing stagnation.

Primary Bottleneck Stage

- ☐ Prospecting
- ☐ Qualification
- ☐ Proposal/Negotiation
- ☐ Closing

Average Days in Current Stage

Enter a number...

Identified Friction Factors

- ☐ Lack of Stakeholder Engagement
- ☐ Budgetary Approval Delays
- ☐ Competitor Interference
- ☐ Missing Technical Documentation
- ☐ Contract/Legal Review Lag

Detailed Bottleneck Analysis

Write something...

Expected Resolution Date

Enter date...

Data Integrity & Field Completeness

Verify that all mandatory fields (e.g., deal value, close date, decision-maker contact info) are populated accurately before a stage transition occurs.

Deal Probability Percentage

- ☐ 10%
- ☐ 25%
- ☐ 50%
- ☐ 75%
- ☐ 90%
- ☐ 100%

Expected Close Date

Estimated Deal Value

Primary Decision Maker Name

Required Documentation Verified

- ☐ Contact Information Verified
- ☐ Budget Confirmed
- ☐ Authority Confirmed
- ☐ Need Identified
- ☐ Timeline Established

Missing Data Notes

Write something...

Win/Loss Analysis & Feedback Loops

Standardize the process for documenting reasons for closed-won and closed-lost opportunities to drive continuous sales strategy improvement.

Outcome Status

- ☐ Closed Won
- ☐ Closed Lost
- ☐ Deferred/Nurture

Primary Loss Reason

- ☐ Price/Budget
- ☐ Competitor Win
- ☐ Feature Gap
- ☐ Lack of Need
- ☐ Poor Timing
- ☐ Relationship/Trust Issues

Detailed Loss/Win Narrative

Write something...

Analysis Completion Date

Enter date...

Competitor Comparison or Client Feedback Document



Upload File

Competitor Price Point (if applicable)

Enter a number...

Forecast Accuracy & Revenue Projection

Audit the alignment between pipeline stage probability and forecasted revenue to ensure reliable-to-scale financial planning.

Expected Close Date

Enter date...

Deal Value

Enter a number...

Probability Percentage

- ☐ 10%
- ☐ 25%
- ☐ 50%
- ☐ 75%
- ☐ 90%

Revenue Drivers

- ☐ One-time Fee
- ☐ Recurring Subscription
- ☐ Implementation Fee
- ☐ Add-on Services

Forecasting Assumptions

Write something...

Automated Alert & Task Management

Configure automated notifications for stalled deals, upcoming close dates, and overdue follow-up tasks to prevent revenue leakage.

Alert Trigger Events

- ☐ Stagnant Deal (No activity > 7 days)
- ☐ Upcoming Task Deadline
- ☐ Stage Transition Completed
- ☐ High-Value Deal Created
- ☐ Lost Deal Notification

Notification Recipient

- ☐ Account Executive
- ☐ Sales Manager
- ☐ Sales Operations

Threshold Days for Stagnancy Alert

Enter a number...

Automation Implementation Deadline

Enter date...

Alert Logic Documentation

Write something...

Pipeline Hygiene & Regular Maintenance

Establish a cadence for periodic reviews to archive dead leads, update stale close dates, and remove duplicate entries from the active pipeline.

Last Pipeline Audit Date

Enter date...

Audit Completion Status

- ☐ Pending
- ☐ In Progress
- ☐ Completed

Areas Reviewed During Audit

- ☐ Duplicate Leads
- ☐ Stale Opportunities
- ☐ Incomplete Data Fields
- ☐ Outdated Contact Info

Number of Records Cleaned

Enter a number...

Maintenance Summary & Discrepancies Found

Write something...

Sales Manager Approval

< Previous

> Next

✓ Finish

🔗 Generate Sample Report