abstrakt

NO. 26



ABSTRAKT FIELD GUIDES · CHECKLIST

Managing Your Sales Pipeline

Thirty checks for a pipeline you can forecast from, with stage definitions, a weekly review agenda and the warning signs to catch early.

8	3	October 2026 edition
chapters	worksheets and templates	abstraktmg.com

ABSTRAKT FIELD GUIDES · NO. 26

Steps to Efficiently Managing Your Sales Pipeline

A pipeline is only useful if everyone agrees what is in it and what stage it is in. Most pipelines are a mix of real deals, hopeful ones and accounts nobody has called in months. This checklist covers 30 practices that make a pipeline honest and forecastable, with a short explanation for each, a stage definition page and a weekly review agenda. It is for owners and sales leaders.

INSIDE THIS CHECKLIST

01 Stages that mean something
02 Qualification
03 Data hygiene
04 Follow-up discipline
05 The weekly pipeline review
06 Forecasting and coverage
07 Bottlenecks and warning signs
08 Keep the top of the funnel full

HOW TO USE IT

Read it once end to end, then work through the worksheets with the people who own the numbers. The fill-in pages are meant to be printed and written on.

ABOUT THE NUMBERS

Every figure in this checklist names its source and period. Worked examples use round illustrative numbers and say so. Sample talk tracks are dramatized: names and figures in them are samples.

CHAPTER 01

Stages that mean something

- [ ] **1. Your pipeline has five to eight stages, written down.** More stages create arguments about where a deal sits; fewer hide where deals stall.
- [ ] **2. Each stage has an exit test confirmed by the buyer.** "We sent a proposal" is activity. "The buyer reviewed the proposal with us and named the decision date" is a buyer commitment. Stages move on commitments.
- [ ] **3. Everyone uses the same definitions.** Print them. When two salespeople would put the same deal in different stages, the forecast is fiction.
- [ ] **4. Each stage has a typical probability**, based on your own history of deals that reached that stage and closed.
- [ ] **5. There is a stage for "nurture" outside the active pipeline.** Accounts with a known renewal date or a "not now" belong somewhere you will see them, but not in this quarter's forecast.

WORKSHEET

Your stage definitions

Stage 1 and the exit test _____

Stage 2 and the exit test _____

Stage 3 and the exit test _____

Stage 4 and the exit test _____

Stage 5 and the exit test _____

Stage 6 and the exit test _____

Historical close rate from each stage _____

CHAPTER 02

Qualification

- [ ] **6. Every opportunity names the person who signs** and who else is involved. Deals with one contact stall when that person leaves, goes on vacation or loses the argument internally.
- [ ] **7. Every opportunity has a stated need in the buyer's words.** "Roof leaking over the warehouse since March" is a need. "Interested in our services" is not.
- [ ] **8. Every opportunity has a timing event**: a renewal, a budget date, a failure, a project start. Deals without a date drift.
- [ ] **9. Opportunities are inside your service area and scope.** Deals you would not want to deliver should not inflate the pipeline.
- [ ] **10. Disqualified deals are closed out with a reason**, not left open to look busy.

CHAPTER 03

Data hygiene

- [ ] **11. Every open deal has a next step with a date.** The single best predictor of a stuck deal is no scheduled next step.
- [ ] **12. Every deal has been touched in the last 14 to 30 days**, depending on your cycle. Older than that, it is either in nurture or lost.
- [ ] **13. Deal values are realistic**, based on the scope discussed, not the biggest possible job.
- [ ] **14. Close dates are updated when they slip**, with a note on why. A close date pushed three times is a signal.
- [ ] **15. Notes are in the CRM, not in someone's head or inbox.** If the salesperson left tomorrow, the next person should be able to call the buyer with context.

> FROM THE SALES FLOOR
>
> **Clean it every Friday**
>
> Ten minutes at the end of the week: every open deal has a next step, a date and a current value. A clean pipeline makes Monday's review take half the time.

CHAPTER 04

Follow-up discipline

- [ ] **16. Proposals are reviewed live with the buyer**, not just emailed. A review meeting gets objections on the table while you can answer them.
- [ ] **17. Follow-up is tied to the buyer's calendar**: the budget meeting, the owner review, the end of peak season. Calling every week to "check in" pushes buyers to stop answering.
- [ ] **18. Lost deals record the reason and the renewal month.** The account you lost to the incumbent today is next year's opportunity.
- [ ] **19. Nurture accounts have a scheduled next touch** with something useful to say, timed ahead of their renewal or budget date.

CHAPTER 05

The weekly pipeline review

- [ ] **20. You hold a pipeline review every week**, at the same time, for 30 minutes.
- [ ] **21. The review focuses on movement and risk**, not on reading every deal aloud.
- [ ] **22. Each salesperson commits to the next step** on their top deals, and the commitments are checked next week.

TEMPLATE

A 30-minute weekly agenda

5 minutes: new opportunities added this week, and where they came from _____

10 minutes: deals that moved stage, and deals that should have but did not _____

10 minutes: the five largest deals: next step, date, risk, help needed _____

5 minutes: top-of-funnel check: qualified meetings booked versus target _____

CHAPTER 06

Forecasting and coverage

- [ ] **23. The forecast uses stage probabilities from your own history**, not gut feel. Value × probability, summed, is a weighted forecast.
- [ ] **24. You know your pipeline coverage**: open pipeline value divided by the remaining target for the period. Too little coverage means you will miss, no matter how well you close.
- [ ] **25. You know how long deals take** from first meeting to close, by deal type. That tells you how far ahead the top of the funnel has to work.

WORKED EXAMPLE

Coverage, round numbers

A contractor needs $600,000 more in new revenue this half. Its history shows it wins about one in four qualified opportunities. It needs about $2.4 million in qualified opportunities in the pipeline, roughly four times the remaining target. It has $1.5 million. The gap is not a closing problem; it is a top-of-funnel problem, and it has to be fixed months before the end of the half because deals take time to close.

Illustrative numbers.

WORKSHEET

Your coverage

Remaining revenue target for the period	
Your historical win rate on qualified opportunities	
Pipeline needed (target ÷ win rate)	
Qualified pipeline you have today	
Gap	
Qualified meetings needed to close the gap	

CHAPTER 07

Bottlenecks and warning signs

- [ ] **26. You measure conversion from each stage to the next.** The stage with the biggest drop is where to spend coaching time.
- [ ] **27. You compare your proposal and win rates with outside benchmarks.** Across Abstrakt client programs, the share of opportunities reaching a proposal ranged from 10.0% to 43.9% by vertical, and the share of proposals won from 7.4% to 26.9% (Abstrakt sales center, Performance Intelligence, cumulative through October 2026). Close rates depend heavily on your own process and pricing; use the range for perspective, not as a target.
- [ ] **28. You watch for deals aging past your normal cycle.** A deal twice as old as your average is unlikely to close as forecast.

Warning sign	What it usually means	What to do
Many deals stuck at "proposal sent"	Proposals emailed, not reviewed	Book review meetings; qualify harder before quoting
High proposal rate, low win rate	Being compared on price	Better discovery and site walks; find what the incumbent missed
Close dates keep slipping	No real timing event	Ask what has to happen first, and when
Pipeline shrinks every month	Top of funnel is not refilling	Separate prospecting from closing
Most deals have one contact	Single-threaded	Ask the decision question; meet the others involved

CHAPTER 08

Keep the top of the funnel full

- [ ] **29. Someone prospects every week, separate from closing.** When the closer also prospects, prospecting stops whenever deals heat up, and the pipeline empties a quarter later.
- [ ] **30. You track qualified meetings booked each week against a target.** It is the leading indicator for every number in this checklist.

Score it

Checks	What it means
26 to 30	A pipeline you can forecast from
18 to 25	Mostly honest; fix next steps and stage definitions
10 to 17	The forecast is unreliable; start with items 1 to 3, 11 and 20
Under 10	Rebuild: definitions, a weekly review and a prospecting owner

RATHER HAVE IT DONE FOR YOU?

Our SDRs run this playbook every day.

Abstrakt is a technology-enabled outsourced sales development company. We find the right companies and the right contacts, call them with a trained and certified SDR, and book qualified appointments on your calendar. One client per trade per territory.

See if your market is open: abstraktmg.com/is-my-market-open
Talk to an outbound strategist: abstraktmg.com/contact

17+	100,000+	1,500+	$1B+
years on the phones	meetings booked a year	clients	in client revenue generated

Company figures: Abstrakt approved company facts (src/data/company-facts.json), verified 2026. Revenue is revenue clients closed from Abstrakt-sourced meetings.

SOURCES AND NOTES

1. Abstrakt sales center, Performance Intelligence benchmarks (share of opportunities reaching a proposal and share of proposals won, by vertical), cumulative through October 2026. abstraktmg.com/sales-benchmarks
2. Checklist items are Abstrakt's own guidance. Worked examples use illustrative numbers and say so.

CREDITS

Cover photo: Two Abstrakt team members working through an account at a desk. Abstrakt photo (Abstrakt original, September 2026).

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