



GROWTH AND PLANNING

Sales pipeline review template

A structured weekly pipeline review for checking opportunity quality, deal movement, risks, follow-up ownership, and forecast confidence.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

Your pipeline needs a reliable operating cadence.

WORK THROUGH THE CHECKLIST

☐ 01 **Review each active opportunity**

☐ 02 **Check next action dates**

☐ 03 **Identify stalled deals**

☐ 04 **Confirm decision makers**

☐ 05 **Update forecast confidence**

☐ 06 **Assign follow-up owners**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.