

CRM Pipeline Design Template

Define stages, data, response rules and reporting before configuring the CRM.

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I design the pipeline around evidence that a buyer has moved forward. Stages are shared definitions, not personal opinions. Every open opportunity needs an owner, a next action and a date.

Business / pipeline owner / version / review date

Define the unit before adding stages

Design decision	Your rule
What one opportunity represents	
Who can enter this pipeline / exclusions	
Lead source and intake owner	
What counts as won / supporting evidence	
What counts as lost / when nurture is separate	
Who approves stage and field changes	

Use a small shared vocabulary

- **Stage:** the buyer's current progress, supported by entry evidence.
- **Activity:** work performed, such as a call or an email.
- **Next action:** one useful step with an owner and due time.
- **SLA:** your internal time commitment for a defined action.
- **Stage age:** elapsed time in the stage, separate from the SLA.

The real estate and B2B examples in this workbook are hypothetical. All timing targets are example operating choices, not benchmarks or reported results.

Main handoff failure this design needs to solve

Make every move explainable

Write stages as observable buyer progress. Keep a stage only if it changes the next action, required evidence or ownership. Avoid using a separate stage for every attempted contact.

Define the entry and exit

Entry answers: what must already be true? Exit answers: what new evidence permits a move? Name the person allowed to move the record and the evidence they must leave behind.

Stage definition worksheet

Stage / purpose	Entry evidence	Exit evidence	Owner / allowed next stages

Agree exception rules

- ☐ New inquiries enter one known intake stage.
- ☐ Skipped stages require evidence or an approved exception reason.
- ☐ Backward moves preserve the history and reset only the intended timers.
- ☐ Reopened deals have a reason and a fresh next action.
- ☐ A duplicate or test record is handled as administration, not as a lost sale.
- ☐ A person with two distinct buying decisions can have separate opportunities.

Example of a valid move / evidence recorded

Stage-change approver / unresolved stage question

Collect data when it becomes useful

Require the minimum information needed for the next decision. A large mandatory form at intake can hide missing information behind guesses. Allow an explicit unknown where the business can still proceed, then assign a task to resolve it.

Suggested timing - adapt to the pipeline

Point in the process	Useful required facts
At intake	Source, contact route, inquiry timestamp, owner and service interest.
Before qualification	Problem or intent, fit evidence, buying role and known constraints.
Before proposal or offer	Agreed scope or selection, decision process and commercial assumptions.
Before won	Accepted commitment, value basis, start or completion milestone and handoff owner.
Before lost	Primary lost reason, factual note and any agreed future contact.

Required-field dictionary

Field / record level	Type / allowed values	Required at stage	Source / enforcement owner

Keep the meaning stable

- ☐ Store person facts once; keep deal-specific facts on the opportunity.
- ☐ Use controlled choices for reportable categories and plain dates for due actions.
- ☐ Name the source of truth if another system owns the value.
- ☐ Test stage-change enforcement; a field label alone does not enforce a rule.

How missing required data is flagged / who resolves it

Make response rules measurable

An SLA needs a clock and an action. Define whether it uses elapsed time or covered business time, plus timezone, holidays and backup coverage. Do not make a buyer's decision deadline your team's service promise.

SLA per stage - fill in your operating targets

Stage / action promised	Target / clock basis	Start / stop event	Breach alert / backup owner

Define automation by trigger and exit

Start with record hygiene, assignment, tasks and alerts. Add customer messages only when preference and eligibility checks are clear. Automate reminders around an owned process.

Automation per stage

Stage / trigger	Eligibility / guard	Action / owner	Stop / failure path

Rules to prove with test records

- ☐ Repeated events do not create duplicate opportunities or parallel tasks.
- ☐ Replies, bookings, opt-outs and terminal outcomes stop the right sequences.
- ☐ SLA breaches route to an available person; alerts have a backup.
- ☐ Failed actions remain visible and can be handled manually.

After-hours rule / unavailable-user fallback

Keep losses factual and comparable

Choose one primary reason for the commercial outcome, plus a short factual note. Use a stable category set across the team. Do not mark a guess about budget or competition as confirmed evidence.

Starter lost-reason taxonomy - adapt before launch

Code / reason	Use when	Evidence or distinction
FIT / Not suitable	The need, geography or service is outside agreed fit.	State which fit rule failed.
PRIORITY / Not proceeding	Buyer confirms the work is no longer a priority.	Record the stated change or deferral.
BUDGET / Funding constraint	Buyer confirms resources cannot support the purchase.	Separate budget from a preference for another option.
ALTERNATIVE / Chose another route	Buyer chose a vendor, internal solution or status quo.	Record the alternative only if known.
TERMS / Scope or commercial mismatch	A specific scope, delivery or commercial condition blocks agreement.	Write the unresolved condition.
NO RESPONSE / Contact ended	The agreed bounded follow-up policy is complete.	Do not infer a hidden objection.
UNKNOWN / Not established	The outcome is known but the cause is not.	Assign a learning action if appropriate.

Separate closure from future follow-up

A closed opportunity can have a future relationship task if contact is appropriate. Nurture needs its own reason and date; it should not inflate active pipeline. Duplicate, spam and test records need separate administrative treatment.

Closure worksheet

Lost reason / factual note	Future contact agreed? / date	Learning action / owner

- ☐ The team can distinguish the categories without guessing.
- ☐ Reason changes preserve an audit trail and a named owner.

Taxonomy owner / review date / category needing clarification

Specify the decision before the chart

A dashboard should answer who needs to act and where the process fails. Define the record unit, date field, filters, timezone and owner for every measure. Keep open pipeline, closed outcomes and cash collection separate.

Dashboard specification starter

Question / metric	Exact definition	Source / cadence
Who needs attention? / unowned	Open opportunities with no assigned owner at review time.	CRM opportunity records / daily.
What is overdue? / next actions	Open records with a next-action due time before now.	Task and opportunity records / daily.
Where does work stall? / stage age	Elapsed time since latest valid stage entry; flag re-entry separately.	Stage history / weekly.
Does progress occur? / conversion	Entrants to a stage that reach the next defined stage within a chosen cohort window. Show still-open records.	Stage history / weekly.
What closes? / win rate	Won / (won + lost) for a defined closure period. Exclude administrative removals.	Closed opportunities / weekly.
Why do we lose? / lost reasons	Closed-lost count by primary reason, with unknown shown.	Closure records / monthly.
What value is real? / revenue	Separate booked commitment, expected fee and collected cash as applicable.	CRM plus finance source / agreed cadence.

Your dashboard requirements

Metric / business decision	Window / filters / owner	Target or flag / action

Quality checks

- ☐ Each count can be reconciled to a list of underlying records.
- ☐ Entry-cohort conversion is not mixed with closure-period win rate.
- ☐ Stage probabilities are labeled assumptions until supported by your own history.

Dashboard owner / data exception / next review

Example / real estate brokerage

Hypothetical buyer-side brokerage. One opportunity = one active buyer search. All SLAs below are example targets for covered business time. Won requires the agreed completed commercial event and fee record, not a viewing or an unsigned offer.

Filled stage definitions

Stage	Entry evidence	Exit evidence
Inquiry	New property inquiry recorded.	Two-way contact confirms needs and fit.
Qualified search	Location, budget range and timing confirmed.	Buyer agrees a relevant viewing plan.
Viewings agreed	Viewing date and properties confirmed.	Feedback supports a specific offer discussion.
Offer discussion	Buyer chooses to discuss terms.	Agreed terms move to the completion process.
Completion pending	Responsible parties and milestones confirmed.	Completed transaction and brokerage fee status recorded.

Filled fields, SLAs and automation - example targets

Stage	Required fields	SLA / action	Automation
Inquiry	Source, contact, owner.	15 covered min / first response.	Assign and create callback task.
Qualified search	Area, budget range, timing.	1 business day / shortlist action.	Create shortlist task.
Viewings agreed	Property IDs, time, agent.	1 business day after viewing / feedback.	Create feedback task; stop on cancellation.
Offer discussion	Property, terms, next action.	1 business day / status update.	Alert owner on overdue action.
Completion pending	Milestones, fee basis, owner.	2 business days / milestone check.	Remind responsible owner; stop at closure.

Lost example: ALTERNATIVE when the buyer confirms another property route; NO RESPONSE only after the chosen follow-up policy.
Dashboard: response breaches, viewings awaiting feedback, stage age and completed brokerage fees. Property sale value is not brokerage revenue.

Adaptations for our brokerage / changed SLA / owner

Example / B2B service firm

Hypothetical CRM implementation studio. One opportunity = one scoped implementation decision. The targets below are examples. Won means accepted scope, required commercial approval and a named delivery handoff owner; a verbal expression of interest is insufficient.

Filled stage definitions

Stage	Entry evidence	Exit evidence
New inquiry	A relevant service inquiry arrives.	Buyer agrees a discovery conversation.
Discovery agreed	Meeting purpose and participants confirmed.	Problem, impact and process discussed.
Qualified scope	Fit, scope and decision process supported.	Buyer agrees a proposal review.
Proposal under review	Scoped proposal delivered to agreed participants.	Open issues and decision date confirmed.
Decision pending	Decision participants and next step confirmed.	Accepted commitment or explicit closed-lost outcome.

Filled fields, SLAs and automation - example targets

Stage	Required fields	SLA / action	Automation
New inquiry	Source, service interest, owner.	1 business hour / first response.	Assign and create contact task.
Discovery agreed	Meeting time, roles, purpose.	1 business day after meeting / summary.	Create summary task; handle no-show.
Qualified scope	Need, buyer roles, constraints.	2 business days / scope plan.	Check required data; flag unknowns.
Proposal under review	Scope, value basis, review date.	3 business days / review follow-up.	Create review task; stop on reply.
Decision pending	Decision step, date, owner.	5 business days / status check.	Escalate stale action; stop at closure.

Lost example: TERMS for an unresolved scope mismatch, supported by a factual note. **Dashboard:** accepted inquiries, discovery outcomes, proposal aging, closed win rate and booked project value. Reconcile collected cash separately with the finance source.

Adaptations for our service / changed SLA / owner

Test the model with real scenarios

Walk through a new inquiry, a duplicate, a returning buyer, a no-show, a stalled proposal and a closed opportunity before configuring everything. Use test records first, then a limited live pilot with a named owner.

Design review checklist

- ☐ Every stage has entry evidence, exit evidence and an accountable owner.
- ☐ Required fields arrive before the decision that needs them.
- ☐ Each stage has a next-action SLA with a clock and backup coverage.
- ☐ Automations have eligibility checks, exits and a visible failure path.
- ☐ Won, lost, nurture and administrative removals have distinct meanings.
- ☐ Lost reasons use factual evidence and show unknowns honestly.
- ☐ The dashboard has definitions, source records and review actions.
- ☐ Stage changes, reopenings and duplicate handling preserve useful history.

Pipeline acceptance test sheet

Scenario / starting stage	Expected move / required data	Actual behavior / issue owner

Approved by / pilot start / review date

First correction to make / owner / due date

Want help implementing this?

Bring your completed worksheets. I can help turn your next decision into a working growth system.

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