

Sales Pipeline Stages Worksheet

Define what actually counts as progress in your sales process.

STAGE	WHAT THIS STAGE MEANS	EXIT CRITERIA
Lead	Someone has shown interest	Contact info + a real reason to believe they're a fit
Qualified	Confirmed as a real opportunity	Budget, authority, need, and timeline understood
Discovery	Their actual problem is understood	You can restate their problem better than they can
Proposal	A specific offer has been made	Proposal sent, pricing discussed, next step scheduled
Negotiation	Working through objections/terms	Remaining objections named and being addressed
Closed Won / Lost	Decision made	Signed agreement, or a documented reason it didn't close

Questions To Answer Before You Use This

1. What's the single biggest reason deals stall in your pipeline today?
2. Which stage do you have the least visibility into?
3. Is there a stage people skip past too quickly?