CRM & PIPELINE

Pipeline Aging Review

Fixed price: $129 **Format: 5-page sample written report** **Delivery: asynchronous**

FICTIONAL SAMPLE - NOT A REAL CLIENT

Executive snapshot

ClearPath Garage Doors, a fictional garage door service company, is used to demonstrate how this service is delivered. Identify aging pockets where opportunity age and inactivity indicate weak control.

Primary risk

Thirty percent of the pipeline is older than 60 days

Best next move

Create weekly aging bands with owner-level exception counts.

Evidence reviewed

Open pipeline export; stage-entry dates; last activity; next action; owner; value/service.

What this report does

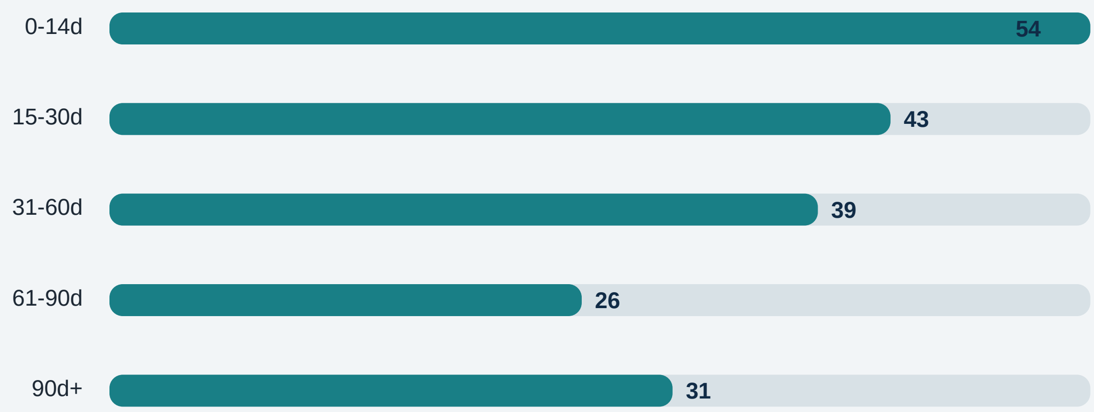
Converts the supplied evidence into prioritized operational actions without inventing ROI or revenue-loss claims.

SERVICE-SPECIFIC ANALYSIS

Current-state review

The sample analysis below uses synthetic records to show the type of evidence this service would evaluate for a real client. The numbers are illustrative, not benchmarks.

Illustrative operating data



Interpretation

Many of these records remain in active stages without a current next action. These stages lack strong exit criteria. The problem is partly ownership discipline, not just customer delay.

PRIORITY FINDINGS

What deserves attention first

Priority reflects operational risk and controllability, not a claim about financial impact.

HIGH **Thirty percent of the pipeline is older than 60 days**

Many of these records remain in active stages without a current next action.

HIGH **Aging is concentrated in Proposal Sent and Follow-up**

These stages lack strong exit criteria.

MEDIUM **One rep owns a disproportionate share of 90+ day opportunities**

The problem is partly ownership discipline, not just customer delay.

Control implication

The immediate objective is not to add complexity. It is to make the smallest number of controls visible, owned, and repeatable enough that the process can be managed consistently.

RECOMMENDED ACTIONS

30-day implementation rhythm

The sequence below is intentionally limited. Complete the control work in order, confirm adoption, and only then expand the process.

0-7 days	Create weekly aging bands with owner-level exception counts.	Owner / manager
8-21 days	Require a next action for any opportunity older than 30 days.	Process owner
22-30 days	Move 90+ day records to a separate recovery or closed status unless evidence supports active pursuit.	Manager review

Operating rules

- Assign one accountable owner for each action.
- Use a dated next action or review date.
- Measure only fields the team can maintain consistently.
- Do not add software or process complexity unless the current controls are actually being used.

NEXT-STEP ROADMAP

What to maintain, what to revisit

MAINTAIN

Keep the controls that are already producing reliable visibility. Do not change a working control simply to make the process look more sophisticated.

REVISIT

Review the high-priority finding after 30 days with the same evidence definition used in this report.

STOP / CLOSE

If the control is stable and the underlying question is answered, no additional paid service is required.

ESCALATE ONLY IF EVIDENCE SUPPORTS IT

A different service is appropriate only when a separate operational problem becomes visible outside this report’s scope.

Limitations

This sample is illustrative. A real report would use only client-supplied or client-approved evidence, state any missing fields, and avoid unsupported conclusions.