CRM & PIPELINE

Pipeline Stage Cleanup Review

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

FICTIONAL SAMPLE - NOT A REAL CLIENT

Executive snapshot

Northstar HVAC & Mechanical, a fictional HVAC service company, is used to demonstrate how this service is delivered. Reduce ambiguous stages and create objective entry/exit criteria that keep pipeline reporting usable.

Primary risk

Working and Follow-up overlap

Best next move

Collapse overlapping stages and remove Other from the active pipeline.

Evidence reviewed

Stage list; definitions; current pipeline export; sample records; aging; won/lost rules.

What this report does

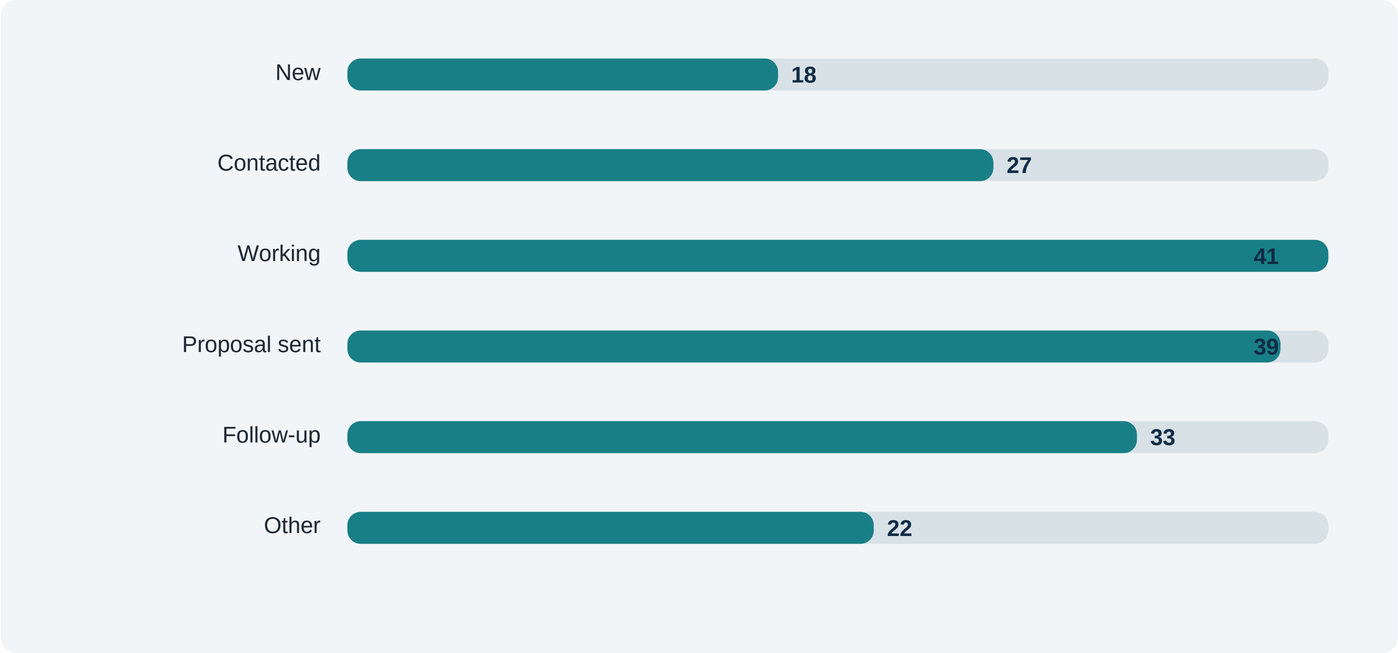
Converts the supplied evidence into prioritized operational actions without inventing ROI or revenue-loss claims.

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

Reps use both stages for the same condition, making reporting unreliable. The catch-all stage includes waiting, unqualified, and inactive opportunities. Records remain in stages based on habit rather than a defined customer event.

PRIORITY FINDINGS

What deserves attention first

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

HIGH **Working and Follow-up overlap**

Reps use both stages for the same condition, making reporting unreliable.

HIGH **Other is masking multiple real outcomes**

The catch-all stage includes waiting, unqualified, and inactive opportunities.

MEDIUM **Stage movement lacks objective exit rules**

Records remain in stages based on habit rather than a defined customer event.

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	Collapse overlapping stages and remove Other from the active pipeline.	Owner / manager
8-21 days	Define one observable entry and exit rule for every stage.	Process owner
22-30 days	Move inactive records out of the active pipeline based on age and next-action criteria.	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.