# Ashford Business Services Ltd

## Sales Pipeline Review Sheet

Reviewing the sales pipeline as a team: value by stage, forecast to close, the deal register, and review actions.

**Document:** Sales Pipeline Review Sheet **Version:** 1.0

**Prepared by:** _____ **Owner:** _____

**Date:** _____ **Review date:** _____

**Review header: Review date:** _____ **Review chair:** _____

**Review period:** _____ **Pipeline total:** _____ **Forecast close value:** _____ **Pipeline by stage:**

| Stage | Number of deals | Total value |
|---|---|---|
| New lead | | |
| Contacted | | |
| Qualified | | |
| Proposal sent | | |
| Negotiation | | |
| Closed won | | |
| Closed lost | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

### Deal register

| Client company | Opportunity | Owner | Stage | Value | Expected close | Days in stage | Action |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

**Forecast discussion** 1. Walk through the deal register, starting with deals in negotiation. 2. Challenge every deal forecast to close in November 2026 and record the evidence for it.

3. Move deals with no activity for 30 days back one stage and assign a recovery action. 4. Agree the forecast close value (Forecast close value) before the meeting ends.
**Review actions:**

| Action | Owner | Due date |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |

# Ashford Business Services Ltd

| | | |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |

**Completion checklist:** The pipeline total (£45.00) equals the sum of the stage values.

Every deal stuck over 30 days has a recovery action.

The forecast close value (Forecast close value) was agreed in the meeting chaired by Review chair.