NEW BUSINESS DEVELOPMENT & SALES · CHECKLIST

# CRM Pipeline Configuration Checklist

A generic setup checklist for configuring any CRM's pipeline so deals can be tracked and forecast consistently.

How to use this: Work through this once when setting up or auditing your pipeline, then use the weekly hygiene section as a recurring routine.

## Required Fields on Every Deal

Configure these as mandatory fields so no deal can be created or advanced without them.

- [ ] Deal owner (a single named person, not a team)
- [ ] Current stage (from your fixed stage list only)
- [ ] Stage entry date (auto-logged, not manually typed)
- [ ] Deal value / expected contract size
- [ ] Expected close date
- [ ] Next step: action, owner, and date
- [ ] Source (how this deal originated)
- [ ] Primary contact and decision-maker, if different

## Stage Definitions to Configure

Write the entry test for each stage directly into the CRM's stage description field, if it supports one, so the definition travels with the pipeline rather than living in a separate document.

| Stage | Binary Entry Test | Typical Max Days in Stage |
|---|---|---|
| Discovery Booked | Call scheduled with a stated problem | 7 |
| Qualified | Meets written qualification criteria | 10 |
| Solution Agreed | Buyer confirms product fit in writing or verbally | 14 |
| Commercials in Review | Proposal/pricing sent and budget confirmed | 14 |

| Stage | Binary Entry Test | Typical Max Days in Stage |
|---|---|---|
| Verbal Commit | Buyer has said yes; contract in progress | 10 |

## Win/Loss Reason List

Configure a fixed, mandatory dropdown for closed deals. Keep the list short enough that people actually use it correctly.

- [ ] Won — set the specific driver (e.g. price, timing, fit) as a sub-reason where possible
- [ ] Lost — no budget
- [ ] Lost — no decision / went quiet
- [ ] Lost — chose competitor (name it)
- [ ] Lost — chose to build internally / do nothing
- [ ] Lost — bad fit (qualification error)
- [ ] Disqualified before close (record at what stage and why)

## Automations and Reminders to Set Up

Most CRMs support these as basic rule-based automations; set them up once so hygiene doesn't rely on memory.

- [ ] Auto-flag any deal that exceeds its stage's max-days threshold
- [ ] Auto-reminder to the deal owner when a next-step date passes with no update
- [ ] Weekly digest of all deals with no activity logged in 7+ days
- [ ] Required reason field enforced before a deal can be marked closed-won or closed-lost
- [ ] Monthly auto-report of pipeline value by stage, filtered to exclude flagged/stalled deals

## Weekly Hygiene Routine

Run this as a fixed five-minute pass, same day every week.

- [ ] Review all deals flagged for exceeding stage time limits
- [ ] Confirm every open deal has a valid next step (action, owner, date)
- [ ] Move, disqualify, or re-date any deal that failed the review above
- [ ] Confirm all deals closed this week have a win/loss reason logged
- [ ] Spot-check one older deal per week for stage accuracy

## Monthly Pattern Review

A short reflection to turn the logged data into decisions, not just records.

Which loss reason appeared most often this month?

Which stage had the most deals exceed their aging threshold?

Is there a qualification criterion this month's losses suggest we should tighten?

What one change to the pipeline setup would reduce next month's aging flags?