

Pipeline Worksheet

A pipeline is a set of repeatable steps that your organization uses to develop relationships with new contacts. Use this worksheet to define your team's efforts and get everyone on the same page.



INSTRUCTIONS

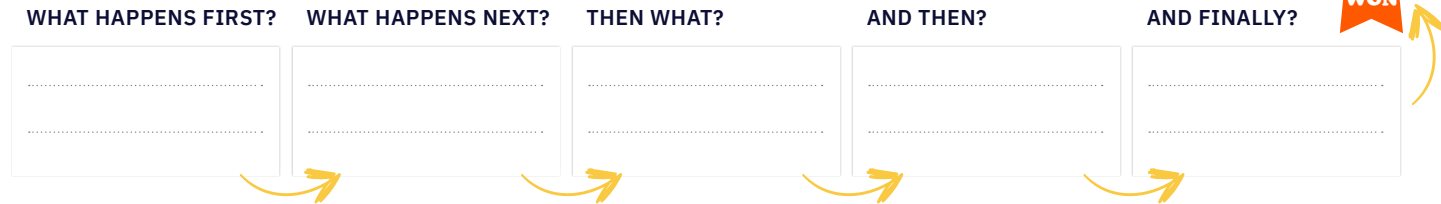
- Write down the key activities, milestones, and decisions that **need to take place** throughout the course of every relationship.
- Choose a series of **stages** to support that process—between 3–7, depending on the complexity of the relationship. Typical stage names include:
 - Initial Contact
 - Set Appointment
 - Research
 - Send Contract
 - Get Signature
 - Receive Payment
 - Schedule Consultation
 - Re-Engage
- For each stage, **list the tasks** that your team must complete to accomplish the stage goal. Some typical tasks include:
 - Review application
 - Call new contact
 - Prepare for meeting
 - Deliver contract

Note: Each stage should have a **goal** that your team must complete before the contact moves forward. What's the specific action or agreement that must be reached in each stage?

Optional: Do you assign new contacts to different members of your team based on territory, relationship type, value, or other criteria? **Think about the rules** you currently use to distribute each new lead to the person who's best equipped to handle it. (You can automate these rules in Nutshell.)

Pro Indicates a feature only available in Nutshell Pro

Your Contact's Decision Process



Your Sales Stages (aka Your Pipeline)

*To add pipeline stages, lead assignments, goals, tasks, and automated email sequences in Nutshell, go to your [Sales Automation](#) page

WHO DOES THIS?	WHO DOES THIS?	WHO DOES THIS?	WHO DOES THIS?	WHO DOES THIS?
STAGE GOAL <small>Pro</small>	STAGE GOAL <small>Pro</small>	STAGE GOAL <small>Pro</small>	STAGE GOAL <small>Pro</small>	STAGE GOAL <small>Pro</small>
TASKS <small>Pro</small>	TASKS <small>Pro</small>	TASKS <small>Pro</small>	TASKS <small>Pro</small>	TASKS <small>Pro</small>