Not Just for Sales

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.

Nutshell

INSTRUCTIONS

1. Write down the key activities, milestones, and decisions that **need to take place** throughout the course of every relationship.
2. 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

   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?
3. 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

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

WHAT HAPPENS FIRST?	WHAT HAPPENS NEXT?	THEN WHAT?	AND THEN?	AND FINALLY?

LEAD WON

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 Pro	STAGE GOAL Pro	STAGE GOAL Pro	STAGE GOAL Pro	STAGE GOAL Pro
TASKS Pro	TASKS Pro	TASKS Pro	TASKS Pro	TASKS Pro
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