The Pipeline Management Framework Cheatsheet

UNION SQUARE CONSULTING

Close more pipeline with higher ACVs and shorter sales cycles.

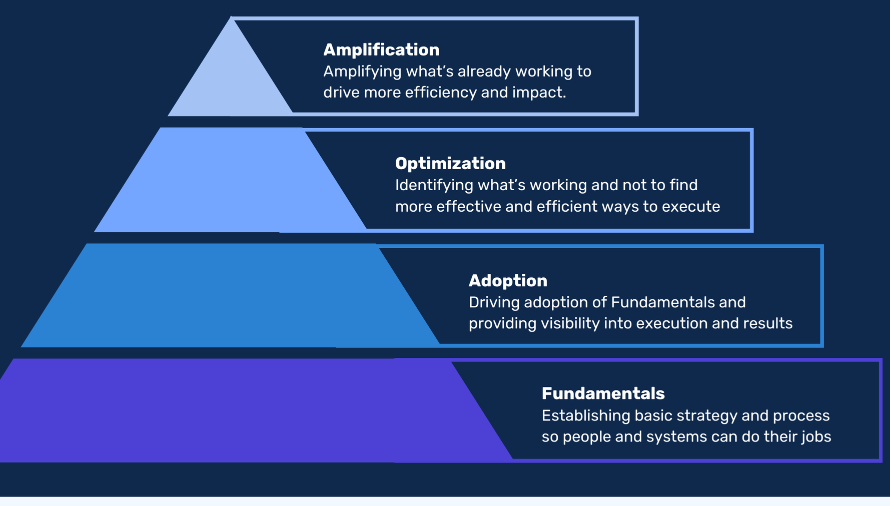
Click here to read the full Framework

What You'll Get out of This Cheatsheet

Pipeline generation is regularly priority number one, but how often are those new opportunities actually closing? After investing so much effort generating that pipeline, how much revenue is being left on the table due to poor pipeline management? The problem is rarely a matter of volume. What's missing is the operational engine that enables reps to protect their selling time, work deals more strategically, and forecast accurately.

This cheatsheet helps you build that engine: the process, data, and systems that close more of the opportunities you're generating. Build it from the base up with the Pipeline Management Pyramid, starting with Fundamentals, then working through Adoption, Optimization, and Amplification.

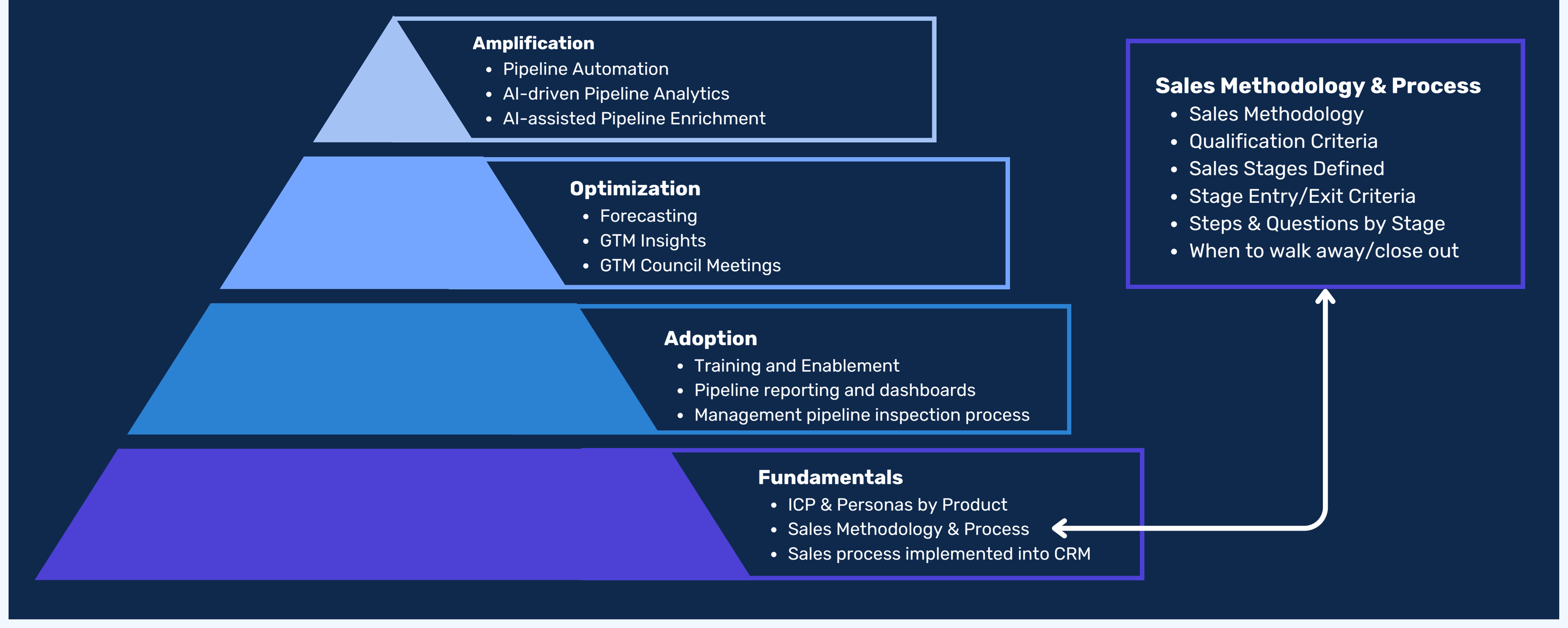
The GTM Efficiency Pyramid



Pipeline Efficiency Checklist

- [ ] We built our ICP and personas from best customers
- [ ] We engage the full buying group, not one contact
- [ ] Reps consistently follow defined qualification criteria
- [ ] We've chosen a sales methodology
- [ ] Our process has entry and exit criteria per stage
- [ ] The process lives in the CRM with required fields
- [ ] Reps know when to walk away from dead deals
- [ ] We have ongoing training and enablement
- [ ] Reps run the process and fill fields on each deal
- [ ] We have dashboards for open pipeline and closed-won
- [ ] Management inspects the pipeline on a cadence
- [ ] We run 1:1 coaching on each rep's deal data
- [ ] We run a weekly forecast meeting and teardown
- [ ] We run monthly team win/loss reviews
- [ ] We slice close rate, ASP, SQOs, and cycle by segment
- [ ] We ensure dedicated time to analyze data
- [ ] We forecast on a documented cadence, within 5%
- [ ] We have regular GTM Council meetings
- [ ] We're not automating with AI unless the above is done

The GTM Efficiency Pyramid for Pipeline Management



FUNDAMENTALS: Define the right buyers and build the process to convert them

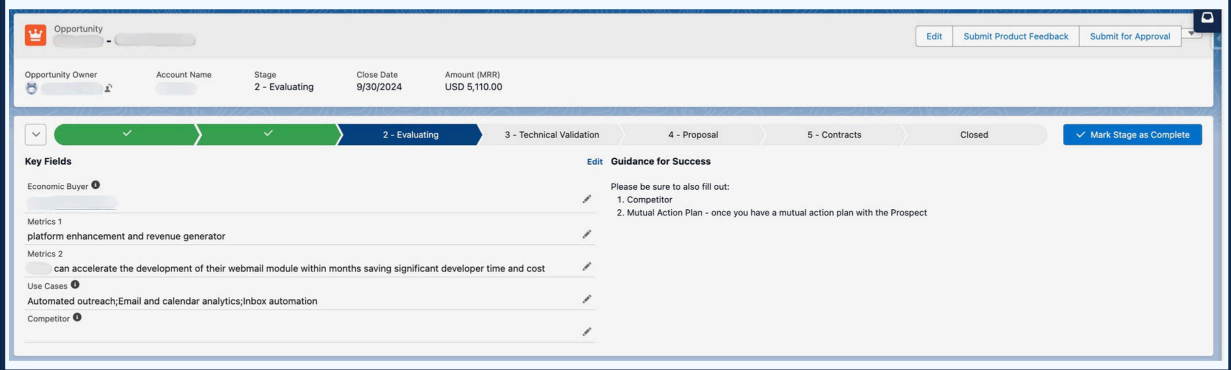
Elevate the Way You Define and Manage Your ICP and Personas

Dimension	Most Common (Bad)	Good	Great
Data source	Built on assumptions	Built from best-fit customers (win/loss, interviews)	Win/loss + retention + expansion + adoption data
Firmographics	Industry, size, revenue, geo (broad)	Narrowed to a defensible range	Granular and tiered (primary vs. secondary)
Technographics	None	Current tech stack noted	Stack + displacement signals feeding scoring
Buyer definition	A few job titles	ICP (company) split from personas (people)	Full buying committee: signer, champion, blocker
Pain & triggers	None	Pain points and goals per persona	Buying triggers and intent signals for timing
Disqualifiers	None	Loose "not a fit" notes	Explicit disqualification criteria
Connection to GTM	Lives in a doc	Informs targeting and messaging	Drives lead scoring and routing; validated vs. behavior
Maintenance	Never updated	Reviewed every 6–12 months	Refined continuously; defined per product

Implement Sales Process Into the CRM

You can have the best process, the best training, and your reps might still forget most of it within weeks or months. When the process lives in the CRM, a stage only advances once the required data is entered, and a rep can't skip ahead without it. That's how you turn process into daily execution, and eventually into muscle memory.

Here's an example of what it might look like to enforce your process in Salesforce:



Pipeline Management Process: Do's and Dont's

Sales Methodology

DO
- Pick one methodology and standardize it
- Use it to surface why deals stall early
- Build it into your stages and fields

DON'T
- Don't let it sit in a slide deck nobody opens
- Don't let every rep qualify deals their own way
- Don't adopt one without building it into the CRM

Sales Stages & Exit Criteria

DO
- Define entry and exit criteria for each stage
- Spell out the data reps should collect at each stage
- Make every deal earn its way into the next stage

DON'T
- Don't let stages mean different things to different reps
- Don't advance deals on optimism instead of evidence
- Don't forget to regularly check to ensure reps are following criteria

Steps & Questions by Stage

DO
- Lay out the steps a rep should take at each stage
- Write down the questions reps should be asking
- Standardize it so discovery gets better across the team

DON'T
- Don't assume reps already know the right questions to ask
- Don't let your best reps keep the playbook in their heads
- Don't settle for thin, inconsistent discovery

Walking Away from Deals

DO
- Define the point where a deal should be disqualified
- Track how long a deal usually takes to lose, not just to win
- Clear stalled deals out before they pile up

DON'T
- Don't let reps sit on dead deals to pad the pipeline
- Don't punish reps for closing out dead deals
- Don't be afraid of closing out existing zombie pipeline

Process Built Into the CRM

DO
- Build the CRM to only advance stages once the fields are filled
- Add fields for your methodology and for deal risks
- Check that reps are actually filling them in

DON'T
- Don't rely on training and memory for consistent process execution
- Don't overdo it on fields and mandatory data entry, collaborate with reps and use automation where possible

Pipeline Inspection

DO
- Inspect the pipeline and individual deals on a set cadence
- Take big issues to your GTM Council if you have one
- Build 1:1s around the rep's own deal data

DON'T
- Don't run deal reviews from memory, one deal at a time
- Don't let the cadence slip when things get busy
- Don't inspect without coaching on what to fix

Reporting & Dashboards

DO
- Build an open-pipeline view sorted by biggest deals first
- Build a closed-won view sorted by source
- Segment data by product, rep, geography, customer type, etc.

DON'T
- Don't build a wall of charts nobody opens
- Don't run reports before you have any context
- Don't mistake building the report for doing the review

Forecasting

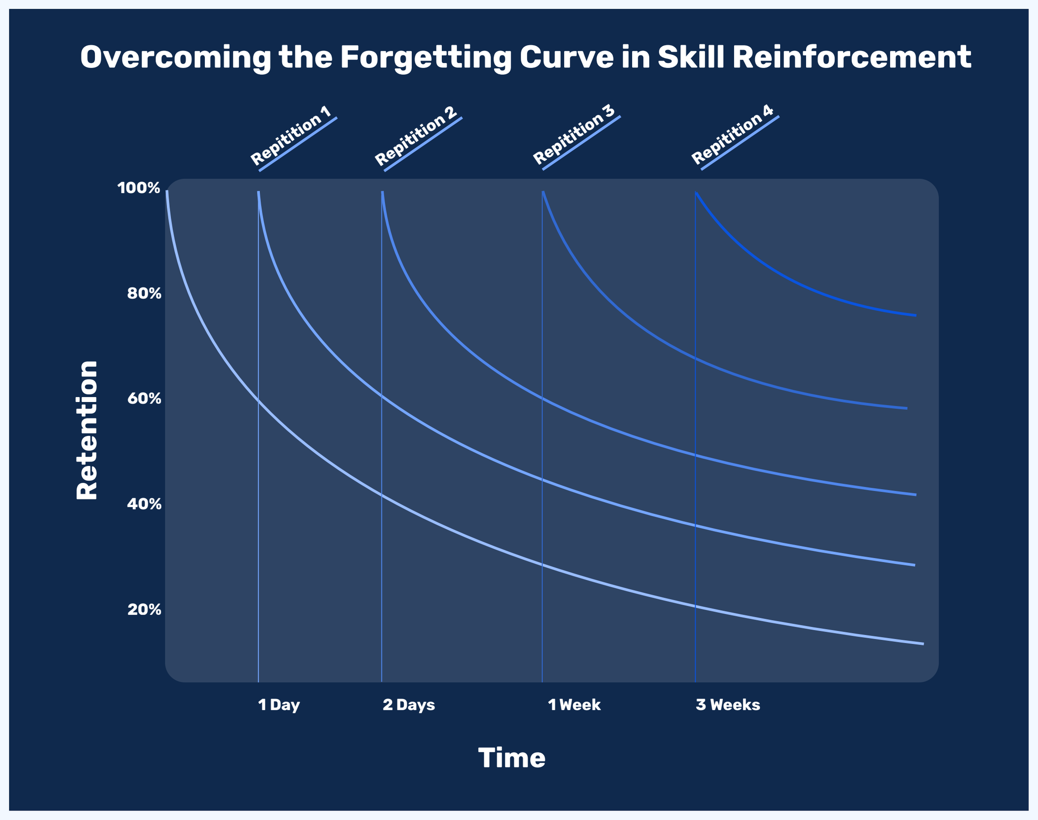
DO
- Define exactly what counts as a committed deal
- Forecast on the same cadence every time
- Reconcile your top-down and bottoms-up numbers

DON'T
- Don't forecast deals your reps don't believe in
- Don't trust a forecast built on messy CRM data
- Don't let one missed call quietly slide to next quarter

Click here to get the Pipeline Insights Questionnaire

We recommend getting your CRO, Head of Sales, and Sales Managers to each fill the questionnaire out on their own, then compare your answers. This will surface more gaps and disconnections in your pipeline management process than just one person doing the exercise on their own.

ADOPTION: Get the whole team executing the process consistently



Training and Enablement

Training shouldn't be a one-time event. A single onboarding session and a playbook is just a starting point. We need ongoing enablement:

- Live training sessions
- Recorded walkthroughs
- 1:1s where reps can ask questions

Pipeline Reporting and Dashboards

Reps and managers both need to see execution and results, so build the views you'll actually run reviews from, not a wall of charts nobody opens. Start with two:

An open-pipeline report:
- Every deal's name
- Amount
- Close date
- Owner
- Sorted largest to smallest
- With next steps and a mutual action plan on each one.

A closed-won report: sorted by source, so you can see where your good pipeline actually comes from.

Don't build reports without context first.

We've wasted hours running reports to surface something the team could have told us in five minutes. Ask the simple questions first, then build the views to confirm what you hear.

The report itself isn't the point. The value comes from blocking time to review it on a cadence.

Regularly Inspect Pipeline

The CRM alone is not enough to enforce process adoption. Management has to inspect the pipeline and individual deals on a consistent basis and coach reps to improve pipeline cleanliness, close rates, cycle times, and deal sizes.

This reinforcement can include:
- Daily or weekly pipeline review
- Weekly forecast meeting with leadership
- A weekly team teardown of one key opportunity
- Weekly 1:1 coaching built on rep's own deal data
- Monthly team win/loss reviews to assess strengths and weaknesses

Here's an example list view on opportunities in SalesForce that you can use to conduct your pipeline reviews:

Opportunities
Pipeline Review

New | Printable View | Assign

12 items • Sorted by Close Date • Filtered by All opportunities - Decision Criteria, Closed • Updated a few seconds ago

Search this list...

	Opportunity Name	Owner Full Name	Stage	Amount	Close Date	Decision Criteria	Decision Process	Next Step
1	GenePoint Standby Generator	Gerry Marletta	Prospecting	$85,000.00	12/30/2024	Cost-effectivenes...	Final decision by CFO a...	Review proposal with CFO on ...
2	University of AZ Portable Generators	Gerry Marletta	Needs Analysis	$50,000.00	12/27/2024	Compliance with s...	CIO and legal review	Provide additional security info
3	Grand Hotels Guest Portable Generators	Gerry Marletta	Value Proposition	$250,000.00...	12/24/2024	Continued ROI	CEO and COO decision	Finalize contracts by 10/20
4	Edge Emergency Generator	Gerry Marletta	Needs Analysis	$75,000.00	12/24/2024	Scalability and gro...	Team discussion with fi...	Initial demo scheduled 11/22
5	United Oil Installations	Gerry Marletta	Negotiation/Review	$270,000.00...	12/22/2024	Price competitive...	CEO sign-off after lega...	Send updated quote by 11/10
6	Express Logistics Standby Generator	Gerry Marletta	Needs Analysis	$220,000.00...	12/22/2024	Increased functio...	CTO approval required	Arrange follow-up call with CTO
7	United Oil Plant Standby Generators	Gerry Marletta	Needs Analysis	$675,000.00...	12/21/2024	Ease of implemen...	Decision made by IT M...	Share product roadmap on 11/...
8	United Oil SLA	Gerry Marletta	Value Proposition	$120,000.00	12/16/2024	Cost savings in su...	Signed off by Procure...	Draft contract to Procurement
9	Edge SLA	Gerry Marletta	Prospecting	$60,000.00	12/11/2024	Pricing and data a...	Head of BI decision	Complete onboarding by 11/01
10	Pyramid Emergency Generators	Gerry Marletta	Prospecting	$100,000.00	12/4/2024	Competitive edge ...	Decision by board	Set up board call for 11/15
11	United Oil Office Portable Generators	Gerry Marletta	Negotiation/Review	$125,000.00	11/26/2024	Enhanced service ...	CEO and CMO approval	Present updated proposal 12/01
12	University of AZ Installations	Gerry Marletta	Proposal/Price Qu...	$100,000.00	11/24/2024	Integration with e...	Signed off by Head of IT	Schedule technical demo on 1...

OPTIMIZATION: Find what's converting and do more of it

Pipeline Management Insights: What to Look For

The data is sitting right there, but nobody has the time or the mandate to dig into it. Dedicate real, protected time for the right person, whether it's the CRO, the VP of RevOps, an analyst, a consultant like us, or a combination, to regularly slice and dice the data.

Where to Look	What to Look For
Cycle length to lose vs. cycle length to win	Losing usually takes about twice as long as winning. Once a deal passes three times your win cycle, it's likely dead. Consider disqualifying it.
Sales cycle against deal size, by segment	A long sales cycle is normal with large, complex deals. However, long sales cycles on small deals might be a symptom of a larger problem (and a threat to reps' selling time).
ASP across reps in the same segment	When your top reps land bigger deals than the rest on the same kind of account, you've found an opportunity to coach the rest, analyze rep capacity, or analyze territories.
SQO volume against close rate	High SQOs with a low close rate usually means the qualification bar is too low and junk is getting in. Low SQOs with a high close rate is an opportunity to invest more in TOFU.
Stage-to-stage conversion and time in stage	The stage with the steepest drop-off is where your process or methodology is weakest. A spike in time-in-stage should be investigated.
Losses split by reason: no-decision vs. competitor	Losing to "no decision" is a qualification and urgency problem. Losing to a competitor is a differentiation problem. Both are important insights to flag.
Contacts per open deal against deal size	Big deals running on a single contact are risky, no matter how good they feel. Flag complex deals in the CRM to be multi-threaded to push reps in the right direction.
Close dates that have slipped, counted per deal	A deal that's slipped two or more times is almost never closing this quarter. Treat repeated slips as a disqualification signal.
Required-field and next-step completion	This is a strong leading indicator of pipeline management health. When completion slips, your forecast and insights are less reliable.
Pipeline source by closed-won and cycle time	A source that generates the most pipeline might close the slowest or the least often. Focus resources on the source that produces revenue, not just pipeline volume.
Close rate sliced by segment, compared to expansion revenue and LTV by segment	The segments that close the most aren't always your best segments. Cross-reference this data with expansion opps/revenue, product adoption success, and LTV. If there's a segment you win less of, but expands the most and stays the longest, focus resources on that segment to improve targeting and close rates.
Commit accuracy: deals marked commit vs. what actually closes	If the deals you're most sure of only close 70% of the time, you can't defend the number to your CFO. You want one agreed definition of commit, so the forecast holds every quarter.

Forecasting Methods

With accurate pipeline data, we can move into a regular forecasting cadence. This relies on and further reinforces everything above, as we think carefully about our pipeline and what we can expect to close.

These are three common methods:

Weighted Forecast	Bottoms-Up Forecast (recommended)	AI Forecast
Assign a close-rate % to each stage, run the math	Deal-by-deal analysis, reps rolling up to leadership	AI projects outcomes from historical patterns
Fast and simple, but limited	Forces reps and managers to judge each deal critically	Needs large, highly accurate data sets to work
Good for an early baseline	Best primary method for most teams	Use as a cross-check, not your only method

GTM Council

The GTM Council brings together leaders from marketing, sales, customer success, and sometimes finance and product. This is a regular meeting, weekly or biweekly, where data-driven insights are presented to leaders and decisions are made about where to invest, what to change, and what to double down on.

Sample GTM Council Agenda Topics

RevOps	Marketing	Sales	Misc.
Status of pipeline - change over time	Current demand generation forecast	Current forecast with changes	Confirm goals and pacing and make any adjustments needed
Weighted value vs. forecast - any gaps?	Report out on marketing results for demand	Any deals that need help / support	Any special topics that have been set aside
Action items from last call	Sales Development read out on productivity and needs	Report out on sales activity and prospecting	Review action items gathered during the call
Any general FYI for system / process changes	Update on marketing activities coming up	Partnerships updates	
	Discuss any SLA violations / handoff issues / qualification concerns	Any requests or concerns	
	Seek input from sales as needed		

Who Should Be in the Room

RevOps Leader (Leads Meeting)
Sales Lead
Marketing Leader
CS Leader
Product Leader
Finance Leader
Partnerships Leader (If Applicable)
CRO (Usually in the beginning to oversee, can opt out once things are moving smoothly)

AMPLIFICATION: Layer AI on top of what's already working

With the foundation in place, a team executing consistently, and a regular process for analyzing and acting on the data, we can start to layer AI and automation into our pipeline management process. AI and automation amplify what's already in place, whether it's working or not. The foundation has to be there first.

Here are three of our favorite use cases.

AI-Run Pipeline Reviews

Best Way to Implement	Have it build your open-pipeline view and surface the risk signals. Example: no next step booked, single-threaded, gone quiet, close date slipping, etc. Send it to reps ahead of time so they show up ready instead of getting grilled live.
Risks	AI can flag the deals but it lacks context and nuance. Don't lean on it too hard. If your stage criterias are inconsistent or your close dates are stale, the AI will confidently call a dead deal healthy
Tools	Gong, Clari Labs, einstein, BoostUp

Automated CRM Updates

Best Way to Implement	Decide what you need on each deal first (qualification fields, deal risks, next step), then let AI populate it from the activity it can already see.
Risks	This one is meant to clean up your data, but it can corrupt it just as easily. AI can log a next step nobody agreed to, or make a deal look healthier than it is. Spot-check what it writes, and keep reps owning what's on their deals.
Tools	people.ai, Avoma, einstein, Gong

Removing Internal Friction

Best Way to Implement	Walk one deal end to end and write down every handoff, approval, and manual data step. Automate the busywork (list-matching, data prep, reminders, handoff triggers) and leave the judgment calls to the humans.
Risks	Some of that friction is there on purpose. You don't want to automate away a check that was catching bad deals. Cut the busywork, keep the checks that protect your margin.
Tools	Flows, salesforce, Chili Piper, LeanData, n8n

Listen to Our Top Podcast Episodes on GTM AI

- The AI Mistakes CROs Keep Making with Jonathan Kvarfordt
- 30% Higher ACV by Fixing Foundations and Layering AI with Duane Dufault
- The State of GTM AI with Craig Rosenberg

GTM SCIENCE by UNION SQUARE CONSULTING

Call your number. Hit it. Then go bigger.

UNION SQUARE CONSULTING

We help CROs build GTM Engines that make their number repeatable.

Walk into Q4 knowing the quarter is already loaded: outbound ran all of Q3 on a defined process; pipeline came in at real coverage; the forecast you called in September is within 5% of what you're closing in December.

Your team didn't need you in every deal. The process ran. And the data calls for raising guidance for Q1.

Contact us today, and we'll show you the roadmap and timeline to get you there.