Pipeline review agenda and inspection sheet

Turn three opportunity updates into clear decisions and evidence-producing next steps.

Your reusable working template 1/2

> **1.** Prepare routine updates before the meeting; select three changed or uncertain opportunities.
> **2.** Use five minutes for overview, twenty for exceptions and five for decisions as an initial 30-minute pilot agenda.
> **3.** Distinguish direct evidence, interpretation and unknowns in every row.
> **4.** At the next review, inspect the promised evidence before discussing new actions. Adapt age thresholds to comparable opportunity types.

Opportunity, owner, amount and basis

Current stage, entry date and required buyer evidence

Latest buyer-confirmed evidence: source and date

Expected closing date and customer milestone supporting it

A practical Tibyan working aid, not a validated assessment. Example is hypothetical; adapt decisions and figures to your context. Do not enter sensitive information in a shared copy.

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Turn three opportunity updates into clear decisions and evidence-producing next steps.

Your reusable working template 2/2

Change since last review: amount, timing, access or scope

Unresolved buying or delivery dependency

Decision: retain, revise, support, pause or close

Next agreed action, owner, intended evidence and review date

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Completed hypothetical example 1/2

Opportunity, owner, amount and basis

Factory A maintenance-analytics pilot; Lina; 100,000 currency units, scope estimate.

Current stage, entry date and required buyer evidence

Proposal stage; entered 1 October; customer must confirm scope and approval path.

Latest buyer-confirmed evidence: source and date

Operations manager accepted demo relevance on 20 October; approval path unknown.

Expected closing date and customer milestone supporting it

Month-end date unsupported; security review has not started.

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Completed hypothetical example 2/2

Change since last review: amount, timing, access or scope

Security review postponed; procurement route unconfirmed.

Unresolved buying or delivery dependency

Technical owner must define security-review requirements.

Decision: retain, revise, support, pause or close

Retain opportunity; remove unsupported month-end date and exclude from the current-period forecast until customer timing is confirmed.

Next agreed action, owner, intended evidence and review date

Lina to arrange technical scoping call; specialist supplies data-flow outline; inspect agreed requirements at next weekly review.

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