

Pipeline Tracker

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Use this sheet to track pipeline across the sales team.

This example covers Q1, but you can copy & paste it to recreate it for Q2, Q3, and Q4.

You can copy the formulas we've used to make the calculations even easier.

Happy selling!

Organization name	Prospect name	Rep name	Deal size	Deal probability	Adjusted forecast	Pipeline stage	Estimated close	Action points	Notes
Example Inc.	John Doe	Steve Douglas-Rogers	\$1,000,000	70%	\$700,000	Demo	1/1/2023	Confirm availability	Ask Dave about one-pager
Template & Sons	Jane Doe	Bill David-Roberts	\$275,000	55%	\$151,250	Qualification	2/2/2023	Send discussed content	N/A
New Co.	Richard Roe	Alan Eastwood	\$535,000	85%	\$454,750	Proposal	3/3/2023	Ask Jen about contract	Potential holdup
Totals			\$1,810,000		\$1,306,000				