

Enterprise Edition

# CRM Pipeline Setup Guide

*Build the minimum pipeline discipline required to recover revenue.*

The system matters more than the software. A spreadsheet can work at low volume, but the operating rules below should stay true no matter which CRM or tracker you use.

## Recommended stages

| Stage         | What it means                 | What must happen next                                             |
|---------------|-------------------------------|-------------------------------------------------------------------|
| New Lead      | Lead entered the system       | Assign an owner and create the first response task immediately.   |
| Contacted     | First touch completed         | Track response time and confirm whether the lead is reachable.    |
| Qualified     | Lead is a fit                 | Confirm intent, fit, and the likely next step.                    |
| Booked        | Call or appointment scheduled | Send confirmation and reminder coverage before the meeting.       |
| Showed        | Lead attended                 | Document the conversation and prepare the proposal or close path. |
| Proposal Sent | Offer is out                  | Trigger a follow-up cadence with a next action date.              |
| Won           | Client purchased              | Attach the original lead source and deal value.                   |
| Lost          | No deal closed                | Capture the reason lost for future review.                        |
| Nurture       | Not now, but still viable     | Set a future follow-up date so the lead does not disappear.       |

## Required fields

| Field                            | Why it matters                                                              |
|----------------------------------|-----------------------------------------------------------------------------|
| Lead source                      | So you can evaluate which channels actually create revenue, not just leads. |
| Campaign, ad, or referral detail | So paid sources and referral partners can be judged accurately.             |

|                            |                                                                                      |
|----------------------------|--------------------------------------------------------------------------------------|
| <b>First response time</b> | So you can see whether lead capture and speed-to-lead are breaking early conversion. |
| <b>Owner</b>               | So every lead clearly belongs to someone.                                            |
| <b>Booked date</b>         | So attendance and scheduling patterns can be reviewed.                               |
| <b>Show status</b>         | So no-show behavior is visible and recoverable.                                      |
| <b>Deal value</b>          | So CAC, revenue per lead, and source quality can be reviewed correctly.              |
| <b>Reason lost</b>         | So you can identify whether the problem is fit, pricing, timing, or follow-up.       |
| <b>Next action date</b>    | So leads do not stall without a defined next move.                                   |
| <b>Last touch date</b>     | So follow-up recency is visible during review.                                       |

## Operating rules

- Every lead gets an owner.
- Every lead gets a next action.
- Every no-show receives a same-day recovery attempt.
- Every proposal receives a follow-up cadence instead of one isolated send.
- Every won client keeps the original source attached.
- Every week, source-to-sale performance gets reviewed before spend is changed.

### Minimum tool stack

A spreadsheet can work at first.

A CRM becomes the better choice as lead volume increases.

The system discipline matters more than the software brand.