FOR SALES LEADERS WHO RUN WEEKLY REVIEWS

How to prep a pipeline review with one sheet per rep

A per rep sheet with 4 CRM flags and a rules box where you set your own definitions. Print one per rep.

> Write down what stale means on your team before the review. Then tick 4 flags per deal from the CRM and turn each flag into a question for the rep.

YOUR RULES

Write your own definitions first

A DEAL IS STALE AFTER THIS MANY DAYS WITH NO TOUCH

A CLOSE DATE IS SUSPECT WHEN

A DEAL NEEDS A NEXT STEP BY

DEALS LARGER THAN THIS GET A SECOND LOOK

PREP SHEET

One rep, one sheet

REP

REVIEW DATE

OPEN DEALS

DEAL (LABEL ONLY)	NO NEXT STEP	CLOSE DATE PASSED	NO TOUCH PAST YOUR RULE	STAGE UNCHANGED	QUESTION FOR THE REP

SAMPLE ROW, EXAMPLE DATA ONLY

Deal: clinic supply renewal. Close date passed. Question: what changed with the buyer's timeline?

WEEKLY DIGEST

Outline for the team summary

- Deals that moved stage this week
- Deals flagged and the question asked
- Close dates that changed
- Help a rep asked for

Each flag is a question for the rep. Ask it before you decide what the deal is.

YOUR HOURS

Reporting hours you count yourself

Type your own counts and minutes. Nothing is saved.

Review prep, one per rep

How many a week	Minutes each by hand	Minutes to check a ready summary (your guess)

Weekly team summary

How many a week	Minutes each by hand	Minutes to check a ready summary (your guess)

Asking reps for deal updates

How many a week	Minutes each by hand	Minutes to check a ready summary (your guess)

Reading call notes before reviews

How many a week	Minutes each by hand	Minutes to check a ready summary (your guess)

WHAT THIS SHEET LEAVES FOR YOU

Filling this sheet for every rep, every week, is still on you.

PR MODE sets up the Pipeline hygiene and Weekly pipeline recap for leaders workflows from the CRM you already use. They flag the gaps and prepare a recap before the meeting. You

review what goes to the team. Read the sales leader workflows.

PR MODE guide. prmode.ai/guide-pipeline-review-prep-sheet