FOR SALES PROS WHO OWN THEIR PIPELINE

How to find the deals that went quiet in your pipeline

A 4 number check you run on your own pipeline, then a one page plan you can print for this week.

> Pull 2 lists from your CRM: open deals with no next step, and open deals with no touch inside a cutoff you pick. Write one next step for each and book one review slot a week to keep the list short.

THE CHECK

Count your quiet deals

Use the counts from your CRM filters. You pick the cutoff. Fields start empty.

Open deals you own	Deals with no next step written
Your cutoff in days	Deals with no touch inside your cutoff

THE PLAN

One page plan for this week

STEP	WHAT TO DO	WRITE IT HERE
1. Sort	List every deal from B and C, nearest close date first. A deal in both counts goes on once.	
2. One next step each	A question or a document they asked for, with a date	
3. Send or call	Use the channel the buyer uses with you	
4. Book a weekly slot	Same day and time each week to rerun the check	

DEAL (LABEL ONLY)	LAST TOUCH	NEXT STEP	DATE

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SAMPLE ROW, EXAMPLE DATA ONLY

Deal: warehouse racking quote. Last touch: quote sent. Next step: ask if the delivery date still works. Date: Thursday.

ONE EASY QUESTION

Follow up questions that need a short answer

Does the date in the quote still work for you?
Is anyone else reviewing this that I should send it to?
Would a smaller first order be easier to approve?
Should I close this out for now and check back next quarter?

EXAMPLE WORDING ONLY

YOUR HOURS

After call hours you count yourself

Type your own counts and minutes. Nothing is saved.

Call notes

How many a week

Minutes each by hand

Minutes to check a ready draft (your guess)

Follow up emails

How many a week

Minutes each by hand

Minutes to check a ready draft (your guess)

CRM updates

How many a week

Minutes each by hand

Minutes to check a ready draft (your guess)

Research before meetings

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

WHAT THIS SHEET LEAVES FOR YOU

The follow ups and CRM updates are still yours to write.

PR MODE sets up the Follow up drafts and Call and demo recap workflows, which prepare each follow up and each CRM recap for your check. You approve every message before it goes. Read the sales pro workflows.

PR MODE guide. prmode.ai/guide-quiet-deal-check