# Simple Sales Pipeline Template

A free one-page guide for small businesses. Use it with the CSV template or any spreadsheet.

## Suggested stages

| Stage | What it means | Exit criteria (move on when...) |
|---|---|---|
| 1. New | A lead has just come in (call, walk-in, referral, form). | You have a name, phone number and source logged. |
| 2. Contacted | You have reached the lead at least once. | You know their need, and a next step is agreed. |
| 3. Qualified | They have a real need, budget and a decision-maker you can reach. | They ask for a quote, demo or visit. |
| 4. Proposal sent | You have shared a price, quote or offer. | They accept, negotiate, or say no. |
| 5. Won | They have agreed to buy. | Order or payment is confirmed; schedule delivery. |
| 6. Lost | They decided not to buy, for now. | Reason noted; optional follow-up date set to revisit. |

## How to use it

1. Copy the CSV template (krolead-sales-pipeline-template.csv) into Excel or Google Sheets and delete the example rows.
2. Add every new lead the same day, with its source.
3. Give every lead one next action and a follow-up date. No date means the lead will go cold.
4. Review the sheet daily: sort by follow-up date and act on what is due or overdue.
5. Move a lead to the next stage only when it meets the exit criteria.
6. Each week, count leads per stage to see where deals get stuck.

## Want this on your phone?

KroLead is an Android CRM for small businesses that lets you organize leads, keep call notes, set the next step and manage follow-ups. Get it on Google Play:

https://play.google.com/store/apps/details?id=com.leadbano.crm&referrer=utm_source%3Dblog%26utm_medium%3Dseo%26utm_campaign%3Dpipeline-template

*Example data in the CSV is fictional. Template provided free by KroLead.*