Lead Tracker & CRM Decision Worksheet

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Use one row per sales opportunity. Keep contact details and sensitive notes in an appropriately restricted system. Dates: YYYY-MM-DD. Potential values: USD, not recognized revenue.

Weekly pipeline review

Review date: _____ Team / business: _____ Reviewer: _____

Opportunity ID / organization	Contact / source	Stage	Owner	Next action / due date	Last contact / brief note	Potential value USD

Suggested stages: New enquiry → Qualified → Proposal sent → Decision pending → Won / Lost. Record actual outcomes separately; do not add potential values to booked revenue.

Keep, repair or pilot?

1. Does every active opportunity have one owner and a dated next action? _____
2. Can an authorized colleague understand the current customer history? _____

3. Which repeated handover or reporting problems remain after fixing working rules? _____
4. Current administration hours per month: ____ × assumed hourly value $____ = $____
5. Proposed CRM monthly licenses $____ + administration hours ____ × $____ + other charges $____ = $____
6. One-time setup / migration / training hours ____ × $____ + outside fees $____ = $____
7. Pilot success criteria, owner and review date: _____

Decision: Keep / Repair / Pilot **Reason:** _____

Original practical worksheet, October 29, 2026. Not a validated assessment. Print and write on the sheet; this HTML file does not store entries or submit data.