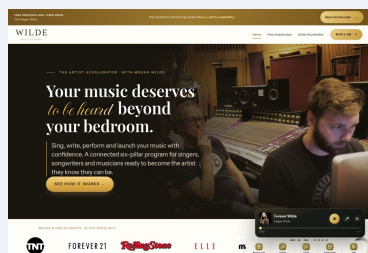


Design a useful sales pipeline

Use stages that reflect real progress rather than wishful thinking.



FROM THE SETLY PROJECT LIBRARY

A real project screenshot for visual inspiration. Follow the written steps for your own business.

YOUR ACTION PLAN

- 1 Define the observable condition for entering each stage.
- 2 Keep stages few enough that the team uses them consistently.
- 3 Assign an owner and next action to every open opportunity.
- 4 Create a separate reason for lost or closed enquiries so reporting stays meaningful.

EXAMPLE - ILLUSTRATIVE

Quote Sent means an actual quote was delivered, not that someone intends to write one.

CHECK YOUR RESULT

Could two team members classify the same enquiry consistently?

Design a useful sales pipeline

Use the prompts below to make this resource specific to your business. Save a local copy after completing it. Keep passwords and private customer data out of this worksheet.

Stage:

Entry condition:

Owner:

Next action:

Exit condition:

DONE WHEN

Could two team members classify the same enquiry consistently?

FURTHER READING

[HighLevel Support](#)

Independent Setly planning resource. Platform settings and requirements can change; use the linked official help for current configuration details.