No. 19

Sales Pipeline & Account Planner

See what the pipeline is really worth, which deals need a decision this week, and whether coming months will hit target.

Built for: Directors of sales, catering and events managers, and owners selling groups, events or B2B contracts.

What is included

File	Format	Use
Sales-Pipeline-Workbook-Blank.xlsx	Excel	Start here: formatted, formula-ready workbook for your own data.
Sales-Pipeline-Workbook-Sample.xlsx	Excel	Same model filled with fictional sample data.
Sales-Pipeline-Account-Planner.html	Interactive dashboard	Optional: opens in Chrome, Edge or Safari on a computer or tablet. Runs without internet; data stays in that browser.
sales-pipeline-account-planner-guide.pdf	PDF	This guide.
LICENSE.txt, START-HERE.txt	Text	License terms and quick start.

Quick start

1. **Start with Excel.** Open **Sales-Pipeline-Workbook-Blank.xlsx** and enter your own data in the blue cells; every other cell calculates. The **-Sample** workbook shows a filled-in example.
2. **Use Google Sheets?** In Google Drive choose New › File upload, then open the workbook with Google Sheets. Formulas carry over; charts may need restyling.
3. **Optional interactive dashboard:** open **Sales-Pipeline-Account-Planner.html** in Chrome, Edge or Safari on a computer or tablet. It runs offline and opens with fictional sample data — choose **Start blank** when you are ready.
4. The dashboard saves entries only in that browser on that device. Use **Save backup** regularly; **Restore** loads a backup elsewhere.

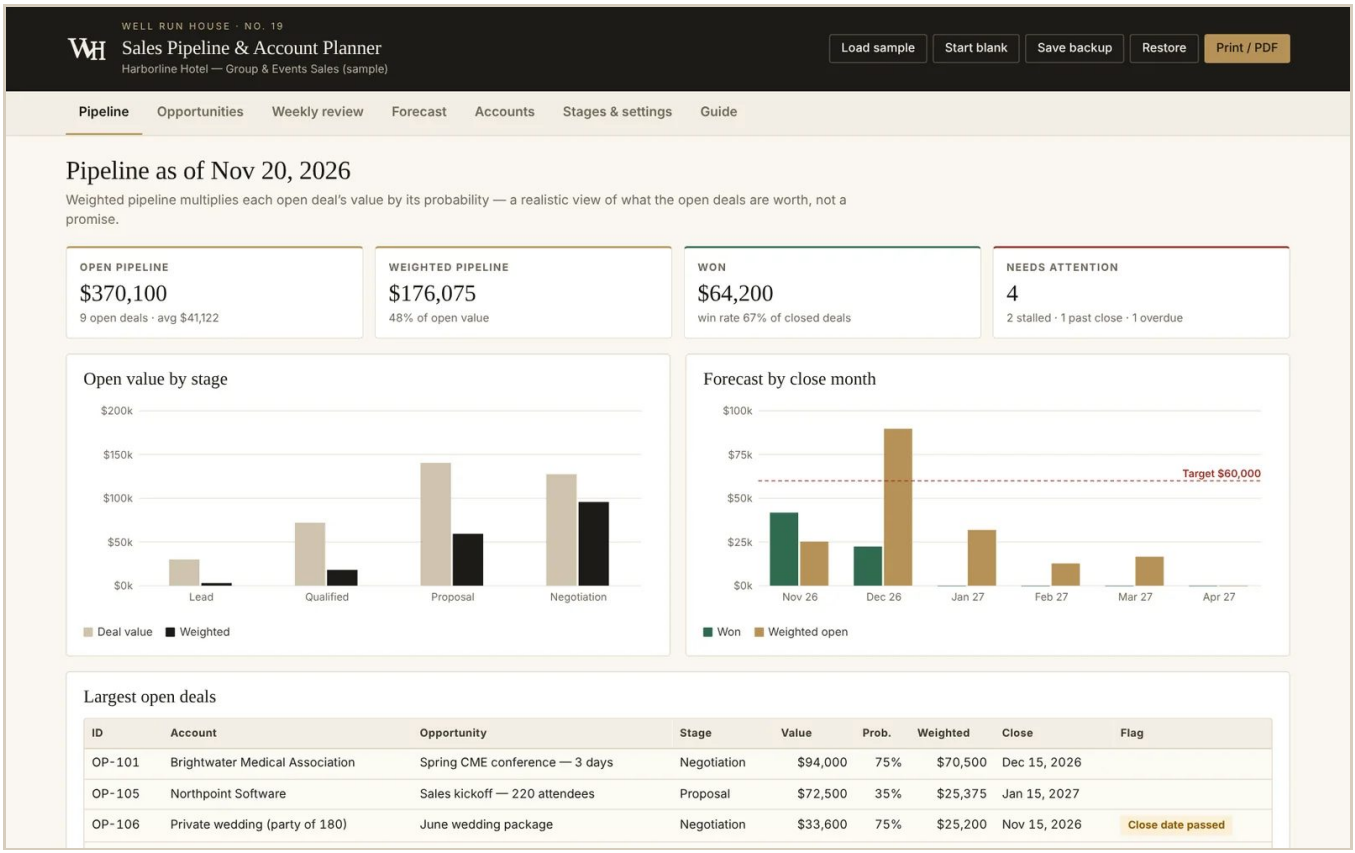
Operating routine

1. **Qualify buyer need** before a deal enters the pipeline.
2. **Confirm the decision maker and next step**; every open deal carries a dated next action.
3. **Update stage probability** as deals move; override only with evidence.
4. **Review the forecast and stalled deals** weekly.
5. **Close out lost deals** promptly so the forecast stays honest.

Sample — the full product includes the Excel workbook, interactive dashboard and complete guide

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Two screenshots from the product, taken with its fictional sample data.



Interactive dashboard — Pipeline overview

	A	B	C	D	E	F	G
1	Pipeline dashboard						
2	*All values are formulas.*						
3				**Stage**	**Deals**	**Value**	**Weighted (open)**
4	**Open pipeline**	$370,100		Lead	2	$30,000	$3,000
5	**Weighted pipeline**	$176,075		Qualified	2	$72,000	$18,000
6	**Won**	$64,200		Proposal	3	$140,500	$59,375
7	**Lost**	$15,500		Negotiation	2	$127,600	$95,700
8	**Win rate (deals)**	67%		Won	2	$64,200	$0
9	**Stalled deals**	2		Lost	1	$15,500	$0
10	**Close date passed**	1					
11	**Next action overdue**	1					