revenuejuice

90-day Pipeline Optimization Checklist

Week 1: Initial Data Gathering

- Look at current pipeline data
- Export 2024 win/loss data
- List all sales tools and integrations
- Schedule team review meeting
- Document top 3 pipeline metrics

Weeks 2-4: Analysis & Planning

- Review win/loss patterns
- Map current sales process flow
- Identify process gaps
- Document tech stack capabilities
- Define success metrics for 2025

Weeks 5-8: System Setup

- Configure pipeline health alerts
- Build core dashboards:
  - Pipeline velocity
  - Deal health scores
  - Activity tracking
  - Conversion rates
- Set up lead scoring rules
- Test all automation workflows
- Implement data quality checks

Weeks 9-12: Launch & Optimization

- Train team on new processes
- Begin tracking new metrics
- Monitor scoring model accuracy
- Fine-tune automation rules
- Set up weekly review cadence
- Document baseline metrics for 2025