

WEEKLY OPERATING CHECKLIST

Weekly pipeline report checklist

Turn pipeline signals into explicit decisions, accountable owners and next actions.

1. Define the review

- ☐ Reporting period is explicit.
- ☐ Segments, teams and pipeline scope are explicit.
- ☐ Stage definitions match the governed CRM process.
- ☐ Known source-data limitations are listed.

2. Ground the source data

- ☐ Every opportunity has a unique record and valid owner.
- ☐ Stage and stage-history inputs are available.
- ☐ Amount, expected close and currency follow team rules.
- ☐ Next step is specific, owned and dated.
- ☐ Unknown or unreliable values remain visibly unknown.

3. Document the KPI dictionary

- ☐ Each KPI has a written definition.
- ☐ Scope and exclusions are explicit.
- ☐ Source fields are named.
- ☐ Refresh cadence is known.
- ☐ The decision supported by each KPI is stated.

4. Build the action table

For every material signal, record:

Evidence	Required decision	Accountable owner	Next action	Due date	Status at next review

5. Run the weekly agenda

1. Confirm scope and data limitations.

2. Decide on material coverage gaps.
3. Review stage movement, stalls, slips and exits.
4. Resolve the exceptions that need judgment.
5. Record owners, next actions and due dates.
6. Close the loop on last week's incomplete commitments.

6. Final quality check

- ☐ The report highlights material change since the last review.
- ☐ No metric appears without a decision it informs.
- ☐ Signal, human judgment and action are kept distinct.
- ☐ Every exception has an owner and next step.
- ☐ The next review can show whether commitments were completed.

RevTech provides fully managed AI agents for GTM. RevTech runs the agents; customers govern them.

RevTech provides fully managed AI agents for GTM: RevTech runs the agents, your team governs them. This worksheet accompanies revtech.ai/blog/pipeline-report and is an operating template, not legal, regulatory or security advice.