



MSP Pipeline Review Checklist

A 30-minute starting point for a more honest pipeline conversation. Review five material opportunities with the deal owners. Tick only where there is current customer evidence; leave assumptions unticked.

☐ **A clear reason to change**

Can we describe the business problem in the customer's words, the impact of doing nothing and why they would act now?

☐ **An understood buying process**

Do we know the decision owner, technical and procurement stakeholders, approval steps and how the customer will fund the decision?

☐ **A real contract or renewal window**

Have we confirmed the incumbent contract end date, notice deadline and a credible decision date? Is the close date the customer's, or ours?

☐ **A viable managed service proposition**

Are scope, recurring fees, contract term, transition costs and expected margin understood? Have delivery colleagues checked capacity and dependencies?

☐ **A clear vendor and channel position**

Where relevant, are partner roles, deal registration, vendor pricing and distributor dependencies clear? Do we know who owns the customer relationship?

☐ **An agreed next step**

Is there a dated action the customer has agreed to take, with a named owner? Can we explain what evidence justifies the current CRM stage?

Evidence beats confidence.

An unticked box is a coaching question, not a judgement on the salesperson. A smaller, better understood pipeline is more useful than a larger one nobody trusts.



Turn the review into action.

Choose the few changes that will make the next forecast more dependable. Work with the team to close evidence gaps, rather than adding fields nobody uses.

Separate pipeline from forecast

Keep development opportunities visible, but do not treat them as committed revenue. Agree what must be true for each forecast category.

Check movement, not just total value

Look at stage age, repeated close-date changes and missing customer actions. Separate recurring service revenue from project revenue and check expected margin.

Choose the right next action

For each reviewed deal: progress it, gather missing evidence, nurture it for later, or close it out. Give each action an owner and review date.

Your next review

One qualification rule we will tighten:

One opportunity that needs an honest decision:

One change to the next forecast meeting:

Owner and review date:

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