

Pipeline Stages + Definitions (Simple)

Use these stages in your tracker (and keep them consistent).

Stage	Definition (what it means)	Exit criteria (when it moves)
New Enquiry	A lead has come in but hasn't been qualified yet.	You've made first contact and captured the basics.
Qualified	It fits your services; timeframe and budget are plausible.	Discovery notes completed; agreed next step.
Quote in Progress	You are scoping/pricing and preparing the quote.	Quote ready to send (or presented).
Quote Sent	The customer has received the quote/estimate.	Next action scheduled (follow-up date set).
Negotiation / Decision	Customer is deciding; questions/changes being handled.	Decision given OR close date passed.
Won / Booked	Work is approved and scheduled (or deposit received).	Job booked into schedule (or PO received).
Lost	Customer did not proceed (or you declined).	Reason recorded (price/timing/competitor/no response/etc.).
Nurture / Later	Not ready yet; keep warm for 30–180 days.	Next contact date set (and value touchpoints).

Close reasons (record one)

- Price
- Timing
- Chose competitor
- No response (ghosted)
- Not a fit (we declined)
- Other (note)