

Sales pipeline review and forecast meeting template

Time	Topic	Lead	Desired outcome/focus
5 min	Win & loss review	Facilitator	Celebrate major wins; briefly review key takeaways from recent losses.
20 min	Pipeline deep dive	Sales Reps	Focus on 3–5 high-value, near-term deals. Identify blockages and immediate next steps.
10 min	Forecasting review	Manager	Confirm forecast commitments and identify risks/opportunities to the quarterly goal.
5 min	Skill huddle	Manager	Quick training on a single, tactical skill (e.g., handling a specific objection or new feature pitch).
5 min	Next steps	All	Clarify individual action items, assign follow-ups, and confirm the next meeting date.