Puro Trading

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Pipeline worksheet

Describe how an enquiry moves through your team today. Short notes are enough. Do not include customer records, personal data about your customers, or passwords.

1. Your business

Company

Your name

Email

People who sell

2. Tools you use today

CRM

Spreadsheets

Email and calendar

Other

3. Where enquiries arrive

4. Your stages today

#	Stage	Entry condition	Owner	Next action
1				
2				
3				
4				
5				
6				

5. Where does follow-up break down?

6. Who can decide how stages work?

Send the completed sheet to info@purotradingco.com. Sending it does not create an engagement; work starts only after a written proposal is accepted. Puro Trading LLC implements sales systems. It is not a trading, brokerage or investment firm.