

Default SDR Deal Pipeline + Stage Evidence

A generic, vendor-neutral pipeline for B2B SDR work. Use it as the default in your CRM if you don't have a team-agreed equivalent.

The pipeline has **five active stages plus two terminal stages**. Every stage carries an explicit **evidence requirement** — the artifact that must exist before a deal is allowed to enter or stay in that stage. This is what the chapter calls the *evidence test for stage integrity*.

Sales-motion note: This default leans toward **considered B2B sales** (multi-step deals with documented qualification, written proposals, and signed agreements).

Transactional or high-velocity SMB motions may collapse *Qualified + Proposal* into a single stage and skip *Verbal Commit* entirely. Adapt the stages to your motion — the evidence-test logic stays the same.

Active stages

Order	Stage	Stage-entry evidence (what must exist before you place or keep a deal here)
1	Discovery	Notes from a real discovery call (or substantive discovery email exchange) with the prospect. Cold-list contacts who haven't responded do not belong here — they belong in the prospecting list, outside the pipeline.
2	Qualified	A documented match against your team's qualification criteria (e.g., BANT, MEDDIC, or your own framework). At minimum: confirmed budget range, identified decision-maker, recognized need, plausible timeline.
3	Proposal	A proposal or quote document has been sent to the prospect. The document itself (or a link to it) is attached to the deal record.
4	Negotiation	At least one round of back-and-forth on terms (price, scope, contract clauses) is in writing on the deal record. A verbal "we're talking about it" does not qualify.

5	Verbal Commit (optional)	The prospect has explicitly committed verbally or in writing to proceed, but signature is pending. Use only if your sales motion routinely has a gap between commitment and signature.
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Terminal stages

Stage	Stage-entry evidence
Closed Won	A signed agreement is attached to the deal record. A verbal yes, an email saying "we're going ahead", or a purchase order without signature do not qualify on their own — they may justify <i>Verbal Commit</i> , but Closed Won requires the executed document.
Closed Lost	A documented reason: prospect's written "no", competitor selection, no-decision after a defined inactivity period, budget cut, etc. Reason category should be selected from a fixed list (see "Required Properties").

Stage hygiene rules that follow from the evidence test

- **Stage demotion is normal and healthy.** If the evidence for the current stage doesn't exist, demote the deal to the highest stage where evidence does exist. Demotions hurt the optimistic view of the pipeline; they don't hurt the pipeline itself.
 - **Stage promotion requires the evidence.** Don't promote a deal to *Proposal* before the proposal is sent — promote it the moment it goes out, and not before.
 - **Stage skipping is allowed if the evidence supports it.** A self-served prospect who walks in already qualified can move from *Discovery* directly to *Proposal* if the proposal is sent and the qualification evidence exists. Skipping for narrative neatness is not allowed.
 - **Closed Won is final only when the agreement is signed and counter-signed.** If a "signed" deal turns out to have been signed only by your side, demote it back to *Negotiation* (or *Verbal Commit* if you use it) until counter-signature lands.
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How to map this to your CRM

CRM	Where to configure the stages
HubSpot Free	<i>Settings → Objects → Deals → Pipelines</i> . Use the default deal pipeline. Replace the default stages with the five active stages above. The terminal stages already exist as <i>Closed Won</i> and <i>Closed Lost</i> .
Salesforce	<i>Setup → Object Manager → Opportunity → Stages</i> . Replace or extend the default stages.
Pipedrive	<i>Settings → Pipelines and stages</i> . Edit the default pipeline's stages.
Zoho CRM	<i>Setup → Customization → Modules → Deals → Stages</i> . Edit.
<i>Any CRM where the free tier locks stage names</i>	Map each of the five stages above to the closest existing stage your tier allows, and document the mapping in your team wiki (or in a Notes field on the pipeline itself). The evidence-test logic still applies — it just runs against your CRM's chosen labels.

The names above are vendor-neutral. If your team uses different stage names ("Lead", "Opportunity", "Close-Pending"), adapt the labels. The underlying evidence-test logic is what matters and what transfers across CRMs.