

This file describes the structure of [weekly-pipeline-report-template.xlsx](#) so that you know what each column means and how to fill in the rollup section.

---

## Header row (columns)

Column	Type	Source from your CRM export	Notes
<b>Deal name</b>	Text	<i>Deal name</i> property	Convention: <i>[Company] — [opportunity in 3-5 words]</i> .
<b>Company</b>	Text	<i>Company</i> property (or associated Company record name)	If your CRM uses the association rather than a free-text field, export the associated company name.
<b>Owner</b>	Text	<i>Owner</i> property	Real user; orphan rows are a hygiene defect.
<b>Pipeline</b>	Text	<i>Pipeline</i> property	One value when you have a single-pipeline setup (HubSpot Free); multi-value if you run multiple pipelines.
<b>Stage</b>	Text	<i>Stage</i> property	Must match one of the active stages defined in "Pipeline and Stages". Closed-stage rows are excluded by the saved view filter (the chapter's S3 step 1).
<b>Amount</b>	Currency	<i>Amount</i> property	Blank cells are a hygiene defect. Chase before publishing.
<b>Probability</b>	Percentage	Stage-derived percentage (or your team's agreed table)	If your CRM auto-derives this from stage, export it; if not, fill from a stage-to-probability table you maintain.
<b>Weighted amount</b>	Currency	Formula: <i>Amount</i> × <i>Probability</i>	XLSX formula in row 2 onwards: <i>=F2*G2</i> .
<b>Close date</b>	Date	<i>Close date</i> property	Drives the time-bound rollups.

<b>Last activity date</b>	Date	Auto-tracked in most CRMs (HubSpot, Salesforce, Pipedrive)	Drives the recency hygiene rule.
<b>Days since last activity</b>	Number	Formula: <code>TODAY() - Last activity date</code>	XLSX formula in row 2 onwards: <code>=TODAY()-J2</code> . Highlights stale deals.
<b>Next step</b>	Text	<i>Next step</i> property	The single most predictive deal-health signal.
<b>Stage-entry evidence on file</b>	Text or checkbox	Manual annotation by SDR before publishing	Fill <code>Y / N / partial</code> per the evidence test in "Pipeline and Stages". Any <code>N</code> row should have been demoted before this report runs — flag any remaining <code>N</code> rows.
<b>Notes</b>	Text	Manual annotation by SDR before publishing	Free-text caveats your manager needs to interpret the row.

---

## Rollup section (rows below the deal list)

The rollup section sits below the deal list. The CSV ships with placeholder formulas in the SUM cells so XLSX-converters know where to apply them; CSV users compute by hand.

Row label	What it computes	XLSX formula example	Why it's on the report
<b>TOTAL pipeline value</b>	Sum of <i>Amount</i> for all deal rows	<code>=SUM(F2:F11)</code>	The headline number. The first thing your manager looks at.
<b>TOTAL weighted value</b>	Sum of <i>Weighted amount</i> for all deal rows	<code>=SUM(H2:H11)</code>	The probability-adjusted forecast. More honest than total pipeline value.

<b>Coverage ratio (pipeline / target)</b>	TOTAL pipeline value / quarterly target	(add the following, filling in your quarterly target) =F12/[target]	Tells you whether you have enough pipeline to make the quarter. $\geq 3\times$ target is the common rule of thumb.
<b>Coverage ratio (weighted / target)</b>	TOTAL weighted value / quarterly target	(add the following, filling in your quarterly target) =H12/[target]	Tells you whether the <i>honest</i> pipeline covers the quarter. $\geq 1\times$ is the floor.
<b>Stage distribution — [stage] (% of value)</b>	Sum of <i>Amount</i> for that stage / TOTAL pipeline value	=SUMIF(E:E,"Discover y",F:F)/F12	One row per active stage. Reveals over-concentration in late stages (forecast risk) or early stages (coverage risk).
<b>At-risk deals (Negotiation + with stale activity)</b>	Count of deals at Negotiation or Verbal Commit with <i>Days since last activity</i> > 14	=COUNTIFS(E:E,"Negotiation",K:K,">14")+COUNTIFS(E:E,"Verbal Commit",K:K,">14")	The deals that would change the picture if they slipped. Manager wants to see this number every week.
<b>Week-over-week delta (vs last published report)</b>	Manual: this week's TOTAL pipeline value minus last week's	(manual entry)	The single most narrative-rich number on the report — explain the delta in your cover note.

## Cover-note convention

When you publish the report, your cover note should be **four lines** answering exactly the four questions the chapter teaches:

1. **What is the number?** (*Total pipeline value and / or weighted value.*)
2. **What changed since last week?** (*The week-over-week delta.*)
3. **Why?** (*The hygiene fixes, deal demotions, deal additions, or deal closures that drove the delta.*)
4. **What will you watch this week?** (*The at-risk deals; any specific evidence gaps you're working to close.*)

The cover note is the report; the spreadsheet is the evidence.