

COURSE 02

Pipeline Management & Deal Governance

Build, qualify, and progress pipeline with discipline. From stage definitions to forecasting accuracy — structured execution that removes guesswork.

DURATION

3 Days

FORMAT

Workshop + Exercises

AUDIENCE

Sales Teams & Leaders

LEVEL

Intermediate

CERTIFICATION

Yes — SNL Certified

DELIVERY

In-person or Virtual

COURSE OVERVIEW

Why this course exists

Most sales teams have a pipeline. Few have pipeline discipline. Deals linger in stages for weeks without clear qualification criteria. Forecasts swing wildly because there's no shared definition of what "commit" means. Reviews become status updates instead of strategic conversations that move revenue forward.

This course gives your team a structured pipeline operating system — from how stages are defined and enforced, to how deals are qualified, reviewed, and forecasted. It replaces gut-feel selling with a governed, visible, and repeatable approach to revenue progression.

Built on SNL's proven methodology from enterprise engagements across technology, financial services, and telecommunications — adapted for teams ready to sell with discipline.

WHO THIS COURSE IS FOR

- Sales teams transitioning from ad-hoc to structured pipeline management
- Sales managers who run (or should be running) pipeline reviews
- Sales operations professionals responsible for CRM and reporting
- Revenue leaders seeking visibility and forecast accuracy
- Founders moving from personal selling to team-based sales execution

LEARNING OUTCOMES

By the end of this course, you will be able to:

- 01 Define and enforce pipeline stages with clear entry and exit criteria
- 02 Apply a structured deal qualification framework to every opportunity
- 03 Run effective pipeline reviews that drive action, not just updates
- 04 Build accurate, defensible revenue forecasts your leadership can trust
- 05 Design deal governance policies including escalation and approval gates
- 06 Identify and eliminate pipeline bloat, stalled deals, and forecast risk

Module breakdown

MODULE 1

Pipeline Architecture & Stage Design

- Defining pipeline stages aligned to your sales cycle
- Entry and exit criteria for each stage
- Common stage design mistakes and how to avoid them
- Mapping pipeline stages to buyer decision milestones

MODULE 2

Deal Qualification Frameworks

- MEDDIC, BANT, and custom qualification models
- Scoring and prioritising opportunities
- Identifying red flags and disqualification triggers
- Building qualification into your CRM workflow

MODULE 3

Pipeline Reviews That Drive Revenue

- Structuring weekly and monthly pipeline reviews
- The difference between inspection and coaching
- Questions that uncover stalled deals and hidden risk
- Running reviews that produce next actions, not status updates

MODULE 4

Forecasting Methodology & Accuracy

- Weighted pipeline vs. commit-based forecasting
- Building a forecast your leadership can trust
- Variance analysis: forecast vs. actual
- Leading indicators that predict revenue outcomes

MODULE 5

Deal Governance & Escalation

- Approval gates for pricing, discounting, and terms
- Escalation criteria and deal desk processes
- Risk mitigation frameworks for large opportunities
- Documenting deal governance in your sales playbook

MODULE 6

Pipeline Hygiene & Performance Management

- Identifying and purging pipeline bloat
- Ageing analysis and velocity metrics
- Setting and tracking pipeline coverage ratios
- Embedding pipeline discipline into team culture

DELIVERY FORMAT

How the course is delivered

DURATION

3 days (full-day sessions)

Intensive workshop format with built-in practice time

GROUP SIZE

8 – 20 participants

Small enough for individual attention, large enough for group exercises

MATERIALS

Workbook + templates

Pipeline review templates, qualification scorecards, forecast models included

DELIVERY

In-person or virtual

Live instructor-led with breakout rooms and real-time collaboration

CERTIFICATION

SNL Certified — Pipeline & Deal Governance

Participants who complete all modules and pass the practical assessment receive the SNL Pipeline & Deal Governance certification. Valid for 12 months with annual renewal available. Certification signals execution readiness to enterprise clients and internal leadership.

Ready to build pipeline discipline?

Contact us to discuss corporate bookings, cohort programmes, or custom delivery for your team.

[Get in Touch](#)

snl-services.com

Sophia Sankey | Founder & CEO