

Which deals have you forgotten to follow up?

A seven-day CRM cleanup plan and Excel follow-up tracker for deals with missing owners, vague actions or overdue dates.

PIPELINE & AI



A practical worksheet for the next account, campaign or conversation.

The problem

The pipeline looks busy, but sellers cannot explain what happens next on several open deals.

What it costs the team

Promising replies are missed, several people chase the same account and forecasts include opportunities with no clear path forward.

What you will have at the end

An owned follow-up queue with explicit continue, pause and close decisions.

01 / THE METHOD

How do you clean up an unreliable follow-up queue?

Review open opportunities against the last real customer interaction. Give each one an owner, a specific next action and a date, or record a reason to pause or close it. Separate a date you chose internally from a next step the customer actually agreed.

1. Days 1-2: recover context

Export or review the open queue. Keep a stable deal reference, the company, contact, owner, stage and last genuine interaction. Read the thread or call note before deciding what the deal needs.

2. Day 3: fix ownership

Choose one accountable owner for each live opportunity. Resolve duplicates against the underlying account. Keep a note of who is coordinating a group or multi-contact conversation.

3. Days 4-5: decide the next step

Write an action someone can complete, such as “send the requested integration notes”, rather than “follow up”. Add a date and record whether the customer agreed it. Pause or close records that lack a current reason to continue.

4. Day 6: review overdue work

The workbook identifies missing owners, missing next steps and overdue dates. Review the context before contacting anyone. An overdue internal task does not create permission or a reason to chase a buyer.

5. Day 7: make the review repeatable

Review new replies and upcoming actions together. Keep the original source, relevant context and contact preferences on the record. Define what a qualified opportunity means to your team and apply it consistently.

02 / PUT IT TO WORK

Worked example: a vague follow-up

A deal says “proposal sent” and has no next action. The thread shows the buyer asked for security details before involving an operations colleague. The owner changes the action to “send the requested security summary and ask whether the colleague needs anything else”, with a review date. The stage follows the customer’s progress rather than the seller’s activity.

Questions to work through

Situation	What happened in the last real interaction?
Problem	What is preventing the customer’s next decision?
Implication	Which other people or tasks are waiting on it?
Need-payoff	What specific action would help the customer move forward?

Before you use it

- Every continuing deal has an owner.
- The action is specific and dated.
- The customer’s words are separate from internal assumptions.
- Paused and closed deals are removed from the live chase queue.

These examples are illustrative. They are not customer results or recommended performance benchmarks.

03 / YOUR WORKSHEET

Apply it to your next piece of work

Use the editable worksheet in this download, or write your answers here. Keep facts, decisions and unresolved questions visible.

Stable deal reference and company

Person and accountable owner

Stage and last interaction date

Customer's requested next step

Next action and due date

Customer-agreed or internal review date

Continue, Pause or Close with reason

Contact preferences and relevant context

Sources and further reading

[Salesforce: State of Sales 2026](#). Sales operations research provides context for data quality and AI adoption. No industry conversion benchmark is assumed here.

Use the same work in Adapt

Keep the company context and the next step together as the team moves from research into a conversation.

[Keep opportunities and next steps in Adapt CRM](#)