PipelineSync

FREE TEMPLATE · SALES PIPELINE

HubSpot Deal Pipeline Template

Plan every pipeline before you build or change it: what it is for, who can use it, each stage with the criteria your team agrees, the rules that keep deals honest, time in stage and the forecast mapping. Reference pages, a worked example and fillable worksheets.

Pipeline plan | Stage design | Forecast mapping | Monthly review

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Fillable PDF · pipelinesync.net/resources

START HERE

How to use this template

Most pipeline problems start before the first deal: stages nobody defined, criteria nobody checks and rules nobody turned on. This template makes you write those decisions down and keeps them as the record of how deals move.

1 Check your plan
See what your plan allows for pipelines, rules and access (pages 3 to 5).

2 List every pipeline
One row per pipeline in the pipeline plan, before adding new ones (page 7).

3 Write the brief
For each pipeline: purpose, owner, access, creation stages and rules (page 9).

4 Design the stages with the team
Stages in order with criteria, properties and automation (pages 10 and 11).

5 Set rules and the forecast mapping
Decide the rules, then map stages to forecast categories (pages 12 and 13).

6 Review every month
Track time in stage, run the review and log changes (pages 14 and 15).

What is inside

Page	Section	Use it to
03	**Reference: pipelines, plans and access**	Pipeline counts per plan, default stages and access
04	**Reference: stages, rules and automation**	Probabilities, required properties, rules and automation
05	**Reference: time in stage and the forecast**	Time in stage properties, forecast categories, weighted amount
06	**Standards: stages and criteria**	Agree how to name stages and write criteria a manager can check
07	**Pipeline plan**	Record every pipeline, its purpose, owner, access and rules
08	**Worked example**	See a complete, illustrative new business pipeline
09	**Pipeline brief**	Plan one pipeline before you build it
10	**Stage design**	Write every stage in order with the team
11	**Required properties and automation**	Decide what reps must fill in and what runs at each stage
12	**Pipeline rules and access**	Choose the rules, editing access and who may bypass them
13	**Forecast mapping**	Map stages to forecast categories and check weighted amounts
14	**Time in stage tracker**	Compare average days in each stage with your target
15	**Monthly review and change log**	Keep the pipeline honest and every change explained

Tip: Every worksheet is fillable in Acrobat Reader, Preview or your browser, or print it. Copy the brief and stage pages for each pipeline. A spreadsheet version is on the template page at pipelinesync.net.

REFERENCE · CHECKED OCTOBER 2026

Pipelines, plans and access

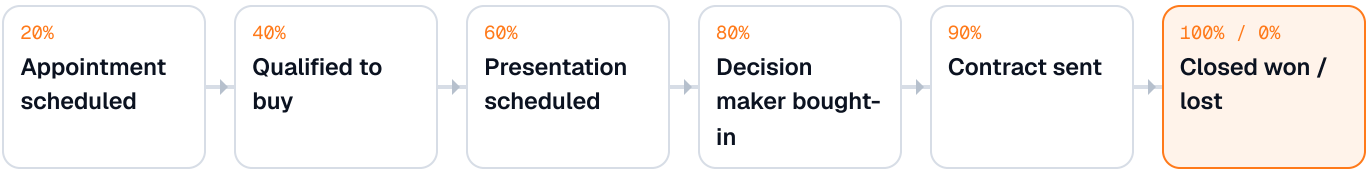
A deal pipeline is the set of stages a deal moves through, from first meeting to closed won or closed lost. Every account has a default pipeline. A Starter, Professional or Enterprise subscription is needed to create a custom pipeline, and the number of custom pipelines is shared across all objects, not only deals.

Custom pipelines per plan

Plan	Seat-based pricing accounts	Flexible seats-and-credits accounts
Free tools	0 custom pipelines	0 custom pipelines
Starter	15 custom pipelines	15 custom pipelines
Professional	100 custom pipelines	350 custom pipelines
Enterprise	350 custom pipelines	350 custom pipelines

The count excludes each object's default pipeline. Cloning a pipeline and restricting a pipeline by team need Professional or Enterprise. Creating and editing pipelines or stages needs Edit property settings permission. A pipeline that contains records, or is used in other tools or integrations, can't be deleted. Connecting an e-commerce integration adds a deal pipeline you can't modify.

The default Sales Pipeline



HubSpot's seven default deal stages and their probabilities. Reports and sales analytics need both a Won and a Lost stage in each pipeline.

Who can use a pipeline

Pipeline access PRO / ENT

- Set by a Super Admin: **Private to me**, **Available to everyone**, or **Select users and teams who can edit**
- Users without access can't create deals in the pipeline
- They can still open a deal from a direct link, search for it and see it in reports and associations

Editing access by stage PRO / ENT

- A pipeline rule can limit who edits deals in certain stages to specific users, teams or Super Admins
- Where settings overlap, the most restrictive one takes precedence
- Deal approval, a separate rule, needs Sales Hub Enterprise: up to 30 approvers per pipeline

REFERENCE · CHECKED OCTOBER 2026

Stages, rules and automation

> Each stage has a probability that sets a deal's Deal probability when it moves. Stages can require properties, pipeline rules (Professional and Enterprise) stop deals skipping stages or moving backwards, and board automations create tasks, send internal emails or edit the deal on entry.

Deal probability

- Pick a probability from the dropdown or enter a custom value; Won and Lost are closed stages.
- Updates automatically on each stage move; a manual edit stops that until the deal reaches Closed won (100%) or Closed lost (0%).

Required properties per stage

- Conditional stage properties show chosen properties when a user creates a deal in, or moves it to, a stage.
- Tick **Required** and users can't save the deal until it is filled in. Read-only properties can't be used.
- HubSpot's page didn't state the plan needed, or whether workflow, import or API updates are covered: check your account.

Pipeline rules PRO / ENT

Rule	What it does
Limit deal creation to specific stages	New deals can only be created in the stages you choose
Restrict deals from skipping stages	Deals move through each stage in order; moving to a closed lost stage is still allowed
Restrict deals from moving backwards	Deals can't go back a stage, unless a closed deal is reopened
Control deal editing access	Limit who can edit deals in certain stages
Add approval process for deals	Sales Hub Enterprise; deals can't be created past the approval stage, including by workflows

Set by Super Admins. With rules on, deals' pipeline or stage can't be bulk edited. Except deal approval, rules can be bypassed by Super Admins, users with Edit property settings permission, and workflows. HubSpot's page is inconsistent on API updates: test integrations that move deals.

Automation at each stage

Automation	What it does	Plan
Board-view stage automation	Create a task, send an internal email or edit the record on entry	Sales Hub or Service Hub Starter+
Close date automation	Sets Close date to today when a deal moves to a closed stage; can be turned off per pipeline	All plans
Default close date	Last day of the month created (not mobile, import or workflow deals)	All plans

REFERENCE · CHECKED OCTOBER 2026

Time in stage and the forecast

> Stage calculated properties record when each deal entered and left every stage and how long it stayed. They need Professional or Enterprise and are off by default for new pipelines and stages, so turn them on when you build. Values are filled in retroactively from existing data once they are on.

Stage calculated properties

Property	Use it for
Date entered / Date exited [stage]	When a deal reached or left a stage; stage-to-stage conversion
Latest time in [stage]	How long the most recent visit to a stage lasted
Cumulative time in [stage]	Total time across every visit, if deals move back and forth
Date entered current stage / Time in current stage	Stalled open deals; use these for workflow triggers

Workflows won't enroll deals on Cumulative time or Latest time in a stage while the deal is still in that stage; HubSpot recommends the current-stage properties instead. Turning the properties on needs Edit property settings or Super Admin permission.

Forecast categories

Not forecasted	Pipeline	Best case	Commit	Closed won
Excluded	Low likelihood	Moderate likelihood	High likelihood	Won

- In the forecast settings you map each pipeline's stages to a category. Category meaning follows its position in the order, not its name.
- Besides Not forecasted and Closed won, only five more categories appear in the mapping.
- **Automate forecast categories** creates a workflow named "Forecast Category Mapping for Pipeline: [pipeline name]".
- Super Admin permissions are needed to set up the forecast tool and edit categories. The forecast tool needs Sales Hub Professional or Enterprise (some of HubSpot's pages also list Service Hub) and an assigned seat.

Weighted amount

Amount multiplied by Deal probability. It is the default forecast deal amount setting. In board view, each stage's weighted amount is the total amount in the stage times the stage probability.

Forecast period

Monthly or quarterly. Changing the period resets forecastable revenue goals and forecast submissions for all pipelines, so choose it once.

Sales analytics reports (Sales Hub Starter+) include Time spent in deal stage, Deal funnel, Deal pipeline waterfall, Deal push rate and Deal velocity.

Setup record

Time in stage properties turned on	☐ Yes, date: _____	by: _____
Forecast categories mapped	☐ Yes, date: _____	by: _____

STANDARDS

Naming stages and writing criteria

A stage name should say what has happened to the deal, not what the rep hopes will happen. Criteria should be something a manager can check on the deal record without asking the rep. Agree both with the team that moves the deals, then use them in every pipeline.

Vague criteria and checkable criteria

Hard to check	A manager can check it on the record
"Good call, they seem interested"	Discovery meeting logged; pain and timeline written in deal properties
"Decision maker engaged"	Decision maker associated to the deal and attended a meeting
"Proposal stage"	Proposal or quote sent to the decision maker on a recorded date
"Verbal yes"	Buyer confirmed scope and price in writing (email logged)
"Lost interest"	No reply after the agreed date; Closed lost reason filled in

These are illustrative examples, not HubSpot rules. Your team writes its own; our guides on deal stages and pipeline accuracy go deeper.

RECOMMENDED STAGE NAME PATTERN

Past-tense event the buyer took part in

Example: **Discovery held** · **Demo completed** · **Proposal sent** · **Contract signed**

Your standards

Stage name pattern	
Most stages per pipeline	
Criteria must be	e.g. visible on the deal record, written as an event, agreed by the sales manager
Who may add or rename a stage	
How probabilities are set	e.g. from last year's win rate per stage, reviewed every quarter
Agreed by / date	

- [ ] Every pipeline has one owner
  Who approves stage and rule changes
- [ ] Every open stage has exit criteria
  Written before the pipeline goes live
- [ ] Closed lost needs a reason
  A required property on that stage
- [ ] Changes go in the change log
  Page 15

WORKSHEET

Pipeline plan

One row per deal pipeline, including the default one. Separate pipelines for processes that really differ, such as new business and renewals; a pipeline per rep or product usually splits reporting without changing how deals are sold.

ID	Pipeline name	Purpose	Deal types it holds	Owner	Access	Creation stages	No skip	No back	Time in stage	Forecast mapped	Status
P-01	*New business*	*First-time deals from qualified meeting to signed contract*	*New logos only*	*Sales manager*	*Sales team*	*Discovery booked*	*Yes*	*Yes*	*On*	*Yes*	*Live*

Access: Everyone, Select users and teams, Private to me (Professional or Enterprise). No skip / No back: pipeline rules on (Professional or Enterprise). Time in stage: stage calculated properties on or off. Status: Planned, Building, Live, Retire.

WORKED EXAMPLE · ILLUSTRATIVE

New business pipeline

An illustrative design for a team selling to new customers. Your stages, probabilities and timings will differ; the point is how much is agreed before anyone builds it.

Purpose	Track first-time deals from a qualified meeting to a signed contract. Renewals and expansions use their own pipeline.
Owner and access	Sales manager · Select users and teams: Sales team and Sales managers
Creation stages	Discovery booked only, so every deal starts with a meeting
Rules	No skipping stages; no moving backwards; managers only can edit deals in Contract sent
Time in stage and forecast	Stage calculated properties on; monthly forecast period; categories mapped below

#	Stage	Prob.	Exit criteria (agreed by the team)	Required to enter	Automation on entry	Forecast	Target days
1	Discovery booked	10%	Discovery held; pain, timeline and decision process on the deal	Amount (estimate), Close date	Task: prepare discovery	Pipeline	14
2	Qualified	30%	Decision maker named and agreed to see a proposal	Decision maker, Budget range	Notify manager	Pipeline	21
3	Proposal sent	60%	Buyer confirmed scope and price in writing	Proposal date	Task: follow up in 3 business days	Best case	14
4	Contract sent	90%	Contract signed, or the deal is lost	Contract sent date	Internal email to finance	Commit	10
5	Closed won	100%	(closed)	Closed won reason	Task: onboarding handoff	Closed won	
6	Closed lost	0%	(closed)	Closed lost reason		Not forecasted	

Weighted amounts in October

Discovery booked: 50,000 open × 10% = 5,000. Proposal sent: 80,000 × 60% = 48,000. Contract sent: 40,000 × 90% = 36,000. The forecast mapping page does this sum for each stage.

First monthly review

Proposal sent averaged 19 days against a 14-day target, with five deals over. Action: managers review those five in the weekly pipeline call, and reps book the follow-up before sending the proposal.

All values on this page are made up for illustration. Decision maker, Budget range, Proposal date and Contract sent date are example custom properties.

WORKSHEET · COPY FOR EACH PIPELINE

Pipeline brief

Pipeline name and ID	
Purpose (one sentence)	
Deals it holds	
Deals it must not hold	
Owner	
Plan check (page 03)	☐ Custom pipeline allowed ☐ Rules and access (Pro / Ent) ☐ Time in stage (Pro / Ent)

Who works deals in this pipeline, and what they need from it

Pipeline access	☐ Available to everyone ☐ Select users and teams ☐ Private to me
Users and teams with access	
Deals can be created in	
How deals arrive	☐ Rep creates ☐ Workflow ☐ Meeting booked ☐ Integration ☐ Import
Forecast period	☐ Monthly ☐ Quarterly (changing it later resets goals and submissions)
Integrations that create or move deals	
Reports and dashboards that use it	
Handoff when a deal is won	
Success measure	
Approved by / date	

DONE FOR YOU

Rather hand your pipeline to a HubSpot Gold Partner?

We run the stage workshop with your team, build the pipeline, rules, required properties and automation, set up forecasting and fill in this template for you.

Book a free consultation

WORKSHEET · COPY FOR EACH PIPELINE

Stage design

Pipeline: _____ Fill this in with the reps and the manager who reviews the deals. Include both closed stages: reports need a Won and a Lost stage.

#	Stage name	Prob.	Entry: what is true when a deal arrives	Exit: what must happen before it leaves	Required properties	Automation on entry	Who moves it	Forecast category	Target days
1	*Discovery booked*	*10%*	*Meeting booked with a buyer who fits*	*Discovery held; pain and timeline on the deal*	*Amount, Close date*	*Task: prepare*	*Deal owner*	*Pipeline*	*14*
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									

Forecast category: Not forecasted, Pipeline, Best case, Commit, Closed won. Probability: HubSpot sets Deal probability from the stage; a manual edit stops it updating until the deal closes. Required properties can't be read-only properties.

WORKSHEET

Required properties and stage automation

Pipeline: _____ Decided by: _____

Properties a rep must fill in to enter each stage

Stage	Property	Type	Required	Who owns the definition	Used in (report, forecast, handoff)
Qualified	*Decision maker*	*Dropdown*	*Yes*	*Sales manager*	*Proposal approval, win/loss report*

Only ask for a property if someone uses it. Tier and API or workflow coverage for required stage properties weren't stated by HubSpot when we checked: test them in your account.

Automation when a deal enters a stage

Stage	Type	Details (task, recipient, value)	Built with	Owner
Contract sent	*Internal email*	*Tell finance a contract is out, with amount*	*Board automation*	*RevOps lead*

Type: Create task, Internal email, Edit record (board automation, Sales or Service Hub Starter+), or a workflow (Professional or Enterprise). Close date automation sets Close date to today on a closed stage unless you turn it off.

- ☐ Close date automation decided
  On or off for this pipeline
- ☐ No two automations set the same property
  One owner per property

WORKSHEET · COPY FOR EACH PIPELINE

Pipeline rules and access

Pipeline: _____ Set by (Super Admin): _____

Rule (Professional or Enterprise)	On?	Why, or why not	Exceptions to remember
Limit deal creation to specific stages	☐ Yes ☐ No		Stages allowed:
Restrict deals from skipping stages	☐ Yes ☐ No		Deals can still skip to closed lost
Restrict deals from moving backwards	☐ Yes ☐ No		A reopened closed deal can move back
Control deal editing access	☐ Yes ☐ No		Most restrictive setting wins
Deal approval (Sales Hub Enterprise)	☐ Yes ☐ No		Can't be bypassed; up to 30 approvers

Editing access by stage

Stage	Who can edit deals in this stage	Reason
Contract sent	*Sales managers, Super Admins*	*Amount and terms are fixed once the contract is out*

Pipeline access

Access setting	☐ Available to everyone ☐ Select users and teams who can edit ☐ Private to me
Users and teams	

Before you turn the rules on

- ☐ Workflows that move deals reviewed
  Workflows bypass the rules
- ☐ Integrations that move deals tested
  HubSpot's page is inconsistent on API updates
- ☐ Bulk stage edits done first
  Not possible while rules are on
- ☐ Team told what changes
  Who to ask when a move is blocked

WORKSHEET · WITH SALES LEADERSHIP

Forecast category mapping

Agree which category each stage belongs to before you set it up in the forecast settings. Weighted amount is open amount times deal probability; fill it in each month to sanity-check the forecast against what each stage really converts at.

Pipeline: _____ Month: _____ Agreed by: _____

Stage	Probability	Forecast category	Open amount	Weighted amount	Why this category
Proposal sent	*60%*	*Best case*	*80,000*	*48,000*	*Moderate likelihood once scope is agreed*
Total					

Categories in HubSpot's mapping: Not forecasted, Pipeline (low likelihood), Best case (moderate), Commit (high), Closed won. Meaning follows the order, not the name. Only five categories besides Not forecasted and Closed won appear.

Forecast settings

Forecast deal amount	☐ Weighted amount (default) ☐ Total amount
Forecast period	☐ Monthly ☐ Quarterly
Automate categories	☐ Yes, creates the "Forecast Category Mapping for Pipeline" workflow ☐ No
Set up by (Super Admin)	

WORKSHEET · ONCE A MONTH

Time in stage tracker

Copy the average days per stage from the Time spent in deal stage report, or a custom report on the time in stage properties. Mark the status Over when the average is above your target, and agree one action for each stage that is over.

Month	Pipeline	Stage	Open deals	Avg days	Target days	Status	Deals over	Action agreed	Owner
2026-10	*New business*	*Proposal sent*	*12*	*19*	*14*	*Over*	*5*	*Review the five deals in the weekly call*	*Sales manager*

Status: On or Over. Stage calculated properties need Professional or Enterprise and are off by default for new pipelines. For stalled open deals, use Time in current stage; the full report setup is in our time in deal stage report guide.

WORKSHEET · ONCE A MONTH

Monthly pipeline review and change log

Check	How	Done	Notes
Deals past close date	Open deals with a close date before today: update or close		
Over target time in stage	Page 14, or the Time spent in deal stage report		
No next activity	Open deals with no upcoming task or meeting		
Required properties filled	Spot-check deals in each stage against page 11		
Criteria and probabilities	Still match how deals from each stage close		
Forecast mapping and access	New stages mapped; new people and teams have access		

This month's numbers

Pipeline	Created	Won	Lost	Win rate	Open amount	Weighted	Past close date
New business	*24*	*6*	*9*	*40%*	*520,000*	*210,000*	*7*

Win rate = won ÷ (won + lost) for deals closed this month. The spreadsheet version calculates it.

Change log

Date	Pipeline	What changed	Why, and what it affects	By
2026-10-27	*New business*	*Split Qualified into Qualified and Demo held*	*Reps skipped the demo; forecast mapping updated*	*RevOps*

PipelineSync

HUBSPOT GOLD SOLUTIONS PARTNER

Want your pipeline designed, built and forecasting for you?

We run the stage workshop with your team, build the pipelines, rules, required properties and automation, set up time in stage and forecast reporting, then hand over this template filled in.

RevOps infrastructure, lead to close

Lifecycle stage definitions, lead scoring and routing with SLAs and fallback owners, sales and marketing automation, attribution reporting and executive dashboards.

HubSpot implementation and onboarding

Design and build of the full HubSpot structure: properties, deal pipelines, lifecycle stages, teams and permissions, workflows and dashboards, with SOPs and training.

HubSpot audit

A structured review of your portal, data, automation and reporting, with prioritized recommendations.

Ongoing HubSpot administration and optimization

Monthly support for workflow changes, reporting updates, data hygiene and user support.

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