

Zoho Bigin Pipeline Planner

Design your sales process before configuring your CRM.

Start with the people who answer enquiries and prepare proposals. Agree what each stage means, who owns the opportunity, and what must happen next. Then map this plan to the options available in your Bigin account.

Example pipeline for a service business

This is an illustrative workflow. Adapt the labels and acceptance rules to your business. Bigin settings and available features depend on your current edition.

Stage	Move here when	Next action example
New enquiry	A request arrives; requirements still need clarification.	Ask which problem the prospect wants help with.
Requirement understood	You understand the need and can judge service fit.	Confirm the scope and practical constraints.
Proposal shared	A concrete scope and offer have been sent.	Agree a date to discuss questions.
Decision pending	The prospect is considering the offer; unresolved points are known.	Clarify the remaining decision or timing.
Won	Your agreed acceptance and booking conditions are met.	Arrange delivery and handover.
Lost / unsuitable	The opportunity is declined or cannot be served.	Record a short reason and close the record.

A stage should describe something observable. "Proposal shared" is clearer than "Looking promising". Agree what counts as won before reporting sales.

Plan your own stages

Business: _____ Main service: _____

Process owner: _____ Review date: _____

Write the entry rule for each stage. Then decide the next action and what information is needed to carry it out.

Stage	Entry rule / evidence	Next action / owner
_____	_____	_____
	_____	_____
_____	_____	_____
	_____	_____
_____	_____	_____
	_____	_____
_____	_____	_____
	_____	_____
_____	_____	_____
	_____	_____

What counts as won in your business?

Your notes

When do you close a stalled or unsuitable opportunity?

Your notes

Make the process usable

Completed enquiry example - fictional

Field	Example
Opportunity reference	DEMO-001
Requirement	Review a service website and enquiry route.
Stage	Requirement understood
Owner	Consultant
Next action	Send a defined review scope.
Due date	Date agreed with the prospect.
Exit evidence	Prospect has received the scope and offer.

Test three scenarios

1. A suitable enquiry: can the team follow it from first contact to agreement?
2. An unsuitable request: can it be closed with a clear reason?
3. A stalled proposal: is the next action owned, dated, and realistic?

Minimum information to agree

Use a unique reference, source where known, service requirement, owner, stage, next action, due date, and outcome. Collect only the information needed to manage the conversation.

Before you configure Bigin

Check your account edition and current settings. Map your stages and fields to supported options. Test with fictional records first. Add automation after the team understands the process and can maintain it consistently.

One change to test this week

Your notes

Bring your completed worksheet to a **1-on-1 session with Abhilash**. Share your main question and preferred time. Scope and fees are agreed before booking.

Original worksheet by Abhilash E. Version 1.0 - 3 October 2026. This resource is independently authored and is not an official Zoho template.