CRM Usage and Pipeline Hygiene Guide

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1. Data Integrity Mandate

The CRM is the single source of truth for all customer interactions, forecast data, and pipeline metrics. **Inaccurate data directly impacts commissions, forecasting, and company strategy.**

2. Mandatory Data Entry Standards

Object	Field	Requirement	When to Update
Account	Legal Name	Must match the official client name.	Creation of new account.
Contact	Role & Authority	Must use the standard dropdown list (Champion, Decision Maker, Technical Buyer).	Initial qualification & before any Proposal.
Opportunity	Next Step & Date	Must be a concrete action (e.g., "Send Proposal 10/12"). **Not vague** (e.g., "Follow up").	After every customer interaction.
Opportunity	Forecast Category	Must accurately reflect the deal stage confidence (Pipeline, Best Case, Commit, Closed Won/Lost).	Weekly Forecast Review.
Opportunity	Revenue/ARR	Must reflect the current negotiated price from the **Pricing Matrix**.	Prior to 40% stage completion.

3. Pipeline Stage Gates and Definitions

An Opportunity cannot advance to the next stage unless the corresponding mandatory actions have been completed and documented.

Stage	% Probability	Stage Gate Criteria
0 - Prospecting	10%	Verified **Need** (from Nexa-BANT check) and assigned a contact.
1 - Discovery Complete	20%	Budget identified, and the primary Champion has been engaged.
2 - Solution Presentation	40%	Full demo delivered, and the client agrees to a formal proposal timeline.
3 - Negotiation	60%	Proposal submitted, and Legal/Procurement has engaged NexaCore.
4 - Verbal Commit	80%	Client has verbally agreed to the commercial terms. **Deal Review Form is Approved.**
5 - Closed Won/Lost	100%/0%	Contract signed/lost.

4. Pipeline Hygiene Rules

- Opportunities dormant for **45 days** without a "Next Step" update will be automatically flagged for review by Sales Operations and may be moved to the "Stalled" pipeline.
- All customer-facing documents (Proposals, SOWs) must be uploaded to the corresponding Opportunity file.