

◆ OPEN-SOURCE AI PLAYBOOK · FOR SALES

Pipeline Review Prep

Pipeline reviews turn into status updates, and the risky deals slip through.

THE SYSTEM

Scores every open deal for risk, lists what changed since last week and suggests the next move.

🕒 BUILD TIME

1-2 weeks

🔧 HOW IT'S BUILT

Low-code

🔌 WORKS WITH

HubSpot or Salesforce

👤 OWNER

Head of sales, with RevOps for the setup

How it works: every open deal on one map, the risky ones explained

🔄 What changed since last week

+4 New deals

\$310k added

3 Moved forward

2 into Negotiation

1 Won

Wexford Print · \$58k

1 Lost

Fenwick Dental

5 Dates pushed

2 for the second time

2 Went quiet

No reply in 14+ days



1 Halvorsen Freight

\$148k · risk 85

No reply from Dana Ruiz in 17 days · Close date moved twice: 30 Sep → 31 Oct → 30 Nov

Next move: Find a new champion. Their CFO, Mark Ellison, joined the last call: Sam asks him for 20 minutes this week.

2 Pellam Foods

\$212k · risk 55

Only their ops director is involved · No meeting booked after the proposal

Next move: Hold the price for now. Lena brings in their finance lead before any talk of a discount.

3 Quarry Lane Homes

\$118k · risk 60

Close date moved twice since August · 41 days in Proposal; usual is 18

Next move: Ravi asks directly what would make them decide this month, and sends the comparison sheet first.

4 Ostrava Labs

\$64k · risk 55

No reply in 15 days · No next step after the demo

Next move: Small deal: no meeting time needed. Lena sends a short "should we close this for now?" note.

How the score works: eight warning signs add points (no reply in 14+ days +25, champion gone +25 ...). 50 or more gets flagged, with its reasons.

One flag up close: the evidence trail

- 22 Sep** Pricing call with Dana Ruiz (Head of Operations) and Mark Ellison (CFO). [Call notes](#)
- 29 Sep** Close date moved from 30 Sep to 31 Oct. Note: “waiting on budget sign-off.” [CRM history](#)
- 2 Oct** Last reply from Dana: “Reviewing with finance, back to you next week.” [Email](#)
- 13 Oct** Sam’s follow-up to Dana bounced: the address is no longer active. [Email](#)
- 15 Oct** Close date moved again, to 30 Nov. No next meeting on the calendar. [CRM history](#)

Sample deal, fictional company.

Who does what

🔗 The system **Sunday night**

Reads every open deal, its history, emails and calendar. It never changes a deal, a date or a stage.

👤 The sales leader **Monday, 9 am**

Opens the prep doc and starts with the top-right corner. You run the meeting. The doc just sets the agenda.

👥 Each rep **After the meeting**

Edits and sends any drafted email themselves. Nothing goes to a customer without the rep.

Can we build it? **FOR YOUR TECH LEAD**

🛠️ Tools you’ll use

Deals and their history	HubSpot (deal property history)	or Salesforce (opportunity field history)
Email and calendar activity	Logged in the CRM from Gmail or Outlook	or Gmail and Calendar APIs, Microsoft Graph
Running the steps	n8n, on a Sunday-night schedule	or Make, Zapier, or a short script
Reasons and next moves	Claude	or ChatGPT, Gemini
Job changes	Email bounces, plus UserGems or Clay	or email bounces only
The prep doc	Google Docs, linked in Slack	or Notion, Word and Teams

🛠️ Three ways to build it

Start simple **1 day**

Export open deals each Friday and run a saved Claude prompt with the eight warning signs. You get the flags and reasons, without the matrix.

Production **1-2 weeks**

n8n pulls deals and their history on Sunday night, adds up the signs, plots the matrix, has Claude write reasons and next moves, and posts the doc.

Custom **3-4 weeks**

Tunes the points against your own won and lost deals, tracks whether flagged deals slipped, and adds a forecast view for the CRO.

🔒 Access it needs

- ◆ Read-only access to deals, contacts, stages and close-date history in the CRM
- ◆ Read access to logged emails, meetings and call notes
- ◆ Write access only to the prep doc and one Slack or Teams channel

🛡️ Guardrails

- ◆ Read-only on the CRM: it never changes a stage, a close date or an amount
- ◆ Every flag shows its reasons and sources, so anyone can check it
- ◆ Emails are drafts; the rep edits and sends them
- ◆ Scores are about deals, never used to rate reps
- ◆ The sales leader decides what gets discussed and what happens next

🎯 What to measure

- ◆ Share of flagged deals that slipped or were lost
- ◆ Minutes per deal in the meeting, flagged vs. not
- ◆ Flags reps marked as wrong, and why
- ◆ Forecast accuracy, quarter over quarter

👥 Who builds and runs it

RevOps or a sales-minded ops person builds it with an engineer for a few days of CRM and n8n work. After launch, the head of sales owns the warning signs and their points, and reviews the false flags once a month.

◆ FREE, OPEN SOURCE, NO SIGN-UP

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This playbook is one of 20. Each one solves a problem almost every company has, and shows how the system works, the tools it runs on, how long it takes to build and where a person signs off. Read them all, download any of them, and send them to your team.

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Pallav Kaushish

Co-Founder, AIXGrowth

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