

# /pipeline-review

**Source:** `~/ .claude/skills/pipeline-review/SKILL.md`

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name: pipeline-review version: "2.0"  
level: 3 trigger: "pipeline review, kako stoje leadovi, sales update, pregled prodaje, forecast" author: john updated: 2026-03-16 description: Strukturirani sedmi?ni/mjese?ni pregled sales pipeline-a. Query CRM, generiše follow-up drafte, ažurira forecast. IF stale leads > 5 THEN auto-draft follow-up emails.

Pipeline Review — Sales  
Pipeline Pregled

# Description

Strukturirani pregled svih aktivnih leadova u sales pipeline-u. Za svaki lead: status, kontekst, preporuka (follow-up, advance, lose). Auto-generiše follow-up email drafte za stale leadove. Ažurira forecast.

# Trigger

Koristi ovaj skill kad:

- Alem kaže "pipeline review", "kako stoje leadovi", "sales update", "pregled prodaje"
- Sedmični/mjesečni pregled poslovanja
- Prije sastanka sa klijentima ili partnerima
- Kad treba forecast za planning

# Alati

- **Pipeline:** `~/system/tools/sales-pipeline.js`
- **CRM:** `~/system/tools/unified-crm.js`
- **Contacts:** `~/system/tools/contacts.js`
- **Drafts:** `~/system/tools/drafts.js`
- **Invoices:** `~/system/tools/invoice-generator.js`
- **Tasks:** `node ~/system/tools/mc.js`
- **Email:** MCP `mcp_email_emails_find` (za zadnji kontakt)

# Workflow

## Korak 1: Snapshot pipeline-a

```
# Svi aktivni leadovi
NODE_PATH=~/system/node_modules node ~/system/tools/sales-pipeline.js list

# Statistika
NODE_PATH=~/system/node_modules node ~/system/tools/sales-pipeline.js stats

# Forecast
NODE_PATH=~/system/node_modules node ~/system/tools/sales-pipeline.js forecast
```

# Korak 2: Per-lead analiza

Za SVAKI aktivni lead (ne-lost, ne-won), prikaži:

```
## <Lead Name> – Stage: <stage>
- **Dani u stage-u:** X dana (od zadnjeg advance-a)
- **Zadnji kontakt:** <datum> (<tip kontakta>)
- **Vrijednost:** <amount> <currency>
- **Izvor:** <source>
- **BANT:** Budget ✓/x | Authority ✓/x | Need ✓/x | Timeline ✓/x
- **Notes:** <zadnje bilješke>
- **Preporuka:** FOLLOW-UP / ADVANCE / LOSE / HOLD
```

Provjeri kontekst za svaki lead:

```
# Lead detalji
NODE_PATH=~/.system/node_modules node ~/.system/tools/sales-pipeline.js show <lead-id>

# CRM presjek (invoices, tickets, tasks)
NODE_PATH=~/.system/node_modules node ~/.system/tools/unified-crm.js client "<name>"

# Zadnji email
# mcp__email__emails_find(account: "john", query: "<client email>", limit: 3)
```

# Korak 3: Klasificiraj leadove

Sortiraj po prioritetu:

## **HOT (akcija odmah):**

- Lead u negotiating > 7 dana bez kontakta
- Proposal sent > 14 dana bez odgovora
- Qualified lead > 21 dana bez advance-a

## **WARM (akcija ove sedmice):**

- Lead u qualified, treba zakazati discovery
- Proposal treba napisati/poslati
- Follow-up email čeka

## **COLD (preispitaj):**

- Lead u prospect > 30 dana
- Nema BANT kvalifikacije
- Ghosting (3+ pokušaja kontakta bez odgovora)

## Korak 4: Generiši akcije

Za svaki lead predloži konkretnu akciju:

Situacija	Akcija
Stale > 7 dana	Follow-up email draft
Qualified, nema discovery	Zakaži discovery call
Discovery done, nema proposal	Napiši proposal (CEO gate!)
Proposal sent, nema odgovora	Follow-up "gentle nudge"
Negotiating, nema progressa	Call/meeting za clarification
Ghost (3+ attempts)	Final follow-up → LOSE ako nema odgovora

## Korak 5: Auto-generate follow-up drafte

Za stale leadove, kreiraj email draft:

```
# Draft se kreira u drafts.db
# Tip: follow-up = MEDIUM risk (auto-approve + notify)
```

Follow-up template (Norwegian — standardni jezik za norveške klijente):

```
Subject: Oppfølging – [Prosjekt/Tema]

Hei [Navn],

Jeg ville bare følge opp samtalen vår om [tema].
[Specifikt neste steg eller spørsmål].

Har du mulighet til en rask prat denne uken?

Med vennlig hilsen,
ALAI Holding AS
```

Za internasjonale klijente — English template:

Subject: Following up – [Project/Topic]

Hi [Name],

Just following up on our conversation about [topic].  
[Specific next step or question].

Would you have time for a quick call this week?

Best regards,  
ALAI Holding AS

## Korak 6: Ažuriraj forecast

Na osnovu pregleda, prikaži:

```
## Pipeline Forecast
| Stage | Leads | Total Value | Weighted (prob) |
|-----|-----|-----|-----|
| Prospect | X | Y NOK | Y × 10% |
| Qualified | X | Y NOK | Y × 25% |
| Proposal Sent | X | Y NOK | Y × 50% |
| Negotiating | X | Y NOK | Y × 75% |
| **Total Pipeline** | **X** | **Y NOK** | **Z NOK** |

## Won (last 30/60/90 days)
| Period | Deals | Revenue |
|-----|-----|-----|
| Last 30d | X | Y NOK |
| Last 60d | X | Y NOK |
| Last 90d | X | Y NOK |
```

## Korak 7: MC taskovi za high-priority

Za HOT leadove, kreiraj MC task:

```
node ~/system/tools/mc.js add "Follow up: <Lead> – <specifična akcija>" --priority H --route bizdev
```

# Korak 8: Executive Summary

Prikaži Alemu sažetak:

```
## Pipeline Review – <datum>

**Active leads:** X
**Total pipeline value:** Y NOK
**Weighted forecast:** Z NOK

**HOT (akcija odmah):**
- <Lead 1>: <akcija>
- <Lead 2>: <akcija>

**WARM (ova sedmica):**
- <Lead 3>: <akcija>

**COLD (preispitaj):**
- <Lead 4>: razmotriti LOSE

**Won this month:** X deals, Y NOK
**Lost this month:** X deals, Y NOK

**Next steps:**
1. <konkretna akcija 1>
2. <konkretna akcija 2>
3. <konkretna akcija 3>
```

## Pravila

1. **Svaki lead pregledan** — NE preskakati leadove, čak ni "očigledno mrtve"
2. **Dani se broje** — Stale = bez kontakta > 7 dana u aktivnom stage-u
3. **Follow-up ≠ spam** — Max 3 follow-up pokušaja. Nakon 3. → LOSE ili HOLD
4. **Forecast realan** — NE napuhavati brojke. Weighted probability po stage-u
5. **CEO vidi summary** — Pipeline review UVIJEK završava executive summary-jem
6. **Anti-hallucination** — NE izmišljaj lead podatke. Čitaj iz pipeline.js
7. **BANT provjera** — Svaki qualified lead mora imati minimum 2/4 BANT
8. **Lost ≠ zauvijek** — Lost leadovi mogu biti reactivated. Log razlog.
9. **Draft, ne send** — Follow-up email UVIJEK kao draft. CEO/John odobri.

# Primjer

Alem: "Kako stoji pipeline?"

John:

## Pipeline Review – 2026-02-12

**Active leads:** 4

**Total pipeline value:** 425,000 NOK

**Weighted forecast:** 168,750 NOK

**HOT:**

- Riad (negotiating, 12 dana): AI feature wishlist. Čeka prototip. → Zakazati demo call
- TechCorp (proposal\_sent, 8 dana): AI chatbot. → Follow-up email draft kreiran

**WARM:**

- DataViz AS (qualified, 5 dana): Dashboard projekt. → Zakazati discovery
- NordTech (prospect, 3 dana): Svjež lead. → Kvalificiraj BANT

**COLD:**

- OldLead AS (prospect, 45 dana): Nema odgovora na 2 pokušaja. → Preporučujem LOSE

**Won this month:** 1 deal, 150,000 NOK (Wizard NUF)

**Lost this month:** 0

Next steps:

1. Demo call sa Riad ove sedmice
2. Follow-up email TechCorp (draft kreiran)
3. Discovery call DataViz AS

## ? Operational Limits

- **MAX TURNS:** 20 (validate) | 10 (lookup)
- Report to John after pipeline snapshot. Do NOT loop on stale leads > 3 iterations.

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