

The Opportunity Pipeline Canvas

*A framework for deciding what starts next — and writing down
exactly what has to happen before it does.*



Adaptive · Predictive · Delivered

How to Use the Opportunity Pipeline Canvas

Canvas Overview

A backlog isn't a strategy until every entry has an owner and a reason it's still waiting. This canvas sorts what's active, what's next, and what's later, then makes explicit what has to happen before each one moves. If too many initiatives are showing up as the Next #1 priority, run them through the Pairwise Prioritization Canvas to gain control over the order.

Getting Started

1. List What's Waiting. Everything currently active, proposed, or on hold — the whole list, not just what's top of mind.

2. Sort Into Now / Next / Later. Now = actively resourced today. Next = approved, waiting on something specific. Later = real, but not yet.

3. Name One Owner. The person accountable for watching it, not doing all the work.

4. Write the Trigger. Pick one of the four types on the left, and make it specific enough that someone other than you would know when it fires.

5. Revisit on a Cadence. Nothing sits in Later by default; it either advances or gets re-justified.

The Four Triggers

- **Completion** — “When X completes, this starts.”
- **Capacity** — “When Y frees up, we begin.”
- **Hard Deadline** — “No later than [date], regardless” — worked backward from a fixed external date, minus how long it takes, minus a buffer.
- **Revisit** — “If [condition] hasn't happened by [date], revisit whether we still need this.”

Facilitation Tips

- A revisit trigger asks whether you still need it. A hard-deadline trigger doesn't ask — it's a forced start.
- If two entries share the same trigger, that's a sign they're actually one decision, not two.

After You Sort

- Owner isn't “who does the work” — it's who notices when the trigger fires.
- When a trigger fires, move the entry and tell the Owner directly — don't wait for them to check.

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Initiative	Status	Owner	Trigger
Core Banking Vendor RFP	Now	Priya — IT	— already active, no trigger needed.
Mobile App Redesign	Next	Marcus — Retail	Completion — When the Core Banking RFP scoring completes, this starts.
Branch Renovation — Uptown	Next	Dana — Facilities	Capacity — When the facilities team frees up from the RFP rollout, we begin.
Compliance Filing Requirement	Later	Sam — Compliance	Hard Deadline — Filing due in 9 months; takes 1 month to execute. Must start no later than 7.5 months from now (9 – 1 – 0.5-month buffer) — sooner if capacity opens.
New Member Rewards Program	Later	Open	Revisit — If no sponsor has stepped forward by the Q3 board meeting, revisit whether we still need this.

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Bringing It All Together

This canvas doesn't decide what's actually urgent — the Pairwise Prioritization Canvas already did that part. What this adds is the discipline to say, in writing, why something is still waiting and what has to happen before it moves.

- **Give every waiting initiative** an owner who knows why it's waiting.
- **Turn “we'll get to it eventually”** into a specific, written condition.
- **Catch compliance deadlines** before they turn into a scramble.
- **Keep Later from becoming** a place initiatives go to be forgotten.

You'll know it's working when nothing in Later surprises you — every entry has an owner, a reason, and a date it gets checked again.

Want a Second Set of Eyes on Your Pipeline?

Contact Metagyre to learn how we support leadership teams building this kind of judgment — from sorting the backlog through the governance board that reviews it.

