

Sales Pipeline + Follow-Up Toolkit — Read Me First

A simple system to capture leads, follow up consistently, and convert more quotes into booked work.

Most SMEs don't have a sales problem — they have a follow-up problem. This toolkit gives you a lightweight pipeline, simple templates, and a weekly rhythm so opportunities don't slip through the cracks.

Outcome (what you'll have completed)

- A clear set of pipeline stages (so everyone speaks the same language).
- A Lead & Opportunity Tracker (Excel) to manage enquiries and quotes.
- A follow-up cadence (exact days + scripts) so you stay consistent.
- A weekly sales review routine (15–30 minutes) to keep the pipeline moving.
- A discovery call notes template so quoting is cleaner and faster.

The order to use these tools

Step	Tool	Why it matters	Time
1	Pipeline Stages (Definition)	Creates clarity and ownership across the team.	10 min
2	Lead & Opportunity Tracker (Excel)	Ensures every enquiry has a next action and date.	20–30 min
3	Discovery Call Notes Template	Improves scope clarity and quote quality.	5–10 min/lead
4	Quote Follow-Up Cadence + Scripts	Stops leads going cold; increases conversion.	5 min/follow-up
5	Weekly Sales Review (Agenda +	Creates momentum and accountability.	15–30 min/week

	Scorecard)		
--	------------	--	--

Rules that drive results

- Every lead must have a next action and a next action date.
- Speed matters: same-day response wins more often than not.
- Follow-up is service, not pressure — most customers are busy, not avoiding you.
- Track conversion: enquiries → quotes → wins. Improve the weakest link.