



ASCENDEA

AI / BUSINESS GROWTH / GUIDE & WORKBOOK

Build a Sales Pipeline in 30 Days — Practical Workbook for UK Small Businesses

A beginner-friendly UK small-business guide and workbook for mapping a sales process, defining evidence-based stages, recording opportunities, setting cautious forecasts and running weekly pipeline reviews without treating estimates as guarantees.



Author: Rob Arnold

ascendea.ai

Your route through this resource

Before you begin	3
Days 1–7: Build the foundations.....	5
Days 8–21: Put the pipeline into daily use.....	10
Days 22–30: Review, learn and improve	17
Keep the pipeline useful after day 30	22
Seven-day follow-through plan	23
Final workbook: your pipeline operating plan	24
Official guidance checked for this edition	25

Chapter links and PDF bookmarks support navigation. Writing areas are for handwritten or separate notes, not interactive PDF forms.

Author: Rob Arnold · Ascendea · Edition v1.0 · October 2026

<https://ascendea.ai/>

Educational guidance; not a guarantee of business results or legal, tax or personalised financial advice. This is a non-exclusive licensed-content adaptation. For your own learning and permitted end use only; no resale, redistribution, editable-source or private-label rights are granted.

Author: Rob Arnold · Ascendea · <https://ascendea.ai/>

Editorial and PDF QA Edition v1.0 · October 2026

A practical guide and workbook for owners and managers who want a clearer, better-run sales process.

A sales pipeline is a simple record of potential work: who is interested, what has happened, what needs to happen next and how likely the opportunity is to become a customer. It will not guarantee income or remove the need for good service, relevant marketing and honest sales conversations. It can, however, make your next action and your assumptions visible.

This workbook is written for UK small businesses with little technical experience. It suits a local trade business, professional practice, independent retailer, B2B supplier or service firm. You can use a spreadsheet first and move to a CRM later. The aim is not to build a complicated system; it is to run a useful one consistently.

Before you begin

What you will have by day 30

By working through the exercises, you should have:

- a small number of clearly named stages that reflect how your customers actually buy;
- an objective rule for moving each opportunity to the next stage;
- one place to record the deal value, next action, owner and important notes;
- a simple baseline for conversion, deal size and sales-cycle length;
- a weekly review routine and a 60-day improvement experiment.

Your first figures are **planning assumptions**, not promises. If you have only a few historic opportunities, record that uncertainty rather than treating a tiny sample as a reliable forecast. A pipeline forecast is an estimate to help you plan, not money you can spend before it is received.

How to use this workbook

Set aside a short, protected block for each numbered day. If you cannot work on it every day, keep the order and complete it over longer than 30 calendar days. Write down what you know, what you have estimated and what you still need to test. A small, current pipeline is more useful than a perfect-looking system nobody updates.

All businesses, prices, timings, targets and outcomes in the examples are **illustrative fictional planning examples**. They are not Ascendea client stories, market benchmarks or expected results.

Plain-English terms

Term	Meaning in this workbook
Lead	A person or organisation that may be interested, but has not yet been confirmed as a suitable opportunity.
Opportunity	A lead with enough information and engagement to be managed through a sales process.
Pipeline stage	A named point in that process, such as Qualified or Proposal Sent.
Exit criterion	A specific, observable event that must happen before an opportunity moves forward.
Conversion rate	The share of opportunities that moved from one stage to the next during a stated period.
Weighted pipeline	A planning estimate that multiplies each open opportunity by a probability based on your own history.
CRM	Customer relationship management software: a tool for recording contacts, deals and activities.

Publication and use notice

Author of this Ascendea edition: **Rob Arnold**. Publisher: **Ascendea**. Website: <https://ascendea.ai/>.

This edition is prepared as a non-exclusive licensed adaptation for general business education and permitted end use, subject to the established source-acquisition and rights context recorded for this edition. It is not legal, tax, financial or regulatory advice. Provided for your own learning and permitted end use. **No resale, redistribution, private-label, editable-source or sublicensing rights are granted.** Technology, pricing and UK guidance can change; check the linked official guidance and obtain suitable professional advice for your circumstances. Final This finished edition is available as a free Ascendea resource.

Days 1–7: Build the foundations

Day 1 — Audit the sales process you use now

Do not start by copying someone else's pipeline. Start with the last few real enquiries, quotations and sales. Trace the route from first contact to a yes, no or no decision yet.

1. List each step a typical buyer took, including messages, calls, site visits, quotations and approvals.
2. Mark where an opportunity stopped, went quiet or was lost.
3. Circle steps that happen consistently and underline steps that depend on memory or improvisation.
4. Estimate the time from first meaningful contact to sale for the completed opportunities you can find.
5. Note where you currently keep information: inbox, diary, phone notes, spreadsheet, accounting package or nowhere reliable.

Sales reality check. Score each area from 1 (largely improvised) to 5 (clear, repeatable and recorded). The score is a prompt for action, not an audit result.

Area	Score 1–5	What happens now?	First improvement to test
Finding or receiving leads			
First reply or first call			
Qualification			
Discovery of needs			
Quote or proposal preparation			
Follow-up			
Agreeing the sale			
Handover after sale			

Decision at the end of day 1: name the one place that will become your live pipeline record. A spreadsheet is acceptable at this stage if it is shared appropriately, backed up and updated.

Day 2 — Map a customer journey that fits your business

Most small businesses can begin with five stages. Add a stage only if it represents a real change in the customer's position or a genuinely different piece of work for your team.

Suggested stage	What it means	Example for a local heating firm	Example for a B2B bookkeeping practice
New lead	An enquiry or relevant introduction has arrived.	A householder requests a boiler quote.	A managing director asks about monthly management accounts.
Qualified	You have checked basic fit and agreed a useful next step.	The property, work type and availability are within your service area.	The business size, records and decision process look suitable.
Discovery / assessment	You have gathered enough detail to scope the work.	A survey or detailed call confirms the required work.	A call clarifies reporting needs, systems and timing.
Proposal / quote sent	The customer has received a defined offer.	A written quote with scope, assumptions and expiry date is sent.	A scoped fee proposal is sent to the decision-maker.
Decision / close	The customer accepts, declines or asks to revisit later.	The quote is accepted and a deposit or booking is agreed.	Terms are accepted and onboarding is scheduled.

You may add **Onboarding** after a sale if ownership changes hands, or **Nurture / revisit later** for people who are not ready. Do not use “nurture” as a hiding place for every unresponsive contact; record why it is there and when it will next be reviewed.

Your pipeline design

Stage name	What is true at this point?	Who owns it?	Normal next action
1.			
2.			
3.			
4.			

Stage name	What is true at this point?	Who owns it?	Normal next action
5.			
Optional:			

Day 3 — Write exit criteria, not hopeful descriptions

A pipeline becomes misleading when a deal moves because it “feels promising”. An exit criterion is a fact that anyone on the team can check. It gives you a clean handover and makes forecasts less dependent on wishful thinking.

Use the following pattern: **Move from [stage] to [next stage] only when [observable evidence] is recorded.**

Move	Weak criterion	Stronger, checkable criterion
New lead → Qualified	“They seem interested.”	The contact has agreed a call, visit or other next step, and the basic fit check is complete.
Qualified → Discovery	“They have a budget.”	The relevant problem, decision-maker, intended timing and a sensible budget range or purchasing route have been discussed.
Discovery → Proposal / quote sent	“We know enough.”	The scope, assumptions, key requirements and recipient for the offer are recorded.
Proposal / quote sent → Decision	“They are considering it.”	The offer has been received, a decision process or review date is known, and material questions are being addressed.
Decision → Won	“They said yes.”	Your agreed acceptance evidence is held, such as a signed order, written acceptance, purchase order or deposit where appropriate.

Your exit-criteria worksheet

Current stage	Required evidence before moving on	Where will it be recorded?	If the evidence is missing

A criterion should be proportionate. A sole trader booking a small repair may not have a formal procurement process. A business customer placing a significant order may have more than one stakeholder, a purchase order and a longer approval route.

Days 4–5 — Establish your first useful measures

Start with measures that change a decision. Do not create a dashboard of numbers that nobody uses.

Measure	Simple calculation	What it helps you ask
Number of open opportunities by stage	Count the deals in each stage.	Is the pipeline thin at an early stage, or are too many deals stuck later on?
Total open pipeline value	Add the potential value of open deals.	How much possible work is being discussed?
Average deal value	Total value of comparable won deals ÷ number of won deals.	Is the typical opportunity changing?
Stage conversion	Deals that moved forward ÷ deals that entered that stage in the same defined cohort.	Where are suitable buyers dropping out?
Sales-cycle length	Days from your chosen start point to won or lost decision.	How long does this type of sale actually take?
Next-action coverage	Open deals with a dated next action ÷ all open deals.	What is likely to be forgotten this week?

Build a baseline from real history

Use the last 10–20 relevant opportunities if they are available. If you have fewer, use what you have and label the result “early estimate”. Do not mix very different work types, such as a £150 retail sale and a six-month commercial tender, unless you also report them separately.

Period reviewed	Leads entered	Qualified	Proposals / quotes sent	Won	Lost	Notes on data quality

Calculate each rate using a matching starting group. For example, if 12 of 20 leads became qualified, the lead-to-qualified rate for that group is $12 \div 20 = 60\%$. A rate based on a handful of deals can move sharply from month to month; use it as a signal to investigate, not as proof of a permanent performance level.

Days 6–7 — Create a cautious weighted-pipeline view

A weighted pipeline can help you plan workload and spot gaps. It does not turn an uncertain opportunity into revenue. Choose starting probabilities from your own historic conversion figures where possible. If you have no history, use clearly labelled temporary assumptions and review them after enough decisions have occurred.

Illustrative fictional example. A small commercial-cleaning firm uses the following temporary planning weights: New lead 10%, Qualified 25%, Site survey complete 45%, Proposal sent 60% and Decision pending 75%. The owner does not treat those figures as a guarantee or invoice against them.

Stage	Number of open deals	Total potential value	Planning probability	Weighted value calculation	Weighted value
New lead		£	%	total value × probability	£
Qualified		£	%	total value × probability	£
Discovery / assessment		£	%	total value × probability	£
Proposal / quote sent		£	%	total value × probability	£
Decision pending		£	%	total value × probability	£
Total		£			£

For one £4,000 opportunity at a 50% planning probability, the weighted amount is £2,000. That is an estimate based on a rule you chose; it is not a statement that the deal will pay £2,000.

Day 7 check: can you look at your record and answer all four questions?

1. How many active opportunities do we have at each stage?
2. What is the next dated action for each one?
3. What evidence supports its current stage?
4. What part of the forecast is based on history and what part is an assumption?

Days 8–21: Put the pipeline into daily use

Day 8 — Choose a management tool that your team will use

Do not buy software because it has automation you may never configure. The right starting point is the simplest tool that lets the right people keep a shared, current record.

Option	Good starting use	Watch for
Spreadsheet	One or two people, few active opportunities and a disciplined update routine.	Duplicate versions, unclear access, no reminders and information scattered in separate notes.
Basic CRM	A small team that needs contact history, activities and a visual pipeline in one place.	Setup time, imported duplicates and paying for features that remain unused.
More capable CRM or connected system	Multiple owners, several sales processes, reporting needs or justified integrations.	Extra cost, permissions, change management and more complex administration.

Before choosing, list the non-negotiables: who needs access, which fields you need, whether you require mobile use, how you will export your data, and what existing calendar, inbox or accounting processes must remain separate.

A beginner–safe setup and security check

1. Choose a tool after a short trial using a few non-sensitive test records where possible.
2. Create individual user accounts. Do not share a single password among staff.
3. Give each person only the access needed for their role. Remove access when a person leaves or changes role.
4. Turn on multi-factor or two-step verification where the service offers it, and keep recovery details controlled.

5. Decide what customer information genuinely needs to be stored. Avoid copying documents or sensitive personal information into notes “just in case”.
6. Check who can export data, connect third-party apps or change permissions.
7. Keep a separate, appropriate backup or export routine and test that the file can be opened.

The UK National Cyber Security Centre's small-organisations guide is a useful starting point for accounts, devices, backups and spotting scams. It is not a compliance guarantee; use controls that fit your systems and the data you handle. See [NCSC: Small organisations guide to cyber security](#).

Days 9–10 — Configure the minimum viable pipeline

Set up only the fields that somebody will use to make a sales decision. You can add fields later after you have proved they are useful.

1. Open the pipeline or deals area of your chosen tool, or create a shared spreadsheet with one row per opportunity.
2. Add the stage names and exit criteria you wrote on days 2–3.
3. Add the core fields below. If you use a spreadsheet, protect formula cells and agree who may change the stage list.
4. Enter current opportunities one at a time. Use the evidence you have, not the stage you wish they were in.
5. Give every open opportunity an owner and one dated next action.
6. Review the first live view with the people who will update it. Remove anything confusing.

Core field	Why you need it	Example entry
Organisation or customer name	Identifies the opportunity.	Green Lane Dental Practice
Contact and role	Shows who you are speaking to.	Alex Patel, practice manager
Opportunity / work type	Prevents vague deal names.	Monthly bookkeeping support
Stage	Shows the current position.	Discovery complete
Potential value and basis	Separates a quoted amount from an estimate.	£1,200 per month, pending scope
Expected decision date	A best estimate, not a promise.	18 November 2026
Owner	Makes follow-up accountable.	Sam

Core field	Why you need it	Example entry
Next action and date	Stops opportunities disappearing.	Confirm site-survey appointment, 8 November
Stage evidence	Supports the stage decision.	Director confirmed service need and agreed discovery call
Notes / objections	Preserves useful context.	Wants to compare two providers; procurement requires written scope
Source	Helps assess how useful a lead source is.	Existing customer referral

Days 11–14 — Define activities for each stage

A stage tells you where the opportunity is. A stage playbook tells you what to do next. Keep it short enough that a new member of staff could follow it without guessing.

Stage	Collect	Provide or do	Questions to answer	Typical next action
New lead	Contact route, basic need, source and permission context.	A prompt, truthful acknowledgement.	What are they asking for? Is there a clear fit?	Arrange a short qualification conversation or politely decline.
Qualified	Problem, fit, decision route, timing and practical constraints.	Clear outline of the next step.	Who uses the service, who decides and what would make this unsuitable?	Book discovery, survey or demonstration.
Discovery / assessment	Requirements, current process, desired outcome, risks and scope assumptions.	Notes, summary and any agreed measurement method.	What is included, excluded and dependent on the customer?	Prepare a quote or proposal.
Proposal / quote sent	Recipient, date sent, commercial assumptions and expiry where relevant.	Defined written offer and proposal discussion.	Has it reached the people who need to assess it? What is the decision route?	Agree a review date and answer material questions.

Stage	Collect	Provide or do	Questions to answer	Typical next action
Decision	Reason for likely yes, no or delay; final conditions.	A clear route to accept, decline or revisit.	What evidence is still required? Is the decision actually in their control?	Record won, lost or revisit-later outcome.

Discovery questions for beginners

Use questions that help you understand the work rather than a script that pressures a buyer.

- What happened the last time this problem occurred?
- Who is affected, and what does the current process involve?
- What would a useful outcome look like in practical terms?
- Who else needs to be involved in the decision or implementation?
- Are there dates, access issues, safety requirements, systems or approvals that change the scope?
- What have you tried already, and why was it insufficient?
- What would make this a poor fit, even if the price were acceptable?

Write back a short summary and ask the customer to correct a misunderstanding before you build a proposal on it.

Days 15–16 — Create a small template library

Templates save time when they preserve the structure, not when they make every message sound identical. Put [square brackets] around every fact that needs a truthful, case-specific replacement. Read the message before sending it; never send placeholders or claims you cannot support.

Template: enquiry acknowledgement

Subject: Your enquiry about [specific service or work]

Hello [name],

Thank you for getting in touch about [specific need]. From what you have shared, the sensible next step is [brief next step, such as a 15-minute call / site survey / request for information].

To check whether we are a fit, could you tell me [one or two genuinely needed questions]?

If it is helpful, I can offer [two realistic options]. If this is not the right time or we are not the right fit, please say so and I will close the enquiry.

Kind regards, [name, business name, contact details]

Template: meeting confirmation

Subject: Confirming [date] — [topic]

Hello [name],

I am confirming our [call / meeting / survey] on [date and time] at [location or link]. We will use the time to understand [purpose] and agree whether a proposal or another next step is worthwhile.

Please bring or send [only necessary information]. I will send a short summary afterwards. If someone else should be involved in the decision, please let me know before the meeting.

[name]

Template: proposal-cover note

Subject: Proposal for [defined outcome]

Hello [name],

Attached is our proposal for [defined scope]. It sets out what is included, the assumptions, exclusions, price basis, customer responsibilities and suggested next step.

Please review it with the people who need to decide. I suggest a short call on [date] to answer questions and confirm whether the scope is suitable. If the proposal is not the right fit, a direct no is useful too.

[name]

Template: honest objection response

Thank you for explaining the concern about [price / timing / scope / comparison]. I do not want to guess at the answer. The current proposal includes [relevant fact] and excludes [relevant fact].

We can either keep the original scope, look at a smaller defined option, or pause while you decide. I can set out the cost and timing impact of a changed scope before you commit.

Do not manufacture urgency, testimonials, discounts or competitor comparisons. If you make a value calculation in a proposal, show the assumptions, distinguish capacity from cash savings, and invite the buyer to correct the inputs.

Days 17–18 — Build a follow-up system that respects people and the law

A good follow-up is relevant, timed around the customer's decision process and easy to stop. The source guide used fixed follow-up intervals; use these only as a starting planning pattern. A buyer may need a faster answer, more time or no further contact.

When	Purpose	A helpful reason to contact	Stop or change course when
Day 0	Acknowledge or send agreed information.	Confirm what happens next.	The enquiry is not a fit or the person asks not to hear from you.
Around day 3–5	Check a promised item was useful.	Answer one relevant question or provide agreed clarification.	No lawful or appropriate basis for the contact, or the message would simply repeat itself.
Around day 7–10	Clarify a genuine decision issue.	Offer a short call, revised scope or missing information.	The person says no, does not wish to be contacted, or a different date is agreed.
Around day 14–21	Close the loop.	Ask whether to proceed, pause or close the record.	There is no response after a reasonable, relevant attempt.
Later review	Revisit only with a clear reason and appropriate permissions.	A stated future review date, requested update or genuinely relevant development.	The contact opted out, objected or the follow-up is no longer appropriate.

UK electronic-marketing checkpoint

This workbook is not a substitute for legal advice. Before campaign-style outreach, use the current [ICO business-to-business marketing guidance](#) and [ICO electronic-mail marketing guidance](#).

The ICO currently distinguishes corporate subscribers from individual subscribers. Companies, LLPs, Scottish partnerships and government bodies are corporate bodies for this purpose. Sole traders and some partnerships are treated as individual subscribers. The PECR rules for unsolicited electronic marketing therefore differ. In particular, do not assume a sole trader may be cold-emailed merely because they trade as a business. If status is unclear, take the more protective route and obtain appropriate advice.

For corporate email or text marketing, the ICO says you must not disguise your identity and must provide a valid address to opt out. Keep a suppression list and honour objections. Named business contacts and personal work email addresses can be personal data, so UK GDPR duties, including the right to object to direct marketing, may apply. Social-media direct messages can also fall within the electronic-mail rules. Telephone marketing has separate rules; check the current TPS/CTPS requirements and objections before calling. ICO guidance is under review following legal change, so recheck it before launching a campaign.

Pre-send check

Check	Record or action
Is this a response to an enquiry, a warm introduction or proactive marketing?	
What is the recipient's business status, and what rule or permission applies?	
Are you using personal data? What privacy information and lawful basis are appropriate?	
Does the message identify your business honestly and give a usable route to opt out?	
Have you checked the suppression / do-not-contact list?	
Is the message relevant, accurate and individually reviewed?	

Days 19–21 — Make clean data entry a habit

A system only helps if it reflects what happened. Updating a record should be a short task after a meaningful customer interaction, not a long reconstruction at month end.

Five-minute post-interaction checklist

1. Log the date, interaction type and people involved.
2. Write the factual outcome and any information that changes the scope or decision route.
3. Move the stage only if the exit criterion is met.
4. Record a specific next action, owner and date.
5. Update the potential value or probability only when new evidence supports the change.
6. Record an opt-out or objection immediately and apply it to the appropriate contact process.

Sales-record update SOP

SOP element	Definition
Owner	The person who had the interaction, or their named delegate.

SOP element	Definition
Trigger	A call, meeting, visit, material email, quote decision or change in the customer's circumstances.
Input	The current opportunity record and factual notes from the interaction.
Output	An accurate current stage, concise notes, a named owner and a dated next action; or a recorded lost / nurture / opt-out outcome.
Exception / human fallback	If the owner is unsure about the stage, value, legal status, sensitive information or promise made, leave the stage unchanged, flag it for a manager and use the existing manual process until it is resolved. Do not invent a note to make the record look complete.

Numbered procedure

1. Open the existing opportunity immediately after the interaction or in the next agreed admin block.
2. Confirm you are editing the correct contact and organisation.
3. Add a short factual note: what was discussed, what was agreed and what remains unknown.
4. Compare the new evidence with the stage exit criterion.
5. Move the record only when that criterion is satisfied.
6. Create one next action with a date, an owner and a specific purpose.
7. If there is no viable next action, record why: lost, not a fit, asked not to be contacted, or agreed future review date.
8. Save the record and check that the task or reminder is visible to its owner.

Days 22–30: Review, learn and improve

Day 22 — Run your first weekly pipeline review

Schedule a 30-minute review at the same time each week. If more than one person sells, review together or prepare the same information first. The point is to decide what to do, not to admire a total value.

Review question	What to inspect	Action to record
What is open now?	Deal count and potential value by stage.	Check that the current stage is supported by evidence.
What needs action this week?	Dated next actions and expected decision dates.	Name the owner and action for each priority deal.
What has stopped moving?	Deals with no meaningful activity beyond your normal stage length.	Contact, requalify, move to a future-review list or close.
What arrived this week?	New opportunities and their sources.	Check response and qualification action.
What moved forward or was lost?	Stage movement and reasons.	Record patterns without blaming individual people.
What should change?	One bottleneck or data-quality issue.	Choose one small experiment, owner and review date.

Weekly review record

Review date	Open pipeline value (unweighted)	Weighted planning value	Deals expected to decide soon	Stalled deals	New opportunities	Main decision this week
	£	£				

Priority action	Owner	Due date	Evidence of completion

Days 23–24 — Find a bottleneck before trying to fix it

A bottleneck may be a poor-fit lead source, a slow internal quotation process, an unclear offer, a missing decision-maker, a price objection, a seasonal delay or an inaccurate data entry habit. Do not assume it is a salesperson's closing skill.

For each stage, calculate the typical time spent there, inspect the outcomes and read the notes. Use a defined period and comparable work. If the data is weak, say so.

Stage	Opportunities entering in period	Opportunities moving on	Indicative conversion	Typical time in stage	Repeated reasons / objections	Hypothesis to test

Example of disciplined interpretation. If many quotes are sent but few are accepted, do not immediately add a larger discount. Review whether quotes were requested by a genuine decision-maker, whether the scope was understood, whether customers compare different levels of service, and whether your follow-up records are complete. Choose one intervention and a time-bound review rather than changing everything at once.

Possible small experiments include:

- asking one additional qualification question before preparing a quote;
- sending a one-page scope summary before a full proposal;
- reducing the time taken to book a survey;
- adding a plain-language explanation of an important inclusion or exclusion;
- recording a specific loss reason instead of leaving lost deals blank.

Days 25–26 — Forecast backwards with assumptions visible

A backward calculation can turn a sales ambition into a set of activity assumptions. It cannot prove that the goal will be reached. Use rounded-up numbers where you need whole opportunities, and state the historical period behind each rate.

Illustrative fictional calculation. A B2B maintenance business is considering a monthly new-sales target of **£30,000**. Its assumed average won deal is **£3,000**. Its current planning rates are 50% lead to qualified, 40% qualified to proposal and 30% proposal to won.

Step	Calculation	Planning output
Won deals needed	$£30,000 \div £3,000$	10 won deals
Proposals needed	$10 \div 30\%$	33.3, rounded up to 34 proposals
Qualified opportunities needed	$34 \div 40\%$	85 qualified opportunities
New leads needed	$85 \div 50\%$	170 new leads

The calculation only holds if the deal size, conversion rates, timing, capacity and demand remain similar enough. It does not say that sending 170 messages creates £30,000 of revenue. Some leads may come from referrals, repeat customers, paid media, events or inbound enquiries, and some may not be appropriate to contact proactively.

Your forecasting assumptions

Planning period	Revenue goal	Average deal value	Deals won needed	Lead-to-qualified rate	Qualified-to-proposal rate	Proposal-to-won rate	Source / confidence note
	£	£		%	%	%	

Days 27–28 — Build a decision dashboard, not a promise dashboard

Your dashboard can be a simple spreadsheet tab. Start with measures that tell you where to look next. Do not adopt a universal “healthy pipeline” multiple; the amount of cover needed depends on your sales cycle, capacity, seasonality, delivery limits and how uncertain the opportunities are.

Metric	Current	Comparison point	What you will investigate if it changes
Open opportunities by stage		Prior four weeks / appropriate period	Is the problem lead flow, qualification, progress or recording?
Unweighted open value	£	Prior period	Are values or scope assumptions changing?
Weighted planning value	£	Forecast range	Are probabilities based on enough comparable decisions?
Average age by stage	days	Your own normal range	Which deals need a decision, requalification or closure?
Next-action coverage	%	100% is a useful process aim for active deals	Which records have been forgotten?
Conversion by stage	%	Cohort and period shown	Is a bottleneck visible, or is the sample too small?

Metric	Current	Comparison point	What you will investigate if it changes
Won / lost reasons	count	Qualitative review	What can we test or improve honestly?

Add an “unknown” category rather than guessing a loss reason. The quality of your reasons matters more than pretending every no can be neatly classified.

Days 29–30 — Choose one 60-day improvement experiment

Pick the weakness that most limits a useful next step. Do not set a target that relies on a customer behaving in a particular way. You can commit to an activity, a quality check or a review date; you cannot guarantee a conversion rate.

Improvement focus	Current evidence	One change to test	Owner	Start date	Review date	What would make us stop or change it?

Example only. A fictional IT-support business finds that quotations often lack a clear decision date. It tests a proposal-cover note that asks for the customer’s review process and agrees a date for questions. It measures whether more records contain a decision date; it does not promise a higher win rate.

At the 30-day review, ask:

1. Is the data sufficiently complete to draw a conclusion?
2. Did we apply the change consistently?
3. What changed in the process, customer feedback or results?
4. What else changed that could explain the result?
5. Should we keep, revise or stop the experiment?

Keep the pipeline useful after day 30

Daily, weekly and monthly operating rhythm

Frequency	Suggested routine	Purpose
Start of day	Check new leads, today's actions and urgent customer commitments.	Decide what genuinely needs attention today.
After each material interaction	Complete the five-minute update checklist.	Preserve context while it is fresh.
End of day	Check that every active deal has a next action or a recorded reason not to.	Prevent silent follow-up failures.
Weekly	Run the 30-minute review and choose priority actions.	Keep the live pipeline truthful and actionable.
Monthly	Compare forecast with actual outcomes, review conversion and stage age, and update assumptions carefully.	Learn from enough decisions without overreacting to one week.

Common challenges and proportionate responses

Challenge	What you may see	First checks	Proportionate response
Too many stalled deals	Large open value, old dates and repeated unanswered follow-ups.	Is there a real next step? Are the records accurate? Is the normal buying cycle longer?	Ask for a decision or future-review date, requalify, move to a clearly labelled revisit list or close the deal.
Feast-or-famine activity	Prospecting stops when delivery is busy, then the pipeline is empty later.	Which activity is sustainable alongside delivery? Which sources are genuinely relevant?	Reserve a small recurring business-development block and protect delivery capacity. Do not send indiscriminate outreach to fill the gap.

Challenge	What you may see	First checks	Proportionate response
Low conversion at one point	Plenty of leads but few qualified opportunities, or many proposals but few wins.	Are stages and denominators consistent? Is the sample large enough? What reasons repeat?	Test one change to qualification, scope clarity, timing or response speed; then review.
Inaccurate forecast	The weighted figure repeatedly differs from outcomes.	Are probabilities based on similar past opportunities? Are late-stage criteria rigorous?	Recalculate assumptions from more complete history and separate distinct sale types.
Incomplete records	Notes are missing and next actions are not visible.	Is the update task too complicated? Are responsibilities clear?	Reduce required fields, reinforce the SOP and give one named person responsibility for the weekly data-quality check.
Customer asks not to be contacted	An opt-out, objection or complaint arrives.	Has it been logged and applied across relevant contact methods?	Stop relevant marketing contact promptly, update the suppression process and seek advice where the position is unclear.

Seven-day follow-through plan

Use this after the initial 30-day build to protect the habit.

Day	Focus	Concrete output
1	Run the weekly review.	A priority action list with owners and dates.
2	Address the biggest bottleneck.	One hypothesis and one small change to test.
3	Clean the pipeline.	Every active deal is current, closed or assigned a future review date.
4	Review lead sources.	A list of sources, their quality evidence and one ethical, lawful action to test.

Day	Focus	Concrete output
5	Improve qualification.	A revised, plain-language qualification checklist.
6	Review reporting.	A dashboard that shows stage, next action, age and the assumptions behind forecasts.
7	Plan the next month.	One 60-day experiment, owner and review date.

Final workbook: your pipeline operating plan

Complete this page in plain language. It turns your work into a decision and an action plan rather than a set of observations.

Decision	Your answer
The one customer group or work type this first pipeline covers	
The system of record we will use	
The person accountable for keeping it current	
The five core stages we will use	
The most important exit criterion we will enforce	
The information we will no longer store because it is not needed	
The day and time of the weekly review	
The first pipeline bottleneck we will test	
The action we can control over the next 60 days	
The evidence that will tell us whether to keep, revise or stop the change	

Decision	Your answer
Where we need legal, data-protection, tax, security or other specialist advice	

Final check before you rely on the forecast

- ☐ Every active opportunity has an owner, current stage evidence and a dated next action.
- ☐ Stage names and exit criteria make sense to the people who use them.
- ☐ Deal values distinguish estimates from quoted or accepted amounts.
- ☐ Probabilities and conversion rates state their data period and confidence level.
- ☐ Lost, deferred and opted-out contacts are recorded honestly rather than left in the active pipeline.
- ☐ Any proactive electronic marketing has been checked against current UK rules and your own suppression list.
- ☐ Access to customer records is limited appropriately, and the team knows the fallback if the system is unavailable.
- ☐ The weekly review is in the diary, with a named owner.

Official guidance checked for this edition

- [ICO: Business-to-business marketing](#) — corporate versus individual subscriber distinction, UK GDPR implications and opt-out handling.
- [ICO: Electronic mail marketing](#) — consent, soft opt-in, identity, opt-out and electronic messaging guidance. The ICO says this guidance is under review; check it again before use.
- [NCSC: Small organisations guide to cyber security](#) — a practical starting point for small-business account, device, backup and scam-awareness controls.

Remember: a pipeline is a working record, not a growth guarantee. Keep it current, treat people fairly, learn from outcomes and change the process when the evidence says you should.