



ASCENDEA

AI / BUSINESS GROWTH / EBOOK & PLANNING WORKSHEETS

Build a Repeatable Sales System

A practical UK small-business workbook for creating a clear offer, running discovery conversations, managing a sales pipeline, following up responsibly, choosing CRM and automation tools, documenting sales work and completing a 90-day implementation plan. It replaces unsupported performance claims with evidence-led planning, human review and usable worksheets.



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

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A practical sales workbook for UK small businesses

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Before you begin

A steadier sales process is not a guarantee of revenue. It is a way to replace guesswork with a visible routine: decide who you can help, make relevant contact, run useful conversations, follow up appropriately, record what happened and improve one part at a time.

This workbook is for UK owners and managers of small businesses, including trades, professional services, B2B suppliers and independent retailers. It assumes you may be doing the selling yourself and may be new to CRM systems, automation or AI. You can begin with a notebook or spreadsheet; software is optional until it solves a real problem.

Use the worksheets as working documents. A number, target, price, timing or scenario in this workbook is **illustrative** unless you have recorded your own evidence. Treat estimates as assumptions to test, not promises to a customer or forecasted income.

How to use this workbook

1. Read Parts 1–4 before changing tools or hiring anyone.
2. Complete the short worksheets as you go. Write down what you know, what you are assuming and what you need to test.
3. Run the weekly review for at least several weeks so your data begins to mean something.
4. Automate only a task that is already understood and has a suitable human fallback.
5. Use the 90-day plan at the end to choose a manageable next action.

Adaptation and use notice

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1. Start with a sales system, not a sales scramble

A sales system is a repeatable way to move from a relevant prospect to a clear outcome. That outcome may be a sale, a proposal, a future review date or a respectful decision not to proceed. It is not a trick for making every person buy.

Without a system, the owner often reacts to the quietest week: networking frantically, discounting too soon, trying a new channel, then stopping it before there is useful evidence. A system creates a calmer alternative. It gives every opportunity a next step, every stage a definition and every loss a place to learn from.

Build the right order

Marketing can create attention, but attention is not the same as a qualified opportunity. Before spending more on adverts, social posts or lead lists, make sure you can answer these questions:

- Who is a suitable buyer?
- What business problem can you credibly help with?
- What happens from first enquiry to decision?
- Who records the next action and when it is due?
- What evidence tells you whether the approach is improving?

For a local electrician, a suitable buyer might be a facilities manager responsible for several small commercial properties. For an accountant, it might be an owner-manager who needs regular management information. For a B2B retailer, it could be a purchasing manager who has a recurring stock or delivery problem. Be specific enough to recognise a fit; do not assume every business is one.

The four parts of a practical sales system

Part	What it means	First version to create
Offer	A clear buyer, problem, scope and boundary	One plain-English offer sentence
Conversation	Discovery before recommendation	A question list and call-note template
Pipeline	Agreed stages and next actions	A spreadsheet or CRM board
Review	A weekly decision using your own evidence	A 30-minute review appointment

A system does not need to be complicated. A five-stage spreadsheet, updated after every meaningful conversation, is more useful than an unused enterprise CRM.

Workbook: your starting point

The customer group I can currently serve:

The problem I understand well enough to discuss responsibly:

What I currently do when a new enquiry arrives:

Where opportunities currently get lost, delayed or forgotten:

One change I will test first:

2. Sell by helping a buyer decide

Consultative selling means understanding the buyer's situation before suggesting an answer. It is not pressure disguised as friendliness. Your job is to find out whether there is a real fit and, if there is, to make the next decision easier. Sometimes the most helpful answer is that your offer is not suitable yet.

Reframe rejection as information

A decline can still be useful information. Record the actual reason if the buyer is willing to give one: wrong timing, no authority, competing priority, price, no perceived need, unsuitable scope or no response after a reasonable follow-up. Do not invent a reason to make your figures look neater.

This distinction matters. "No budget" may mean the business has not yet seen a worthwhile problem to solve. "We already use someone" may mean no change is needed. Neither statement automatically means you should argue, discount or keep contacting the person.

Listen before you explain

A good discovery conversation gives the buyer room to describe their current process in their own words. Ask a broad question, wait for the answer, then use a follow-up to clarify the consequence. Summarise what you heard and ask whether it is accurate.

Useful questions include:

- "How are you handling this at the moment?"
- "What is working well, and where does it become difficult?"
- "Can you describe the last time it happened?"
- "Who is affected when that happens?"

- “What have you tried already?”
- “What would a sensible improvement look like?”
- “Who else would need to be comfortable with a change?”

Avoid pretending you already know the answer. A short hypothesis can open a useful conversation: “Some property managers find that urgent maintenance requests are mixed in with routine messages. Is that relevant here, or is the issue different?” Then let the buyer correct you.

Prepare before a meeting

Use publicly available, relevant information only. Read the organisation’s website, recent public news or a role description. Do not collect unnecessary personal details. Prepare a small number of questions and decide the appropriate next step: another discovery call, a site visit, a scoped proposal, a sample, or a clear close-out.

Workbook: meeting preparation sheet

Item	Your note
Organisation and contact role	
Genuine reason this may be relevant	
What I know from a permitted public source or earlier conversation	
What I must not assume	
Three questions I need answered	
Useful material I can share if asked	
Appropriate next step if there is a fit	
Date and owner for follow-up	

SOP: prepare and record a discovery conversation

Owner: the person leading the conversation.

Trigger: a meeting is booked or a qualified inbound enquiry needs a call.

Input: the enquiry, previous notes, permitted public information and the meeting-preparation sheet.

Output: a factual call note, next action and updated pipeline stage.

1. Open the contact record or spreadsheet and read the previous notes.

2. Write three to five questions that will help you understand the process, consequence, decision process and timescale.
3. Start by confirming the purpose of the conversation. Do not claim a result you have not delivered.
4. Ask questions, listen and make concise factual notes. Do not promise a scope or price before you understand the need.
5. Summarise the problem, desired outcome, constraints and any uncertainty. Ask the buyer to correct the summary.
6. Agree one next step with an owner and a date. If there is no fit, record that accurately and close the opportunity.
7. Update the record promptly. Store only information that is relevant to the sale and your relationship.

Exception and human fallback: If the buyer asks for legal, regulated, medical, financial or other specialist advice outside your competence, say so. Pause the recommendation, seek suitable expert input or refer them elsewhere. If your CRM is unavailable, write the note in an approved secure location and enter it later; do not leave customer information in a personal chat or unsecured device.

3. Define a clear offer and a suitable buyer

An offer is more than a list of services. It gives a buyer enough clarity to judge whether a conversation is worthwhile. Start with a narrow version. You can broaden it once repeated evidence shows that you can deliver it safely and profitably.

Write a working offer sentence

Use this as a drafting tool:

I help **[specific buyer]** deal with **[specific problem]** by providing **[defined service or product]**, with **[relevant boundary or safeguard]**.

Fictional example: “We help small commercial landlords organise planned maintenance requests through a managed booking and update service, with urgent or unclear work passed to a named person.”

This says who it is for, what it addresses and what it will not do automatically. It is better than “We transform property operations” because a buyer can understand and test it.

Qualify for fit, not just enthusiasm

A good prospect may have a relevant problem, the ability to act, access to the people who use the process and a credible reason to discuss a change. You do not need an inflexible scoring model, but you do need a shared definition of “worth pursuing”.

Check	Helpful evidence	Caution sign
Problem	A recent, concrete example	Only vague interest in a trend
Fit	Your offer addresses the stated need	You would need to invent a service to fit
Authority	The decision route is known	Nobody knows who will decide
Practicality	Information, time and access can be provided	Essential dependency is unavailable
Commercial fit	Scope and budget discussion is possible	Buyer requests unlimited work for an unknown price

Price with visible assumptions

Price should reflect the agreed scope, delivery effort, direct costs, risk, support expectations and value to the buyer. Do not treat time saved as automatic cash saved, and do not promise a payback period before it has been tested.

Illustrative planning example: A business spends an estimated 4 hours a week on a repeat administrative task. If its own working assumption is £25 per hour and it uses 48 working weeks, the annual **capacity value** is $4 \times £25 \times 48 = £4,800$. This is not automatically profit, payroll saving or money available to spend. It may only become a financial benefit if the business can reassign the time, avoid overtime, serve existing demand or make another deliberate change.

Record third-party subscriptions, delivery hours, subcontractors, taxes and contingency separately. State whether any quoted figure includes VAT, where applicable. Use an accountant or other qualified adviser for tax and contractual questions.

Workbook: one-page offer definition

Field	Your working answer
Offer name and intended buyer	
The problem in the buyer's words	
Deliverables or product included	
What is explicitly excluded	
Client/customer responsibilities	

Field	Your working answer
Assumptions and dependencies	
Price basis and third-party costs	
VAT treatment to confirm	
Evidence for acceptance or a successful handover	
Manual fallback, support and ownership	
Specialist or contract review needed	

4. Map your pipeline and use useful measures

A pipeline is a shared picture of where each real opportunity is. It is not a list of everyone you have ever met. Each stage should answer two questions: what has happened, and what must happen next?

Start with five simple stages

Adapt the wording to your business, but keep the movement rules clear.

Stage	Enter when	Leave when	Record now
New enquiry / prospect	A relevant enquiry arrives or a suitable prospect is identified	A first conversation is booked or outreach is closed	Source, contact, owner, next action
Discovery	You have a conversation about a possible need	Fit and decision route are understood, or no fit is recorded	Problem, consequence, stakeholders, timescale
Qualified opportunity	There is a defined need and plausible route to a decision	A proposal, quote or suitable alternative is agreed	Scope assumptions, value, next decision
Proposal / quote	A specific proposal or quote has been sent	Accepted, declined, changed or expired	Amount, sent date, decision date, risks
Won / lost / paused	A decision has been recorded	N/A	Reason, lessons, handover or future review date

Do not move an opportunity forward just because you hope it will close. A stage should describe evidence, not optimism.

Know the difference between leading and lagging indicators

Revenue already invoiced is a **lagging indicator**: it tells you what happened. Leading indicators help you manage the work before revenue is known: relevant new enquiries, discovery conversations, proposals sent, stage movement, time in stage and due follow-ups.

Track a small set consistently. The following definitions work in a spreadsheet or CRM.

Measure	Simple calculation	What it can help you ask
Stage conversion	Opportunities that moved forward ÷ opportunities that entered the stage	Is there a bottleneck worth understanding?
Win rate	Won opportunities ÷ won plus lost opportunities for a stated period	Which offer, source or customer type is worth examining?
Average deal value	Total value of won deals ÷ number of won deals	Are we comparing similar work?
Sales-cycle length	Close date minus first meaningful contact date	Where does a decision slow down?
Pipeline value	Stated potential value at each stage	What is visible, not guaranteed?
Weighted pipeline	Potential value × your own documented stage assumption	What range might merit planning attention?

A weighted pipeline is a planning tool, not booked revenue. If you use a stage probability, base it on your own history where possible. Until you have enough history, label it as a provisional assumption.

Workbook: weekly sales scorecard

Week beginning: Owner:

Measure	This week	Previous week	Notes or evidence
New relevant enquiries / prospects			

Measure	This week	Previous week	Notes or evidence
Discovery conversations held			
Opportunities qualified			
Proposals or quotes sent			
Won / lost / paused decisions			
Value in each pipeline stage			
Overdue next actions			
Opt-outs or data issues actioned			

One pattern I can support with evidence:

One change I will test, and the date I will review it:

SOP: weekly pipeline review

Owner: business owner or nominated sales lead.

Trigger: the same 30-minute appointment each week.

Input: up-to-date contact and opportunity records, the scorecard and notes from recent conversations.

Output: accurate next actions, closed stale records, one improvement test and a short management note.

1. Check that every active opportunity has an owner, a next action and a due date.
2. Review opportunities by stage. Ask what evidence supports the stage and what could prevent the next step.
3. Mark opportunities as won, lost or paused when that is the honest position. Record the reason without blaming the buyer.
4. Count your measures using the same definitions as previous weeks. Keep the date range visible.
5. Identify one bottleneck or quality issue. Do not change several parts of the process at once.
6. Choose a small test, such as clearer qualification questions or a shorter quote format. Name its owner and review date.

7. Check overdue actions, opt-outs and any complaints before starting new outreach.

Exception and human fallback: If there is too little data to support a conclusion, record “not enough evidence yet” rather than guessing. If the review reveals a complaint, suspected data breach, misleading claim or serious customer issue, pause the relevant campaign or workflow and deal with it through the appropriate owner or specialist process.

5. Run better discovery, proposal and decision conversations

A buyer may need clarity on the problem, the effect of leaving it unchanged, the available options and the practical next step. Structure helps, but it should never become an interrogation.

Use a four-part discovery sequence

The well-known SPIN structure can be used as a memory aid. Keep the questions relevant and do not manufacture pain.

Question type	Purpose	Example for a small business service
Situation	Understand the present process	“How do new site requests reach the right person now?”
Problem	Identify friction or risk	“Where does that process fail or create extra work?”
Implication	Explore the consequence	“What happens to the customer or team when it is delayed?”
Need and value	Let the buyer define useful change	“What would a workable improvement need to do?”

After you have listened, summarise: “You have described three issues: messages are duplicated, urgent requests can be missed and the office spends time chasing updates. Have I understood that correctly?” Then explain only the part of your offer that connects to that answer.

Respond to objections with curiosity and honesty

An objection may be a question, a constraint or a genuine reason not to proceed. Do not force an answer. Check what the person means, provide accurate information and agree the next step.

What the buyer says	A respectful response	What not to do
"It costs too much."	"What would you need to see to judge whether the scope is worthwhile?"	Claim savings or returns you cannot evidence
"I need to think about it."	"Of course. Which part needs more thought, and would a short written summary help?"	Demand a decision on the call
"I need someone else to approve."	"Who else needs the information, and what will they need to decide?"	Pretend the current contact has authority
"We are happy with what we use."	"That is useful to know. What would need to change before you reviewed alternatives?"	Create fear or false urgency
"Not now."	"What needs to be true for the timing to be better? Shall we close this for now or agree a date to revisit?"	Add them to endless follow-up messages

Never use invented testimonials, competitor claims, artificial deadlines or a false "Re:" subject line to create familiarity. A refusal or opt-out is an instruction to respect, not a prompt to find a different route around it.

Close by agreeing a decision, not by applying pressure

Closing can be a simple invitation to choose an appropriate next action. If a buyer has confirmed a fit, you might ask: "Would a written scope for the agreed pilot help you decide?" If the buyer is not ready, a correct close can be: "It sounds as though this is not a priority at present. I will close the opportunity unless you would like us to agree a future review date."

Real urgency comes from the buyer's own evidence of the cost, risk or inconvenience of waiting. Do not create a deadline unless it is real, explained and fairly applied.

Workbook: proposal and decision check

Before you send a proposal or quote	Complete
Buyer's problem is described in their own words	☐
Scope, output and exclusions are clear	☐

Before you send a proposal or quote	Complete
Assumptions, dependencies and client responsibilities are visible	☐
Price basis, third-party charges and VAT wording are checked	☐
Acceptance evidence and handover are described	☐
Data, security, safety or specialist constraints are considered	☐
The proposal does not claim unverified results	☐
A named decision route and next date are recorded	☐

6. Build follow-up and outreach that people can trust

Follow-up is useful when it is relevant, expected or proportionate. It is not a licence to send a long sequence to everyone who has not replied.

Start with a lawful and respectful contact plan

UK direct-marketing rules depend on the channel and the recipient's status. The ICO says that companies and LLPs are generally corporate subscribers under PECR, while sole traders and certain partnerships are treated as individual subscribers. The electronic-mail rule differs between those groups, and the UK GDPR still applies when personal data is processed. The ICO's B2B guidance is under review following the Data (Use and Access) Act, so recheck it before a campaign.¹

For corporate email or text marketing, the ICO says you must not conceal your identity and must give a valid opt-out address. It recommends maintaining and screening a do-not-contact list. For sole traders and certain partnerships, do not assume that the corporate email position applies; check the applicable PECR conditions and use consent or a valid exception where required.¹

Direct messages stored electronically can fall within the broad meaning of electronic mail. Telephone marketing has separate requirements. Do not treat a social-media connection, a public email address or a purchased list as blanket permission. If you use a supplier or agency, you remain responsible for the marketing you instigate.¹

This is a practical prompt, not a compliance guarantee. For a campaign, document your recipient type, source of contact data, lawful basis where personal data is used, privacy information, suppression process and owner. Seek specialist advice for uncertainty, international campaigns or higher-risk work.

Use a modest, relevant rhythm

Choose a frequency based on context and consent, not a generic “30-day sequence”. An inbound enquiry may need a prompt response. A corporate prospect who has not replied to a relevant first contact may justify one thoughtful follow-up. Stop if someone objects, opts out or asks not to be contacted. Record the outcome immediately.

Sample email for a corporate business contact — adapt only after checking your circumstances:

Subject: A question about [specific process] at [Company]
 Hello [Name],
 I noticed [a genuine, relevant public observation]. We help [specific type of business] with [defined problem]. I wondered whether [brief question about the process] is a current issue for your team.
 If it is useful, I can send a short outline of a possible next step. If it is not relevant, please tell me and I will not follow up.
 [Your name, business identity, contact details and required privacy/opt-out information]

Only say “we help” if it is true. If you are testing a new service, say so. Keep the observation factual and avoid attachments, tracking tools or automation you have not assessed for the context.

SOP: send and stop a sales follow-up

Owner: the sender or campaign owner.

Trigger: an agreed follow-up date or a permissible, relevant outreach opportunity.

Input: contact record, audience/status check, prior messages and current opt-out/suppression list.

Output: one appropriate message or a recorded decision not to contact.

1. Confirm the reason for the message is relevant and truthful.
2. Check whether the recipient is a corporate subscriber, sole trader or other type of individual subscriber where that matters. If uncertain, pause and take the more protective route or obtain advice.
3. Check consent, applicable PECR conditions, privacy-information requirements and the suppression list before sending.
4. Send a short message from an identifiable sender with a valid way to opt out where required.
5. Record the date, channel, message purpose and next review date.
6. If the recipient opts out, objects or complains, update the suppression record promptly and stop the relevant marketing.

7. If there is no reply, decide whether a further message remains proportionate and permissible. Do not run an indefinite sequence.

Exception and human fallback: Stop automation immediately if an unsubscribe mechanism fails, a complaint arrives, the recipient type is unclear, a message contains an error or a campaign's legal basis has not been checked. Escalate to the responsible manager or a qualified privacy adviser before restarting.

7. Choose CRM, automation and AI carefully

Technology should make a sound process easier to run. It will make a poor process run poorly at greater speed. Begin with the smallest useful setup, then add complexity only when you have a clear reason and someone who can maintain it.

Set up a CRM in small steps

A CRM is a system for recording contacts, conversations, opportunities and next actions. It may be a simple spreadsheet at first, then a dedicated application when your volume, collaboration or reporting needs justify it.

Step	What to do	Check before moving on
1. Choose the minimum fields	Contact, organisation, source, stage, owner, next action and due date	Each field supports a real decision
2. Clean existing data	Merge obvious duplicates and remove unnecessary records	You know where the data came from and whether you may use it
3. Create your stages	Use the definitions from Part 4	The team can explain the entry and exit rules
4. Add a daily habit	Update the record after meaningful contact	The next action is visible and owned
5. Test reporting	Produce a simple stage and overdue-action view	Numbers match the underlying records
6. Add only one automation	For example, assign an owner or create a follow-up task	A person can stop or correct it

When comparing CRM providers, check the provider's current official documentation for features, limits, data terms, support, pricing, permissions, export options and security controls. Consumer chat subscriptions, API usage and business plans can be separate products. Do not copy an old online price list into a proposal.

Decide what to automate

Suitable early candidates are reminders, task creation, duplicate checking, meeting scheduling and internal draft preparation. Keep judgement-heavy work with a person: discovery, pricing decisions, complex complaints, sensitive messages, contract decisions and anything that could create an important commitment.

Task	First question	Human control
Reminder after a meeting	Is the date and owner recorded correctly?	Owner checks the task list
Appointment scheduling	Are availability and booking rules correct?	Person can override bookings
Draft follow-up	Is the source note accurate and the claim supportable?	Person edits and sends
Lead routing	Are the categories safe and clear enough?	Uncertain cases go to a queue
AI summary of call notes	May this information be submitted to the tool?	Person checks the summary against the source

Use AI as a drafting aid, not an authority

AI can assist with summarising permitted notes, suggesting a draft, identifying a missing field or practising a conversation. It can also be wrong, overconfident or unsuitable for the data supplied. Treat every output as a draft requiring human review against the original source, your policy and the buyer's actual situation.

If personal data is involved, the ICO's AI guidance highlights accountability, transparency, lawfulness, accuracy, fairness, security, data minimisation and individual rights. It also links to DPIA considerations. The guidance is under review, so confirm current obligations before implementation.³

Do not put passwords, bank details, health data, client confidential material or unnecessary personal information into a tool. Establish who owns the account, who can access it, how long information is retained, what is logged and how access is removed when someone leaves. The NCSC's current guide for small organisations covers protecting accounts and devices, backups and scams; use it as a starting point, not as a compliance certificate.⁴

Safe prompt templates for internal use

Replace bracketed text with approved, minimum necessary information. Do not paste confidential or personal information unless your organisation has assessed the tool and permitted that use. Verify every output before use.

1. Create an internal call-note draft

You are helping prepare an internal sales note. Using only the permitted text below, create: (a) the buyer's stated problem, (b) desired outcome, (c) constraints, (d) agreed next action, (e) unanswered questions. Do not invent facts, commitments, prices or timelines. Mark any uncertainty as "needs human check".

Permitted meeting notes: [paste approved, minimised notes]

2. Check a proposal for unsupported claims

Review the draft below as a cautious sales editor. List statements that sound like guarantees, unsupported savings claims, invented testimonials, unclear scope or missing assumptions. Do not rewrite facts. Suggest questions a human should answer before sending.

Draft: [paste approved draft]

3. Practise a discovery conversation

Role-play a prospective buyer in [sector]. Give one short answer at a time. Do not invent personal data or claim real experience. Raise realistic but general concerns about scope, timing and budget. After five questions, give feedback on whether the questions were clear and non-leading.

SOP: test one sales automation

Owner: sales-system owner, with a named reviewer.

Trigger: a repeated task has a clear input, desired output and manual alternative.

Input: current process map, test records, access/permission decisions and a success/failure checklist.

Output: a documented decision to keep, amend, pause or remove the automation.

1. Write down the task exactly as it happens today, including the owner and the manual fallback.
2. Define the permitted input, desired output, prohibited actions and escalation path.
3. Check data protection, security, provider terms and access permissions before connecting any live system.

4. Test with appropriate non-live or authorised sample data. Include ordinary, unclear and failure cases.
5. Compare the result with the original record. Check errors, review time, cost and whether the manual fallback worked.
6. Keep a person responsible for approval where the output affects a customer, price, commitment, privacy or safety.
7. Record the version, test result, limitation and decision. Re-test after a material change.

Exception and human fallback: Pause the workflow if it sends an incorrect message, exposes information, takes an unauthorised action, produces an unsafe suggestion or cannot be explained by the owner. Use the pre-existing manual process while the issue is assessed. Do not resume merely because the tool is available.

8. Scale through people and documented work

A sales hire is not a shortcut around an unclear offer or inconsistent founder-led sales. Consider adding capacity when you have a repeatable process, enough appropriate work for the person to do, a realistic budget and a way to supervise quality.

Check readiness before hiring

Readiness question	Evidence to look for
Is the offer clear?	Written buyer, scope, exclusions and pricing logic
Is work available?	More suitable enquiries or sales activity than the current team can handle well
Is the process teachable?	Stages, call preparation, record standards and handover steps are documented
Can quality be supervised?	Named manager, call review process and customer-feedback route
Is the employment model understood?	Appropriate professional advice on employment status, pay, commissions and contracts

Do not use a vague “revenue multiple” to justify a hire. Build a cash and capacity model from your own assumptions: salary or contractor cost, employer costs where relevant, equipment, training time, management time, lead availability, direct costs and a downside case.

Train for consistency

A useful onboarding sequence explains why the business exists, who it serves, how opportunities are qualified, what can and cannot be promised, how records are kept and how a customer can get help. Role-play can be helpful, but only with fictional or authorised material. Do not use an actual customer's confidential conversation as a training asset without permission.

Illustrative 30/60/90-day development plan:

Period	Focus	Evidence to review
Days 1–30	Product/service understanding, process observation and CRM basics	Call notes, role-play feedback, policy completion
Days 31–60	Supervised discovery and follow-up	Quality of questions, records, boundaries and next actions
Days 61–90	Independently managed work within agreed limits	Sample review, customer feedback, conversion context and support needs

This is a planning framework, not a promise that someone will be ready on a particular day.

Coach with evidence, not surveillance

Use a regular one-to-one to review pipeline quality, upcoming decisions, skills to practise, workload, ethical or compliance concerns and support needed. A target that encourages poor-fit sales, inaccurate claims or unlawful outreach is not a good target.

Build a sales playbook

Your playbook should contain the current version of your buyer definition, offer, qualification rules, pipeline stages, templates, pricing/discount authority, escalation routes, security rules and handover process. Use version dates. A new team member should know what to do when an input is missing, a buyer requests an exception or the system fails.

Workbook: team and process readiness

Item	Evidence / action owner	Review date
Offer and exclusions written		
Qualification criteria used consistently		

Item	Evidence / action owner	Review date
CRM stage and data rules documented		
Proposal and approval boundaries documented		
Training material uses permitted examples		
Customer complaint/escalation route is clear		
Account, access and leaver process is clear		
Hiring/engagement advice required		

9. Your 90-day implementation plan

This plan is a sequence for learning and implementation, not a forecast. Adjust the pace if you have existing customer obligations, seasonal demand, a small team or a blocker that needs specialist input. Do not delay a security, privacy or customer issue to protect the calendar.

Days 1–30: create the foundation

Choose one buyer group and one problem you can discuss intelligently. Write the offer sentence, map the existing path from first contact to decision, create your initial pipeline stages and start recording activity. Practise discovery questions and prepare before meetings.

By the end of this phase, aim to have:

- one written buyer and problem hypothesis;
- a simple pipeline with clear stage definitions;
- a discovery-call sheet and proposal check;
- a weekly review appointment; and
- a list of assumptions you still need to test.

Days 31–60: run the process consistently

Use your system for real, appropriate conversations. Improve the accuracy of your records, build a small set of truthful templates and review one bottleneck at a time. If you begin outreach, apply the B2B marketing checks in Part 6 before sending. If you introduce a CRM, set up only the minimum fields and daily update habit.

By the end of this phase, aim to have:

- recorded outcomes from relevant conversations;
- a visible list of next actions and overdue items;
- an honest view of where opportunities pause or are lost;
- one small improvement test; and
- any opt-outs, security or data-handling issues resolved.

Days 61–90: improve and document

Review your own stage movement, sales-cycle observations and common questions. Retain what is helping, remove what adds work without value and document the current process. Test one modest automation only if the underlying task is clear. Assess team readiness only after the process is genuinely teachable.

By the end of this phase, aim to have:

- a current sales playbook;
- one evidence-backed improvement to the process;
- a decision about the next capability to build, pause or seek help with; and
- a 90-day follow-on plan based on actual records, not internet benchmarks.

Workbook: 90-day action plan

Period	My priority	First small action	Owner	Review date	Evidence I will use
Days 1–30					
Days 31–60					
Days 61–90					

The one sales activity I will protect in my calendar this week:

The person who will hold me accountable:

The condition that would make me pause and seek specialist help:

10. Keep the system human and improve it carefully

A predictable process is not one that guarantees a particular sales result. It is one that helps you see what happened, take the next sensible action and avoid repeating preventable mistakes.

Keep the human parts visible: listening, checking understanding, making truthful claims, handling concerns respectfully and knowing when not to sell. Keep the system parts visible too: current records, clear ownership, useful definitions, safe controls and regular review.

When the process is working, do not assume it will work unchanged forever. Buyer needs, staff, suppliers, technology and law can all change. Review the system, update your playbook and retain the manual route for important work.

Final self-assessment

Score each area from 1 to 5 for your own planning. A 1 means it is not defined; a 3 means there is a usable draft; a 5 means it is supported by recent evidence and working in practice.

Area	Score 1–5	Evidence / next action
Buyer and offer clarity		
Discovery and preparation		
Pipeline and CRM discipline		
Measures and weekly review		
Proposal, follow-up and customer respect		
Data, outreach and security safeguards		
Automation and AI human review		
Team/process documentation		

My highest-priority improvement:

The evidence I need before making a bigger change:

Action, owner and date:

References and verification notes

1. [ICO — Business-to-business marketing](https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/business-to-business-marketing/)

<https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/business-to-business-marketing/>

2. [ICO — Electronic and telephone marketing](https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/guide-to-pecr/electronic-and-telephone-marketing/)

<https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/guide-to-pecr/electronic-and-telephone-marketing/>

3. [ICO — Guidance on AI and data protection](https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/artificial-intelligence/guidance-on-ai-and-data-protection/)

<https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/artificial-intelligence/guidance-on-ai-and-data-protection/>

4. [NCSC — Small organisations guide to cyber security](https://www.ncsc.gov.uk/collection/small-organisations-guide-to-cyber-security)

<https://www.ncsc.gov.uk/collection/small-organisations-guide-to-cyber-security>

The linked guidance was checked on **9 October 2026**. ICO B2B marketing and AI guidance state that they are under review following changes made by the Data (Use and Access) Act. Recheck the official pages before acting, particularly before sending a campaign or introducing AI that processes personal data.

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