# The Always-On Pipeline Step-By-Step Guide

### Step 0 — The rule that makes the whole thing work (10 minutes)

Decide this now: sales is no longer a "when I have time" activity.

You are building a basic operating system:

1. Pipeline is visible
2. Selling time is non-negotiable
3. Follow-up runs without you "remembering"

If you miss this step, everything becomes vibes and memory again.

## Part 1 — Get the pipeline out of your head (60–90 minutes)

### Step 1 — Choose where your pipeline will live (10 minutes)

Pick one place:

- Best: a simple CRM (HubSpot, Pipedrive, Close, etc.)
- Fine: a spreadsheet (if you'll actually keep it updated)

The tool doesn't matter. Visibility does.

### Step 2 — Create your pipeline stages (15 minutes)

Keep this simple. Use 5–7 stages max:

1. New lead / Identified
2. Contacted
3. Discovery booked
4. Discovery done

5. Proposal sent
6. Decision pending
7. Won / Lost

If you already have stages, simplify them. Complexity kills consistency.

## Step 3 — Build your "single-screen opportunity record" (15 minutes)

Every opportunity must have these fields:

- Company / Person
- Problem they're trying to solve
- Stage
- Estimated value
- Probability (optional)
- Next step
- Next step date
- Notes / context

Non-negotiable: every opportunity has a next step + date.

## Step 4 — Do a full pipeline capture (20–45 minutes)

Dump everything into the pipeline:

- Email threads you keep meaning to reply to
- DMs / LinkedIn messages
- "We should chat soon" conversations
- Old proposals
- Past clients who said "maybe later"
- Referrals that never got followed up

If it could become revenue: it goes in.

## Step 5 — Triage: clean the mess into action (10 minutes)

For each opportunity choose one:

- Advance it: set next step + date
- Nurture it: set a follow-up date (don't leave it "hanging")
- Close it out: mark lost (dead is better than invisible)

# Part 2 — Protect selling time like delivery time (30 minutes)

## Step 6 — Create your non-negotiable weekly “Sales Block” (10 minutes)

Put it in your calendar, recurring, same day/time every week.

Minimum effective version:

- 2 hours per week (solo founder)
- If you’re bigger: 2–5 hours total across the week

This is the Always-On part. It happens even when you’re slammed.

## Step 7 — Define what happens inside the Sales Block (10 minutes)

Your block is not “do sales stuff.”

It has 3 sections:

1. Pipeline Review (15 min)
    - What has no next step/date? Fix it.
    - What’s stalled? Decide the next move.
2. Follow-ups (45–60 min)
    - Work the follow-up sequence (Part 3 below)
3. New outreach (30–60 min)
    - Start new conversations so the top of the pipe never dries up

## Step 8 — Add a 5-minute daily “pipeline hygiene” habit (optional but powerful)

Every workday:

- Open pipeline
- Update stages
- Add any new lead
- Set next step/date

This prevents “Friday panic” and keeps momentum.

# Part 3 — Install a follow-up sequence that runs without willpower (60–90 minutes)

## Step 9 — Decide your default follow-up cadence (10 minutes)

Most service deals don't die from "no." They die from silence.

Use a simple sequence like:

- Touch 1: 2 days after last contact
- Touch 2: 7 days
- Touch 3: 14 days
- Touch 4: 30 days
- Touch 5: 60–90 days (long-term nurture)

You can tighten/loosen this, but you need a default.

## Step 10 — Write 4 reusable follow-up messages (30–45 minutes)

Each follow-up needs a reason (so you don't feel awkward).

Use these "reasons":

1. Value add: quick insight, example, idea
2. Clarify: confirm priority/timing
3. Risk reversal: offer a smaller next step
4. Close the loop: "Should I close this out?"

Example templates (edit to your voice):

**Value add**
"Quick thought after our chat — if you want to reduce X, the fastest lever is usually Y. If helpful, I can send a 2-minute outline. Still aiming for [goal] in [timeframe]?"

**Clarify**
"Where is this sitting on your priority list right now — this week, later this month, or 'not yet'?"

**Smaller next step**
"If the full project feels like a leap, we can start with a short [audit/workshop] and map the plan first. Want me to outline that option?"

**Close the loop**
"No rush — I haven't heard back, so I'm going to assume timing isn't right. Should I close this out for now, or is there a better month to revisit?"

## Step 11 — Turn the sequence into tasks (15–30 minutes)

In your CRM or spreadsheet, create follow-up tasks automatically or manually:

- Every opportunity gets the next follow-up scheduled
- If they reply, you reset the clock
- If they go quiet, sequence continues

Goal: no opportunity sits there without a scheduled next touch.

# Part 4 — Keep the pipeline healthy (so you spot problems early)

## Step 12 — Create a weekly “Pipeline Health” dashboard (15 minutes)

You want 3 numbers you can see in 30 seconds:

1. **of active opportunities**
2. £ value of pipeline
3. **of opportunities with next step/date**

Optional but useful:

- Opportunities per stage
- Average days stalled in stage
- Win rate

## Step 13 — Add a monthly “founder sanity check” (20 minutes)

Once per month ask:

- If I stopped all outreach today, how many weeks of pipeline do I have?
- Which stage is the bottleneck? (Discovery? Proposal? Follow-up?)
- Do I have enough new conversations starting each week?

This is how you stop the “empty next quarter” surprise.

# Part 5 — The minimum viable Always-On Pipeline (if you’re overwhelmed)

If you do nothing else, do this:

1. Put every opportunity in one place
2. Every opportunity has a next step + date
3. 2 hours per week in calendar for:

    a. pipeline review
    b. follow-ups
    c. new outreach
4. 4-message follow-up sequence reused forever

That alone breaks feast/famine for most service businesses.

## What your week looks like when this is working

- You deliver client work without sales vanishing
- Follow-ups happen even when you’re busy
- You can glance at your pipeline and know if next month is safe
- No more “panic prospecting from zero”