

The Sales Process Playbook

How to run a predictable pipeline with a team of two to ten.

Most small businesses do not have a sales problem. They have a memory problem — deals go quiet, follow-ups get skipped, and nobody can say what will close this month. This pack fixes that with three connected tools and a weekly rhythm you can actually keep.

Includes	Pipeline stage template · Follow-up sequence planner · Lead scoring sheet
Format	One Excel workbook (also opens in Google Sheets) + this guide
Built for	South African small businesses and owner-led sales teams
Setup time	About 45 minutes to go live; 20 minutes a week to keep running
Version	1.0 · Currency in South African Rand

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One page. Print it and stick it up.

SECTION 1

Start here: 45 minutes to go live

Do these six things in order. Do not customise anything until the pack is running with your real deals in it.

The setup sequence

☐	Open the workbook and read the Start Here tab. Two minutes. It explains the colour code: blue cells are yours to type in, grey cells calculate themselves.
☐	Rename your pipeline stages. Go to Pipeline Stages. Change the stage names to the words your team actually uses. Do not add stages yet — work with six selling stages for the first month.
☐	Write one exit criterion per stage. The single condition that must be true before a deal is allowed to move forward. Section 2 explains how.
☐	Load every open deal into the Deal Tracker. Delete the example row first. Every deal you are actively working, no matter how small. This is the longest step — budget twenty minutes.
☐	Open the Dashboard and sanity-check it. If the weighted forecast looks absurd, your stage probabilities are wrong, not the maths. Adjust them on the Pipeline Stages tab.
☐	Book a recurring 30-minute weekly slot. Same day, same time, every week. Section 7 gives you the agenda. A pipeline without a weekly review decays within a fortnight.

The one rule that decides whether this works

Every deal lives in the tracker, or the tracker is worthless. The moment your team keeps a "real" list somewhere else — a notebook, a WhatsApp thread, someone's head — the forecast becomes fiction and people stop trusting it. Agree on day one: if it is not in the file, it does not exist.

What you should *not* do in week one

- Do not add extra columns. You will want to. Resist it until you have run four weekly reviews and can name the specific decision the column would improve.
- Do not build reports on top of this. The Dashboard answers the questions that matter at this size. Extra charts are procrastination dressed as analysis.
- Do not rewrite the follow-up sequences before you have run one to completion. They are built on how buyers actually behave, not on how sellers wish they behaved.
- Do not backfill historic deals. Load what is open now. Closed history adds noise and takes an afternoon you do not have.

SECTION 2

Designing your pipeline stages

A stage is not a description of how you feel about a deal. It is a statement of what the buyer has done.

The commonest mistake in small-business pipelines is naming stages after seller activity — *called, emailed, followed up*. Activity stages inflate forecasts, because a rep can move a deal forward by doing something, without the buyer doing anything at all. Buyer-evidence stages do not have that problem. A deal advances only when the buyer has demonstrably done something: replied, met you, confirmed a budget, agreed terms.

Exit criteria: the part everyone skips

For every stage, write down the condition that must be true before a deal is allowed to leave it. Then hold the line. This single discipline does more for forecast accuracy than any software.

Stage	Weak criterion (avoid)	Strong criterion (use)
Contacted	"I've reached out."	Two-way contact made — they replied, answered the phone, or met you.
Qualified	"They seem interested."	Need confirmed in their words, rough budget known, and you are speaking to someone with influence.
Discovery	"We had a good chat."	Requirements written down, decision-maker named, timeline stated by them.
Proposal Sent	"I emailed the quote."	Proposal delivered <i>and</i> a walkthrough conversation booked or completed.
Negotiation	"They're thinking about it."	Verbal commitment given; only commercial terms remain open.
Closed Won	"They said yes."	Signed order, purchase order, or paid deposit in hand.

Why "proposal sent" is where forecasts go to die

In most small-business pipelines, Proposal Sent holds the largest share of value and the lowest share of movement. Deals arrive there and never leave, because sending a document feels like progress. If the buyer has not booked time to discuss the proposal, the deal has not actually advanced — it has just changed the seller's mood. Require the booked conversation before the stage change and this problem largely disappears.

Setting your win probabilities

The pack ships with sensible defaults — 5% at New Lead rising to 80% at Negotiation. These are starting points drawn from typical small-team B2B pipelines, not from your business. After twenty to thirty closed deals, replace them with your own numbers using this calculation:

Stage probability = deals that reached this stage *and* eventually closed won ÷ all deals that ever reached this stage.

If 40 deals reached Proposal Sent and 22 of them closed won, your Proposal Sent probability is 55%, not the 60% default. Change the number on the Pipeline Stages tab and the whole forecast updates.

How many stages?

Six selling stages, plus Closed Won and Closed Lost. That is the right number for a team under ten people. Every stage you add is another judgement call your team has to make consistently, another place deals can hide, and another line on the dashboard that nobody reads. If you genuinely sell two different things with two different processes, keep one stage set and add a column for product type rather than doubling your stages.

SECTION 3

Running the Deal Tracker

The tracker only rewards you if it is current. Five rules keep it that way.

What each column is for

Column	Who fills it	Why it exists
Deal value	You	Drives every rand figure on the dashboard. Use the realistic first-year value, not the dream upsell.
Stage	You (dropdown)	Pulls the win probability automatically. Never type a stage name freehand.
Prob. / Weighted value	Calculated	Deal value × stage probability. This is your honest forecast number.
Date opened / Age	You / calculated	Shows how long a deal has been alive. Old deals are usually dead deals.
Last contact	You	The single most important column. It powers the gone-quiet alert. Update it every time you speak to them.
Next action + date	You	The specific next thing, and when. "Follow up" is not a next action. "Call MD to confirm start date" is.
Alert	Calculated	Flags gone quiet, overdue action, or a close date that has passed.

The five hygiene rules

1. **Update Last contact the same day.** Not at the end of the week. The gone-quiet alert is only as honest as this column, and a stale date creates false alarms that teach people to ignore the alerts entirely.
2. **Every open deal has a next action with a date.** If you cannot think of one, the deal is not open — it is a lead. Move it back or close it out.
3. **Expected close dates are dates you would bet on.** Not the end of the quarter because that is when you would like it to land. If the date passes twice, the deal is not real.
4. **Close lost deals properly.** Mark them Closed Lost and record why. A pipeline full of zombies makes the forecast look healthy while the business starves.
5. **One deal, one row.** Do not track three products for the same customer as three rows unless they can genuinely close independently.

Setting your gone-quiet threshold

The Deal Tracker has a setting in the top right — **Quiet after (days)**, set to 10 by default. Any deal with no contact for longer than that gets flagged. Ten working days suits most considered purchases. If you sell something bought quickly, drop it to five. If your sales cycle runs for months with long, legitimate gaps, raise it to fifteen — but no higher, or the alert stops catching anything.

Adding rows

The tracker is pre-built for two hundred deals. To add more, select the last row, copy it, and paste down — the formulas and dropdowns come with it. Do not insert blank rows in the middle of the block: the dashboard reads a fixed range and a gap does not break it, but a row pasted *below* row 207 will be invisible to every calculation.

SECTION 4

Reading the Dashboard

Ninety seconds, four questions, one decision about where to spend the week.

The number to commit to

Weighted forecast, not open pipeline value. Open pipeline is what you would earn if you won every deal on the list, which you will not. Weighted forecast discounts each deal by its stage probability and lands far closer to reality. When someone asks what you will do this quarter, quote the weighted number.

Four diagnostic questions

Question	Where to look	What a bad answer looks like, and what it means
Is there enough in the pipeline?	Open pipeline value vs your target	Under 3× your target for the period. This is a lead generation problem. No amount of better closing fixes it.
Is value bunched in one stage?	Pipeline by stage table	Most value in the first two stages means you qualify too loosely. Most value in Proposal Sent means you close too softly.
How many deals are stuck?	Where deals are stuck panel	More than a fifth of deals flagged means the team is chasing new leads instead of working the ones they have.
Where do wins actually come from?	Where deals come from table	If referrals convert at triple the rate of cold outbound — and they usually do — your marketing effort is in the wrong place.

Three-to-one, and why it matters

A small-team pipeline is generally healthy at three to four times the revenue target for the period, measured on *open pipeline value*. Below three, arithmetic is against you: even a strong close rate will not bridge the gap, and the fix is more leads, not more pressure. Above five, you are probably carrying deals that should have been closed out — check the alert panel.

On win rate

The dashboard calculates win rate as deals won divided by everything decided — won plus lost. Ignore this number until you have closed at least twenty deals inside the file. Below that, it swings wildly on a single outcome and will lead you to change things that were never broken.

SECTION 5

Follow-up that actually gets replies

Most small-business deals are lost to silence, not to a competitor. Silence is a solvable problem.

The Follow-Up Sequences tab holds four cadences. Each is a numbered set of touches with a day offset, a channel, a goal and a message angle. The Follow-Up Tracker then tells you which touch is due for which lead and on what date. You do not have to remember anything.

Cadence	Use it when	Length	The idea behind it
Inbound enquiry	Someone contacts you	6 touches over 14 days	Speed is everything. The first two touches happen on day zero because response time is the single biggest lever on inbound conversion.
Cold outbound	You contact them first	6 touches over 21 days	Earn attention before asking for time. Every touch gives something specific; none of them says "just checking in".
Post-proposal	A quote or proposal is out	6 touches over 21 days	Surface objections early, reach the real decision-maker by touch four, and ask for a decision either way by touch six.
Re-engagement	A deal went cold or was lost	4 touches over 45 days	No pitch. Lead with something useful, then ask whether the original blocker has changed.

Five rules that make cadences work

1. **Speed beats polish on inbound.** A lead contacted within five minutes converts at a dramatically higher rate than one contacted the next day. A rough call now beats a beautiful email tomorrow.
2. **Change the channel, not just the message.** Six emails in a row read as one email. Email, then phone, then WhatsApp, then LinkedIn reads as persistence — and it reaches people who simply do not use email.
3. **Every touch must give something.** An answer, a price range, a case example, a useful article. A message whose entire content is "just following up" trains the recipient to ignore your name.
4. **Always finish the sequence.** The last two steps produce a disproportionate share of replies, because they ask for a decision rather than for attention. Most sellers quit at touch three, which is exactly where the value starts.
5. **Log every touch.** Update Last contact on the Deal Tracker and Last step done on the Follow-Up Tracker. Both alert systems depend on it.

The message that gets the most replies

The final step of the inbound and post-proposal cadences is a permission-to-close-the-file email: *"I have not heard back, so I will assume the timing is wrong and stop following up — unless you tell me otherwise."* It consistently outperforms every other message in a sequence, because it costs the reader nothing to answer and removes the pressure that made them go quiet in the first place. Send it. Mean it. Then actually stop.

Using the Follow-Up Tracker

Enter the lead, pick a sequence from the dropdown, set the start date, and set **Last step done** to 0. The tracker works out the next step, the date it is due, the channel and the goal. After you complete a touch,

increase Last step done by one — everything recalculates. When the sequence runs out, the status reads *Complete*, and you either move the lead to a re-engagement sequence or let it go.

SECTION 6

Scoring leads so you call the right people

Eight questions, one hundred points, four grades — and a two-minute habit that saves hours.

Small teams do not lose because they are lazy. They lose because attention is finite and it gets spread evenly across leads that deserve wildly different amounts of it. Lead scoring fixes the allocation problem. It is not about rejecting people; it is about deciding who gets a phone call and who gets an email.

What the model measures

	Question	Max	What it tells you
Fit	Company size	15	Bigger businesses usually mean bigger deals. Tune the bands to your own average deal size.
Fit	Industry fit	10	You close fastest where you already have proof and references.
Fit	Contact seniority	15	In small businesses the owner signs. Deals without an owner conversation stall at proposal.
Fit	Budget position	15	The strongest single predictor of a close. Ask by the second conversation.
Intent	Lead source	10	Referrals convert several times better than cold outbound. Score the channel, not the effort.
Intent	Engagement so far	15	Behaviour beats stated interest. What they did tells you more than what they said.
Intent	Buying timeline	15	Decides sequencing, not whether you pursue. Long timelines go to nurture, not the bin.
Intent	Pain level	5	No pain, no purchase. Curiosity without a problem is a research call.

What the grades mean

Grade	Score	Meaning	Do this
A	75–100	Right buyer, ready now	Phone within 24 hours. Owner or senior rep takes it personally.
B	55–74	Right buyer, not urgent	Phone within three working days, then run the inbound cadence.
C	35–54	Possible, but not now	Email cadence only. Review again in sixty days.
D	0–34	Poor fit	One polite email, add to the newsletter list, move on.

Calibrate before you trust it

Score your last ten won deals and your last ten lost deals against the model. If the won deals do not score meaningfully higher, your *points* are wrong — the model itself is fine. Adjust the points column on the Lead Scoring Model tab until the historical pattern comes out right. Do this once and the score becomes something the team will actually act on.

Two things to avoid

- **Do not add questions in the first three months.** Nine questions is not meaningfully better than eight, and every extra question makes the score slower to fill in and harder to trust.
- **Do not treat a D as a rejection.** A grade is a priority order. D-grade leads still get one email — they just never get a phone call, and they never get a custom proposal.

SECTION 7

The 30-minute weekly sales meeting

Same day, same time, every week. Run it straight off the Dashboard tab.

Time	Agenda item	What is actually being decided
0–3 min	Read the headline numbers aloud	Weighted forecast, open deals, deals needing attention. No commentary yet — just the numbers, so nobody argues about facts later.
3–10 min	Work the stuck list	Every deal flagged gone quiet, overdue or past its close date. For each one: recover it, reschedule it, or close it lost. No fourth option.
10–20 min	Top five deals by weighted value	For each: what has the buyer actually done since last week, and what is the next action with a date? If nothing has changed for two weeks running, drop the probability or drop the deal.
20–26 min	New leads and their grades	Every lead scored since the last meeting. A-grades assigned by name, with a call booked before the meeting ends.
26–30 min	Commitments	Each person names the deals they will move this week and the specific actions they will take. Write them into the Next action column live.

What not to do in this meeting

Do not coach individual deals in front of the group — that is a separate one-to-one conversation and it will eat the whole half hour. Do not update the tracker during the meeting except for next actions; if the data was not current beforehand, end the meeting and reschedule. The point of the discipline is that people arrive prepared.

If you are a one-person business

Run the same agenda with yourself, on the same day each week, for twenty minutes. The value is not in the discussion — it is in being forced to look at every stuck deal and make an explicit decision about it. Solo sellers lose more revenue to quiet drift than to lost bids.

SECTION 8

Message bank

Twelve messages to adapt, not to copy. Replace the bracketed parts with something specific — a generic message in a personal voice still reads as generic.

Inbound enquiry

01 Phone opener, day 0

"Hi [Name], it's [Your name] from [Company] — you enquired about [specific thing] a few minutes ago. Is now a bad time? ... Great. Before I tell you anything about us, can I ask what made you start looking at this now?"

The 'is now a bad time' opener gets a higher continue rate than 'do you have a minute', because saying no is easy and people relax when it is.

02 Email after an unanswered call, day 0

Subject: Tried to reach you about [thing]

Hi [Name],

You asked about [specific thing] this morning — I tried calling but did not get through.

Short version: [one sentence answer to the thing they asked]. Typically this runs [price range] depending on [the one variable that matters].

Would either [day, time] or [day, time] suit for ten minutes?

[Your name]

03 WhatsApp, day 7

"Hi [Name], [Your name] here from [Company] — you were looking at [thing] last week. Still on the cards, or has it gone quiet on your side?"

One line, no signature block, no pitch. Many buyers reply here after ignoring three emails.

04 Close-the-file email, day 14

Subject: Should I close your file?

Hi [Name],

I have not managed to reach you about [thing], so I am going to assume the timing is not right and stop following up.

If that is wrong, just reply with one word and I will pick it straight back up. Either way, no hard feelings — I would rather know.

[Your name]

Cold outbound

05 First touch, day 0

Subject: [Their company] + [specific observation]

Hi [Name],

I noticed [specific, verifiable thing about their business — a new branch, a job advert, a change in what they offer].

We work with [type of business] on [the problem you solve]. For [comparable company], that meant [concrete result with a number].

Worth a ten-minute conversation, or not a priority right now?

[Your name]

Under 90 words. The observation must be real — a fake one is worse than no email at all.

06 Proof email, day 8

Subject: How [similar company] fixed [problem]

Hi [Name],

[Similar company] had the same issue with [problem]. Within [timeframe] they had [specific measurable outcome].

Happy to send the two-page version if useful — want it?

[Your name]

Asking for a yes/no on a document is a much lower bar than asking for a meeting.

07 Break-up email, day 21

Subject: Wrong time?

Hi [Name],

I have written a few times about [problem] with no luck, which usually means it is not a priority this year. Completely fair.

I will stop here. If it moves up the list, my number is below — or I can check back in six months if you would prefer.

[Your name]

Post-proposal

08 Delivery email, day 0

Subject: Your proposal — and a time to walk through it

Hi [Name],

Proposal attached. The short version: [the one outcome they told you they cared about], for [price], starting [date].

Proposals raise questions better answered live than by email. Does [day, time] work for fifteen minutes?

[Your name]

Always propose the walkthrough in the same message as the document. Sending it cold is how deals stall.

09 Phone opener, day 2

"Hi [Name] — have you had a chance to look through it? ... What jumped out at you, good or bad?"

Then stop talking. Do not pre-emptively defend the price; you will negotiate against yourself.

10 Reaching the decision-maker, day 9

"[Name], I want to make sure I am not making your job harder. Who else needs to be comfortable with this before it goes ahead — and would it help if I put together something short for them, or joined a call?"

Framed as helping them, not going around them. That distinction matters.

11 Decision email, day 21

Subject: A no is fine — I just need to know

Hi [Name],

We have been going back and forth on [project] for a few weeks. I would rather have a clear no than an open maybe — it lets me plan, and it stops me bothering you.

Where has it landed?

[Your name]

Re-engagement

12 Restart email, day 0

Subject: Thought of you when I saw this

Hi [Name],

[One genuinely relevant thing — a rule change, an industry shift, a case study from their sector].

No agenda, just thought it was relevant to what you were dealing with last time we spoke.

[Your name]

Ask for nothing. The next message in the cadence does the asking.

SECTION 9

Quick reference card

Print this page. Put it where the team can see it.

Every day	Every week	Every month
Score every new lead the day it arrives.	Run the 30-minute review off the Dashboard.	Close out zombie deals honestly.
Update Last contact whenever you speak to someone.	Clear every deal on the stuck list — recover, reschedule or close.	Review conversion by lead source and shift effort accordingly.
Do the touches that are due on the Follow-Up Tracker.	Confirm every open deal has a next action with a date.	Re-check stage probabilities against actual outcomes.
Call inbound A-grades within 24 hours.	Check the weighted forecast against target.	Re-enrol old lost deals into the re-engagement cadence.

The numbers worth remembering

Metric	Healthy for a small team	If it is wrong
Open pipeline vs target	3× to 4×	Below 3× is a lead generation problem, not a closing problem.
Deals flagged as stuck	Under 20% of open deals	Above that, the team is chasing new leads instead of working existing ones.
Inbound response time	Under 5 minutes, always under 1 hour	Slower than an hour and you are competing on price instead of attention.
Touches before giving up	Minimum 6 on outbound	Most sellers stop at 3, which is where the replies start.
Deals with a dated next action	100%	Anything less and deals are drifting rather than being worked.

If you only change one thing

Update the **Last contact** column the same day you speak to someone, and run the weekly review without fail. Everything else in this pack is built on those two habits. A team that does only these two things with a rough pipeline will outperform a team with a beautiful pipeline and no rhythm.

This guide accompanies the Sales Process Template Pack workbook. Benchmarks quoted are typical ranges for small-team business-to-business selling and are offered as starting points — replace them with your own figures as soon as you have twenty to thirty closed deals recorded in the tracker.