TEAM WORKBOOK · 60 MINUTES

THE PIPELINE HEALTH CHECK

Find exactly where revenue leaks between first enquiry and signed deal.

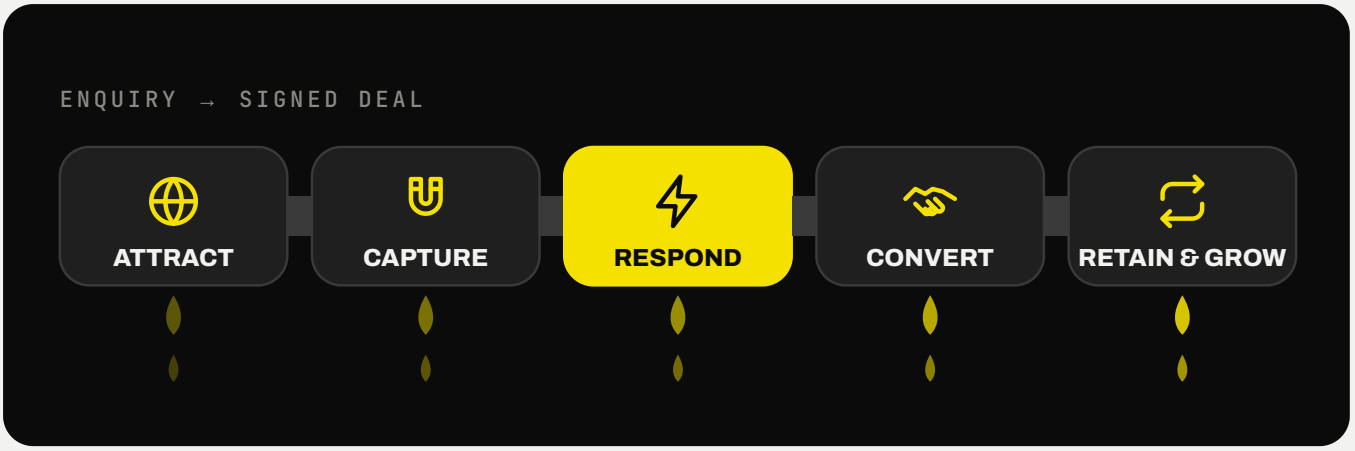
ENQUIRY → SIGNED DEAL



WHY THIS MATTERS

MORE LEADS RARELY FIX A LEAKY PIPELINE.

Most businesses don't have a lead problem. They have a handover problem: enquiries wait, get one follow-up and go cold.



Who
Sales, marketing and whoever answers enquiries.

How long
One hour, one room. Estimates are fine.

You'll leave with
Your weakest stage and three fixes for 90 days.

STAGE 01

ATTRACT

Are the right buyers finding you?

We know which channels produced last year's best clients	YES	PARTLY	NO
Traffic is growing from searches relevant to what we sell	YES	PARTLY	NO
We're visible where decision-makers actually look	YES	PARTLY	NO

RECORD · QUALIFIED VISITORS OR REFERRALS / MONTH → _____

STAGE 02

CAPTURE

Do interested people enquire?

Buyers can book, call or send a form from every key page	YES	PARTLY	NO
There's something for people not ready to talk yet	YES	PARTLY	NO
We know what % of visitors enquire	YES	PARTLY	NO

RECORD · ENQUIRIES / MONTH · VISIT-TO-ENQUIRY % → _____

STAGE 03

RESPOND

How fast do we follow up?

New enquiries get a reply within hours, not days	YES	PARTLY	NO
Every lead has one owner and a record in a CRM	YES	PARTLY	NO
We follow up more than once if there's no reply	YES	PARTLY	NO

RECORD · AVERAGE TIME TO FIRST REPLY → _____

STAGE 04

CONVERT

Do conversations become signed work?

Proposals go out within an agreed number of days	YES	PARTLY	NO
Proposals are followed up on a set schedule	YES	PARTLY	NO
We record why we lose, and act on it	YES	PARTLY	NO

RECORD · PROPOSAL-TO-WIN % · DAYS TO CLOSE → _____

STAGE 05

RETAIN & GROW

Do clients come back and refer?

Every client gets a planned check-in after delivery	YES	PARTLY	NO
We ask for reviews and referrals as a habit	YES	PARTLY	NO
We know which clients could buy more	YES	PARTLY	NO

RECORD · REPEAT REVENUE % · REFERRALS / QUARTER → _____

WHY STAGE 03 MATTERS MOST

THE FIRST CREDIBLE REPLY SETS THE AGENDA.

Buyers often contact several suppliers at once. If your reply time is measured in days, start here.

BENCHMARKS

HOW DO YOU COMPARE?

Indicative ranges for B2B service businesses. Your best benchmark is your own number next quarter.

Website visit → enquiry

YOU → _____

NEEDS WORK	HEALTHY	STRONG
< 0.5%	1–2%	3%+

Time to first reply

YOU → _____

NEEDS WORK	HEALTHY	STRONG
Next day+	Same day	< 1 hour

Enquiry → qualified call

YOU → _____

NEEDS WORK	HEALTHY	STRONG
< 30%	40–60%	60%+

Proposal → win

YOU → _____

NEEDS WORK	HEALTHY	STRONG
< 20%	25–40%	40%+

Follow-ups before giving up

YOU → _____

NEEDS WORK	HEALTHY	STRONG
1	3–4	5+

Revenue from existing clients

YOU → _____

NEEDS WORK	HEALTHY	STRONG
< 30%	40–60%	60%+

YOUR ACTION PLAN

FIX THE WEAKEST STAGE FIRST

If it's Attract
Service pages built around buyer searches · a monthly LinkedIn rhythm

If it's Capture
Book-a-call on every page · shorter forms · a guide for early buyers

If it's Respond
Instant lead alerts · same-day reply standard · 3-touch follow-up

If it's Convert
Proposal template with proof · fixed follow-up schedule · loss reviews

If it's Retain & grow
90-day check-ins · review and referral ask at project close

YOUR THREE FIXES FOR THE NEXT 90 DAYS

FIX 1

OWNER · DUE

FIX 2

OWNER · DUE

FIX 3

OWNER · DUE

NEXT STEP

WANT A SECOND PAIR OF EYES?

Send us your stage scores. We'll show you where the biggest leak is and what fixing it is worth, using our Revenue Leak Calculator.

BOOK A FREE 30-MIN CALL
wearenv.co.uk/contact

EMAIL US
info@wearenv.co.uk

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