

The 30-minute weekly sales pipeline review

A regular sales review helps you stay in touch with potential customers and plan your next steps. Set aside 30 minutes at the same time each week to update your sales pipeline and focus on the work most likely to lead to a sale.

Follow this 30-minute sales review

1. Update your pipeline: 5 mins

Review every current sales opportunity. Record any new enquiries, replies, meetings, quotes and decisions from the past week.

Make sure each opportunity shows:

- The customer or organisation name
- The product or service they are interested in
- The likely value of the sale
- The current sales stage
- The next action and due date

2. Choose priority leads: 10 mins

Look for the opportunities that are most likely to move forward. Choose no more than three leads to focus on during the coming week.

Give priority to customers who:

- Have asked for a quote or proposal
- Have a clear need and timeframe
- Need a reply or follow-up from you
- Have agreed to a next step
- Could lead to valuable ongoing work

3. Plan follow up actions: 10 mins

Write one clear next action for every active opportunity. Avoid vague notes such as „Äúfollow up soon,Äù. Instead, state what you will do and when you will do it.

For example:

- Call Sam on Tuesday to discuss the proposal
- Send the updated quote to Aroha by 3 pm Thursday
- Email a case study to the customer after Friday,Äôs meeting
- Ask the customer whether they are ready to make a decision

Add each action to your calendar, task list or sales system. If someone else is responsible, agree who will do it and by when.

4. Improve your sales process: 5 mins

Finish by looking for one pattern or blockage in your pipeline.

Ask yourself:

- Where are leads getting stuck?
- Are you responding to enquiries quickly enough?
- Are customers clear about your offer and pricing?
- Are quotes converting into sales?
- Do you have enough future opportunities coming in?

Choose one small improvement to test during the coming week. You might tighten your quote template, improve your enquiry response, contact past customers or update a key service page.

Keep your sales pipeline moving

A weekly sales pipeline review gives you a clear view of what is happening now and what needs your attention next. It can help you protect future work while you deliver for current customers.

Start with 30 minutes. Over time, this simple habit can help you follow up more consistently, make better use of sales opportunities and build greater confidence in your sales process.

Get support with your sales plan

If you want an independent view of your sales process, a Business Mentor can help you set practical priorities, review what is working and stay accountable for your next actions. Register for a Business Mentor to get support that suits your business.