# The Monday pipeline check

Thirty minutes, every Monday. Put every open deal on one board, inspect it, weight it, watch the calendar, and act on the gap the same day.

### 1 One board

List every lead and quote with five columns: the business, the monthly value, the stage, the next step, and the date of that next step. Stages: new enquiry, site visit booked, quote sent, decision due, won or lost. Keep the board in Systex.

### 2 Monday inspection

Same time, same order, every week, for thirty minutes. Ask one question: what happens next, and when? Any deal without a dated next step gets one, or is marked lost. Siobhan removed a third of her board this way — deals that had been dead for months.

### 3 Weight by stage

Use your own past numbers. Siobhan: about 1 in 5 new enquiries became a contract, about half of site visits did, and about two thirds of decision-stage quotes did. An $800 decision-stage quote counted as about $530; an $800 new enquiry counted as about $160.

### 4 Watch the calendar

Siobhan set aside six hours a week for site visits and calls. When fewer than half were filled, she knew next month would be quiet, about six weeks before it showed up in the bank.

### 5 Act on the gap the same day

If the forecast is below target, pick one action: call past quotes, ask happy clients for referrals, or visit three businesses near an existing site.

## Siobhan's example · Commercial cleaning · Galway

### Locked figures — must match the video

| | |
|---|---|
| **Setting** | Commercial cleaning company in Galway |
| **Team** | Eighteen cleaners, serving offices, shops and clinics |
| **Typical contract** | About $800 a month |
| **Review length** | Thirty minutes, every Monday |
| **Dead deals removed** | A third of the board, dead for months |
| **New enquiry win rate** | About 1 in 5 became a contract |
| **Site-visit win rate** | About half |
| **Decision-stage win rate** | About two thirds |
| **$800 decision-stage quote, weighted** | About $530 (=$800 × 2/3) |
| **$800 new enquiry, weighted** | About $160 (=$800 × 1/5) |
| **First-week weighted total** | About half her target |
| **Hours set aside each week** | Six hours for site visits and calls |
| **Warning sign** | Fewer than half of those hours booked |
| **Lead time of the warning** | About six weeks before it showed up in the bank |
| **After three months** | Forecast usually within about 10% of what came in |
| **Hiring** | Cleaners hired before contracts started, not after |
| **Tracked in** | Systex |


Example figures. General education, not financial advice. Results vary.

# Find the leak, then plan the work

Draw the funnel with your own numbers, fix the biggest bottleneck first, compare with your best months, and plan the weekly activity behind your target.

### 1 Draw the funnel

Mei Ling counted the last three months: 40 enquiries, 22 first calls, 10 site checks, 6 proposals and 2 new clients. She kept those counts in Systex.

### 2 Find the biggest leak

Almost half of the enquiries never got a first call. Many waited two days for a reply. That was the leak, not a lack of leads. Later steps were fine: most site checks received a proposal, and a third of proposals became clients.

### 3 Fix the bottleneck first

A funnel can only move as fast as its slowest step. One rule: every enquiry gets a call within two working hours, shared between two team members on a simple rota.

### 4 Compare with your own best months

Mei Ling's best month turned about 3 in 10 site checks into clients. That became her target, not a number from a book.

### 5 Plan the weekly activity

To reach 4 new clients a month, her funnel numbers implied about 30 first calls and about 14 site checks a month, or roughly 8 calls and 3 or 4 site checks a week, checked every Monday.

## Mei Ling's example · IT support · Penang

### Locked figures — must match the video

| | |
|---|---|
| **Setting** | IT support business in Penang, computers and networks for small offices |
| **Support plan** | About $300 a month |
| **Starting sales** | Stuck at about 2 new clients a month |
| **Three-month average funnel** | 40 enquiries, 22 first calls, 10 site checks, 6 proposals, 2 new clients |
| **Biggest leak** | Almost half of enquiries never got a first call; many waited two days |
| **Later steps** | Most site checks received a proposal; a third of proposals became clients |
| **New rule** | Every enquiry gets a call within two working hours |
| **Who calls** | Two team members, with a simple rota |
| **Best-month benchmark** | About 3 in 10 site checks became clients |
| **Target** | 4 new clients a month |
| **Activity behind the target** | About 30 first calls and about 14 site checks a month |
| **Weekly activity** | Roughly 8 calls and 3 or 4 site checks a week |
| **After three months** | First calls rose from about 22 to about 34 a month |
| **New clients after three months** | From about 2 to about 4, from the same number of enquiries |
| **Tracked in** | Systex |

## This Monday

- [ ] Block thirty minutes in your calendar, and repeat it every week.
- [ ] List every open deal with its value, stage and next step. Mark the dead ones lost.
- [ ] Weight the rest by stage and add them up.
- [ ] Write one number: how far that total is from your target, and one action to close the gap this week.
- [ ] Put this week's board into Systex.

These are examples, not promises. Keep your deals, stages and next steps in Systex. Find it at loftybiz.net.



Example figures. General education, not financial advice. Results vary.