FREE TEMPLATE

The best time to prospect is before your pipeline is empty

Your 90 day prospecting plan. It takes you from a blank sheet to proper conversations and meetings with the companies you most want to win, in 13 weeks.

WEEKS 1 AND 2

Plan

- [ ] Work out your numbers and define your ideal customer (page 3)
- [ ] Call your lapsed customers, and look for other sites, departments or products you could supply to existing customers
- [ ] List 15 to 20 target companies in three tiers (page 4)
- [ ] For each one, find the decision maker, the engineer who specifies and the buyer or category manager who places the order
- [ ] Book a calling block in your diary every weekday, same time, at least an hour, and protect it
- [ ] Decide where you'll write up every call, email and next step

WEEKS 3 TO 6

Start conversations

- [ ] Research every contact before you get in touch: their LinkedIn profile, the company's LinkedIn page, their website, industry publications and any recent news or projects
- [ ] Find one thing worth mentioning, so every message is personal to that person and company
- [ ] Phone first, backed up by personal emails and LinkedIn
- [ ] Ask about their business and their problem first
- [ ] Never pitch your products on the first call
- [ ] Phone on, emails off in your calling block, and write up every call before you move on
- [ ] Follow up every enquiry within two working days



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WEEKS 7 TO 13

Build the pipeline

- [ ] Go to the meetings, and send quotes that meet their specification
- [ ] Agree a date and time to go through every quote with them (see our quote follow up checklist)
- [ ] Put every enquiry and quote on your sales forecast, weighted by stage
- [ ] Keep in touch with everyone you've spoken to: a useful technical article once a month, LinkedIn posts about your projects, and case studies or proof points your clients have approved
- [ ] Replace target companies that drop off the list with new ones
- [ ] Review the plan every Friday, and at 30, 60 and 90 days

Your pipeline stages

Identified | **Contacted** | **Conversation** | **Meeting** | **Enquiry** | **Quote** | **Purchase order**

Every enquiry and quote goes on your sales forecast, weighted by the stage it has reached.

Common mistakes

- [ ] Stopping prospecting when you get busy. The best time to prospect is before your pipeline is empty
- [ ] Talking about your products before you understand their problem
- [ ] Giving up after one call
- [ ] Not writing up calls, so nobody knows what was said or what happens next

Keep it legal: contact business contacts only, include a polite opt out line on every first cold email, and remove anyone who asks not to be contacted again straight away. **If you record calls:** tell the person at the start that the call is being recorded and why, and stop if they'd rather you didn't. Make sure your privacy notice covers call recording, keep recordings secure, and don't keep them longer than you need them.

How did you score?

How many of these do you do every week? A calling block every weekday. A named list of target companies. Research before every first contact. Follow up within two working days. Write up every call.

All 5: you're in good shape. **3 or 4:** there are gaps. **0 to 2:** let's talk.

Take the free scorecard

Book a free meeting

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Before you start: know your numbers

Most businesses go prospecting without knowing what they need from it. Fill this in first, then work back to a target for every week.

Share of turnover from your top three customers	
Average order value (£)	
Out of every ten quotes, how many become purchase orders?	
Order intake you want from new business in the next 90 days (£)	

Work back to your weekly targets

Orders I need (order intake ÷ average order value)	
Quotes I need (orders ÷ purchase orders per quote)	
Meetings I need to get those quotes	
Proper conversations I need to get those meetings	
Each week (÷ 13): conversations / meetings / quotes	

Your ideal customer

Sector, and what they make

Size: turnover and employees (check Companies House)

Location

What they buy from you, and typical order value

Accreditations or approvals they'll expect you to have

Who specifies, who buys, who signs off the order

Tier your target companies: Tier 1 is the five companies you most want to win. Tier 2 is ten good fits. Tier 3 is five longer shots.

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Your target companies

Tier	Company	Why them	Decision maker	Engineer who specifies	Buyer	First contact	Status	Next action and date

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Weekly scorecard

Fill this in every Friday. The numbers that matter most are proper conversations and meetings booked.

Week	Contacts researched	LinkedIn connections	Emails sent	Calls made	Proper conversations	Meetings booked	Enquiries received	Quotes sent	Quote value (£)	Orders won	Order value (£)
Weekly target											
Week 1											
Week 2											
Week 3											
Week 4											
Week 5											
Week 6											
Week 7											
Week 8											
Week 9											
Week 10											
Week 11											
Week 12											
Week 13											
Total											

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