HR CONSULTANCY LAUNCH PROGRAMME · RUN OUTREACH AND TRACK YOUR PIPELINE

Pipeline tracker worksheet

Pipeline stages, weekly outreach targets, and a simple, honest discovery-call structure that surfaces scope early.

01 Your pipeline stages

A prospect moves through the same stages every time. Naming them tells you where things stall.

- [ ] New: a name, a source, and a first contact made.
- [ ] Conversation: a real reply, a call booked, or a coffee agreed.
- [ ] Discovery: a proper call held, and fit assessed.
- [ ] Proposal: scope and price sent, in writing.
- [ ] Won or parked: signed, or a reason and a date to revisit.

02 Weekly outreach targets

Small, steady numbers you actually hit beat a big push you do once. Set targets you can keep.

Partner conversations this week.

Follow-ups with people who went quiet.

New connection requests to target owners.

03 Your discovery-call structure

Run every call the same honest way. Understand first, then check fit, then say plainly where your scope ends.

- [ ] Understand: their business, their team, and what is prompting the call now.

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- [ ] Check fit: their size, their sector, and whether they can commit to support.
- [ ] Surface the scope line early: the HR you handle, and the legal work you refer out.
- [ ] Agree the next step: a written proposal, and by when.

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