The SalesFlow Coach
Pipeline Habit Scorecard

A simple self-assessment tool for making sure
you get all that you can out of your pipeline activities

SalesFlowCoach.app

Introduction

From solo-traders and founders, all the way through to professional sales teams at corporations: Almost everyone tries to increase sales by increasing volume and activity. More calls! More followup! More leads into the pipeline!

But listen: if your leads don't reply, and your sales aren't happening, doing more of what isn't working won't be the solution.

More calls or emails or leads are not what you need.

Instead, you want to take a thoughtful, methodical approach to how you work on your pipeline and your deals.

Put differently: the best way to get more sales, is to improve your habits and way of operating, i.e. your pipeline habits. Improve those, and you'll far get more sales out of your current efforts.

This scorecard helps you evaluate your pipeline habits and identify opportunities for improvement.

It's based on fundamental elements of the SalesFlow Coach methodology, such as batching your activities by type, logging buyer & deal intel, and working with rules, boundaries and goals.

These are the drivers of a healthy pipeline habit, so give yourself an honest assessment, and identify the areas you need to improve.

How to use

First, plan a few moments to mindfully reflect on each of the statements. 10 minutes is all it takes, but take your time, and don't do this in a rush: Intelligent reflection is the name of the game, both for this scorecard as well as for your actual pipeline work.

Next, score yourself 1 through 5 for each question, add up your scores, divide by 5, and that's your overall Pipeline Habit Score.

To get that score to move up, a few SalesFlow Coach fundamentals apply:

1. Review and rate yourself weekly, and log your (subjective) score in, ideally in a spreadsheet

2. Each week, pick one of the areas where you score low, and plan practice or learning activities, in order to improve in that area

3. Record your Pipeline Habit Score every week in a chart, to see if you're improving or not

Ready?

Let's go!

SalesFlowCoach.app

Rank each of the statements from 1 (I disagree) to 5 (I Agree)

Pipeline driver	Self-assessment:	Disagree (1) / Agree (5				
1. Prioritisation	Pipeline work is a priority. It gets scheduled and executed on every day	1	2	3	4	5
2. Thoughtfulness	I take my time to carefully review my deals and my notes, before taking action	1	2	3	4	5
3. Mindspace-batching	I batch my pipeline activities by type in order to improve my efficiency	1	2	3	4	5
4. Note-taking	I try to be diligent in taking notes as I work my deals	1	2	3	4	5
5. Logging	I always update my CRM after working on my pipeline	1	2	3	4	5
6. Boundaries & disqualification	I have strong rules that help me disqualify buyers	1	2	3	4	5
7. Time-protection	I only take meetings when I have reasonable certainty that there might be a deal here	1	2	3	4	5
8. Focused communication	Meeting agendas are communicated before, or at the start, of each meeting	1	2	3	4	5
9. Tracking & measurement	I regularly track and measure my progress	1	2	3	4	5
10. Goals & focus	I have clear goals, and I make sure that all my activities contribute to reaching them	1	2	3	4	5

So, what's next? You now know how to identify areas for improvement, and which habits to strengthen, so here's a few suggestions for moving forward:

- If you want short daily learning on ethical selling and business growth, sign up for a daily email if you haven't done so already
- Dive into your pipeline and your deals with SalesFlow Coach
- And of course, get in touch with Martin if you want to talk about getting his help.

SalesFlowCoach.app