PROSPECTING WITH PRECISION

WORKBOOK

Building a Predictable Pipeline in the $600K–$1.2M Market

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PROSPECTING WITH PRECISION WORKBOOK

Building a Predictable Pipeline in the $600K–$1.2M Market

Coach Name: ___________________________

Date: _________________________________

SECTION 1 — PIPELINE CLARITY

1. Define Pipeline (In Your Own Words)

Pipeline is:

2. Current Pipeline Snapshot

Complete honestly.

Stage	# of Prospects
Identified	______
Contacted	______
Conversation Scheduled	______
Diagnosis Completed	______
Proposal Presented	______
Decision Pending	______

Total Active Prospects: ______

Is this enough to produce predictable income?

☐ Yes

☐ No

SECTION 2 — TARGETING DISCIPLINE

3. Why We Target $600K–$1.2M

In your own words, why is this band optimal?

4. What Breaks at $700K?

List operational strain typically experienced at ~$700K revenue:

-
-
-
-
-

5. The 10PM Owner Exercise

At $700K revenue, what is this owner thinking at 10PM?

Write 3 internal-monologue sentences:

1.
2.
3.

This is the mindset you speak into.

6. Below $500K Guardrail

List signs of survival-mode businesses:

-
-
-

Why do we avoid targeting below $500K?

SECTION 3 — PIPELINE MATH REALITY

7. Income Target Reverse Engineering

Desired Monthly Income: $ ________________

Average Annual Client Value: $ ________________

Clients Needed Per Month: ______

Assume:

Close Rate = 25%
Proposal Conversion = 50%
Conversation Conversion = 40%

Working backward:

Proposals Required Per Month: ______

Conversations Required Per Month: ______

Outreach Required Per Month: ______

Does your current activity support this?
☐ Yes
☐ No

What must change?

____

____

____

SECTION 4 — IDEAL PROSPECT DEFINITION

8. Define Your Ideal Prospect

Industry Focus: ____________________________________

Revenue Range: $600K–$1.2M

Common Pain Indicators:

- ____
- ____
- ____

Complete this sentence:

"We serve ___________________ businesses generating $600K–$1.2M who are struggling with ___________________ and want ___________________."

SECTION 5 — A-LEVEL QUALIFICATION DRILL

Read the following fictional businesses and classify each:

A. $425K landscaper, 2 employees, inconsistent cash flow

A / B / C

Why? ____

B. $780K HVAC company, hiring techs, running Google Ads

A / B / C

Why? ____

C. $2.3M manufacturer with internal CFO

A / B / C

Why? ____

D. $900K marketing agency, owner overwhelmed, thin margins

A / B / C

Why? ____

E. $300K startup

A / B / C

Why? ____

F. $1.1M plumbing company scaling rapidly

A / B / C

Why? ____

9. Define Your A-Level Criteria

What makes a prospect A-Level?

- ______________________________
- ______________________________
- ______________________________

Minimum A-Level Standard in Pipeline: ______

SECTION 6 — PROSPECTING METHODS

10. Advertising Signal Strategy

List 5 businesses between $600K–$1.2M currently advertising:

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________

What pain does their advertising suggest?

____

____

11. Network Mining

List 15 individuals who can introduce you to $600K–$1.2M operators:

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________

5. ______________________________
6. ______________________________
7. ______________________________
8. ______________________________
9. ______________________________
10. ______________________________
11. ______________________________
12. ______________________________
13. ______________________________
14. ______________________________
15. ______________________________

Your introduction positioning statement:

____

____

____

12. Chamber & BNI Targeting

Organization: ______________________________

List 10 member businesses estimated in target range:

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________
8. ______________________________
9. ______________________________

10. ______

Classify A / B / C for each.

13. Gemini Prompt Development

Write your initial Gemini prompt:

______

Refined version:

______

______

______

______

14. AI-Generated & Validated Prospects

List 10 validated businesses:

1. ______
2. ______
3. ______
4. ______
5. ______
6. ______
7. ______
8. ______
9. ______
10. ______

Validation Steps Used:

☐ Website review

☐ Employee count

☐ Advertising check

☐ Owner confirmed
☐ Revenue estimate confirmed

SECTION 7 — BUILD YOUR PIPELINE

15. A-Level Prospects (Minimum 10)

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________
8. ______________________________
9. ______________________________
10. ______________________________

16. B-Level Prospects

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________

17. C-Level Prospects

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________

5. ______

SECTION 8 — ACTIVITY COMMITMENT

Daily Outreach Target: ______

Weekly Conversations Target: ______

Monthly Proposals Target: ______

Monthly Close Target: ______

Minimum Pipeline Size Commitment:
☐ 30
☐ 40
☐ 50

SECTION 9 — 30-DAY EXECUTION PLAN

Week 1 — Build List

Target # of Qualified Prospects: ______

Actions:

Week 2 — Outreach

Target Conversations Scheduled: ______

Actions:

Week 3 — Follow-Up Discipline

Defined follow-up cadence:

Week 4 — Conversion Conversations

Target Proposals: ______

Actions:

SECTION 10 — DISCIPLINE COMMITMENT

I commit to:

☐ Targeting only $600K–$1.2M structural-growth businesses

☐ Maintaining minimum pipeline volume

☐ Reviewing pipeline weekly

☐ Avoiding survival-mode operators below $500K

☐ Applying structured outreach daily

Signature: ____________________________

Date: ________________________________

FINAL REFLECTION

What must change immediately in my prospecting discipline?

What action will I take tomorrow?
