

VYNETA PRACTICAL RESOURCES

LESS GUESSWORK. A BETTER FIRST TEST.

Simple Sales Pipeline Workbook

Give every real opportunity an owner, a next action and a decision.

READ / FILL IN / TEST / DECIDE

For freelancers, consultants and lean service businesses

Leave with a small pipeline, usable follow-up messages and a CRM trial brief.

How to use: Read pages 2-5, then fill in pages 6-7. Use a PDF reader that supports forms and save a local copy, or print the worksheets. Browser viewers may not save form entries reliably.

Free to use without a software purchase. Vendor-neutral worksheets. No promised traffic, revenue, time savings or ranking results.

01 / WORK THROUGH THE DECISION

Build stages around evidence

Start with the sale you actually make

Choose one service or offer. Define the customer problem, a plausible budget range and who makes the decision. A downloaded guide is a contact, not automatically a qualified sales opportunity.

Use four stages with entry rules

Qualified: a relevant problem and willingness to discuss it. Discovery: needs, decision process and timing are being verified. Proposal: a specific scope and price have been sent. Decision: the buyer is reviewing and an agreed follow-up exists. Keep won and lost as outcomes, not active stages.

Advance on evidence, not optimism

Write what must be true before moving a record. A sent email does not prove discovery happened. A verbal yes does not prove payment or a signed agreement. Define your own won rule, such as an accepted contract plus the required deposit.

Keep one owner and one next action

Each active record needs a named owner, a concrete action and a due date. In a solo business, the owner is still useful: it makes delegation possible later. Put uncertain facts in notes rather than filling gaps with assumptions.

Fictional example

A design freelancer qualifies a shop that needs a landing page and wants a discovery call. The record stays in discovery until scope and approval process are clarified. It does not move to proposal simply because the freelancer drafted a quote.

02 / WORK THROUGH THE DECISION

Use a record you can act on

Minimum opportunity record

Record: opportunity ID, business/contact, source, customer problem, stage, estimated value, owner, next action, due date and last meaningful interaction. Capture only information needed for the work; avoid payment credentials and unnecessary personal details.

Separate contact source from permission

A source tells you how the person arrived. It does not establish permission for promotional emails. Keep service follow-up distinct from newsletter enrollment and respect the contact preferences they express.

Name the next action precisely

Weak: follow up soon. Useful: send the two scope options by Thursday, then ask which fits. A task should say who does what and when. Keep a short interaction note so tomorrow you do not have to reconstruct the conversation.

Use dates to surface blocked work

An overdue action is an operational problem to review, not proof the buyer is lost. Log the reason: waiting for information, awaiting approval or an internal delay. Close inactive records using your agreed rule and preserve the reason.

One row example

OP-014 | Oak Studio (fictional) | referral | needs a booking page | discovery | value not yet agreed | owner: Sam | send scope questions | due: 12 Oct | budget and approval process still unverified.

03 / WORK THROUGH THE DECISION**Follow up with a useful next step****After discovery**

Subject: Next steps for [project]. Thanks for explaining [problem]. My understanding is [scope] and [timing]. Before I prepare the proposal, could you confirm [one unresolved point]? I will send [deliverable] by [date].

After sending a proposal

Subject: A question about the [project] proposal. Have you had a chance to review the scope? If [specific concern] is a blocker, I can clarify it. Would [option A] or [option B] be the more useful next step? Do not invent scarcity or claim they opened the email without reliable evidence.

When the timing is wrong

Subject: Should I close this out for now? I have not heard back about [project]. If the timing has changed, no problem. Should I pause this conversation, or is there a better time to revisit it? If they decline further contact, respect that decision.

Adapt the cadence to the relationship

Agree a follow-up date when possible. These templates are starting points, not permission to run a mass sequence. Replace every bracket, check tone and facts, and keep automated messages out of unresolved sensitive conversations.

Make messages specific

Offer one useful decision or clarification. A message that only says checking in creates work for the reader. Store the next agreed action in the pipeline immediately after the conversation.

04 / WORK THROUGH THE DECISION

Decide whether a CRM earns its place

Run the same workflow in each candidate

Try adding an opportunity, changing stage, setting a reminder, recording a note, finding overdue work and exporting your own test data. Use fictional contacts for the trial. Confirm required integrations and current plan limits before committing.

Start with friction, not feature count

A spreadsheet may be enough for a small, simple workflow. A CRM becomes worth investigating when missed actions, duplicate records, poor handoffs or manual reporting recur. More features are not valuable if the team cannot keep the records current.

Count operational costs honestly

Monthly workload cost = subscription + add-ons + operator hours times the rate you choose. Hypothetical: a \$30 plan plus two admin hours at \$20/hour costs \$70 for the month. This excludes migration and setup unless allocated separately.

Review outcomes with clear denominators

Review active opportunities lacking a next action, overdue tasks, time in stage and won/lost reasons. For win rate, state which closed opportunities and date cohort you counted. Do not divide wins by all contacts or compare incomplete cohorts as if they were equal.

Weekly review - 20 minutes as a planning example

Clear overdue tasks, verify stage evidence, choose next actions and close records with documented reasons. If the process is still unclear, fix it before buying automation. The workbook does not promise higher sales or shorter sales cycles.

05 / FILLABLE WORKSHEET

Your working brief

Use short notes. Keep detailed evidence in your own files and paste the reference here. Do not enter passwords, customer identifiers or confidential client data.

Offer + buyer problem + qualification rule

Stage entry / exit rules + won definition

Opportunity ID / source / verified facts

Owner / next action / due date / last interaction

One follow-up message adapted to this opportunity

06 / FILLABLE WORKSHEET

Your test record + decision

Use short notes. Keep detailed evidence in your own files and paste the reference here. Do not enter passwords, customer identifiers or confidential client data.

Candidate / plan / date / current cost inputs

Create, remind, note, change stage and export: test results

Must-have integrations / permissions / unresolved limits

Admin minutes / overdue actions / missing next steps

Closed cohort / won + lost counts / reasons

Keep current system, trial CRM or adopt? Evidence + date

07 / DECISION CHECKLIST + FURTHER READING

Finish the test, then choose your next step

- ☐ Every active opportunity has evidence for its stage.
- ☐ An owner, next action and due date are recorded.
- ☐ Messages are accurate and contact preferences are respected.
- ☐ Required integrations and export were checked in a real trial.
- ☐ Costs and outcome denominators are explicit.

Make the next action specific

If the workflow passes your requirements, compare current plans and verify the remaining limits before subscribing. If it fails, revise the brief or consider an alternative. You do not need to purchase software to use this workbook.

Explore the evidence and current details

[Explore Vyneta reviews](#)

[Read the Vyneta noCRM review](#)

[CRM for digital marketing agencies](#)

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Editorial note: Original worksheets drafted with AI assistance and checked for internal consistency. Examples and calculations are hypothetical unless explicitly identified otherwise. This workbook does not establish hands-on experience with every vendor or validate a vendor's claims.

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