Pipeline Management

The best strategies for driving consistent growth

by: Kate Kingston, Kingston Training Group

As those in the office technology industry gear up for the second half of 2025, effective pipeline management is crucial to driving consistent growth and hitting ambitious revenue targets. A robust pipeline ensures that your reps remain focused on qualified opportunities. Following are actionable strategies for sales managers to employ to keep pipelines full and their reps accountable for their workdays.

Daily

Embrace structured prospecting accountability daily. By 4:30 p.m. each day, the sales manager should send an email to his (or her) sales reps asking for the number of net-new meetings they scheduled and the number of processing touches they completed that day.

Salespeople should respond to the email at the end of each business day and reply in the subject line with how many touches and how many meetings they made that day. (e.g., "Kate Kingston — 28 touches, two meetings"). This will dramatically increase net-new meetings and enhance accountability with your team.

Weekly

Calendar Review: Every Friday, have your sales reps send their next week's calendar (fully populated) to their sales manager. Follow up promptly with those who fail to comply to maintain accountability.

Time management is key to maintaining a robust pipeline. Use the following schedule example to structure your sales reps' weeks effectively:

Monday:

- 8 to 8:30 a.m.: Respond to emails, address customer issues
- 8:30 to 10 a.m.: Prospect via phone and email
- 10 to 10:30 a.m.: Prepare to leave for your day in the field
- 10:30 a.m. to 12:30 p.m.: Alternate between meetings and making three dials every time you get in the car
- 12:30 to 1 p.m.: Lunch and make three dials afterward
- 1:15 to 2 p.m.: Foot canvassing
- 2 to 4 p.m.: Alternate between meetings and making three dials during each car trip
- 4:30 to 5 p.m.: Address client issues back at the office
- 5 to 6 p.m.: Prospect via phone and email; prep for the next day

Each sales rep should end his day with an end-of-day checklist to ensure:

- Fifteen dials from the car
- At least 60 minutes of prospecting and paperwork
- Two client meetings
- Filing notes in the dealership CRM

From Tuesday through Friday, follow a similar structure tailored to specific activities like social selling, LinkedIn prospecting, foot canvassing and end-of-week planning.

Utilize the following Calendar Preparation Checklist as a guide to ensure your reps are calendarizing all their activities:

Customer Care (for this week):

- Which customers do you need to reach out to this week to schedule partnership reviews?
- Which customers do you need to create a consultative touchpoint for (i.e., send an article, leave a voicemail or bring an innovative idea to their attention)?
- Which customers have partnership reviews you need to prepare for?
- Have you prepared for all upcoming installations?
- Which customers need training to be scheduled for their new technology?
- Which customers do you need to create or finalize proposals for?

Administrative Care:

Our motto in the office technology industry should be: "Salary for activity and commission for results." In essence, reps are paid a salary for completing their administrative responsibilities, including the following:

- What notes do you have to finish putting into the CRM?
- What prep work do you need to finish for any internal

meetings (e.g., sales manager one-on-ones, company-wide sales meetings, etc.)?

Prospecting:

■ Do you have to find and reach any additional prospects so you have 40 prospects researched and ready to go?

That research should include: understanding who the point people are at each company; knowing exactly how the companies make money; being knowledgeable about their specific compliances; being familiar with their document management needs and workflows so you can create customized communications for each one; knowing what innovations your dealership can bring to their industries through your solutions; and knowing if and how cybersecurity affects their industries.

■ While reviewing your prospecting list, remember to take out any leads because of "nonresponse."

■ Have you scheduled prospecting into your daily calendar? Does that time slot need to be moved or adjusted because other responsibilities have popped up during the day?

■ Do you have new leads in your car so you can make dials while the car is not moving?

■ Have you identified "cold-calling-on-foot" opportunities that surround the meetings you have already scheduled for the week? Do you have the prospecting results from last week's efforts ready to hand to management? Have you evaluated those results to review the prospecting process where you make the most meetings so you can adjust your process? Have you identified your "client success story" candidates for this month?

Social Selling:

■ Have you looked at your LinkedIn profile and considered what you might add (e.g., an article, company brochure, white pages, referrals or testimonials)?

■ Have you reviewed the people who have visited your profile this week so you can add them to your prospect list or confirm their interest?

■ Have you posted on LinkedIn this week while tagging some of your prospects you have proposals for — or for their signatures — to create a value touch?

■ Is there a LinkedIn group you can join to create additional opportunities?

■ Can you find one LinkedIn connection you could help? Remember, it is always best to give first.

■ Is there a new networking group you can join? Or, if you are in one, can you schedule a one-on-one with a member to learn more about his business and how you can help him?

Weekly or Biweekly Team Prospecting Sessions

You must establish mandatory team prospecting sessions.

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At Kingston Training Group (KTG), we have found the best way to institute a successful phone blitz is to schedule it for two hours on Tuesday mornings and Thursday afternoons where each sales rep brings at least 40 prospects researched and ready to dial.

Each rep will call through his list and will not leave voicemails. If he has reached the end of that list of 40 before the two hours are up, he will start at the top of the list and call again.

The reps are allowed to stop the phone blitz as soon as they have scheduled two net-new meetings, which is why it is called "Two or Two." This way, sales reps can buy out of having to sit for the whole two hours if they have scheduled two meetings, but they have been given the placeholder for that success by the sales manager, who has scheduled these once- or twice-weekly sessions to keep their pipelines full of new prospects. This also allows for training opportunities for the sales manager.

The sales manager should be "working the room" and stopping at each rep's desk to listen to those calls during the blitz, ensuring the prospecting skill base is intact. This fosters accountability and momentum.

Weekly Consistent List Replenishment

Reps must regularly refresh their prospect lists and present them to sales managers weekly. KTG recommends that the average territory tenured sales rep should have at least 40 prospective companies researched and ready to go. A new hire should have at least 70.

Use the "Three-Dial Rule"

To maximize sales time, have your reps adopt the practice of making three calls every time they sit in their cars before driving. This microaction builds prospecting consistency and compounds over time. It can add 75 dials to a sales rep's day; to and from work is 30. A sales manager can ask that the first call of the day (staggered through his sales team) is to him so that he can provide immediate feedback to reps on their pitches. Grade their calls and provide the right feedback to increase their results.

Monthly

■ Monitor and recalibrate underperformers.

■ Implement a structured "six-week better prospecting results program" for reps who fall below 70% of their monthly quota.

This weekly, manager-led training hour should address gaps in prospecting, discovery and closing, with managers providing ongoing support. Have the reps live or on a Teams call with the manager making real calls to real prospects. The team environment will foster a collaboration culture and, most importantly, additional prospecting success. Once a sales rep has exceeded his quota, he can opt out of the program (once his six weeks are up).

This should happen at a consistent time every week; for example, at 3 p.m. on Fridays so the reps are working with managers from 3 to 4 p.m. After 4 p.m., hold a sales team weekly debrief and update focusing on prospecting success. This leaves time for reps to ensure their calendars are fully filled out and handed in to managers.

- Include prospecting evaluations in team meetings, offering immediate, actionable feedback.

The Role of Metrics in Pipeline Realism

Regularly assess:

- Conversion rates: Analyze how many leads are progressing through the sales funnel.
- Resource utilization: Ensure reps have the tools they need, such as updated prospect lists or CRM training.
- Team-wide trends: Use monthly and quarterly contests to foster healthy competition and identify high performers to model best practices.

For Sales Reps: Keeping a Full Pipeline

Master prospecting sequencing — Utilize a three-week cycle to engage leads:

- Week One: Identify key contacts and research their business needs. Follow companies on LinkedIn, set up Google Alerts and share relevant articles.
- Week Two: Reengage prospects through LinkedIn and personalized email outreach. Prepare call scripts based on your research.
- Week Three: Begin direct outreach by calling prospects using a personalized script. Then follow up with emails and subsequent calls, and log interactions in the CRM for visibility and strategy refinement.

Leverage LinkedIn and social selling:

- Maximize LinkedIn's power for prospecting by building a complete professional profile with business-appropriate visuals. Join relevant groups to gain messaging privileges and expand your network. Research target prospects to uncover common interests or connections for personalized engagement. And post value-driven content, tagging prospects to increase visibility and engagement.

Prepare effectively for prospecting — Use this preparation checklist to ensure success:

- Identify customer care priorities: Schedule partnership reviews, send articles to customers or prepare for training.
- Handle administrative tasks: Update CRM notes and prepare for meetings.
- Ensure your prospect list includes researched companies with compliance needs, workflow insights and cybersecurity considerations.
- Incorporate foot canvassing and on-the-go dials into your schedule.

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For Sales Management: Validating & Optimizing Pipelines

Establish structures for accountability :

- Daily check-ins: Require reps to submit daily reports detailing net-new meetings and touchpoints by 4:30 p.m.
- Weekly calendar reviews: Ensure reps submit fully populated calendars every Friday and follow up with those who do not comply.

Foster momentum with structured team activities:

- Schedule weekly team prospecting sessions and live call evaluations so you can provide immediate feedback and refine techniques.
- Lead by example during quarterly sales blitzes, rewarding top performers and sharing best practices.

Leverage recognition and analytics:

- Implement monthly recognition programs to celebrate top performers and motivate underperformers.
- Evaluate pipeline metrics regularly, focusing on conversion rates, resource utilization and alignment with team goals.

For sales management, the pipeline is not just a list of opportunities, it is a reflection of future revenue potential. A full, healthy pipeline is the lifeblood of any technology sales organization. By combining structured daily practices, team-led initiatives and robust management oversight, sales teams can maintain consistent momentum. In the second half of 2025, let pipeline management be the cornerstone of your strategy, driving both individual and organizational success. ■

For more than 25 years, Kate Kingston has been exclusively educating office technology sales executives on every type of prospect across 60-plus industries and how they proprietarily use technology. She is a recognized authority on lead generation, recruiting new hires from a prospecting skill-base perspective and new business development. Sales-driven, Kingston is an energized communicator who uses humor, audience participation, proven techniques, handouts and real-time phone calls in her training sessions. She can be reached at kkingston@kingstontraining.com. Visit www.kingstontraining.com.