

CLIENTS ON REPEAT

Consultancy Pipeline Audit



Find what is working, where opportunities slip away,
and what deserves your attention first.

Name / Consultancy: _____

Date: _____

Assess your acquisition system

0 = Not in place 1 = Inconsistent 2 = Repeatable and working

Ideal client I know which organizations, decision-makers and problems I target.	0	1	2
Offer & positioning Buyers can see the outcome, value and why they should choose me.	0	1	2
Authority & visibility I regularly show up where my ideal buyers already pay attention.	0	1	2
Qualified conversations I consistently create conversations with buyers who fit my offer.	0	1	2
Sales conversations I explore needs and buying decisions, then agree on a next step.	0	1	2
Nurture & follow-up I track each opportunity with a next action and follow-up date.	0	1	2
Strategic partnerships I actively cultivate partners who introduce relevant buyers.	0	1	2

Find the leak

Strongest area to keep using: _____

Think of one recent opportunity that stalled. Where did it stop?

☐ First contact ☐ Sales call ☐ Proposal ☐ Decision ☐ Follow-up

What happened—or what next step was missing?

Choose your next move

Review your 0s and 1s. Choose the gap most connected to the stalled opportunity. If tied, start with the earliest missing step in the buyer journey.

My priority: _____

One action I will complete in the next 7 days:

By (date): _____ Progress I will look for: _____

Your expertise is proven. Your pipeline should be, too.

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