



# SALES PIPELINE MAPPING

*AI Systems for Small Business*  
Chapter 6 Worksheet

---

This worksheet guides you through two exercises: mapping your sales pipeline and building your first sales sequence. Complete Part 1 first, then use what you learn to choose and build the right sequence in Part 2.

**Prerequisites:** Your Marketing Foundation Brief from Chapter 4 (buyer persona, positioning, messaging framework, brand voice guide).

**Time estimate:** 90 minutes total, or split into two 45-minute sessions.

---

## Part 1: Map Your Sales Pipeline

*Use AI to help you identify and define every stage a prospect moves through from first contact to post-sale follow-up. Your pipeline should reflect how your business actually works, not a textbook model.*

**Suggested prompt:**

*“Acting as a sales strategist, I want to map the stages of my sales pipeline from first contact through post-sale follow-up. Ask me questions about my business and how customers typically find me, evaluate me, and buy from me before we build the map.”*

### Your Business Context

*Capture the key details from your AI conversation so you have them for reference.*

Business type (service, retail, hybrid, etc.)



How do most customers first find you?

Typical sales cycle length (days, weeks, months?)

What usually triggers the final buying decision?

---

## Your Pipeline Stages

Fill in each stage based on your AI conversation. Rename the stage labels to match your business. Add or remove rows as needed. Make sure you include at least two post-sale stages.

Pipeline Stage	What Happens Here	Where AI Can Help
1. Lead Capture		
2. Initial Response		
3. Discovery / Consultation		
4. Proposal / Offer		
5. Follow-Up		



6. Closing		
7. Onboarding / Delivery		
8. Post-Sale: Review Request		
9. Post-Sale: Referral / Repeat		
10. (Custom stage)		

**For retail businesses:**  
Your stages may look different: foot traffic / web traffic, product engagement, staff interaction, purchase decision, post-purchase follow-up. Rename the stages above to match your actual customer journey.

---

## Identify Your Gaps

Look at your pipeline map. Where are you losing the most prospects? Where is there no system in place? These gaps are your biggest opportunities.

Where do prospects most commonly drop off or stall?

Which stages have NO system or follow-up in place?



What's the single biggest gap costing you the most?

---

## Bonus: Your Objection Map

While you're thinking about your sales process, capture the common objections you hear. Use AI to help you build response frameworks for each one.

**Suggested prompt:**

*“Acting as a sales coach, I want to map the most common objections my prospects raise before buying. I'll describe my business and my typical customer. Ask me questions about the sales conversations I have, and then help me build a response framework for each objection.”*

Common Objection	Response Framework (key points, not a script)
Objection 1:	
Objection 2:	
Objection 3:	
Objection 4:	
Objection 5:	

---

## Part 2: Build Your First Sales Sequence

Based on your pipeline gaps, choose one area to build a sequence for. Focus on the gap that's costing you the most.



## Choose Your Focus

**Which gap are you addressing? (e.g., lead response, lead nurture, post-sale follow-up)**


**What’s the goal of this sequence? (e.g., faster response, consistent nurture, more reviews)**


### Option A: Lead Response + Nurture Sequence

*Use this if your biggest gap is in responding to and nurturing new leads.*

**Suggested prompt:**

*“Acting as a sales strategist, help me build a lead response and nurture sequence. I want a strong first-response template and a 3–5 email nurture sequence for leads who don’t convert immediately. Here’s my buyer persona and brand voice. Ask me questions about my typical leads and sales process before we start building.”*

**First-response template: key elements to include**


**Nurture email 1: topic / angle**




**Nurture email 2: topic / angle**


**Nurture email 3: topic / angle**


**Nurture email 4: topic / angle (optional)**


**Nurture email 5: topic / angle (optional)**


**Timing between emails (e.g., every 3 days, weekly)**


**Option B: Post-Sale Follow-Up Sequence**

*Use this if your biggest gap is after the sale: no review requests, no referral asks, no repeat purchase system.*

**Suggested prompt:**

*“Acting as a customer retention strategist, help me design a post-sale follow-up sequence. I want to include a satisfaction check-in, a review request, and a referral ask, spaced at the right intervals for my business. Here’s my buyer persona and brand voice. Ask me questions about my post-sale process before we start building.”*



<b>Touchpoint 1: Satisfaction check-in   Timing: _____</b>

<b>Touchpoint 2: Review request   Timing: _____</b>

<b>Touchpoint 3: Referral ask   Timing: _____</b>

<b>Touchpoint 4: Repeat purchase / re-engagement   Timing: _____</b>

---

## Review and Measurement

Once your sequence is live, track these metrics monthly:

**Lead response:** Average response time to new leads

**Nurture sequence:** Open rates, click-through rates, replies, conversions

**Pipeline conversion:** % of prospects moving from each stage to the next

**Post-sale:** Reviews generated, referrals received, repeat purchases



Notes from first monthly review (date: _____ )

For more resources and tools:  
**[fistbumpmedia.com/ai-for-business](https://fistbumpmedia.com/ai-for-business)**