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FREE PLAYBOOK

The Pipeline Generation Playbook

Worksheets, checklists and templates for B2B teams that want a steady outbound pipeline without an SDR team.

From the guide at intentionaloutreach.com/pipeline-generation. Every number in the worked examples is hypothetical. Replace them with your own data.

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The pipeline generation process

Pipeline generation is creating qualified sales opportunities: finding the right companies, reaching the people who make decisions, and turning the right conversations into qualified meetings that actually happen.

ICP → **Account list** → **Outreach** → **Qualified meeting** → **Handoff** → **Held meeting** → **Opportunity**

	Demand generation	Lead generation	Pipeline generation
Goal	Make buyers aware of you	Capture potential buyers' information	Create qualified sales opportunities
Output	Audience and future inbound interest	Names and contact details	Qualified meetings and opportunities
Measured by	Reach and engagement	Leads and cost per lead	Meetings held and pipeline value

How to use this playbook

1. Fill in Worksheet 1 and Template 5 before you build a list or write a script.
2. Use Worksheet 6 to turn your revenue target into weekly dials.
3. Run the cadence in protected call blocks (Template 3) and track every week (Worksheet 9).
4. Change one thing per week. Changing five at once hides what worked.

The two leaks to fix first: loose meeting criteria and no show-rate routine. Fix those before adding volume.

WORKSHEET 1

Ideal customer profile

Specific enough that a caller knows exactly who to call and when not to book. Example: US manufacturers with 50 to 500 employees, operating multiple shifts, where plant managers or operations directors own maintenance and production efficiency.

Company characteristics

Industries to target

Industries to avoid

Company size (employees, revenue or locations)

Geography and time zones

Who has the problem / who approves the purchase

Trigger events (why call now)

New location, funding, leadership change, regulation, hiring in your area...

Disqualifiers (don't book if...)

Too small, locked into a contract, no influence over the decision...

Buyer problems, by role

Role	What problem are they dealing with?	How are they handling it today?	Why would a conversation be worth their time?

CHECKLIST 2

List building and suppression

Build the account list first, then one to three contacts per account: the decision-maker, someone in an adjacent role, and someone who can point you to the right person.

Sources

- [ ] Old CRM contacts and quiet opportunities
- [ ] Closed-lost deals where things may have changed
- [ ] Purchased business data that matches your ICP
- [ ] Manual research for niche markets

Before loading

- [ ] Direct dials separated from main company lines
- [ ] Outdated contacts removed
- [ ] Mobile numbers flagged and scrubbed against the National Do Not Call Registry
- [ ] Every account checked against the ICP and disqualifiers

Suppression list

- [ ] Current customers
- [ ] Open opportunities
- [ ] Partners and competitors
- [ ] People who have opted out
- [ ] Companies on your never-call list
- [ ] Kept in one place, updated every week

How many contacts do you need each week?

```
Dials per day ____ × days per week ____ = weekly dials ____
Weekly dials ____ ÷ attempts to resolve a contact ____ = fresh contacts needed ____
Fresh contacts ____ ÷ contacts per account ____ = new accounts needed ____
```

Hypothetical example: 150 dials a day × 5 days = 750 dials. At 5 attempts per contact, that's about 150 fresh contacts, or 50 to 150 accounts a week.

TEMPLATE 3

Cadence and call blocks

A cadence is a planned sequence of attempts and follow-ups. This 10-business-day version is an example to adapt, not a standard.

Day	Example	Your cadence
1	Call, then a short email if you don't connect	
3	Call; brief voicemail if appropriate	
4	Follow-up email in the original thread	
5	Call at a different time of day	
7	Call; second and final voicemail	
9	Call; ask for a referral or better time	
10	Short closing email, then move to nurture	

Every call block

- [ ] **Block the time.** Our reps work in 3.5-hour blocks: in our experience, roughly how long it takes to book a meeting.
- [ ] **Warm up.** Listen to one past call, pick one thing to improve, and practice just that for about 10 minutes. Journaling helps too.
- [ ] **Flip the funnel.** Callbacks, follow-ups and meeting reminders first, then new prospects.
- [ ] **Batch by time zone.** Call each region during its own business hours.

Attempt limits, as we set them up: retire a contact after 6 attempts without reaching the buyer, rest a no-answer for 2 days, and call the same number at most 3 times per campaign in 24 hours. Call only within legal hours in the prospect's local time, honor every opt-out, and give a recording notice if you record.

TEMPLATE 4

Script outline

The opener has one job: give the prospect a reason to keep talking for another 30 seconds. Write direction, not a monologue.

Gatekeeper introduction (short and honest)

Opener: who you are and why you're calling

Value proposition, in one or two sentences

Discovery and qualification questions

"We're happy with what we have"

"Send me an email"

"Now isn't a good time"

The ask for the meeting

Referral question (wrong person)

Voicemail (short)

Never say (guarantees, unapproved discounts, unsupported claims, anything you can't back up):

Example opener: "Hi Jordan, Sam with Northfield. This is a cold call. Can I take 30 seconds to explain why I called, and you can tell me if it's worth another minute?"

TEMPLATE 5

Qualified meeting criteria

Write every requirement in two parts: what must be true, and the question that confirms it. Agree on this before anyone dials.

Requirement	What must be true	Question that confirms it
Role	Decision-maker or appropriate stakeholder	"Would you be the person who owns a decision like this?"
Company size		"Roughly how many people work there?"
Need		"How are you handling this currently?"
Timeline		
Budget		
Technology		"What are you using for this today?"

Decide in advance

- [ ] Does the decision-maker have to attend? If the person on the phone isn't the decision-maker, get them onto the meeting too.
- [ ] How many meetings can be booked per company?
- [ ] Can a no-show be rescheduled, and how many times?
- [ ] What conditions mean the caller should walk away?
- [ ] Who can approve changes to these rules?

Meeting booked	Meeting held	Qualified opportunity
Criteria confirmed and scheduled	Prospect attends with the required people	Your team confirms a real need and next step

WORKSHEET 6

Pipeline math

Work backward from revenue to the activity you need. Use your own CRM and call data where you have it.

Step	Your numbers	Hypothetical example
Revenue target		$300,000
÷ average deal size = deals needed		$25,000 → 12 deals
÷ win rate = qualified opportunities		25% → 48
÷ meeting-to-opportunity rate = held meetings		60% → 80
÷ show rate = meetings to book		80% → 100
÷ conversation-to-meeting rate = conversations		10% → 1,000
÷ connect rate = dials		10% → 10,000
÷ weeks in the period = dials per week		13 weeks → about 770
÷ dials per hour = calling hours per week		40 an hour → about 19 hours

Pipeline coverage

```
Required coverage = 1 ÷ win rate   (25% → at least 4x)
(Required pipeline − existing pipeline) ÷ weeks remaining = new pipeline per week
```

Required pipeline _____ – existing _____ = _____ ÷ weeks left _____ = _____ per week

Show rate matters: in the example, dropping from 80% to 65% means about 123 meetings to book instead of 100, and roughly 180 more dials a week.

CHECKLIST 7

Handoff brief

Every booked meeting comes with this brief, so the person taking the meeting doesn't start from scratch. It should take a few minutes to read.

- [ ] Prospect's name, title, email and phone number
- [ ] Company name, size, location and website
- [ ] Each qualification criterion and the prospect's answer
- [ ] The problem in the prospect's own words
- [ ] Their current solution or workaround
- [ ] Their timeline and reason for considering a change
- [ ] Decision-maker status and other expected attendees
- [ ] Relevant notes from the call
- [ ] A recording link, where available
- [ ] Calendar invite with a short agenda sent the same day

When a meeting doesn't qualify

Which criterion did it miss?

What changes in the list or the calls because of it?

CHECKLIST 8

Show-rate routine

People forget, calendars change, priorities shift. The routine doesn't stop at the calendar invite.

When	What to do	Done
At booking	Repeat the date, time and time zone; confirm attendees and that a reminder text is OK	
Same day	Send the calendar invite with an agenda	
Before the meeting	Text and email reminders	
Morning of	Call to confirm	
If they don't answer	Send a text and get a confirmation	
If they don't show	Offer another time within 24 hours	

Double confirm where you can: once at booking and again the morning of. Decide your rebook policy in advance; repeated reschedules usually mean the meeting isn't a priority.

Example: 20 booked meetings at a 70% show rate is 14 held; at 85% it's 17. Three more held meetings without a single extra call.

WORKSHEET 9

Weekly scorecard and review

Use your first four weeks as a baseline. Then hold one 30-minute review a week and change one thing.

Metric	Wk 1	Wk 2	Wk 3	Wk 4	Target
Dials					
Connects					
Conversations					
Meetings booked					
Meetings held					
Show rate					
Qualified opportunities					
Pipeline value					

Same outcome categories every week: no answer, voicemail, gatekeeper, callback, not interested, wrong number, do not call, meeting booked.

30-minute review agenda

1. How did last week compare with the target?
2. Were there problems with the list or contact data?
3. Which objections and openers came up most often?
4. Why did any meetings fail to qualify?

The one change we're making next week

SHEET 10

Call review

Listen to a few recorded calls each week. Score each area, pick the weakest, and coach around that one thing.

Area	What good sounds like	Score 1 to 5	Notes
Introduction	Clear who's calling and why, in a few seconds		
Value proposition	Relevant to this buyer's problem, not a company pitch		
Qualification	Every required criterion confirmed with a real answer		
Objection handling	Listens, responds to the actual objection, keeps it a conversation		
Booking	Clear ask, date, time zone and attendees confirmed		

Weakest area this week and the one thing to practice

PLAN

Your first 90 days

Phase	Focus	You should have
Days 1 to 30	ICP, qualification criteria, first list, suppression list and script. Run your first cadence cycles and track results.	A baseline for connects, conversations, bookings and show rate
Days 31 to 60	Review month one, improve list quality and messaging, start the show-rate routine, test one change a week.	A cleaner list, better messaging and a measurable process
Days 61 to 90	Keep the weekly review, check pipeline coverage against your next target, decide who owns the calls.	A repeatable system and a decision on DIY, hiring or outsourcing

- [ ] Don't judge the channel after a handful of calls
- [ ] Don't change ICP, list, script and cadence all at once

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Want the dials handled without hiring an SDR team? Intentional Outreach is a managed marketplace of vetted, commission-based phone reps for B2B companies. You set the target market and what qualifies, listen to reps' recorded answers and approve the ones you want, and pay per qualified meeting that's held, plus a platform fee of $500 a month and $250 per active rep. No-shows aren't charged.

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