Category

Consulting

Consulting Pipeline & Forecast Management Playbook

Managing the operational pipeline funnel — leads through conversion — as the direct input to capacity decisions

- Practitioner
- Intermediate
- Template Included

- Mithun A. Sridharan

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- 4 minute(s)

Overview

A framework for managing the consulting business development pipeline operationally — lead sourcing, conversion stages, and win rate by stage — as the direct, practical input to staffing and capacity decisions, distinct from financial revenue forecasting methodology.

How is this different from the Consulting Revenue Forecasting &

Pipeline Management Playbook? This playbook is the operational discipline — managing the actual pipeline funnel stages, lead sourcing, and conversion rates as inputs to staffing decisions. The other playbook is the financial forecasting methodology that translates pipeline data into revenue projections for planning and reporting purposes — a related but distinct, more finance-oriented discipline.

What's the biggest operational pipeline management mistake

consulting firms make? Treating the pipeline as a single undifferentiated number rather than managing conversion rate by stage — a pipeline "value" figure hides whether the bottleneck is lead generation, qualification, or proposal win rate, each requiring a different fix.

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Author

Mithun A. Sridharan

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