COSMOS Sales & Customer Operations Ready Reckoner™

Drive revenue growth and retention

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Why Sales & Customer Ops Trip Up Growing SMEs

In most SMEs, sales is not broken… it is *blurry*.

Leads pour in from everywhere: WhatsApp, LinkedIn, trade fairs, website forms. Then the chaos begins.

No one knows:

- Which leads were quoted?
- Which deals are still alive?
- Which customers are waiting for updates?

So follow-ups depend on memory. Founders chase numbers without rhythm. Teams confuse activity with progress. And despite everyone working hard, growth feels unpredictable.

The problem is not the people… it is the *system*.

What most small businesses lack is not effort, but **structure**:

- A simple way to capture enquiries,
- A rhythm to follow up,
- Visibility into what is working and what is not.

That is where this Ready Reckoner™ steps in.

The COSMOS Lens:

Sales clarity sits at the heart of the COSMOS 4S Systems Framework™:

- **Structure** → Define stages and ownership.
- **SOPs** → Set follow-up cadence and rules.
- **Systems** → Use lightweight trackers and dashboards.
- **Scale** → Build predictable pipelines and calmer teams.

This booklet brings that discipline to your front line — practical, not polished; real tools that replace chaos with rhythm.

Section I - Core Trackers

Bring rhythm to your front-end operations

Formulas don't drive sales… habits do.

But before you can build habits, you need **clarity** on what to track.

Most SMEs rely on scattered notes, WhatsApp messages, or someone's memory. Leads fall through the cracks, quotes vanish in inboxes, and no one can tell which opportunities are truly alive.

The fix is not a fancy CRM. It is three simple trackers that make your sales pipeline visible, measurable, and manageable:

1️⃣ **Enquiry Tracker** – Logs every lead so nothing slips.

2️⃣ **Quotation Register** – Connects effort to outcome.

3️⃣ **Sales Pipeline Dashboard** – Shows health at a glance.

Each tool converts invisible hustle into clear rhythm… the foundation of predictable revenue.

📌 With these three trackers in place, you will stop chasing updates and start managing progress.

A. Enquiry Tracker

Capture every lead before it disappears.

Layer 1 – The Basics

Every lost lead is lost potential. Before automation or CRMs, start with one rule: ***log every enquiry the same day it arrives.***

👉 Minimum columns:

• Date • Customer Name • Source • Product / Service • Owner • Status (Hot / Warm / Cold)

Layer 2 – In Practice (B2B vs B2C)

- **B2B:** Add fields for "Decision Maker," "Expected PO Date," and "Quote Value."
- **B2C:** Track lead source cost and conversion rate per channel.

Update daily → the sheet itself becomes a visibility dashboard.

Layer 3 – Pro Tips (COSMOS Note)

- **Color-code status:** Green = Active | Yellow = Pending | Red = Dormant.
- **Review weekly** to clean dead leads and redistribute ownership.
- For fast-moving products, **create a 2-minute entry form** linked to this tracker via Google Forms or Excel Online.

📌 This is your "sales inbox." Without it, every follow-up is luck.

B. Quotation Register

Track every quote and measure your conversion truthfully.

Layer 1 – The Basics

A quotation without tracking is just paperwork. The register shows you which quotes convert and which languish.

👉 **Minimum columns:**
• Quote No • Date Issued • Customer • Value • Status (Sent / Won / Lost / Hold) • Reason Lost

Layer 2 – In Practice (B2B vs B2C)

- **B2B:** Add approver name and revision count to see which clients negotiate endlessly.
- **B2C:** Track response time and average quote value per salesperson.

Use conditional formatting to highlight quotes older than 7 days with no response.

Layer 3 – Pro Tips (COSMOS Note)

- The Quotations should be linked to the Enquiry No.
- **Calculate Win Rate** = (Won ÷ Total Quotes) × 100 — review monthly.
- Tag quotes by product category to see where your pricing or positioning is off.
- Create a “Quote Pipeline” chart to visualize value by stage.

📌 Numbers don’t lie; your quotation register is your reality check.

C. Sales Pipeline Dashboard

See your sales flow at a glance.

Layer 1 – The Basics

List deals stage-wise and calculate conversion between each stage.

Example columns: Lead → Prospect → Quoted → Negotiation → Won / Lost

Layer 2 – In Practice (B2B vs B2C)

- **B2B:** Link to quotation register for real-time values.
- **B2C:** Use automated count formulas to summarize daily inquiries and sales.

Visualise with a simple funnel chart or bar chart… no software required.

Layer 3 – Pro Tips (COSMOS Note)

- **Measure cycle time** = Date Won – Date Enquiry.
- **Flag stalled deals** > 14 days in the same stage.
- **Color legend** = Active (Green) / Delayed (Amber) / Lost (Red).

📌 When you see your pipeline, you see your future cash flow.

Transition to Section II – Visibility Tools

You cannot improve what you cannot see.

Your trackers now tell you *what's happening*, but without visibility, patterns still hide in spreadsheets.

The next step is to turn those rows into clear signals… so your team sees the same truth in real time.

📌 *In Section II, we will convert data into dashboards: communication logs, CRM Lite sheets, and feedback loops that make customer progress visible to everyone, not just the founder.*

Section II - Visibility Tools

Turn gut-feel selling into measurable progress

Even the best trackers fail if insights stay hidden.

Teams lose rhythm when information lives in silos — one person handles leads, another manages customer calls, and no one sees the full picture.

Visibility fixes that.
When sales data is transparent, action becomes faster, decisions become easier, and customers feel remembered, not chased.

This section introduces three tools that bring that clarity:

1️⃣ **Customer Communication Log:** Keeps every touchpoint traceable.
2️⃣ **CRM Lite Sheet:** Your single-page command center.
3️⃣ **Feedback & Service Loop:** Turns sales into long-term relationships.

📌 Together, these tools move you from "busy activity" to visible performance.

A. Customer Communication Log

Centralise your customer conversations before they vanish.

Layer 1 – The Basics

Most SMEs lose deals not because they forget to quote, but because they forget to follow up.

The solution: one shared log that records *every* touchpoint: call, email, WhatsApp, or meeting.

👉 **Minimum columns:**

• Date • Customer • Contact Person • Mode • Summary • Next Action • Owner • Status

Layer 2 – In Practice (B2B vs B2C)

- **B2B:** Add "Decision Maker" and "Meeting Outcome."
- **B2C:** Include "Channel" (Instagram, store visit, referral) to track engagement source.

Update immediately after every customer contact; it takes 2 minutes and saves countless follow-ups later.

Layer 3 – Pro Tips (COSMOS Note)

- Use filters by "Next Action Date" → daily follow-up list.
- **Add color flags:** Green = Active, Amber = Pending Response, Red = Overdue.
- Review weekly → close or reassign stale leads.

📌 Visibility is accountability. When conversations are logged, nothing gets lost between people.

B. CRM Lite Sheet

A lightweight CRM that actually gets used.

Layer 1 – The Basics

CRMs often fail because they are overbuilt.

Start simple: a single sheet combining enquiry, quote, and follow-up status.

👉 **Minimum columns:**
• Customer • Lead Source • Quote No • Value • Stage (Lead / Quote / Negotiation / Won / Lost) • Last Contact • Next Step • Owner

Layer 2 – In Practice (B2B vs B2C)

- **B2B:** Add “Probability %” to project pipeline value and “Forecast Month.”
- **B2C:** Add “Product Interest” and “Location” for local campaign insights.

Use filters or pivot tables to create instant dashboards: Win Rate, Lead Aging, Value by Stage.

Layer 3 – Pro Tips (COSMOS Note)

- Automate color-coding with simple conditional formatting: Green = Won | Yellow = Active | Red = Stalled.
- Set a “Last Updated” column → shows how fresh each record is.
- Link to your Enquiry Tracker and Quotation Register for end-to-end visibility.

📌 A good CRM Lite is not software, it is discipline made visible.

C. Feedback & Service Loop

Close the loop, because repeat business is cheaper than new business.

Layer 1 – The Basics

A sale is complete only when the customer feels heard afterward.

Build a simple system to collect, review, and act on feedback.

👉 **Minimum columns:**
• Customer • Product / Service • Feedback Date • Rating (1-5) • Comments • Action Taken • Status

Layer 2 – In Practice (B2B vs B2C)

- **B2B:** Send a 3-question check-in email after delivery or project closure.
- **B2C:** Use QR-based feedback forms linked to invoice or delivery receipt.

Summarise monthly: Positive %, Recurring issues, Action Owner.

Layer 3 – Pro Tips (COSMOS Note)

- Tag feedback themes (e.g., response time, quality, pricing).
- Track turnaround time to close customer issues.
- Share patterns in monthly review, it keeps service aligned with sales promises.

📌 Retention is the real growth metric. Your feedback loop makes sure you earn it systematically.

Transition to Section III – Performance Rhythm

Now that your data is visible, the next challenge is **discipline,** keeping it alive week after week.

Numbers matter only when reviewed, and rhythm is what turns data into results.

📌 In Section III, we will build your Performance Rhythm: follow-up SOPs, KPI dashboards, and weekly review habits that transform visibility into consistent revenue.

Section III - Performance Rhythm

Replace end-of-month panic with daily clarity

Numbers mean nothing without rhythm.

Many SMEs track data diligently but still feel stuck because no one reviews it consistently, and follow-ups depend on energy, not process.

Performance rhythm creates *momentum*.

It gives your team a fixed heartbeat: daily actions, weekly reviews, and monthly insights that keep deals moving and decisions grounded.

This section gives you three tools to keep that heartbeat steady:

1️⃣ **Follow-Up SOP:** Standardise cadence so no lead goes cold.
2️⃣ **KPI Summary Dashboard:** Measure health, not hustle.
3️⃣ **Weekly Sales Review Sheet:** Spot bottlenecks before they hurt revenue.

📌 Together, they convert visibility into sustained progress, the foundation of scale.

A. Follow-Up SOP

Bring consistency to customer touchpoints.

Layer 1 – The Basics

Follow-up is not nagging; it is professionalism.

Without a defined rhythm, most deals die quietly after the first conversation.

👉 **Simple cadence you can adapt:**

- Day 1 – Acknowledge enquiry.
- Day 3 – Send quote / confirm needs.
- Day 7 – Check-in politely.
- Day 14 – Final reminder / close loop.

Layer 2 – In Practice (B2B vs B2C)

- **B2B:** Map cadence to buying cycles: longer, more spaced touchpoints with decision-maker notes.
- **B2C:** Shorter cycles; automate Day 3 and Day 7 messages.

Keep tone informative, never pushy.

Layer 3 – Pro Tips (COSMOS Note)

- Create email + call templates; standard words save thinking time.
- Track *Next Action Date* in your Communication Log.
- If no response after Day 14, mark as *Dormant* and revisit in the next campaign cycle.

📌 Follow-up SOPs don't kill spontaneity, they protect consistency.

B. KPI Summary Dashboard

See your sales truth in one glance.

Layer 1 – The Basics

Metrics reveal whether your sales engine is running or idling. Track only what drives action.

👉 **Core KPIs:**

- Leads Received
- Quotes Sent
- Deals Won / Lost
- Conversion Rate (Won ÷ Quotes)
- Revenue vs Target
- Average Ticket Size
- Sales Cycle Time

Layer 2 – In Practice (B2B vs B2C)

- **B2B:** Include “Pipeline Value by Stage” and “Forecast Month.”
- **B2C:** Include “Lead Source Conversion %” to see which channel performs.

Use simple Excel formulas or pivot charts; visuals help the team grasp patterns instantly.

Layer 3 – Pro Tips (COSMOS Note)

- Set color bands → Green = On Target
  Amber = Needs Attention
  Red = Off Track.
- Add trend lines → Month-on-Month growth %.
- Review as a team every Monday — accountability creates improvement.

📌 Dashboards are not decoration; they are mirrors that keep teams honest.

C. Weekly Sales Review Sheet

Turn meetings into decisions, not debates.

Layer 1 – The Basics

A weekly review forces rhythm. It's where data meets dialogue.

Keep it structured and short (30 minutes max).

👉 **Columns to review:**
• Lead Owner • Hot Deals • Stalled Deals • Key Wins • Key Losses • Actions for Next Week

Layer 2 – In Practice (B2B vs B2C)

- **B2B:** Add "Forecast Value" and "Decision Expected By."
- **B2C:** Summarise daily retail/inquiry counts and close ratios.

Hold the review at the same time each week, rhythm builds trust.

Layer 3 – Pro Tips (COSMOS Note)

- Display your KPI Dashboard during the meeting, not anecdotes.
- Rotate ownership: each salesperson presents their pipeline.
- End every review with 3 actions per person → record in the sheet.

📌 Discipline beats motivation. Weekly reviews turn effort into predictable outcomes.

Transition to COSMOS Anchor

Your sales rhythm is now alive: leads logged, data visible, reviews steady.

But systems only deliver long-term value when anchored to a bigger framework.

📌 In the final COSMOS Anchor, you will see how these habits fit inside the 4S Framework™, linking Structure, SOPs, and Systems to real-world Scale.

COSMOS Anchor

From hustle to harmony: the COSMOS Lens on Sales.

Each tool in this Ready Reckoner™, the trackers, dashboards, and SOPs, may look different, but together they form one integrated discipline: **sales rhythm with structure**.

When sales teams use these tools consistently, three shifts happen:

- Effort turns into visibility.
- Conversations turn into conversions.
- Growth turns from unpredictable to deliberate.

That is the essence of the COSMOS 4S Systems Framework™:

COSMOS 4S	In Sales & Customer Operations
Structure	Define your enquiry → quote → follow-up stages clearly.
SOPs	Set repeatable cadences and review habits.
Systems	Use trackers, dashboards, and CRM Lite sheets to stay visible.
Scale	Build predictable pipelines and confident teams.

📌 **COSMOS Note:**

The 4S Framework™ is your compass. Without it, even the best CRM becomes clutter; with it, your operations become calm, clear, and scalable.

Your Next Move

Sales growth starts with clarity, not chaos.

This Ready Reckoner™ gave you **nine practical tools** to structure your customer-facing operations:

- **3 Core Trackers:** Enquiry, Quotation, Pipeline
- **3 Visibility Tools:** Communication Log, CRM Lite, Feedback Loop
- **3 Rhythm Tools:** Follow-Up SOP, KPI Dashboard, Weekly Review Sheet

Now it's your turn to bring them alive:

1️⃣ Choose one tracker to start this week.
2️⃣ Run it for 30 days, update daily.
3️⃣ Hold your first 30-minute review at month-end.
4️⃣ Watch how visibility alone starts driving accountability.

When rhythm sets in, growth stops being accidental.

Call-to-Action:

👉 Explore the full **COSMOS Vault™,** your library of Ready Reckoners™ for Procurement, Inventory, Finance, HR, and Sales at cosmosconsultingservice.com.

Appendix

A - Lead Stage Glossary

Give every deal a name, not a guess.

Clarity starts with shared language.

When every team member labels leads differently (“hot,” “active,” “interested”), chaos creeps in.

Use this simple, universal stage map:

Stage	What It Means	Typical Action	COSMOS Note
Enquiry	New contact received (via call, email, WhatsApp, web form)	Acknowledge within 24 hours	Speed builds trust
Prospect	Basic interest confirmed, qualification ongoing	Share intro deck / gather specs	Confirm decision maker early
Quoted	Formal quotation issued	Follow-up at Day 3 and Day 7	Track version & value
Negotiation	Customer engaging but undecided	Clarify terms, handle objections	Keep notes in Communication Log
Won	Customer confirmed order	Move to invoicing & service stage	Update CRM immediately
Lost	Deal not converted	Record reason (“Price”, “Delay”, “Competitor”)	Learn, don’t delete
Dormant	No activity for >30 days	Revisit during next campaign	Pipeline gold often hides here

📌 When stages are clear, reviews become factual, not emotional.

B - Sample Email & Call Templates

Save words. Stay professional. Keep tone warm.

You don't need long scripts, just clarity and courtesy.
Use these starter templates and adapt them to your brand tone.

1️⃣ Initial Acknowledgement (Day 1)

Subject: Thank you for your enquiry

Hi [Name],
Thank you for reaching out to [Company]. We've received your enquiry for [product/service] and will revert with details shortly.

Warm regards,
[Your Name]
[Company Name]

2️⃣ Follow-Up (Day 3)

Subject: Just checking in on our quotation

Hi [Name],
Hope you are doing well. Sharing a gentle reminder regarding the quotation sent on [date].
Please let me know if you'd like to discuss or revise any details.

Best,
[Your Name]

3️⃣ Final Closure (Day 14)

Subject: Closing the loop on our quote

Hi [Name],
I wanted to close the loop on our earlier quotation for [product/service].
If you ave already made a decision, do let me know, either way, your feedback helps us improve.

Thank you again for considering us.
Warmly,
[Your Name]

📌 Standard messages reduce friction and keep tone consistent across the team.

C - KPI Formula Sheet

Measure what matters — and nothing else.

You don't need a dozen metrics.

Five well-chosen KPIs tell the whole story of your sales rhythm.

KPI	Formula	Why It Matters	Review Frequency
Lead-to-Quote %	(Quotes Sent ÷ Enquiries) × 100	Shows how efficiently enquiries are qualified	Weekly
Quote-to-Win % (Conversion)	(Deals Won ÷ Quotes Sent) × 100	Measures effectiveness of quoting and follow-up	Monthly
Average Ticket Size	(Total Revenue ÷ Deals Won)	Helps focus on high-value opportunities	Monthly
Sales Cycle Time	(Deal Close Date – Enquiry Date)	Reveals speed of closure; shorter = healthier	Monthly
Retention %	(Repeat Customers ÷ Total Customers) × 100	Tracks loyalty and service quality	Quarterly

📌 Dashboards built on these five KPIs give you 80% of sales visibility with 20% of effort.