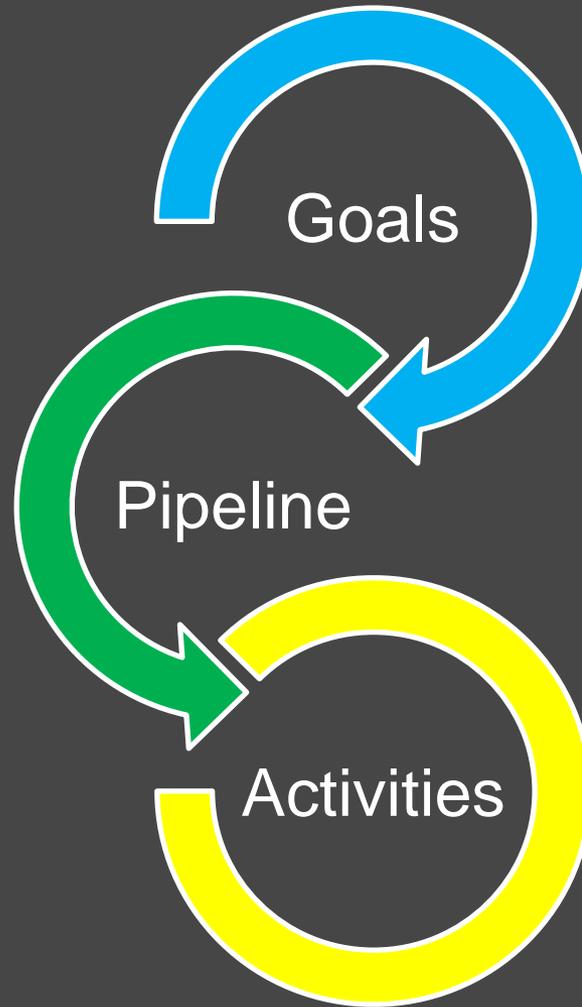
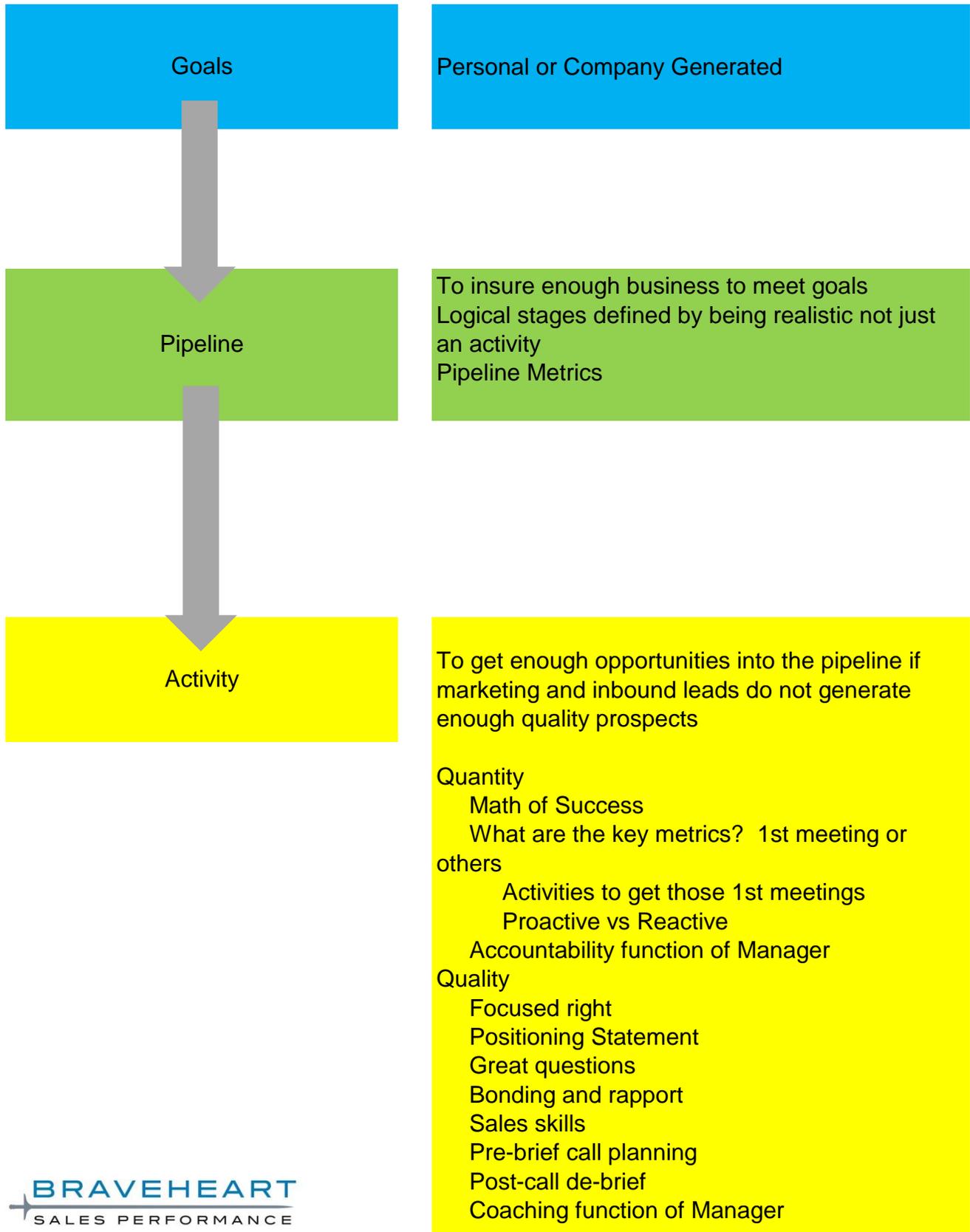


CEO as Sales Manager Toolkit



Sales Leadership Focus



Pipeline Metrics

Monthly Pipeline Requirements

Yr Goal	Closing %	Suspects	Going to 1st	1st Stage	2nd Stage	3rd Stage	Proposals Closed

Be sure to customize the formulas to your experience

Number of Opps Necessary in Each Bucket to Meet Goals

Weekly Activity Required

Attempts	Talks	Appts

If marketing and referrals are NOT producing an adequate number of APPROPRIATE opportunities you will need to prospect.

Suspect Likely Targets to call on. 1 in 3 give you a Discovery Appointment

Going to 1st You got a Discovery appointment scheduled. This formula indicates that 50% of those actually become Prospects and move on to 1st Stage. Adjust to fit your historic experiences.

1st Stage Discovery appointment held and you have determined that they have a compelling reason to buy (you uncovered their Fundamental Buying Motive of pain, fear or gain/pleasure)

2nd Stage You have started to differentiate based on value and they have the money to spend and are willing to spend it

3rd Stage Created value
Intimate relationship exists - in other words they will tell you if they are not really going to buy or are just stringing you along
Decision promised
Decision process fully understood including Who, What, When, Where, Why, How

Get A Plan, Get Sales

Name:

Annual Goal:
 Today's Date:

Average Sale Size	Number of Closed Sales Needed Per Year	Number of Closed Sales Needed Per Month	Closing Ratio (Percentage of 1st appts that turn into closed business)	Initial Conversations Needed Per Week (Based on your calculation of closing ratios)
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<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

3-5 Specific Things To Do Consistently to Grow Your Business (If you did these things you could not fail)	Frequency/Duration/Measurement	Intention
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
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Sales Activity

Number of 1st Appointments Scheduled

Appropriate Prep for Calls

Quality of Prospecting

Operational Requirements

Efficient Use of Co-workers' Time

Proposal Creation Only after Full Qualification

Data Integrity

Activity Plan/Reports Provided Weekly

Opportunities Entered in Systems

Pipeline is Accurate and Provided to Manager

Disqualification Checklist Completed for
New Opportunities

Other

Sales Team Leaders Question Guidelines

Use this template with each of your salespeople

KEY		
Goals	Pipeline	Activities

Initial Questions

Does everyone understand their sales goal?

Has everyone gone through a goal setting session and do you understand what they are working for?

Has everyone completed the exercise of completing their own Pipeline Metrics Worksheet?

Does everyone understand what each stage of the pipeline means and can they tell you how many deals or how much in deal value they need for each stage to be successful?

Does everyone understand his required monthly, weekly and daily activity to produce the adequate number of opportunities in the pipeline?

Are there additional activities that are more strategic in nature (moving into new markets etc) that need attention?

Ongoing Periodic (weekly) One-on-One Conversations

How has the individual performed YTD against sales goals?

How did he/she do this past week? (Is there a positive trend?)

Why or why not?

Does the individual have an adequate number of deals or dollars in EACH pipeline stage?

Is the next agreed to step identified for each opportunity in the pipeline?

Where are the lean stages in the pipeline?

Why?

Did the individual have the required number of first meetings last week? Other metrics associated with critical activities. (Think in terms of "If he did this every day he could not fail")

If not, why not?

What is going to be done differently?

If activity is where it needs to be, is he moving opportunities through the pipeline – are closing ratios in line?

If not, why?

What is being done to fix it?

De-brief any necessary calls

Get a download of what is planned for the upcoming week. Are enough 1st meetings scheduled?

If not, what is going to be done differently?