

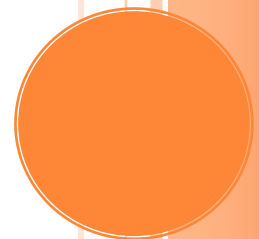
Sales Pipeline/Funnel Management Template User Guide

Sales Funnel/Pipeline Management Template

This Excel-based template is a comprehensive application for Sales Funnel/Pipeline management. The sales pipeline management system provides analysis by Sales Region, Sales Executive, Lead Source, Pipeline Stage and Market Sector. The analysis is available in both tabular and chart forms. The Excel template is totally customizable, uses only standard Excel features and contains no macros.

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SALES PIPELINE/FUNNEL MANAGEMENT TEMPLATE USER GUIDE

Sales Funnel/Pipeline Management Template

INTRODUCTION

This Excel-based spreadsheet template is a comprehensive system for Sales Funnel/Pipeline management.

The sales Funnel/Pipeline management template provides a detailed analysis of the sales funnel / sales pipeline by:

- Sales Region,
- Sales Executive,
- Lead Source,
- Pipeline Stage and
- Market Sector.

The analysis is available in both tabular and chart forms.

The highly flexible Excel template allows the user to set up flexible tables to define sales regions, sales executives, lead sources, pipeline stages and associated probability of closing, and market sectors.

Entering new sales opportunities in the sales funnel / sales pipeline is then made "quick and easy" by selecting the table entry from a dropdown list. This approach also eliminates typing errors in inserting any of these parameters. There is no limit to the number of Sales Regions, Sales Executives, etc. that can be used

The funnel / pipeline net value of each opportunity is calculated based on the funnel / pipeline stage and associated probability of closing an opportunity in that stage of the funnel / pipeline.

This template uses Excel 2007 features and is NOT compatible with earlier versions of Excel.

This template is one of three companion templates.

1. The Sales Pipeline Funnel Planner & Calculator identified the level of new business leads/opportunities required to achieve the sales revenue budget. (Excel 2003)

2. The Sales Leads Generation Plan and Budget template develops a plan and budget to generate the necessary leads by different marketing sources or categories, i.e. trade show, telemarketing, etc. (Excel 2003)
3. The Sales Pipeline / Sales Funnel Management template provides a comprehensive pipeline management system for all new and current opportunities as they progress through the sales funnel / sales pipeline. (Excel 2007).

USER INSTRUCTIONS

Setup

A number of basic parameters must be set up prior to using the template to enter and update sales pipeline leads/opportunities.

Pipeline Set-up Parameters						
Sales Region	Sales Executive	Product Group	Market Sector	Lead Source	Pipeline Stage	Probability
West	Joe Doe	Consumer	Financial Services	Webinar	1. Lead	5%
North West	Jill Somebody	Professional	Government	eMail Campaign	2. Qualified Lead	10%
East	Tom Thumb	Industrial	Non-Profit	Trade Show	3. Opportunity	15%
South East	Michael Mouse	Services	Technology	Telemarketing	4. Good Fit	25%
North			Healthcare	Referral Customer	5. Proposal	35%
Europe			FMCG	Referral Staff	6. Shortlisted	50%
Asia			Transport	Website	7. Negotiating	65%
Canada			Utilities	Advertising	8. Verbal approval	80%
Mid-West					9. P. O.	95%

Figure 1 Pipeline set-up Parameters

These parameters (see Figure 1 above) are:

- Sales Regions
- Sales Executives
- Product Groups
- Market Sectors
- Lead Sources
- Pipeline stages and associated probability of closing.

If a particular parameter is not set up, pipeline analysis will not be available under that heading.

To commence the setup, go to worksheet “Pipeline Data” and enter/edit each of the parameters starting in cell U11. Each parameter can have an unlimited number of entries.

Each entry is validated against those already entered and duplicates are not allowed, i.e. one cannot enter the same Sales Region twice.

Note “Pipeline Stages”, and associated probabilities, should follow the normal pipeline flow sequence and be numbered 1, 2, 3, etc. as per the example in figure 1 above.

Enter & Update Sales Pipeline Opportunities

New Sales Opportunities are entered and existing Opportunities are updated as they progress through the sales pipeline/funnel.

Pipeline Input Data										Date:	26 April 2011
Opportunity Description	Sales Region	Sales Executive	Product Group	Market Sector	Lead Source	Gross Value	Projected Close Date	Current Pipeline Stage	Probability of Close	Weighted Net Value	
Bank of This & That	West	Joe Doe	Services	Financial Services	Webinar	200,000	Jun-2011	7. Negotiating	65%	130,000	
Dept of Energy	South East	Jill Somebody	Professional	Government	Referral Staff	500,000	Jul-2011	6. Shortlisted	50%	250,000	
Hi-Tech Inc	North West	Tom Thumb	Industrial	Technology	eMail Campaign	350,000	Oct-2011	4. Good Fit	25%	87,500	
Big Pharma Inc	Europe	Michael Mouse	Industrial	Healthcare	Telemarketing	100,000	Jun-11	7. Negotiating	65%	65,000	
Dept of Defence	South East	Jill Somebody	Services	Government	Referral Customer	450,000	Dec-11	3. Opportunity	15%	67,500	
High Flyers Ltd	Europe	Michael Mouse	Professional	Transport	Website	100,000	Jun-11	7. Negotiating	65%	65,000	
ABC Biotech	North West	Tom Thumb	Industrial	Healthcare	Advertising	55,000	May-11	8. Verbal approval	80%	44,000	
A N Other Bank	South East	Joe Doe	Services	Financial Services	Trade Show	350,000	Feb-12	2. Qualified Lead	10%	35,000	
Big Company Inc	Mid-West	Jill Somebody	Industrial	FMCG	eMail Campaign	150,000	Aug-11	5. Proposal	35%	52,500	
High Street Savings Bank	South East	Michael Mouse	Services	Financial Services	Webinar	85,000	Aug-11	7. Negotiating	65%	55,250	

Figure 2 Pipeline Input Data Table

Go to the “Pipeline Data” worksheet.

The Pipeline data input table (see figure 2 above) commences in cell B10 and can have an unlimited number of entries.

ENTERING NEW OPPORTUNITIES

For each new opportunity enter the following:

Opportunity Description: This is a free format text field and a recognisable description should be entered.

Sales Region: The relevant “Sales Region” should be selected from the dropdown list of valid Sales Regions. Any new Sales Region should be entered via the Setup table as described in page 3 above.

Sales Executive: The relevant “Sales Executive” should be selected from the dropdown list of valid Sales Executives. Any new Sales Executive should be entered via the Setup table as described in page 3 above.

Product Group: The relevant “Product Group” should be selected from the dropdown list of valid Product Groups. Any new Product Group should be entered via the Setup table as described in page 3 above.

Lead Source: The relevant “Lead Source” should be selected from the dropdown list of valid Lead Sources. Any new Lead Source should be entered via the Setup table as described in page 3 above.

Market Sector: The relevant “Market Sector” should be selected from the dropdown list of valid Market Sectors. Any new Market Sector should be entered via the Setup table as described in page 3 above.

Gross Value: The estimated Gross Value of the opportunity should be entered as a whole positive number.

Projected Close Date: Enter the estimated close date for this opportunity. It should be entered in MM/YYYY format; e.g. 09/2011

Current Pipeline Stage: The relevant “Current Pipeline Stage” should be selected from the dropdown list of valid Pipeline Stages. Any changes to the Pipeline Stages or their associated probabilities should be entered via the Setup table as described in page 3 above. **However, Such changes may effect the existing entries in the Active Sales Pipeline.**

Probability of Close: This field is calculated based on the **Pipeline Stage** selected.

This cell should NOT be edited.

Weighted Net Value: This field is calculated by multiplying the Gross Value by the Probability of Closing the opportunity; which in turn is based on the Pipeline Stage selected.

This cell should NOT be edited.

UPDATING EXISTING OPPORTUNITIES

To update an existing opportunity the relevant Opportunity should be selected and the chosen fields can be updated, typically such updates would involve updating the estimated **Gross Value** of **Projected Close Date** and the **Pipeline Stage** as the Opportunity is progressed through the Sale Pipeline/Funnel. However, any of the field can be updated, e.g. responsible **Sales Executive** changed.

As for New Opportunities, the Probability of Close and Weighted Net Value should not be edited.

CLOSING & DELETING EXISTING OPPORTUNITIES

All Opportunitites have a specific Lifecycle that results in a Sales Win, Sales Loss or a decision to Qualifing Out.

At the end of the end of the Opportunity Lifecycle the Opportunity should be removed from the Active Pipeline.

To remove an Opportunity the following procedure should be followed:

1. Right mouse click on any field in the Opportunity to be removed.
2. Select “Delete” from the right mouse button menu
3. Select “Table Rows” from the Delete submenu.

REFRESHING DATA

Once the Sales Pipeline data has been edited it is important to “Refresh” the data to update all the Analysis Tables/Reports and Charts.

To Refresh the data the following procedure should be followed:

- Select the Excel “Data” ribbon.
- Choose the “Refresh All” option.

Analysis

The Sales Pipeline/Funnel template provides a comprehensive range of analysis outputs to facilitate detailed Pipeline management.

The reports generated include:

- Pipeline by Sales Region and Sales Executive within each Region
- Pipeline by Sales Executive and Sales Opportunities managed by each Sales Executive
- Pipeline by Pipeline Stage and Sales Executive within each Stage
- Pipeline by Lead Source
- Pipeline by Market Sector and Sales Region within each Market Sector.

The Charts created include:

- Bar chart of Pipeline by Sales Region and Pipeline Stage within each Region
- Pie chart of Pipeline by Pipeline Stage
- Pie chart of Pipeline by Lead Source.

PIPELINE BY SALES REGION AND SALES EXECUTIVE WITHIN EACH REGION

Filter Options

Regional Pipeline		Month							Grand Total
Region/Sales Exec.		May-2011	Jun-2011	Jul-2011	Aug-2011	Oct-2011	Dec-2011	Feb-2012	Grand Total
<input type="checkbox"/> Europe			130,000						130,000
	Michael Mouse		130,000						130,000
<input type="checkbox"/> Mid-West					52,500				52,500
	Jill Somebody				52,500				52,500
<input type="checkbox"/> North West		44,000				87,500			131,500
	Tom Thumb	44,000				87,500			131,500
<input type="checkbox"/> South East			250,000	55,250		67,500	35,000		407,750
	Jill Somebody		250,000			67,500			317,500
	Joe Doe						35,000		35,000
	Michael Mouse			55,250					55,250
<input type="checkbox"/> West			130,000						130,000
	Joe Doe		130,000						130,000
Grand Total		44,000	260,000	250,000	107,750	87,500	67,500	35,000	851,750

Figure 3 Sales Region/Sales executive

Expand/Collapse

The Regional analysis, as depicted in figure 3 above, by default includes all Regions and Months. The Filter Options highlighted allow the report to be filtered to include only specific Regions or Months.

Within each Region a full analysis is provided for each Sales Executive active within the Region. Using the Expand/Collapse option highlighted allows the user to show all the details or to show only Regional totals. The Expand/Collapse option shows a “-“ where the details can be collapsed to show the Regional data summarized and a “+” where the Region total can be expanded to show the Sales Executives details.

PIPELINE BY SALES EXECUTIVE AND SALES OPPORTUNITIES MANAGED BY EACH SALES EXECUTIVE

Filter Options

Sales Exec	May-2011	Jun-2011	Jul-2011	Aug-2011	Oct-2011	Dec-2011	Feb-2012	Grand Total
Jill Somebody			250,000	52,500		67,500		370,000
Big Company Inc				52,500				52,500
Dept of Defence						67,500		67,500
Dept of Energy			250,000					250,000
Joe Doe		130,000					35,000	165,000
A N Other Bank							35,000	35,000
Bank of This & That		130,000						130,000
Michael Mouse		130,000		55,250				185,250
Big Pharma Inc		65,000						65,000
High Flyers Ltd		65,000						65,000
High Street Savings Bank				55,250				55,250
Tom Thumb	44,000					87,500		131,500
ABC Biotech	44,000							44,000
Hi-Tech Inc						87,500		87,500
Grand Total	44,000	260,000	250,000	107,750	87,500	67,500	35,000	851,750

Figure 4 Sales Executive/Opportunity

Expand/Collapse

The analysis by Sales Executive, as depicted in figure 4 above, by default includes all Sales Executives and Months. The Filter Options highlighted allow the report to be filtered to include only specific Sales Executives or Months.

Within each Sales Executive details a full analysis is provided for each Sales Opportunity. Using the Expand/Collapse option highlighted allows the user to show all the opportunity details or to show only Sales Executive totals. The Expand/Collapse option shows a “-“ where the details can be collapsed to show the Sales Executive data summarized and a “+” where the Sales Executive total can be expanded to show the Sales Opportunities details.

PIPELINE BY PIPELINE STAGE AND SALES EXECUTIVE WITHIN EACH STAGE

Filter Options

Pipeline Stage		Month							Grand Total
Pipeline Stage	Month	May-2011	Jun-2011	Jul-2011	Aug-2011	Oct-2011	Dec-2011	Feb-2012	
- 8. Verbal approval		44,000							44,000
	Tom Thumb	44,000							
- 7. Negotiating			260,000		55,250				315,250
	Joe Doe		130,000						130,000
	Michael Mouse		130,000		55,250				185,250
- 6. Shortlisted				250,000					250,000
	Jill Somebody			250,000					250,000
- 5. Proposal					52,500				52,500
	Jill Somebody				52,500				52,500
- 4. Good Fit						87,500			87,500
	Tom Thumb					87,500			87,500
- 3. Opportunity							67,500		67,500
	Jill Somebody						67,500		67,500
- 2. Qualified Lead								35,000	35,000
	Joe Doe							35,000	35,000
Grand Total		44,000	260,000	250,000	107,750	87,500	67,500	35,000	851,750

Figure 5 Pipeline stage/Sales Executive

Expand/Collapse

The analysis by Pipeline Stage, as depicted in figure 5 above, by default includes all Pipeline Stages and Months. The Filter Options highlighted allow the report to be filtered to include only specific Pipeline Stages or Months.

Within each Pipeline Stage a full analysis is provided for each Sales Executive. Using the Expand/Collapse option highlighted allows the user to show all the details or to show only Pipeline Stage totals. The Expand/Collapse option shows a “-“ where the details can be collapsed to show the Pipeline Stage data summarized and a “+“ where the Pipeline Stage total can be expanded to show the Sales Executives details.

PIPELINE BY LEAD SOURCE

Filter Options

Lead Source	May-2011	Jun-2011	Jul-2011	Aug-2011	Oct-2011	Dec-2011	Feb-2012	Grand Total
Advertising	44,000							44,000
eMail Campaign				52,500	87,500			140,000
Referral Customer						67,500		67,500
Referral Staff			250,000					250,000
Telemarketing		65,000						65,000
Trade Show							35,000	35,000
Webinar		130,000		55,250				185,250
Website		65,000						65,000
Grand Total	44,000	260,000	250,000	107,750	87,500	67,500	35,000	851,750

Figure 6 Pipeline by Lead Sources

The analysis by Lead Source, as depicted in figure 6 above, by default includes all Lead Sources and Months. The Filter Options highlighted allow the report to be filtered to include only specific Lead Sources or Months.

PIPELINE BY MARKET SECTOR AND SALES REGION

Filter Options

Market Sector/Region	May-2011	Jun-2011	Jul-2011	Aug-2011	Oct-2011	Dec-2011	Feb-2012	Grand Total
[-] Financial Services		130,000		55,250			35,000	220,250
+ South East				55,250			35,000	90,250
+ West		130,000						130,000
[-] FMCG				52,500				52,500
+ Mid-West				52,500				52,500
[-] Government			250,000			67,500		317,500
+ South East			250,000			67,500		317,500
[-] Healthcare	44,000	65,000						109,000
+ Europe		65,000						65,000
+ North West	44,000							44,000
[-] Technology					87,500			87,500
+ North West					87,500			87,500
[-] Transport		65,000						65,000
+ Europe		65,000						65,000
Grand Total	44,000	260,000	250,000	107,750	87,500	67,500	35,000	851,750

Figure 7 Market Sector/Sales Region

Expand/Collapse

The analysis by Market Sector, as depicted in figure 7 above, by default includes all Market Sectors and Months. The Filter Options highlighted allow the report to be filtered to include only specific Market Sectors or Months.

Within each Market Sector a full analysis is provided for each Sales Region. Using the Expand/Collapse option highlighted allows the user to show all the details or to show only Market Sector totals. The Expand/Collapse option shows a “-“ where the details can be collapsed to show the Market Sector data summarized and a “+“ where the Market Sector total can be expanded to show the Sales Regions details.

BAR CHART OF PIPELINE BY SALES REGION AND PIPELINE STAGE WITHIN EACH REGION

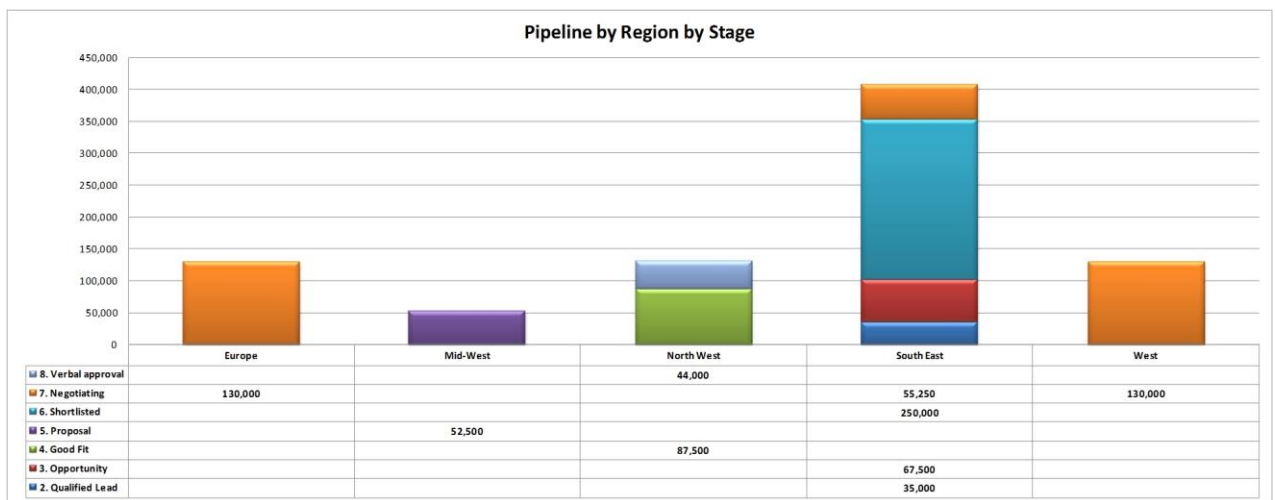


Figure 8 Sales Regions/Pipeline Stage

The stacked bar chart shows the Pipeline by Region. The bars corresponding to each Region are further analyzed by Pipeline Stage, e.g. South East Region in figure 8 above.

The net values of the Pipeline by Region by Stage are depicted in the legend table below the bar chart.

PIE CHART OF PIPELINE BY PIPELINE STAGE

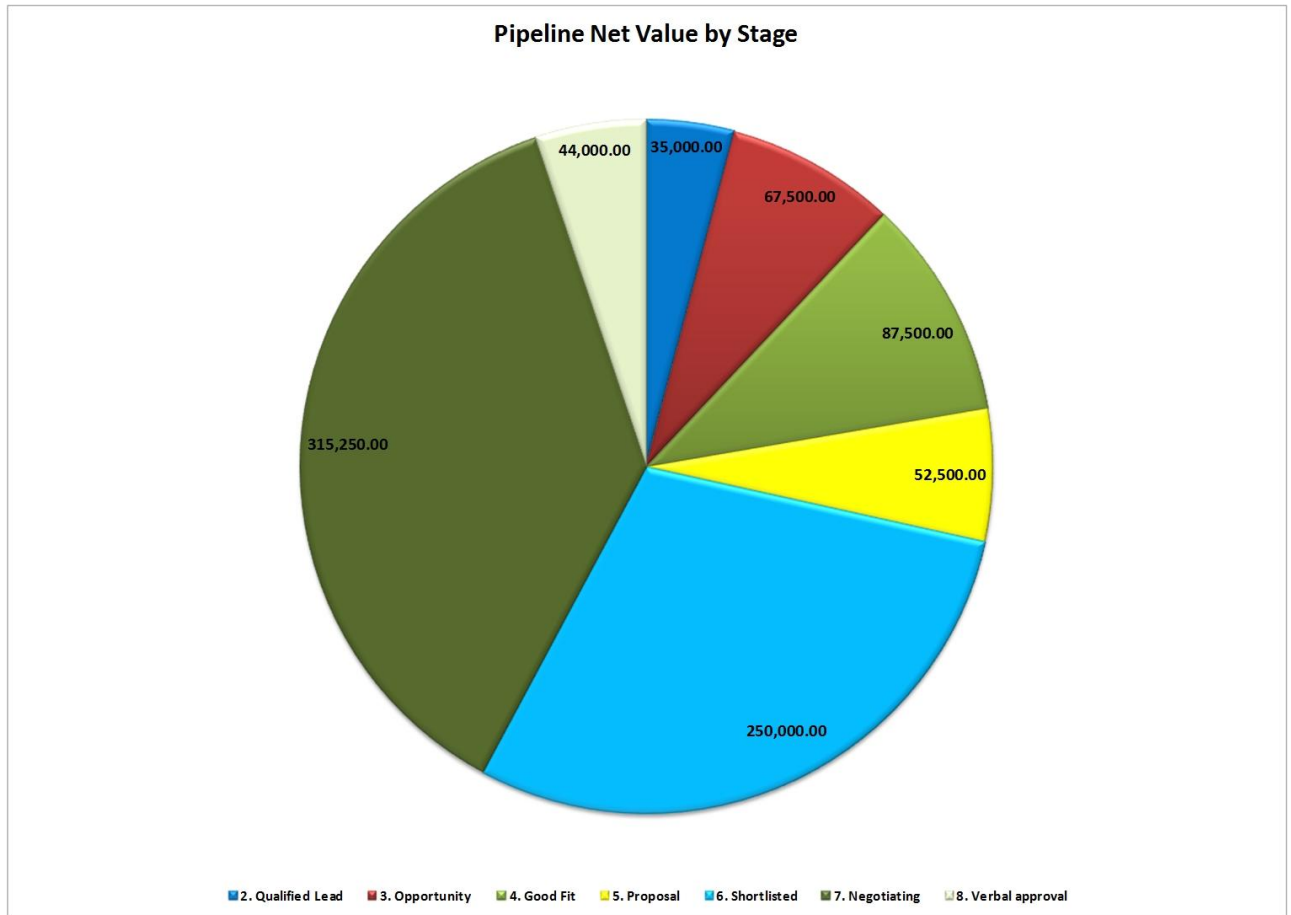


Figure 9 Pipeline Net Value by Stage

The Pie chart, as depicted in figure 9 above, shows the breakdown of the Pipeline Net Value by Stage.

The actual values are shown on each segment of the pie chart.

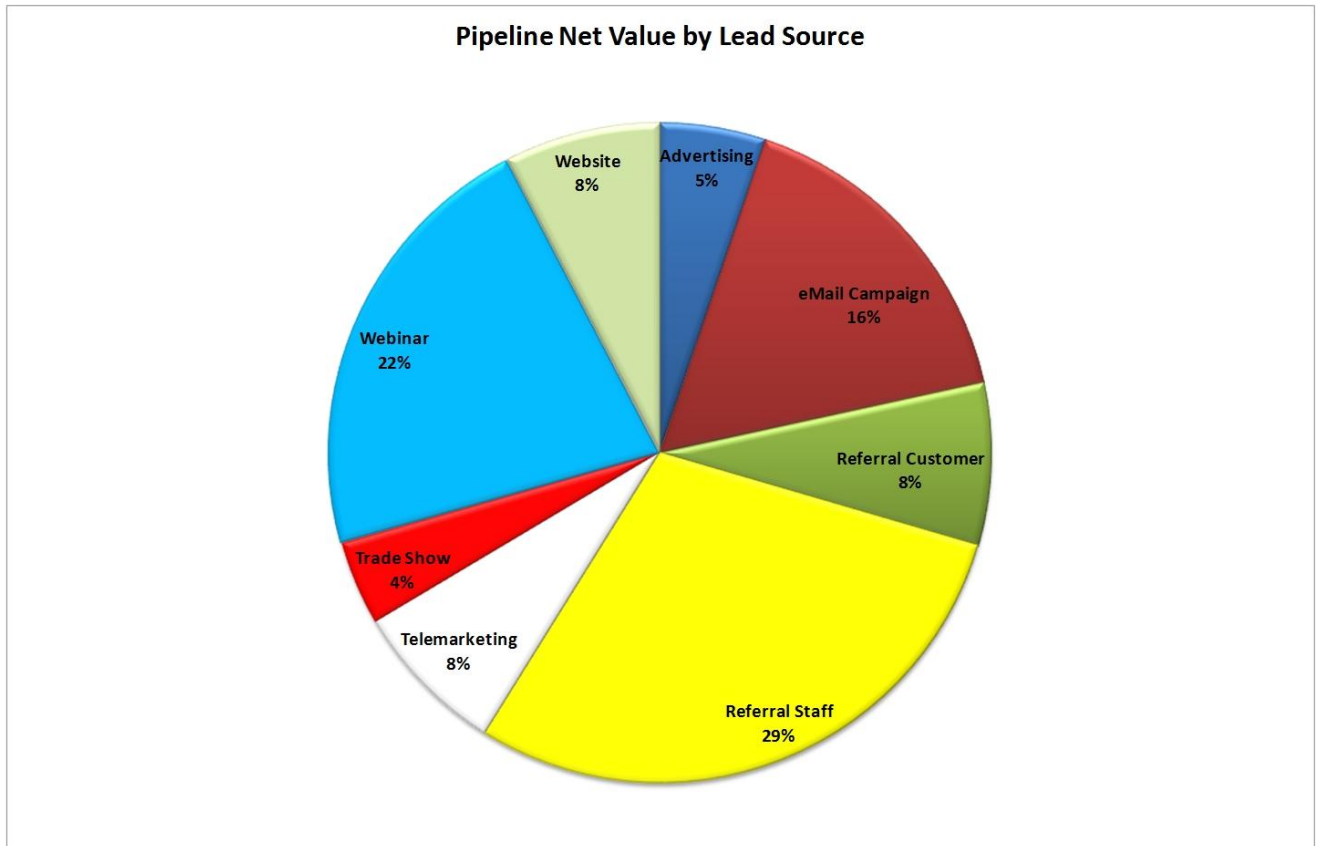
PIE CHART OF PIPELINE BY LEAD SOURCE.

Figure 10 Pipeline Net Value % by Lead Source

The Pie chart, as depicted in figure 10 above, shows the breakdown of the Pipeline Net Value by Lead Source as a percentage of the total Pipeline Net Value.

Customization and Enhancement

The template uses only standard features of Excel 2007 and is fully customizable. The template does not use any macros.

The main features used are:

- Table option for Setup and Data Input.
- Data Validation for Setup and Data Input
- Pivot Tables and Pivot Charts for the analysis.

Each of the tables used for the Pipeline Parameters such as Sales Region, Sales Executive, etc. can have any unlimited number of entries in the current template without any customization.

An unlimited number of sales opportunity entries can be made in the template's current form without any customization.

Validation procedures identify and prevent duplicate entries for the Pipeline Parameters. For Data Input the validation procedures ensure that only valid parameters are entered by selecting them from the appropriate dropdown list.

The analysis uses standard Pivot Tables and Pivot Charts and can be modified by any user familiar with these Excel 2007 features.

Additional analysis reports and charts can be developed by creating new reports or charts using standard Excel 2007 Pivot Tables and Pivot Charts features.