Sales Pipeline/Funnel Management Template (with Win Loss Analysis) 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, Product Group and Market Sector. The analysis is available in both tabular and chart forms. This user guide covers two products (1) the Pipeline Management Template and (2) the Pipeline Template that incorporates comprehensive Win Loss analysis. The Excel templates are totally customizable, and use only standard Excel features.

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4/27/2011

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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
- Product Group 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. Part 2 of the guide covers the additional features that are available with the version that includes Win Loss analysis.

These templates use Excel 2007 of later version features and are NOT compatible with earlier versions of Excel.

Macros should be enabled in the Excel environment.

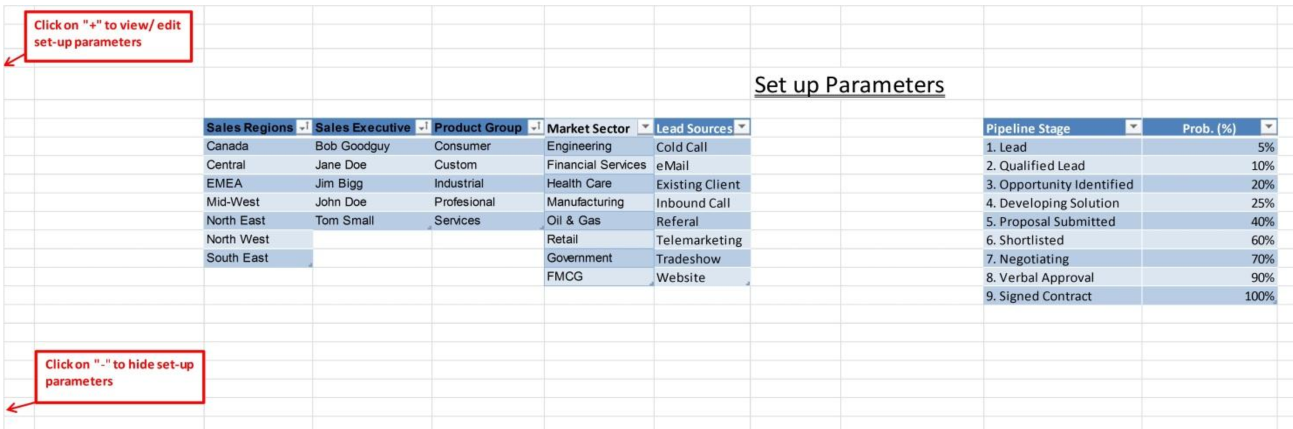
These templates are available as one of three companion template set.

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.



Sales Regions	Sales Executive	Product Group	Market Sector	Lead Sources	Pipeline Stage	Prob. (%)
Canada	Bob Goodguy	Consumer	Engineering	Cold Call	1. Lead	5%
Central	Jane Doe	Custom	Financial Services	eMail	2. Qualified Lead	10%
EMEA	Jim Bigg	Industrial	Health Care	Existing Client	3. Opportunity Identified	20%
Mid-West	John Doe	Profesional	Manufacturing	Inbound Call	4. Developing Solution	25%
North East	Tom Small	Services	Oil & Gas	Referal	5. Proposal Submitted	40%
North West			Retail	Telemarketing	6. Shortlisted	60%
South East			Government	Tradeshow	7. Negotiating	70%
			FMCG	Website	8. Verbal Approval	90%
					9. Signed Contract	100%

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 D6. Each parameter can have an unlimited number of entries.

The Set up parameters are immediately above the main pipeline data input table. For convenience the Set up Parameters section can be hidden of made visible by clicking on the + or – as per on the left as depicted in figure 1 above.

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 Ba	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 B28 and can have an unlimited number of entries.

To ensure that the validation and formatting of the Input Data Table is maintained as new rows are added to the table, please "tab" out of the last cell of the table, i.e. the Weighted Net Value cell (column U) in the last row of the table; A new row with appropriate formating and validation will be automatically added to the table.

If you are using the version incorporating Win Loss analysis, please "tab" out of the last cell of the table, i.e. the Reason for Status cell (column Y) in the last row of the table; A new row with appropriate formatting and validation will be automatically added to the table..

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 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. 09/2012

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 automatically calculated based on the **Pipeline Stage** selected.

This cell should NOT be edited.

Weighted Net Value: This field is automatically 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** or **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 Opportunites have a specific Lifecycle that results in a Sales Win, Sales Loss or a decision to Opt Out.

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

For users of the system incorporating the Win Loss analysis at the end of the Opportunity Lifecycle the opportunities are automatically moved to the Win Loss analysis. (See page 16 below)

For users who do not have Win Loss analysis the following procedure should be followed:

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.

RESFRESHING 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 on the main menu (top of the screen)
- 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 by Sales Region and Sales Executive within each Region.
- Pipeline by Lead Source
- Pipeline by Market Sector and Sales Region within each Market Sector.
- Pipeline by Product Group and Sales Region within each Product Group.

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

Pipeline Value	Close Date										
Sales Region/Sales Exec.	Sep-12	Oct-12	Nov-12	Dec-12	Dec-12	Jan-13	Mar-13	Apr-13	May-13	Jun-13	Grand Total
⊟ Canada						120,000		45,000	225,000		390,000
Bob Goodguy						120,000		45,000			165,000
Jim Bigg									225,000		225,000
⊟ EMEA	80,000	30,000								100,000	210,000
Jane Doe	80,000	30,000								100,000	210,000
⊟ Mid-West		45,000	50,000								95,000
Tom Small		45,000	50,000								95,000
⊟ Central	200,000			250,000	50,000		80,000				580,000
Jim Bigg	200,000				50,000		80,000				330,000
John Doe				250,000							250,000
⊟ North East					20,000						20,000
Tom Small					20,000						20,000
Grand Total	**280,000**	**75,000**	**50,000**	**250,000**	**70,000**	**120,000**	**80,000**	**45,000**	**225,000**	**100,000**	**1,295,000**

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

Pipeline Gross Value	Closing Date										
Sales Exec by Opportunity	Sep-12	Oct-12	Nov-12	Dec-12	Dec-12	Jan-13	Mar-13	Apr-13	May-13	Jun-13	Grand Total
⊟Bob Goodguy						120,000		45,000			165,000
Big Oil						120,000					120,000
Dept. of Energy								45,000			45,000
⊟Jane Doe	80,000	30,000								100,000	210,000
ABC Inc		30,000									30,000
Hi_Tech Inc	80,000										80,000
Good Food Ltd										100,000	100,000
⊟Tom Small		45,000	50,000		20,000						115,000
Poject X		45,000									45,000
XYZ Inc Pilot Project			50,000								50,000
High Flyers Inc					20,000						20,000
⊟Jim Bigg	200,000				50,000		80,000		225,000		555,000
Big Company Inc	200,000										200,000
High Street Saving Bank					50,000						50,000
Another Bank									225,000		225,000
Defence Dept							80,000				80,000
⊟John Doe				250,000							250,000
ABC BioTech Inc				250,000							250,000
Grand Total	**280,000**	**75,000**	**50,000**	**250,000**	**70,000**	**120,000**	**80,000**	**45,000**	**225,000**	**100,000**	**1,295,000**

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 BY REGION AND SALES EXECUTIVE

Filter Options

Pipeline by Stage by Sales Region by Sales Exec.

Pipeline by Stage by Sales Region by Exec	Closing Month Sep-12	Oct-12	Nov-12	Dec-12	Dec-12	Jan-13	Mar-13	Apr-13	May-13	Jun-13	Grand Total
⊟8. Verbal Approval	80,000										80,000
⊟EMEA	80,000										80,000
Jane Doe	80,000										80,000
⊟7. Negotiating		45,000			50,000						95,000
⊟Mid-West		45,000									45,000
Tom Small		45,000									45,000
⊟Central					50,000						50,000
Jim Bigg					50,000						50,000
⊟6. Shortlisted		30,000									30,000
⊟EMEA		30,000									30,000
Jane Doe		30,000									30,000
⊟4. Developing Solution	200,000			250,000	20,000						470,000
⊟Central	200,000			250,000							450,000
Jim Bigg	200,000										200,000
John Doe				250,000							250,000
⊟North East					20,000						20,000
Tom Small					20,000						20,000
⊟3. Opportunity Identified			50,000			120,000	80,000	45,000	225,000		520,000
⊟Canada						120,000		45,000	225,000		390,000
Bob Goodguy						120,000		45,000			165,000
Jim Bigg									225,000		225,000
⊟Mid-West			50,000								50,000
Tom Small			50,000								50,000
⊟Central							80,000				80,000
Jim Bigg							80,000				80,000
⊟1. Lead										100,000	100,000
⊟EMEA										100,000	100,000
Jane Doe										100,000	100,000
Grand Total	**280,000**	**75,000**	**50,000**	**250,000**	**70,000**	**120,000**	**80,000**	**45,000**	**225,000**	**100,000**	**1,295,000**

Expand/Collapse

Figure 5 Pipeline stage/Sales Executive

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 Region and 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 details.

PIPELINE BY LEAD SOURCE

Filter Options

Pipeline by	Close Date										
Lead Source	Sep-12	Oct-12	Nov-12	Dec-12	Dec-12	Jan-13	Mar-13	Apr-13	May-13	Jun-13	Grand Total
Existing Client		30,000						45,000	225,000		300,000
Inbound Call		45,000									45,000
Tradeshow						120,000	80,000				200,000
Website	280,000		50,000								330,000
eMail					70,000						70,000
Cold Call										100,000	100,000
Referal				250,000							250,000
Grand Total	**280,000**	**75,000**	**50,000**	**250,000**	**70,000**	**120,000**	**80,000**	**45,000**	**225,000**	**100,000**	**1,295,000**

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

Gross Value by	Column Labels										
Market & Sales Region	Sep-12	Oct-12	Nov-12	Dec-12	Dec-12	Jan-13	Mar-13	Apr-13	May-13	Jun-13	Grand Total
Financial Services		30,000			50,000				225,000		305,000
Canada									225,000		225,000
Central					50,000						50,000
EMEA		30,000									30,000
Manufacturing	80,000		50,000								130,000
EMEA	80,000										80,000
Mid-West			50,000								50,000
Oil & Gas						120,000					120,000
Canada						120,000					120,000
Retail		45,000			20,000						65,000
Mid-West		45,000									45,000
North East					20,000						20,000
Health Care	200,000			250,000							450,000
Central	200,000			250,000							450,000
Government							80,000	45,000			125,000
Canada								45,000			45,000
Central							80,000				80,000
FMCG										100,000	100,000
EMEA										100,000	100,000
Grand Total	**280,000**	**75,000**	**50,000**	**250,000**	**70,000**	**120,000**	**80,000**	**45,000**	**225,000**	**100,000**	**1,295,000**

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.

PIPELINE BY PRODUCT GROUP AND SALES REGION

Filter Options

Gross Values	Closing Months										
Product Group/Region	Sep-12	Oct-12	Nov-12	Dec-12	Dec-12	Jan-13	Mar-13	Apr-13	May-13	Jun-13	Grand Total
⊟Consumer										100,000	100,000
EMEA										100,000	100,000
⊟Custom					20,000						20,000
North East					20,000						20,000
⊟Industrial	200,000		50,000	250,000		120,000					620,000
Canada						120,000					120,000
Central	200,000			250,000							450,000
Mid-West			50,000								50,000
⊟Profesional		30,000			50,000				225,000		305,000
Canada									225,000		225,000
Central					50,000						50,000
EMEA		30,000									30,000
⊟Services	80,000	45,000					80,000	45,000			250,000
Canada								45,000			45,000
Central							80,000				80,000
EMEA	80,000										80,000
Mid-West		45,000									45,000
Grand Total	**280,000**	**75,000**	**50,000**	**250,000**	**70,000**	**120,000**	**80,000**	**45,000**	**225,000**	**100,000**	**1,295,000**

Figure 8 Product Group/Sales Regions

Expand/Collapse

The analysis by Product Group by Sales Region, as depicted in figure 8 above, by default includes all Product Groups and Months. The Filter Options highlighted allow the report to be filtered to include only specific Product Groups or Months.

Within each Product Group 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 Product Group totals. The Expand/Collapse option shows a "-" where the details can be collapsed to show the Product Group 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

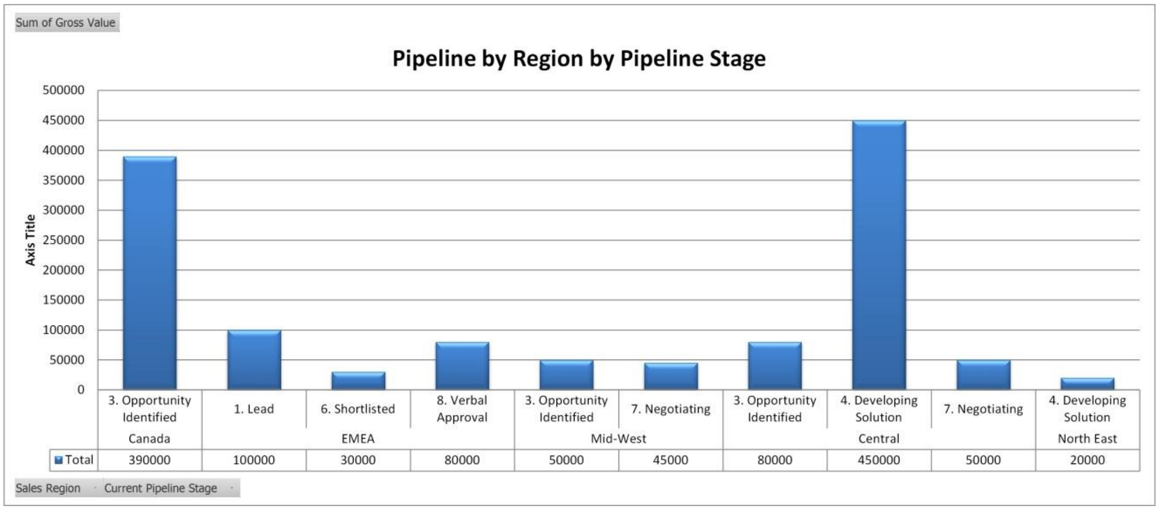


Figure 9 Sales Regions/Pipeline Stage

The bar chart shows the Pipeline by Region by Pipeline stage in figure 9 above.

The gross 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

Pipeline Gross Value by Pipeline Stage

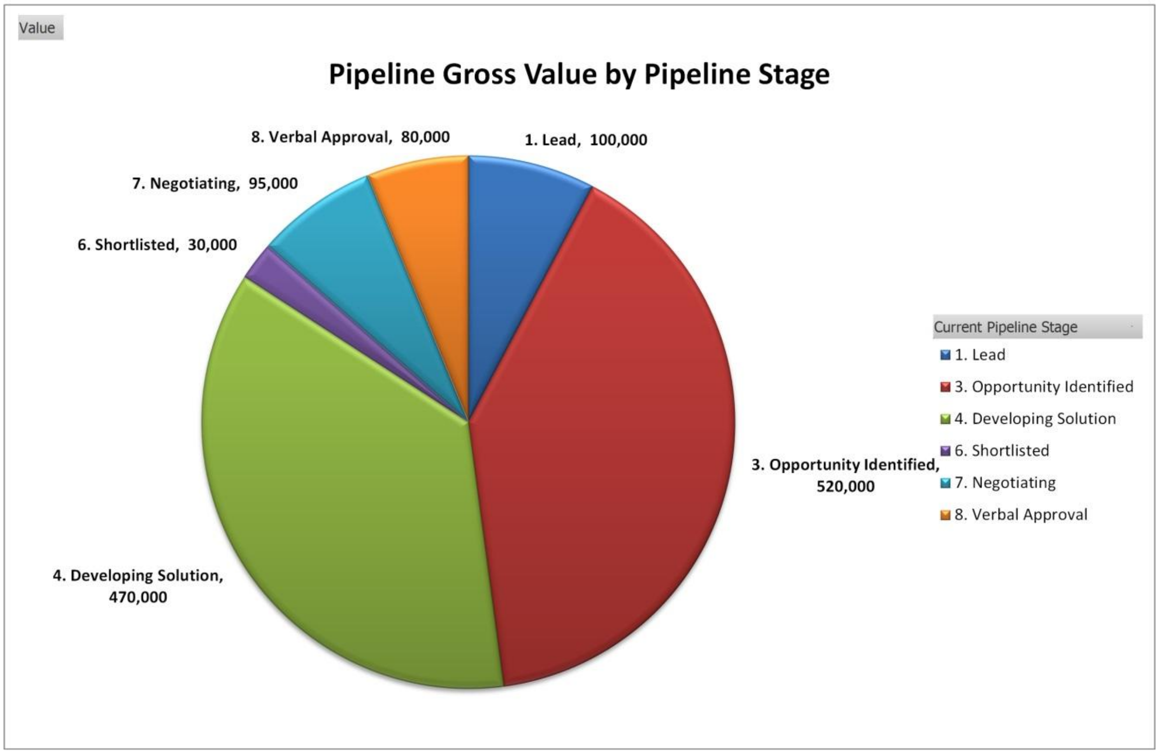


Figure 10 Pipeline Net Value by Stage

The Pie chart, as depicted in figure 10 above, shows the breakdown of the Pipeline Gross Value by Stage.

PIE CHART OF PIPELINE BY LEAD SOURCE.

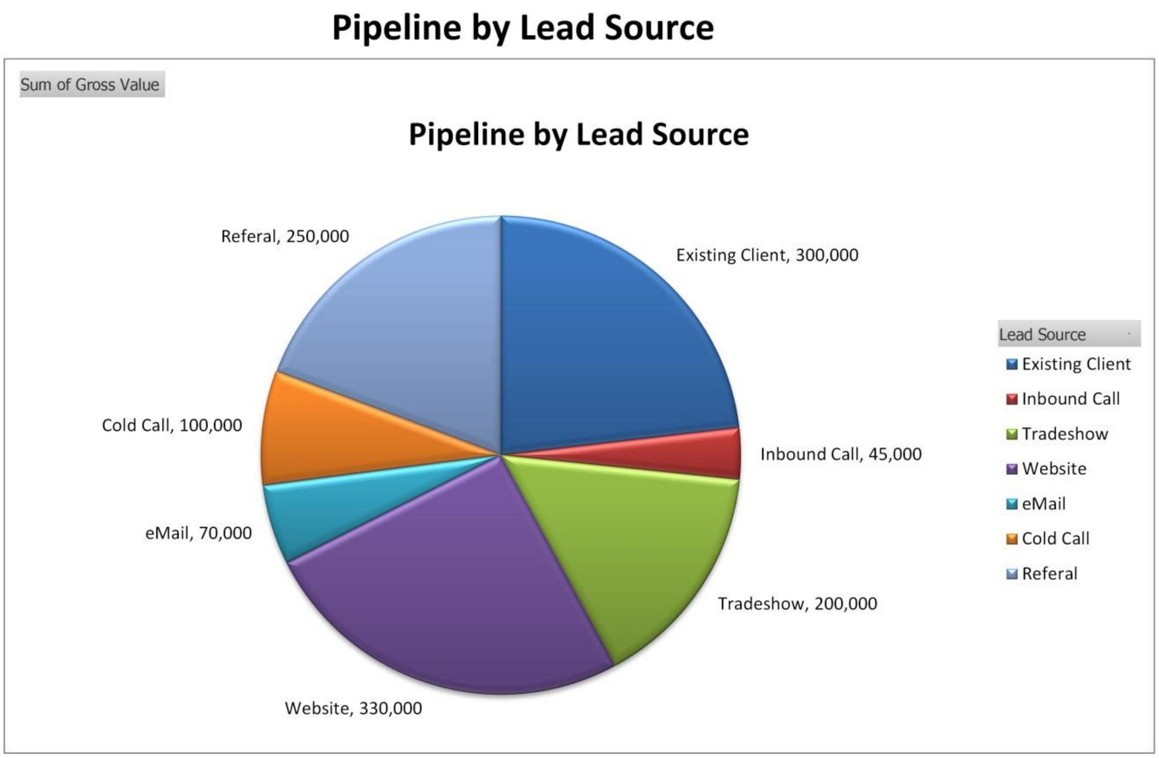


Figure 11 Pipeline Gross Value by Lead Source

The Pie chart, as depicted in figure 11 above, shows the breakdown of the Pipeline Gross Value by Lead Source.

Customization and Enhancement

The template uses only standard features of Excel 2007 and is fully customizable. The Pipeline Management template does not use any macros. The version that provides Win Loss analysis has a single macro to automatically update the Win Loss Data table. This macro can be edited by a competent individual.

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.

Win Loss Analysis Features

Detailed Win Loss analysis features are provided in the Sales Pipeline Management template that incorporates Win Loss Analysis.

This section highlights the differences to the standard Sales Pipeline Management template described above.

Setup

A basic set up parameters described in page 3 above have additional parameters that describe the Win Loss status and the reasons for the outcome on which the Win Loss analysis is based on as per figure 12 below.


Click on "+" to view/ edit set-up parameters

Set up Parameters

Sales Regions	Sales Executive	Product Group	Market Sector	Lead Sources
Canada	Bob Goodguy	Consumer	Engineering	Cold Call
Central	Jane Doe	Custom	Financial Services	eMail
EMEA	Jim Bigg	Industrial	Health Care	Existing Client
Mid-West	John Doe	Profesional	Manufacturing	Inbound Call
North East	Tom Small	Services	Oil & Gas	Referal
North West			Retail	Telemarketing
South East			Government	Tradeshow
			FMCG	Website

Pipeline Stage	Prob. (%)
1. Lead	5%
2. Qualified Lead	10%
3. Opportunity Identified	20%
4. Developing Solution	25%
5. Proposal Submitted	40%
6. Shortlisted	60%
7. Negotiating	70%
8. Verbal Approval	90%
9. Signed Contract	100%

Lead Status	Reason for Status
Win	Win: Existing Customer
Loss	Win: Price/Value
Opted Out	Win: Product Features
	Win: After Sales Service
	Win: Product Range
	Loss: Not Good Fit
	Loss: Price
	Loss: Competitor's Customer
	Loss: Poorly Qualified
	Loss: Company Size/Resources
	Opted Out: Not Good Fit
	Opted Out: Budget

Click on "-" to hide set-up parameters

Figure 12 Setup Parameters including Win Loss

The incremental parameters are Lead Status and Reason for Status. The default lead outcome statuses are Win, Loss or Opted Out. These can be edited and others added if appropriate. The Win Loss analysis is based on the outcomes setup here.

The other additional Setup parameter is "Reason for Status" Typical reasons for status are Win: existing Customer, Price/value, product quality, etc.; Loss: Price, lack of good fit, limited product range, etc. or you may have Opted Out due to lack of budget, or scale/resources.

Comprehensive analysis is based on the Reasons for Status.

Enter & Update Sales Pipeline Opportunities

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

Additional input fields that describe the Win Loss status and the reasons for the outcomes on which the Win Loss analyses are based are used as per figure 13 below.

Win Loss update Button

Pipeline Data Input

Pipeline Data

These columns are calculated. Do NOT edit

Win Loss Update

Date 17/08/2012

Project ID.	Sales Region	Sales Executive	Product Group	Market Sector	Lead Source	Gross Value	Projected Close Date	Current Pipeline Stage	Probability of Close	Weighted Net Value	Lead Status	Reason for Status
Dept. of Energy	Canada	Bob Goodguy	Services	Government	Existing Client	45,000	Apr-13	3. Opportunity Identified	20%	9,000		
Test ABC	Canada	Jim Bigg	Profesional	Health Care	Existing Client	50,000	Dec-12	2. Qualified Lead	10%	5,000		
XYZ Inc Pilot Project	North East	Tom Small	Industrial	Manufacturing	Website	50,000	Nov-12	5. Proposal Submitted	40%	20,000		
High Street Saving Bank	Central	Jim Bigg	Profesional	Financial Services	eMail	50,000	Sep-12	9. Signed Contract	100%	50,000	Win	Win: Price/Value
High Flyers Inc	North East	Tom Small	Custom	Retail	eMail	20,000	Aug-12	8. Verbal Approval	90%	18,000		
Big Oil	Canada	Bob Goodguy	Industrial	Oil & Gas	Tradeshow	120,000	Jan-13	3. Opportunity Identified	20%	24,000		
Another Bank	Canada	Jim Bigg	Profesional	Financial Services	Existing Client	225,000	Dec-12	7. Negotiating	70%	157,500	Loss	Loss: Price
ABC BioTech Inc	Central	John Doe	Industrial	Health Care	Referal	250,000	Dec-12	6. Shortlisted	60%	150,000		
Big Co. Inc	North West	Tom Small	Services	FMCG	Tradeshow	45,000	Feb-13	3. Opportunity Identified	20%	9,000		
Hi-Tech (West) Inc	Mid-West	John Doe	Industrial	Engineering	Referal	100,000	Dec-12	4. Developing Solution	25%	25,000		
Hi_Tech Inc	EMEA	Jane Doe	Services	Manufacturing	Website	80,000	Sep-12	5. Proposal Submitted	40%	32,000		
Good Food Ltd	EMEA	Jane Doe	Consumer	FMCG	Cold Call	100,000	Dec-12	9. Signed Contract	100%	100,000	Win	Win: Existing Customer
Defence Dept	Central	Jim Bigg	Services	Government	Tradeshow	80,000	Mar-13	3. Opportunity Identified	20%	16,000		
Big Company Inc	Central	Jim Bigg	Industrial	Health Care	Website	200,000	Sep-12	4. Developing Solution	25%	50,000	Opted Out	Opted Out: Budget

Figure 13 Pipeline Input Data Table

The Pipeline Data input table as depicted in figure 13 above has two fields that should be completed once the Opportunity outcome, i.e., Win, Loss or Opt Out, is known. These fields are used to provide the outcome Status and the Reason for the Status in columns W and Y.

Lead Status: The relevant "Lead Status" should be selected from the dropdown list of valid Lead statuses.

Reason for Status: The relevant "Reason for Status" should be selected from the dropdown list of valid Reasons for Status.

CLOSING & DELETING EXISTING OPPORTUNITIES

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

Prior to the Win Loss analysis these Opportunities should be removed from the Active Pipeline and added to the Win Loss Analysis table.

The Win Loss Update button in cell Y 25 as depicted in figure 13 should be used to automatically remove these opportunities from the active pipeline and move them to the Win Loss data table.

All opportunities with an entry in the Status column will be moved and deleted from the active pipeline table.

Win Loss Analysis

The Win Loss Data table as depicted in figure 14 below

Project ID.	Sales Region	Sales Executive	Product Group	Market Sector	Lead Source	Gross Value	Projected Close Date	Current Pipeline Stage	Probability of Close	Weighted Net Value	Lead Status	Reason for Status
Test ABC	Canada	Jim Bigg	Profesional	Health Care	Existing Client	50,000	Dec-12	2. Qualified Lead	10%	5,000	Loss	Win: Price/Value
Dept. of Energy	Canada	Bob Goodguy	Services	Government	Existing Client	45,000	Sep-12	9. Signed Contract	20%	9,000	win	Win: Existing Customer
XYZ Inc Pilot Project	North East	Tom Small	Industrial	Manufacturing	Website	50,000	Nov-12	5. Proposal Submitted	40%	20,000	Loss	Loss: Company Size/Resources
High Street Saving Bank	Central	Jim Bigg	Profesional	Financial Services	eMail	50,000	Sep-12	9. Signed Contract	100%	50,000	Win	Win: Existing Customer
High Flyers Inc	North East	Tom Small	Custom	Retail	eMail	20,000	Aug-12	9. Signed Contract	100%	20,000	Win	Win: After Sales Service
Big Oil	Canada	Bob Goodguy	Industrial	Oil & Gas	Tradeshow	120,000	Jan-13	3. Opportunity Identified	20%	24,000	Opted Out	Opted Out: Not Good Fit
Another Bank	Canada	Jim Bigg	Profesional	Financial Services	Existing Client	225,000	Dec-12	7. Negotiating	70%	157,500	Loss	Loss: Price
ABC BioTech Inc	Central	John Doe	Industrial	Health Care	Referal	250,000	Dec-12	9. Signed Contract	100%	250,000	Win	Win: Product Range
Big Co. Inc	North West	Tom Small	Services	FMCG	Tradeshow	45,000	Feb-13	3. Opportunity Identified	20%	9,000	Loss	Loss: Not Good Fit
Hi-Tech (West) Inc	Mid-West	John Doe	Industrial	Engineering	Referal	100,000	Dec-12	9. Signed Contract	20%	20,000	Win	Win: After Sales Service
Hi_Tech Inc	EMEA	Jane Doe	Services	Manufacturing	Website	80,000	Sep-12	4. Developing Solution	25%	20,000	Loss	Loss: Not Good Fit
Good Food Ltd	EMEA	Jane Doe	Consumer	FMCG	Cold Call	100,000	Dec-12	9. Signed Contract	100%	100,000	Win	Win: Price/Value
Defence Dept	Central	Jim Bigg	Services	Government	Tradeshow	80,000	Mar-13	3. Opportunity Identified	20%	16,000	Opted Out	Opted Out: Budget
Big Company Inc	Central	Jim Bigg	Industrial	Health Care	Website	200,000	Sep-12	9. Signed Contract	100%	200,000	Win	Win: Product Features
ABC Inc	EMEA	Jane Doe	Profesional	Financial Services	Existing Client	30,000	Oct-12	9. Signed Contract	100%	30,000	Win	Win: Existing Customer

Figure 14 Win Loss Data Table

This data in this table is used as the basis for the comprehensive Win Loss analysis described below.

WIN LOSS BY REASON AND CLIENT BY CLOSE MONTH

Filter Options

Win Loss Analysis by Reason

Gross Values	Close Date											
Win/Loss/Opted Out/Reason	Aug-12	Sep-12	Oct-12	Nov-12	Dec-12	Dec-12	Dec-12	Dec-12	Jan-13	Feb-13	Mar-13	Grand Total
Win	20,000	250,000	30,000		100,000	250,000		100,000		45,000		795,000
Win: After Sales Service	20,000							100,000				120,000
High Flyers Inc	20,000											20,000
Hi-Tech (West) Inc								100,000				100,000
Win: Existing Customer		50,000	30,000									80,000
ABC Inc			30,000									30,000
High Street Saving Bank		50,000										50,000
Win: Price/Value					100,000							100,000
Good Food Ltd					100,000							100,000
Win: Product Features		200,000										200,000
Big Company Inc		200,000										200,000
Win: Product Range						250,000				45,000		295,000
ABC BioTech Inc						250,000						250,000
Big Co. Inc										45,000		45,000
Loss		80,000		50,000			225,000					355,000
Loss: Company Size/Resources				50,000								50,000
XYZ Inc Pilot Project				50,000								50,000
Loss: Not Good Fit		80,000										80,000
Hi_Tech Inc		80,000										80,000
Loss: Price							225,000					225,000
Another Bank							225,000					225,000
Opted Out									120,000		80,000	200,000
Opted Out: Budget											80,000	80,000
Defence Dept											80,000	80,000
Opted Out: Not Good Fit									120,000			120,000
Big Oil									120,000			120,000
Grand Total	**20,000**	**330,000**	**30,000**	**50,000**	**100,000**	**250,000**	**225,000**	**100,000**	**120,000**	**45,000**	**80,000**	**1,350,000**

Figure 15 Win Loss by Reason and Client

Expand/Collapse

The Win Loss analysis, as depicted in figure 15 above, by default includes all of the outcomes (Win, Loss & Opted Out) and Months. The Filter Options highlighted allow the report to be filtered to include only specific Outcomes or Months.

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

WIN LOSS ANALYSIS BY SALES REGION, SALES EXECUTIVE OUTCOME AND REASON

Filter Options

Win Loss Analysis by Sales Region by Sales Exec

Gross Values	Close Date											
Region/Sales Exec/WinLoss/Reason	Aug-12	Sep-12	Oct-12	Nov-12	Dec-12	Dec-12	Dec-12	Dec-12	Jan-13	Feb-13	Mar-13	Grand Total
Canada							225,000		120,000			345,000
Loss							225,000					225,000
Jim Bigg							225,000					225,000
Another Bank							225,000					225,000
Loss: Price							225,000					225,000
Opted Out									120,000			120,000
Bob Goodguy									120,000			120,000
Big Oil									120,000			120,000
Opted Out: Not Good Fit									120,000			120,000
Central		250,000				250,000					80,000	580,000
Win		250,000				250,000						500,000
Jim Bigg		250,000										250,000
Big Company Inc		200,000										200,000
Win: Product Features		200,000										200,000
High Street Saving Bank		50,000										50,000
Win: Existing Customer		50,000										50,000
John Doe						250,000						250,000
ABC BioTech Inc						250,000						250,000
Win: Product Range						250,000						250,000
Opted Out											80,000	80,000
Jim Bigg											80,000	80,000
Defence Dept											80,000	80,000
Opted Out: Budget											80,000	80,000
EMEA		80,000	30,000		100,000							210,000
Win			30,000		100,000							130,000
Jane Doe			30,000		100,000							130,000
ABC Inc			30,000									30,000
Win: Existing Customer			30,000									30,000
Good Food Ltd					100,000							100,000
Win: Price/Value					100,000							100,000
Loss		80,000										80,000
Jane Doe		80,000										80,000
Hi_Tech Inc		80,000										80,000
Loss: Not Good Fit		80,000										80,000
Mid-West								100,000				100,000
Win								100,000				100,000
John Doe								100,000				100,000
Hi-Tech (West) Inc								100,000				100,000
Win: After Sales Service								100,000				100,000
North East	20,000			50,000								70,000
Win	20,000											20,000
Tom Small	20,000											20,000
High Flyers Inc	20,000											20,000
Win: After Sales Service	20,000											20,000
Loss				50,000								50,000
Tom Small				50,000								50,000
XYZ Inc Pilot Project				50,000								50,000
Loss: Company Size/Resources				50,000								50,000
North West										45,000		45,000
Win										45,000		45,000
Tom Small										45,000		45,000
Big Co. Inc										45,000		45,000
Win: Product Range										45,000		45,000
Grand Total	**20,000**	**330,000**	**30,000**	**50,000**	**100,000**	**250,000**	**225,000**	**100,000**	**120,000**	**45,000**	**80,000**	**1,350,000**

Figure 16 Win Loss Analysis by Region/Sales executive

Expand/Collapse

The Regional analysis, as depicted in figure 16 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, outcomes and reasons. 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, etc.

WIN LOSS ANALYSIS BY MARKET SECTOR

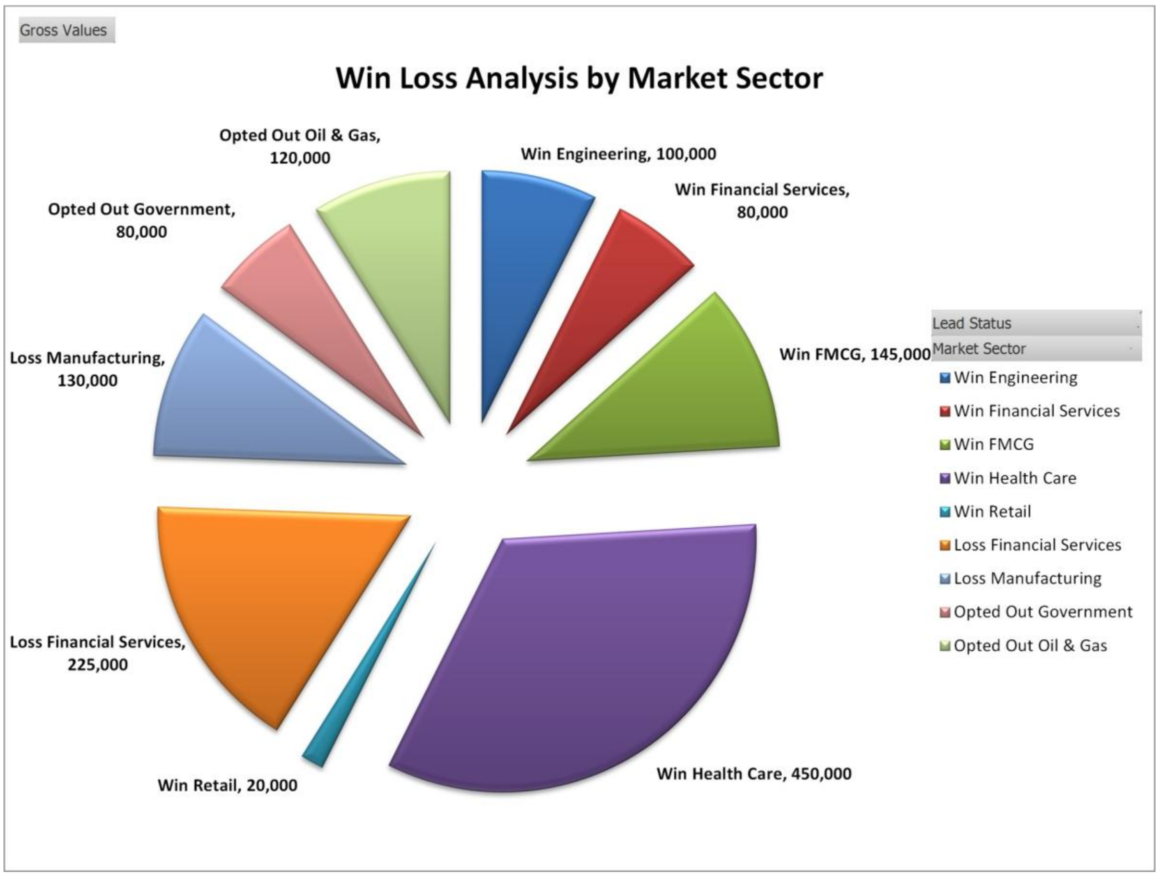


Figure 17 Win Loss Analysis by Market Sector

The chart in Figure 17 shows a breakdown of the Wins & Losses by market sector.

WIN LOSS ANALYSIS BY SALES REGION

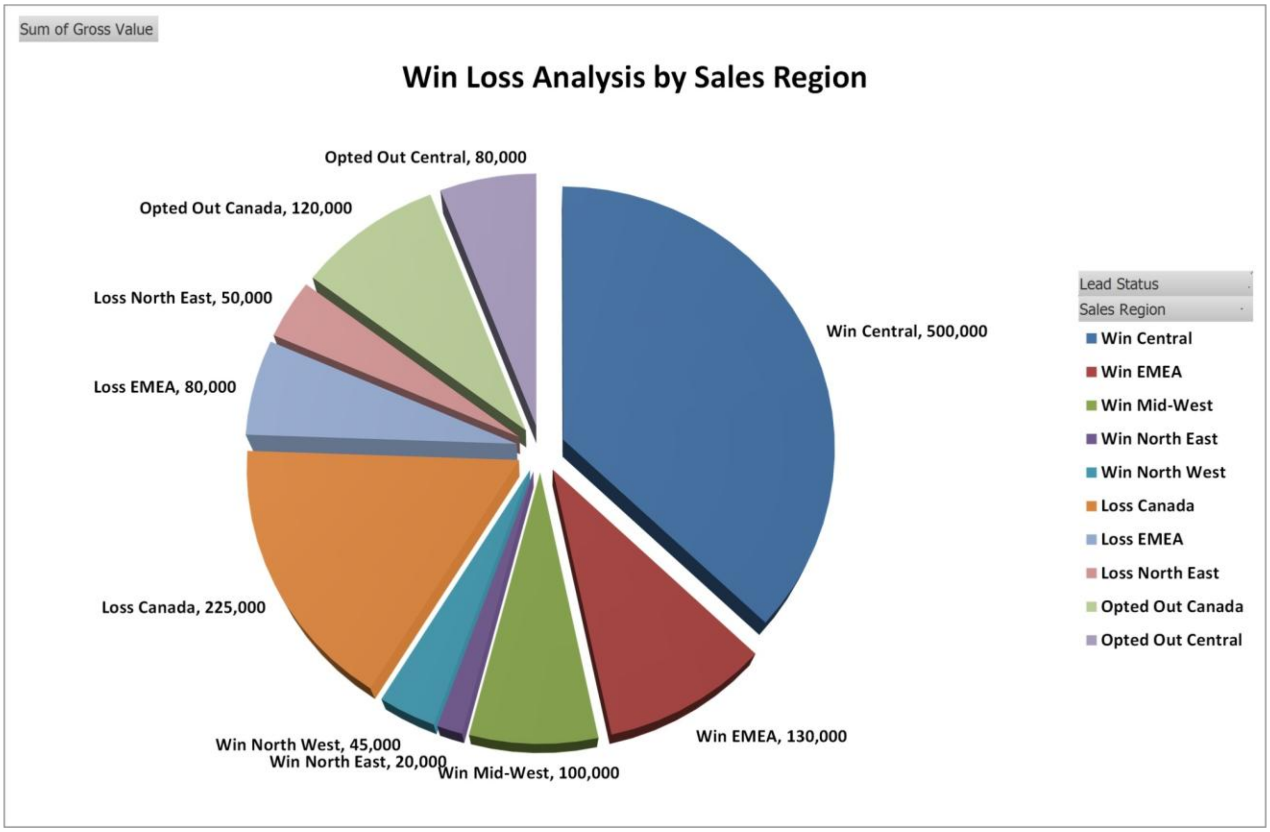


Figure 18 Win Loss Analysis by Sales Region

The chart in Figure 18 shows a breakdown of the Wins & Losses by Sale Region.

WIN LOSS ANALYSIS BY PRODUCT GROUP

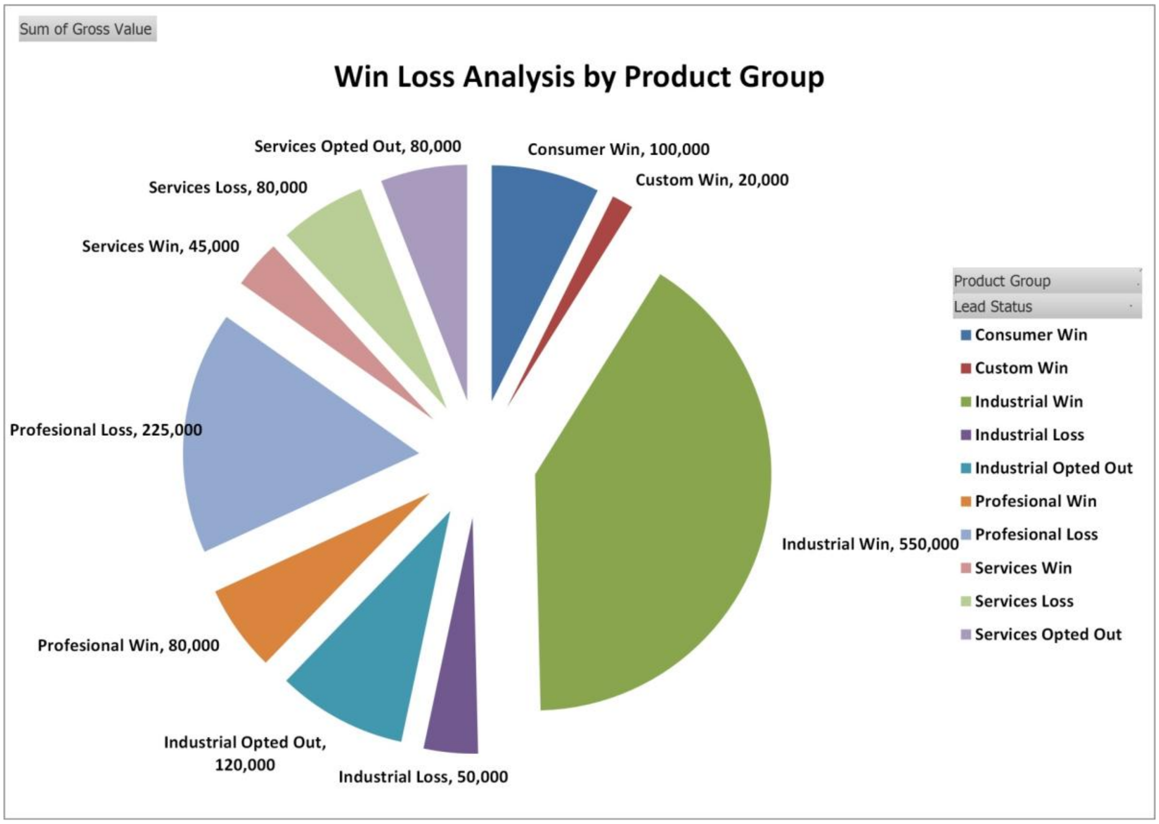


Figure 19 Win Loss Analysis by Sales Region

The chart in Figure 19 shows a breakdown of the Wins & Losses by Product Group.