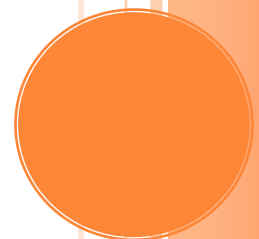# Sales Pipeline Funnel Graphic Template User Guide

Sales Pipeline Funnel Graphic Template User Guide

This Excel-based template is a convenient application for Sales Funnel/Pipeline planning and management. It allows the user to quickly review and analyse the impact of a range of "what-if" questions. The template quickly calculates the number of New Leads required to generate a specific number of Orders or alternatively to calculate the number of Orders that will be generated by a specific number of New Leads.
It will also graphically show the number of Opportunities at each stage of the Sales Pipeline. The template also allows the user to assess the impact of changes to any parameter of the Sales Pipeline, such as, changing the ratio of new Leads Qualified or the ratio of Proposals Submitted that are subsequently Short Listed. .

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12/5/2012

SALES PIPELINE FUNNEL GRAPHIC TEMPLATE USER GUIDE

Sales Pipeline Funnel Graphic Template User Guide

INTRODUCTION

This Excel-based template is a convenient application for Sales Funnel/Pipeline planning and management. It allows the user to quickly review and analyse the impact of a range of "what-if" questions. The template quickly calculates the number of **New Leads** required to generate a specific number of **Orders** or alternatively to calculate the number of **Orders** that will be generated by a specific number of **New Leads**. It will also graphically show the number of **Opportunities** at each stage of the **Sales Pipeline**.

The template also allows the user to assess the impact of changes to any parameter of the Sales Pipeline, such as, changing the ratio of new Leads actually Qualified or the ratio of Proposals Submitted that are subsequently Short Listed.

Most organisations have their own distinct sales cycle. The sales cycle is frequently referred to as the Sales Pipeline. The Sales Pipeline flows from New Unqualified Leads, through a number of stages, to finally exiting from the Pipeline in the form of Clean Sales Orders. The Sales Pipeline is also characterised by the number of leads/prospects dropping out at each stage. The template allows the user to specify the parameters unique to their Sales pipeline.
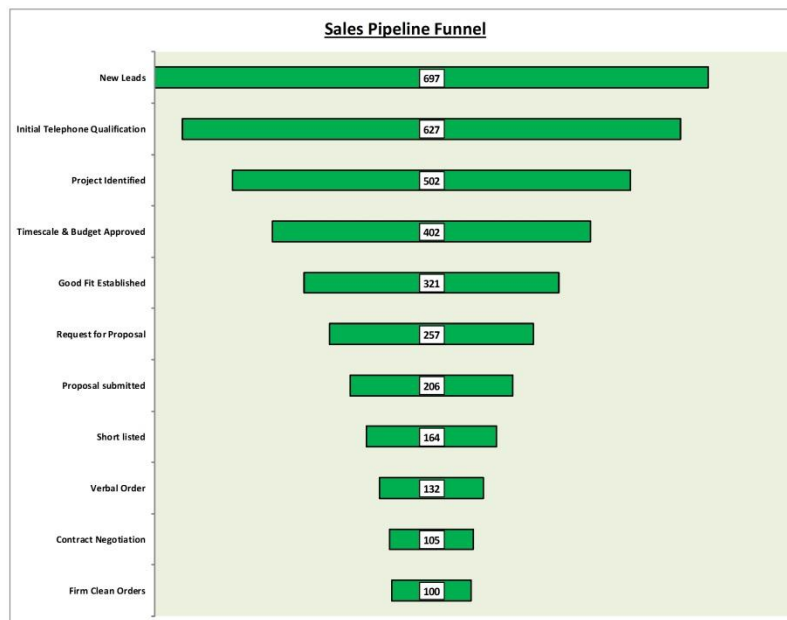

Figure 1 Sales Funnel

The Sales Pipeline/Funnel can be fully customized.

USER INSTRUCTIONS

Sales Funnel Definition

The simple data input sheet, depicted in figure 2 below, is used to define the **Sales Pipeline.** The stages (item 3, figure 2) in the sales process should be defined. The rate of conversion from one stage to the next (item 4, figure 2) is then defined. The example below figure 2 shows that 90% of New Leads pass the initial qualification. This process ultimately defines the shape of the Sales Funnel graphic.

2

Number of New Leads/Firm Orders   **100**

1

Firm Orders ▼

Sales Pipeline Stages   **%**

4

3

Sales Pipeline Stages	%
New Leads	
Initial Telephone Qualification	90%
Project Identified	80%
Timescale & Budget Approved	80%
Good Fit Established	80%
Request for Proposal	80%
Proposal submitted	80%
Short listed	80%
Verbal Order	80%
Contract Negotiation	80%
Firm Clean Orders	95%

5

Sales Conversion Rate (%)   **14.34%**

Figure 2 Sales Pipeline Funnel Data Input

Calculating the Leads and Orders

The template offers two options:

1. Based on a specific number of New Leads how many Orders will be generated?
2. How many New Leads are required to generate a specific number of Orders?

The selection is made via a dropdown list (item 1, figure 2 above).

The number of New Leads (option 1) or number of Orders (Option 2) is entered (item 2, figure 2 above).

All of the figures for the sales pipeline stages are calculated and the Sales Pipeline Funnel Graphic is automatically generated as per figure 3 below.

The Actual Sales Conversion Rate from Sales to Orders is also calculated (item 5, figure 2 above).
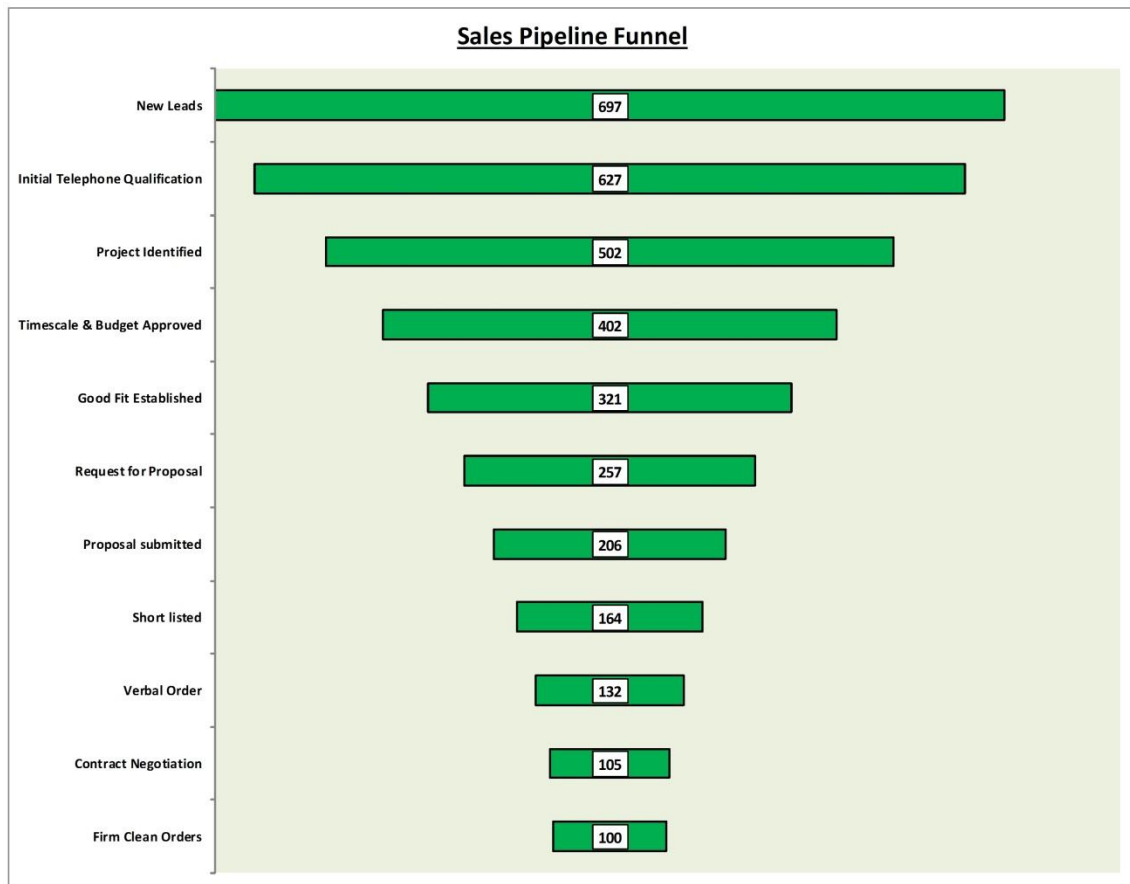
Sales Pipeline Funnel

Stage	Value
New Leads	697
Initial Telephone Qualification	627
Project Identified	502
Timescale & Budget Approved	402
Good Fit Established	321
Request for Proposal	257
Proposal submitted	206
Short listed	164
Verbal Order	132
Contract Negotiation	105
Firm Clean Orders	100

Figure 3 Sales Funnel

PRINTING THE DIAGRAM

To print the completed Funnel graphic:

1. Click on the graphic image.
2. Select Print and the desired printer from the Excel File menu
3. Use the "Print Selection" and "Landscape Orientation" from the printer options.