



Funnel Management

One of the greatest challenges faced by sales leaders is forecasting. You can only properly forecast your team's funnel when each individual reports to you correctly. Forecast poorly and the board will soon be on your back. What is you could get them off your back and then start to coach your people based upon real intelligence about their deals?

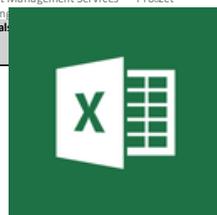
Sales Process Funnel provides sales managers with a simple, accurate and reliable forecasting tool.

Benefit from a highly visual window into exactly what is happening with the sales funnel of individual team members giving you detailed insights into just which opportunities should be pursued or further explored, and which should be dropped, so you can focus on better, more winnable deals.

These insights drive an increase in overall funnel accuracy.

And because Sales Process Funnel is imbedded into your organisation's CRM system data in real time, all your forecasting data is available to you from a single, reliable source. A great example of today's fusion of sales automation and CRM.

Account Name	Opportunity Name	Amount	Close Date	Stage	%	Factored	Lead Source	Sales Person
1st Shipping Terminal Systems	Infrastructure refresh	\$475,000	18/06/2014	Best Few	90%	\$427,500	Employee	Peter Jones
1st Shipping Terminal Systems	US network	\$103,500	18/05/2014	Best Few	90%	\$93,150	Salesperson	Peter Jones
1st Shipping Terminal Systems	UK and France network	\$200,000	18/03/2014	Best Few	90%	\$180,000	Salesperson	Peter Jones
King Consulting	Data Centre EMEA	\$725,000	04/07/2014	Best Few	90%	\$652,500	Employee	Phillippa Smith
1st Shipping Terminal Systems	Admin Training	\$17,000	18/08/2014	Best Few	90%	\$15,300	Other	Peter Jones
King Consulting	Data Centre Americas	\$740,000	31/07/2014	Best Few (in	75%	\$555,000	Salesperson	Peter Jones
Autoschaft GmbH	Hamburg Network	\$112,920	07/06/2014	In the	25%	\$28,230	Salesperson	Hugh Grimes
Best Deliveries Plc	Mobile solution for UK	\$300,000	31/03/2015	Above the	1%	\$3,000	Employee	Peter Jones
Autoschaft USA	NY network	\$150,000	14/08/2014	Above the	1%	\$1,500	Salesperson	Peter Jones
Airport Devices Components Group	Training for controllers	\$30,000	07/03/2015	Above the	1%	\$300	Salesperson	Phillippa Smith
Airport Devices Aircraft Group	Management Training	\$60,000	14/08/201	Above the	1%	\$600	Partner	Peter Jones
Airport Devices Aircraft Group	Infrastructure refresh	\$30,000	14/09/2014	Above the	1%	\$300	Partner	Peter Jones
Investment Management Services	Programme for	\$55,000	03/10/2014	Universe	1%	\$550	Employee	Peter Jones
Autoschaft GmbH	Scoping consultancy	\$10,000	31/10/2014	Universe	1%	\$100	Salesperson	Phillippa Smith
Investment Management Services	Project	\$41,500	07/12/2014	Above the	1%	\$415	Internal	Peter Jones
1st Shipping	Bob	\$5,780	01/02/2015	Above the	1%	\$58	Salesperson	Peter Jones
Brand Total:								



Excel is a great business tool but a lot of funnel reports look like this. Unfortunately there's not a great deal to be gained from this type of data set. And there's not much intelligence here to coach your people with.





In six weeks they helped grow our funnel by £65m, £31m of which became closed business within four months - a fantastic achievement!

Strategy and Marketing Director



So now you can manage your funnel like this.



You can see exactly where deals are in the funnel and how long they have been there.

In this example the size of the coloured blob indicates the value of the deal. And if deals are deemed to be “at risk” based on predetermined criteria those deals can be colour coded to support immediate investigative drill-down.

Summary of benefits:

- Assists sales managers to become more effective and accurate during funnel reviews
- Higher levels of funnel scrutiny by sales management goes hand-in-hand with an increase in the accuracy of data supplied by sales people – visibility and scrutiny jointly drives new levels of responsibility
- Allows salespeople to perform more successfully in their jobs by focusing them on those selling activities that bring the most business value to your organisation
- Ensures the application of data analysis (analytics) to CRM in the most meaningful way
- De-risks deals
- Increases win rates



They’ve had a major impact ... helping define and improve our internal systems and processes.

Chief Executive Officer, Harmoni



Organisations are always striving to better-see the future and to better-predict the trajectory of business in order to:

1. More accurately project forecasts to investors' expectations
2. Improve cost structures by properly investing in production capacity
3. Have more consistent ways to measure progress
4. Make adjustments to close gaps in budgets
5. Better understand customer's buying decisions (and to make the necessary improvements to meet customer demands)
6. Adjust coaching by managers for each sales person's situation
7. Help sales people understand what management is measuring so they are better able to meet the demands of the business

With Sales Process Funnel you benefit from a highly visual window into exactly what is happening with the sales funnel of individual team members. Now you get detailed insights into which opportunities should be pursued or further explored, and which should be dropped. These insights drive an increase in overall funnel accuracy and maximise sales revenues.

 Quantum, 16 Queen Square, Bristol BS1 4NT, England, UK
 +44 (0)117 230 1963
 hello@quantumigl.com
 quantumigl.com

