

Pipeline and Opportunity Management Strategic Review

Preface

Do you find that?

1. It is a challenge to deliver predictable, reliable and consistent sales forecasts in line with growth objectives set by the board.
2. Sales leaders are not in control, find it difficult to make informed decisions and do not have a forensic understanding of the pipeline.
3. There is a need to improve current sale process management to improve performance management and people development.



The Purpose of a Strategic Review

To help Sales Leaders:

- To identify the root causes of barriers to realising the potential of the pipeline.
- To build a robust forecasting model based on science/fact so informed decisions are made.
- To build a dashboard to drive performance management and people development as well as a closed-loop process.
- To develop an action plan which will ensure the enablement of the above.

Content

To carry out a Strategic Review of Pipeline and Opportunity Management processes including sales forecasting, stage-of-sale probabilities and ratios, qualification reviews and the clarity and consistency of sales language.

Our methodology follows a four-phase approach and light project management process. We develop a top-level action plan and roadmap for execution, with a set of agreed milestones. The plan is developed using a six-step Problem Solving Process.

Phase 1 - Preparation and Planning

Brief review of the business' vision for sales:

- Current State
- Challenges Faced
- Sales Performance
- Desired State

Phase 2 - Analysing the Problems

Guided brainstorming to identify/clarify problems to tackle:

- Step 1) What do we want to change?
- Step 2) What is preventing us from reaching the desired state?

Development of an Ishikawa highlighting issues and root causes.

Phase 3 - Generating and Selecting Solutions

We outline and explore the best solutions to overcome the problems identified:

- Step 3) How could we make the change?
 - Which problems require longer term solutions?
- Step 4) What is the best way of doing it?
 - Which solutions offer the fastest/largest financial returns?

Phase 4 – Implementing and Evaluating

- Step 5) Implementation plan devised and agreed with solution in place.
- Step 6) Measurement criteria set to evaluate solution effectiveness. Continuing problems identified, if applicable.

Key Outcomes

- ✓ Key challenges agreed
- ✓ Problems identified/clarified
- ✓ Solutions identified and explored
- ✓ Plans created, agreed and implemented