Small Business

Sales Pipeline Tool

User Guide

V1.0

AfriBizKid

Starting Your Small Business

Contents

Salespeople, Categories and Customer Names – INPUT

Using the INPUT tab (last tab, on the bottom/right), you can add SALESPEOPLE, CATERGORIES and CUSTOMER NAMES, as shown below:

Salespeople
Me
Salesperson # 1
Salesperson # 2
Salesperson # 3
Salesperson # 4
X

Categories
Region # 1
Region # 2
Region # 3
Region # 4
Region # 5
Region # 6
Region # 7
Y

Customer Names
Customer # 1
Customer # 2
Customer # 3
Customer # 4
Customer # 5
Customer # 6
Customer # 7
Customer # 8
Z Customer # 9

X: Salespeople

Input ALL SALESPEOPLE NAMES, starting with YOURS, which will be used on ALL tabs

Y: Categories

Decide how you are going to use the CATEGORIES field, which will be used on ALL tabs.

This could be used for a variety of categories, including:

– Industry *e.g. Pharmaceutical, Food, Clothing, etc.*
– Business Type *e.g. Retail, Wholesale, Manufacture*
– Geographical Area *e.g. North, South, East, West*
– Size of Business *e.g. Large, Medium, Small*
– etc.

Z: Customer Names

Input CUSTOMER NAMES, which will be used on ALL tabs.

Monthly Sales Pipeline

These are the INPUTS and OUTPUTS of the MONTH SALES PIPELINES
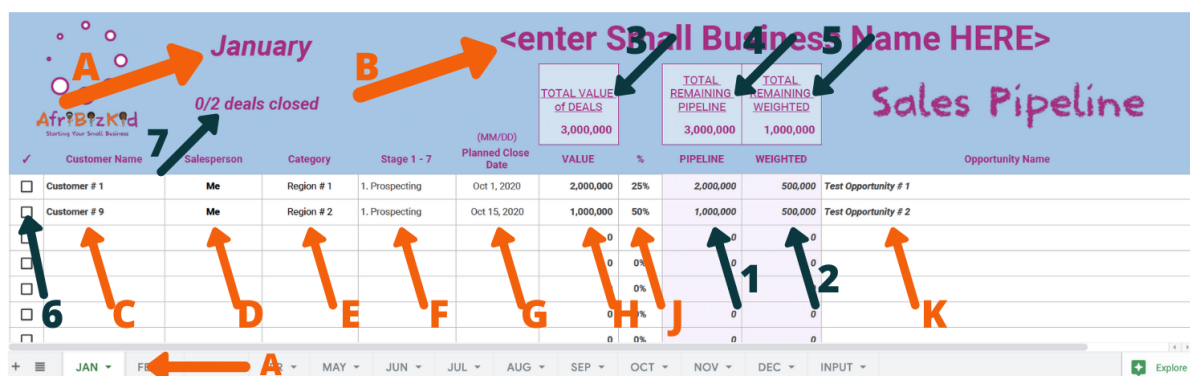
A: Month

The months are pre-input.

You can adjust the MONTHS of the fiscal year my DRAGGING the Month-tabs at the bottom of the screen to suit your fiscal year, e.g. if your fiscal year started in March, you would drag the MAR-tab to be the first tab, and the remainder of the tabs to suit the calendar year.

B: Business Name

Input your BUSINESS NAME on the **JAN-tab**, which will then auto-populate to the other month-tabs.

C: Customer Names

CUSTOMER NAMES are selected from the drop-down menu, based on the inputs in the INPUT-tab.

D: Salesperson Name

The SALESPERSON NAMES are selected from the drop-down menu, based on the inputs in the INPUT-tab.

E: Category

CATEGORIES are selected from the drop-down menu, based on the inputs in the INPUT-tab.

You can make these anything you want, for example:

- Industry *e.g. Pharmaceutical, Food, Clothing, etc.*
- Business Type *e.g. Retail, Wholesale, Manufacture*
- Geographical Area *e.g. North, South, East, West*
- Size of Business *e.g. Large, Medium, Small*
- etc.

F: Sales Stage

The SALES STAGE can be selected from a pre-determined generic sales cycle:

1. **Prospecting** – the prospect has been identified but has not yet been qualified
2. **Qualified** – the prospect has been qualified as an opportunity
3. **Needs Analysis** – a needs analysis has been conducted
4. **Quoted** – the prospect has been quoted
5. **Negotiation** – the negotiation stage is underway
6. **Closed** – the opportunity has been won
7. **Lost** – the opportunity has been lost
8. **HOLD** – the opportunity has been placed on HOLD (not for now)

Stages should be regularly updated to match the stage.

G: Planned Close Date

Enter the date in MM/DD/ or MM/DD/YYYY format, for the date that the opportunity is expected to close.

H: Opportunity Value

Enter the VALUE of the opportunity.

J: Probability

Enter the PROBABILITY of the opportunity closing, which are:

0%	No Probability
25%	LOW Probability
50%	MEDIUM Probability
75%	HIGH Probability
90%	VERY HIGH Probability
100%	COMMITED

These PROBABILITIES are used to determine the WEIGHTED VALUE of the opportunity:

WEIGHTED OPPORTUNITY VALUE = OPPORTUNITY VALUE x % PROBABILITY

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K: Opportunity Name

Input the OPPORTUNITY NAME

1: PIPELINE VALUE

If the opportunity has **NOT BEEN** ticked off as closed (see 6, below), then the PIPELINE VALUE will equal the OPPORTUNITY VALUE.

If the opportunity **HAS BEEN** ticked off as closed (see 6, below), then the PIPELINE VALUE will equal ZERO.

2: WEIGHTED VALUE (of Pipeline)

If the opportunity has **NOT BEEN** ticked off as closed (see 6, below), then the WIEGHTED PIPELINE VALUE will equal the OPPORTUNITY VALUE x % PROBABILITY.

If the opportunity **HAS BEEN** ticked off as closed (see 6, below), then the WIEGHTED PIPELINE VALUE will equal ZERO.

3: TOTAL VALUE of DEALS

This is a SUM of all the OPPORTUNITIES listed on the Sales Pipeline Tool.

4: TOTAL REMAINING PIPELINE

This is a SUM of all the ACTIVE OPPORTUNITIES listed on the Sales Pipeline Tool.

5: TOTAL REMAINING WEIGHTED PIPELINE

This is a SUM of all the ACTIVE OPPORTUNITIES listed on the Sales Pipeline Tool, individually WEIGHTED according to the % PROBABILITY and then summed.

6: INACTIVE OPPORTUNITY

This CHECKBOX is ticked when an OPPORTUNITY is either LOST or CLOSED.

When ticked to show LOST or CLOSED, the OPPORTUNITY is no longer included in the PIPELINE or WEIGHTED columns.

7: DEALS CLOSED

This indicates the number of OPPORTUNITIES (DEALS) that have been 'closed', so either LOST or CLOSED (as it is a count of the TICKS, mentioned in 6, above).
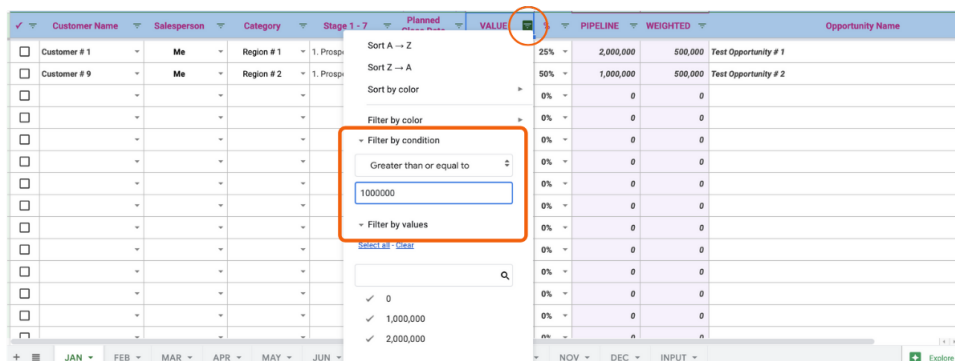
Sorting of Opportunities

By selecting ANY of the SORTING ICONS (shown below, in ORANGE), you will be able to sort your opportunities, for example, by Salesperson Name.

In this example, the sort is on CATEGORY, in which REGION is being used. This means that all opportunities in 'Region # 1' can be selected. The same for SALES STAGE, PLANNED CLOSE DATE, VALUE, or PROBABILITY.
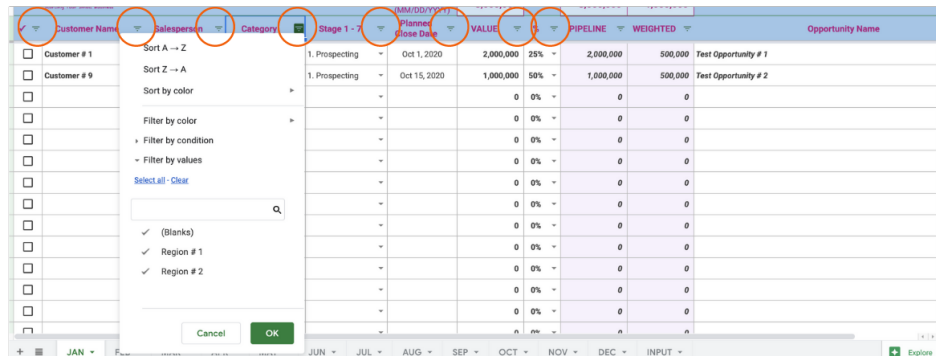
Furthermore, you can apply CONDITIONS to your SORT, for example, as shown below, the VALUE of the opportunity is selected as OPPORTUNITIES with a VALUE greater than 1,000,000.