

G3.02

CUSTOMER RELATIONS

/Sales & Service

DECISION SHEET

v2.2.1

Job to be done

To get an idea on how much sales we will make in the near future, we need to keep track of our customers.

By creating a sales pipeline, we get a tool to follow the progress of our customer prospects.

How to do it

Start by selecting for which customer or customer segment to prepare the pipeline report. Also note who is going to be the account manager.

Continue by placing persons and/or projects in the 4 categories according to whether they are projects in closing, opportunities, contacts who have yet to receive a quote, or leads you need to contact. Next, note the quote amount to give the customer. Figure out the probability of getting the order and calculate the sales forecast.

Finish by writing down the spread of the expected sales over the following months.

Next Step

- Transfer your notes to a spreadsheet and update the numbers on an ongoing basis.
- Make an action plan for initiatives that can increase the probability of sale with each customer.
- Move Leads to Contacts and Contacts to Opportunities.

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Developed by:



Customer Pipeline

Build a pipeline and estimate the sales

PROBABILITY PERCENTAGES DEFINED

10 %	30 %	50 %	70 %	90 %
From idea to customer prospect	Contact with the customer prospect	Positive dialogue with customer prospect	Expectation of sale	Awaiting order confirmation



CUSTOMER SEGMENT:							
ACCOUNT MANAGER:							
Category	Person/project	Quote amount	Probability	Sales forecast	Spread of expected sales		
					This month	Next month	Later
IN CLOSING (90%)			X	=			
			X	=			
			X	=			
			X	=			
			X	=			
OPPORTUNITIES (50-90%)			X	=			
			X	=			
			X	=			
			X	=			
CONTACTS (30-50%)			X	=			
			X	=			
			X	=			
			X	=			
			X	=			
LEADS (10%-30%)			X	=			
			X	=			
			X	=			
			X	=			
TOTAL							

Date:


Name:

Company:


Customer Pipeline – G3.02
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