

# Sales Pipeline Manager

An excel based solution, which is macro free, to show you sales trends, sales process analysis, and a sales forecast. If this sounds like what you need, take a look at the details below.

- Define, track and analyse your sales process**
- Analyse each sales lead, and use the data to project others**
- Spot opportunities to improve your sales process**
- See sales forecasts based on previous sales**
- See a prediction as to how your current leads will pan out**
- See how many sale you still require**
- Analyse each salesperson, and see how they compare**
- Spot shortages in the pipeline in advance**
- Give yourself time to make changes to your sales process**
- Information to help improve your sales process**
- And so much more...**

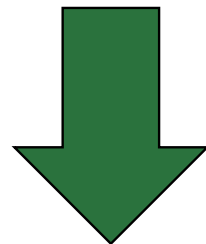
**Monitor your sales process, discover opportunities for improvement, analyse your sales, and forecast your expected sales. All in one spreadsheet.**



[spreadsheetsolutions.biz/store](https://spreadsheetsolutions.biz/store)

 **SPREADSHEET SOLUTIONS**

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## Leads & Sales

Your Business

Enter the number for each lead, as well as the client name, and then the start date, start estimated value, and the probability status for the start. That will then start the process for that particular lead. The respective date cells will change colour when the next stage is due/overdue. Each stage, simply fill in the date that you reach that stage, and if the VALUE or the STATUS have CHANGED, then input/select a new value. If they have remained the same, leave those two cells blank, and simply fill in the date. Do this until you reach the actual sale, where you just fill in the date (and the value if it changes from the last value entered). That will then complete the sale, nothing else is required after that. DO NOT have any duplicate Lead ID/Numbers.

Lead ID/Number	Client	Salesperson	Start			Stage 1			Stage 2			Date
			Date	Value	Status	Date	Value	Status	Date	Value	Status	
123	Client 123	Richard	01/10/2018	£2,000.00	Warm	06/10/2018	£2,100.00	Hot	12/10/2018	£2,200.00	Warm	17/10/2018
124	Client 124	Mark	01/10/2018	£2,000.00	Warm	06/10/2018	£2,100.00	Hot	12/10/2018	£2,200.00	Warm	17/10/2018
125	Client 125	Kim	01/10/2018	£2,000.00	Warm	06/10/2018	£2,100.00	Hot	12/10/2018	£2,200.00	Warm	17/10/2018
126	Client 126	Michelle	01/10/2018	£2,000.00	Warm	06/10/2018	£2,100.00	Hot	12/10/2018	£2,200.00	Warm	17/10/2018
127	Client 127	Sean	01/10/2018	£2,000.00	Warm	06/10/2018	£2,100.00	Hot	12/10/2018	£2,200.00	Warm	17/10/2018
128	Client 128	Vanessa	01/10/2018	£2,000.00	Warm	06/10/2018	£2,100.00	Hot	12/10/2018	£2,200.00	Warm	17/10/2018
129	Client 129	Richard	01/10/2018	£2,000.00	Warm	06/10/2018	£2,100.00	Hot	12/10/2018	£2,200.00	Warm	17/10/2018
130	Client 130	Mark	01/10/2018	£2,000.00	Warm	06/10/2018	£2,100.00	Hot	12/10/2018	£2,200.00	Warm	17/10/2018
131	Client 131	Kim	01/10/2018	£2,000.00	Warm	06/10/2018	£2,100.00	Hot	12/10/2018	£2,200.00	Warm	17/10/2018
132	Client 132	Michelle	01/10/2018	£2,000.00	Warm	06/10/2018	£2,100.00	Hot	12/10/2018	£2,200.00	Warm	17/10/2018
133	Client 133	Sean	01/10/2018	£2,000.00	Warm	06/10/2018	£2,100.00	Hot	12/10/2018	£2,200.00	Warm	17/10/2018
134	Client 134	Vanessa	01/10/2018	£2,000.00	Warm	06/10/2018	£2,100.00	Hot	12/10/2018	£2,200.00	Warm	17/10/2018
135	Client 135	Richard	29/10/2018	£3,000.00	Warm							
136	Client 136	Mark	29/10/2018	£3,000.00	Warm							
137	Client 137	Kim	29/10/2018	£3,000.00	Warm							
138	Client 138	Michelle	29/10/2018	£3,000.00	Warm							
139	Client 139	Sean	29/10/2018	£3,000.00	Warm							

They say that information is key, and we can use your data to reveal some very interesting information. The image above is the sheet where you can enter each lead, assign it to a salesperson, and enter the date, estimated value, and how likely the lead is to end in a sale. You can then enter the same 3 key pieces of information at each stage of the process (you can name the stages according to your process). This means that the spreadsheet can monitor each lead, and see how the perceived probability and value change during the course of the process. This is not only good for analysis, but prediction for future leads. This sheet also shows you if you take too long on any stage of any lead.

Name	Start Date	Monthly Target	Oct 2018
Richard	01/03/2018	£3,000.00	£4,600.00
Mark	01/12/2017	£3,000.00	£4,600.00
Kim	01/04/2018	£3,000.00	£4,600.00
Michelle	01/11/2017	£3,000.00	£4,600.00
Sean	01/11/2017	£3,000.00	£4,600.00
Vanessa	01/01/2018	£3,000.00	£4,600.00

You can also have a list of your sales people, along with their starting date and monthly target. This sheet also shows you each person's sale for each month (of a 12 month rolling period). This is very useful, and handy if you have various salespeople, but there is another reason for this sheet. You can assign each lead to a salesperson, so that you can see how each salesperson performs. Not only in actual sales, but how each person's leads change during the process. You may have one salesperson who is good at closing leads, where another may be good at starting them. You can produce detailed reports for each person, so that you can see exactly how they are doing, and address any differences if required. Not only this, but then future sales are based on the sales person responsible, and not an overall average, making it more accurate.

## Sales & Forecast Report - Your Business

Select Salesperson

ALL Salespeople

This report is showing data from Nov 2017 to Apr 2019 on the graphs - All the data is being used for the Stage Breakdowns below

### Stage Breakdowns

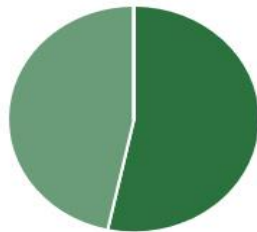
Start - Stage 1		Stage 1 - Stage 2		Stage 2 - Stage 3	
Number of Days Allocated:	5	Number of Days Allocated:	5	Number of Days Allocated:	5
Average Number of Days:	5	Average Number of Days:	5	Average Number of Days:	4
Average Price Change:	5%	Average Price Change:	5%	Average Price Change:	0%
Average Probability Change:	1	Average Probability Change:	-1	Average Probability Change:	0

Stage 3 - Stage 4		Stage 4 - Stage 5		Stage 5 - Sale	
Number of Days Allocated:	5	Number of Days Allocated:	5	Number of Days Allocated:	5
Average Number of Days:	6	Average Number of Days:	3	Average Number of Days:	1
Average Price Change:	0%	Average Price Change:	5%	Average Price Change:	0%
Average Probability Change:	0	Average Probability Change:	0	Average Probability Change:	0

This is the breakdown of each stage, you can filter this per salesperson or see the overall view. This will show you where drops in expectation are happening, or in fact where the perceived values of the sales seems to dip or rise. Not only that, but you can assign a time frame for each stage of the process, and this will show you how the staff actually compare with the time you have set. You may be able to shorten your process, or you may have to allow them more time. All of this is useful information which can be invaluable when making decisions.

Actual & Predicted Lead Outcomes



- Sale
- Predicted Sale
- Rejected
- Predicted Rejection

### Actual Success Rate

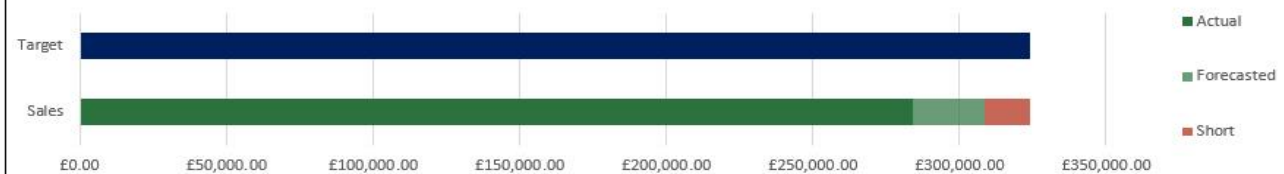
100%

### Actual Success Rate

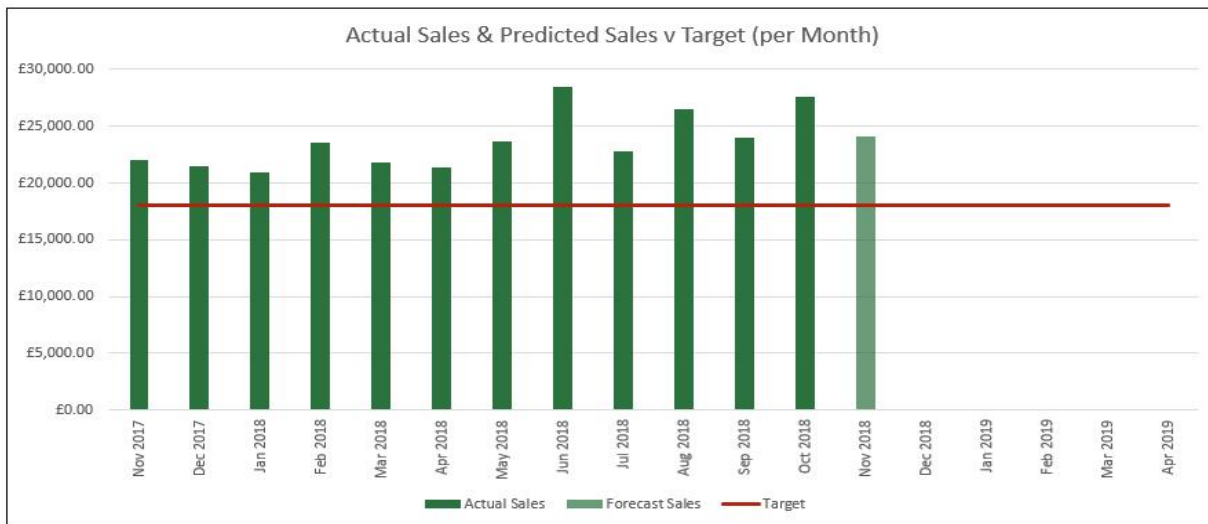
100%

These figures are based on the value of the leads, and not the number of leads.

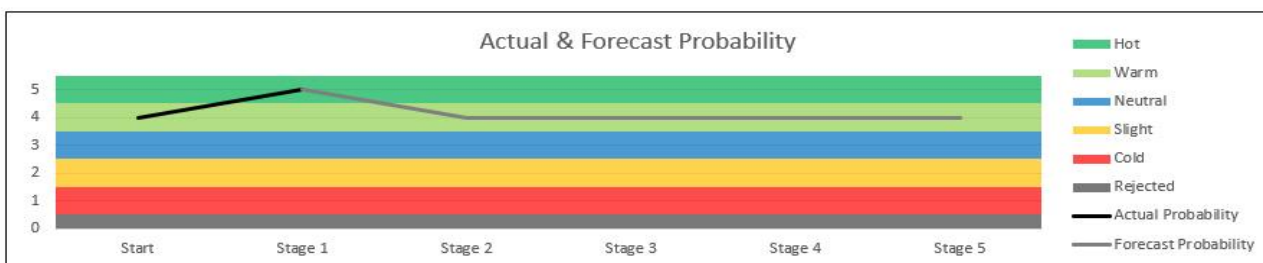
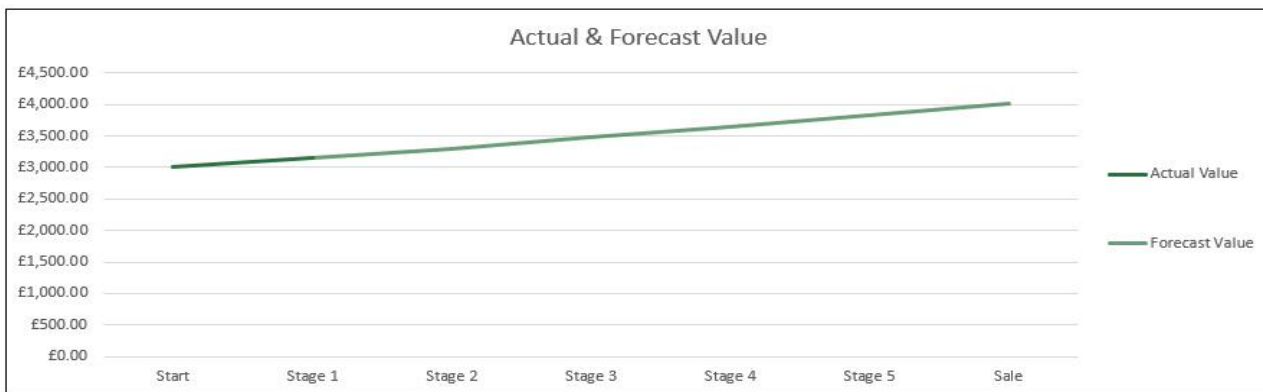
Budget v Actual & Predicted



This spreadsheet produces a wealth of information in the form of graphs and charts, here we can see the outcome of the previous sales leads, and what the spreadsheet is predicting for the current leads (based on experience). You can also see how much more money is required for the period (current 12 months rolling and next 6 months forecast). The beauty of these graphs are that they update automatically as you enter the data spoken about above.



This is probably one of the most useful graphs, and probably the one you're most interested in. Your monthly sales (for the last 12 months) as they have happened, as well as your projected forecast for the next 6 months. This graph uses all of the data on this spreadsheet to make it as accurate as possible based on each salesperson's track record and habits.



Lastly, you can select any lead past or present, and see how it progressed or how it is predicted to progress. This is especially useful if you can take a look at a lead, see how it may pan out based on a salesperson's previous leads, and then make changes if need be. How useful would it be to know that a lead has a chance of failure, while it is still active? It gives you time to make it right.

So there you have it, an overview of this unique product. We can't show you everything in this brochure, so please use the link below to the demo video, should you wish to see exactly how this product works.

All the other links you may need for more information, or to purchase this product, are below.

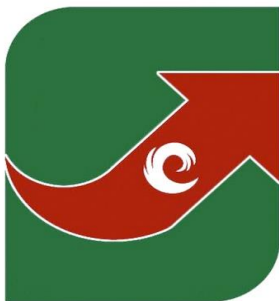


In order to purchase this product, download a free trial, or watch the demo video, please click the image to the left.

This product is sold from the UK, and will be invoiced as GBP. The fee is a once off fee, and there is no monthly charge. There will be an entirely optional annual charge, should you want to receive future upgrades.

**£450**

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