

## Sales Pipeline Reporting and Analysis

Sales pipeline reporting focuses on the continual tracking and study of sales opportunities from raw lead to closed sale. Sales managers monitor key performance indicators to ensure marketing activities are generating the number, quality and flow of leads necessary to meet sales targets and that sales cycles are progressing towards closure. Sales pipeline reports show the status and value of deals currently in the pipeline and probability-weighted forecasts. They also allow sales teams to drill to particular deal terms and conditions, and update material deal terms as negotiations occur. Business-intelligence enabled sales pipeline reporting not only generates and delivers these reports on a regular basis, but also allows managers to uncover competitive trends and performance anomalies by region, product or customer segment.

### Key Performance Indicators

- Forecast Revenue
- % of Deals Closed
- % of Deals Lost
- Win to Raw Lead Ratio
- % of Quota
- Length of Sales Cycle

### Sample Report: Deal Progression by Sales Representative

Opportunity Owner	Owner Role	Opportunity Name	Lead Source	Opportunity Size \$	Expected Revenue	Probability (%)	Age
S. Dogman	South East - AE	LBC City Music	Cold Call	\$5,310,164	\$1,062,033	20%	236
S. Dogman	South East - AE	Krazy Kites	Existing Customer	\$215,489	\$86,196	40%	127
J.Jamison	South East - AE	Vulture Videos	Existing Customer	\$1,850,000	\$1,110,000	60%	78
J.Jamison	South East - AE	Two Hot Tamales, Inc.	Existing Customer	\$654,214	\$261,686	40%	16
M. Lapdog	EMEA UK - AE	Nigel's Avionics	Incoming Call	\$1,721,765	\$344,353	20%	45
M. Lapdog	EMEA UK - AE	Yes I Can!	Email Lead	\$65,874	\$52,699	80%	52
S. Microlie	West - AE	Pete's Accountants	Incoming Call	\$1,375,000	\$275,000	20%	358
S. Microlie	West - AE	Writers Guild	Customer Referral	\$1,197,598	\$479,039	40%	152
M. Bleepus	Central - AE	Marketing Surrogates LLC	Email Lead	\$254,187	\$203,350	80%	32
M. Bleepus	Central - AE	SEC Slime Removers	Partner Referral	\$1,140,000	\$684,000	60%	189
T. Fonbuk	Partner - Germany	Big Talk Gmbh	Tradeshaw	\$368,745	\$73,749	20%	68
T. Fonbuk	Partner - Germany	Steamhead AG	Email Lead	\$56,234	\$22,494	40%	99

This detailed sales pipeline report shows the weighted opportunity size for a sales team in the quarter selected. Dashboard capabilities include thresholds to highlight large revenue opportunities as well as opportunities that are aged longer than the average simplifying analysis by sales managers and executives. Further analysis can focus on which products/services are selling well, the effectiveness of individual sales people or regions, and sales results versus plan.

### COMMON BUSINESS QUESTIONS

- What is the weighted opportunity size of a particular deal?
- How does the total weighted opportunity size in the pipeline compare with revenue forecasts?
- Has the duration of the average sales cycle increased?
- Which deals have been in the pipeline the longest?
- What is the most important reason for lost deals?
- What are the terms of a particular contract?
- What is the conversion rate of leads to closed deals?
- What is the total potential revenue of all opportunities with Customer X?