Sales Management Through

Pipeliner CRM

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Contents

"The most expensive thing you can do in sales is spend your time with the wrong prospect."

— Jeb Blount

Introduction

The topic of sales management is very broad, and is covered in an infinite number of books, so we won't be covering that here. There is also an endless list of material on sales management—and as anyone who has read my previous writings on the subject knows, I consider that *management* is *management*. There are principles which dictate great management, and they are applied in sales management, as well as in the management of any other part of a company, or in the overall management of the company itself. The management methods that we have found the most effective, and to have the biggest impact on effectiveness and efficiency, are those of world-renowned management consultant Fredmund Malik.

> *"Management must be learnt just like any other profession, a foreign language or a type of sport. Management is not easy, so it must constantly be practiced. However, neither is it more difficult than other professions, so anyone can achieve a certain degree of competence, higher than that of an amateur."*
>
> **—Fredmund Malik**

In this ebook we are going to get very specific: we're going to be dealing with sales management through CRM. I personally believe (as do a lot of experts today) that utilizing a CRM is the only way to manage a sales team—and in fact it is practically impossible to manage one without it.

There is no system in the industry today like Pipeliner CRM, one that empowers precision sales management through CRM. Therefore we can truly say that Pipeliner CRM is the only really effective tool available today in the market.

We are going to break sales management through CRM down into 4 basic functions, with a chapter covering each.

Lead Management

In sales, it all begins with leads. There is always a sales quota to be made. A quota won't be attained without adequate opportunities—and opportunities won't happen without adequate leads.

Even with a good inbound lead program (which most companies have today), to truly guarantee their success, every salesperson should prospect, should generate their own leads. Lead management can be very precisely conducted through Pipeliner CRM, from lead assignment up through conversion to an opportunity.

Opportunity Management

At the very heart of running a sales pipeline is *opportunity management*. Opportunity management consists of, first, setting up a sales process. This means knowing the various stages that your opportunities pass through, from lead all the way to close. When you know how long a deal takes to make it through the pipeline, and how long it should take for an opportunity to make it through each stage of that pipeline, you've got a fairly accurate sales process.

Account Management

Account management is a considerable job—and one of the most important for a sales professional. Account management consists of several key functions, all of which actually add up to happy customers. Account management is most precisely conducted through CRM.

Existing accounts are the foundation and stability of a company. Moreover, it is far less complex and costly to keep an existing account satisfied and happy than it is generating new business.

For all of these reasons account management is a primary important function of an enterprise.

The War Room Concept

The War Room is a vital concept in sales management.

A physical war room, in the military, is a space in which generals, officers and battle coordinators visually plan out battle tactics and strategies for specific operations. In business the term has come to mean a meeting space built for the specific purpose of providing a dedicated location for stakeholders and project teams to share a location and visually communicate tasks and activities associated with the execution of critical projects.

Moving over to sales, the idea is to control and manage all of your sales resources in one location, in a way that they are all visually available and all data is present.

Come with me as we explore each of these vital parts of sales management through CRM.

"Efficiency is doing things right; effectiveness is doing the right things."

— Peter Drucker

Chapter 1

Effective Lead Management Through CRM

As there are many, many books on sales management, so there are endless publications, articles and blogs on the subject of lead generation. This chapter doesn't touch that subject, but addresses another vital topic: how to handle leads as they're coming in, and the basics of establishing your lead management.

Inbound and Outbound

As with many companies, our company deals with both inbound and outbound leads. For most companies, inbound leads come from their own website or from social media. Another variety of inbound leads come from paid lead sources.

There is science to be applied to both inbound and outbound leads—and by any stretch, it's not easy either way. Creating a great flow of inbound leads requires a lot of research and planning. Outbound lead campaigns might be even more involved, and it might take hundreds of calls to make one successful appointment.

I arrived in the U.S. from Austria in 2012 to establish Pipeliner CRM in America. There was certainly no standard text I could turn to and discover, "Here on page 93 it says exactly how to generate leads!" I, like everyone else, had to discover it for myself.

A sales manager should understand that an inbound lead ranks higher than an outbound lead, simply because an inbound lead is a reach originated by a prospect. The person already has some kind of alignment with what you're offering.

Inbound leads generally make for faster closes. With outbound leads, since you're starting from square one of the buying cycle, it can take much longer.

Is It Enough?

But from a lead management standpoint, you do need to establish if you are obtaining enough leads—inbound or outbound—to sustain your sales team. This breaks down even further to: how many leads does each salesperson need in order to close enough business?

With inbound leads, there must be a qualification process. Let's say you have set up a conservative men's clothing store in a mall, and people are always coming by and coming in. A young man comes in seeking "hip" fashions, and you have to turn him away as you don't carry that kind of apparel—in other words, you qualify him out. Or perhaps even a woman comes in, but you don't carry women's clothes, so again you must politely turn her away.

Qualifying inbound leads is a constant process. The better your qualifying process is, the more qualified leads you'll have for your sales team. Sales Development Reps (SDRs) are the ones in a company that pretty much have the job of qualifying inbound leads today.

Doing the Math

Nailing this down is a matter of math. You need to figure out:

- How many leads does a salesperson need to convert to one opportunity?
- How many opportunities does a salesperson need for one close?

Once you have figured these out, you have a statistical number you can work with.

You have to figure these out for yourself, but there are statistics being quoted today that might help you. It is said that only 38 percent of contacts turn into leads. So if you have 200 contacts, 76 of those will turn into leads. Note that they are unqualified leads. From my own operation, 40 percent of those unqualified leads will be successfully qualified, so those 76 would then become 30 qualified leads.

Then it becomes a question of how many qualified leads become sales. In my experience it's about 25 percent of those 30 qualified leads, which would come out to be 7 or 8 actual possibilities. So 200 contacts, in this case, boil down to 7 or 8 possible sales.

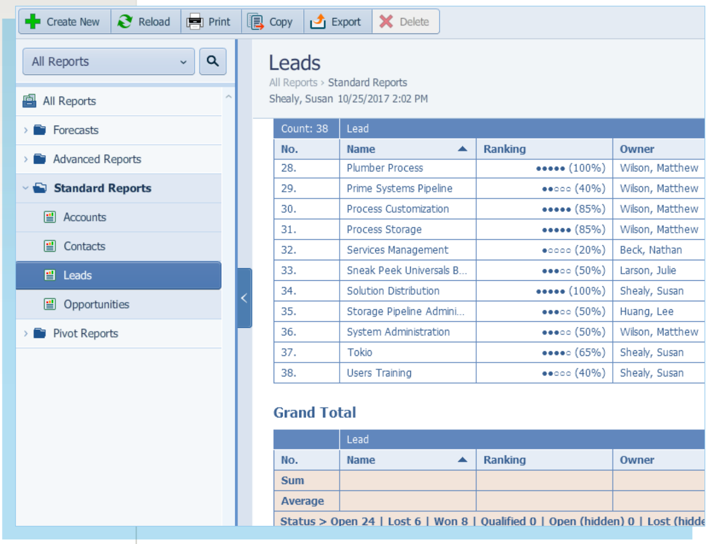
These are, however, only examples. Some percentages may assist you, but your primary focus should be the optimization of your lead process. And that can only be done today through technology. Through technology you can view precise specifics of how your process is progressing. You can then refine it so that it incrementally becomes better, and better, and better. That means that you're always closing more deals.

An Effective Tool

In my opinion, making lead management truly work comes down to having the exact right tool.

Let's say you've got 500 pictures you need to hang in a house. To get that amount of work done efficiently, you must have the right tool, which is probably a narrow hammer made for pounding small nails. Maybe you could use a heavy ashtray or a brick to drive a nail into the wall, but it certainly wouldn't be efficient.

Pipeliner CRM is the most effective tool you can have for lead management.



First of all, Pipeliner has an unbelievable reporting system. When you create a profile within Pipeliner, reports can be shared with your entire team. Your SDRs, for example, can see exactly what they're doing and how they're doing it. They see how they can get incrementally better. They then increase the velocity of "putting the nails into the walls."

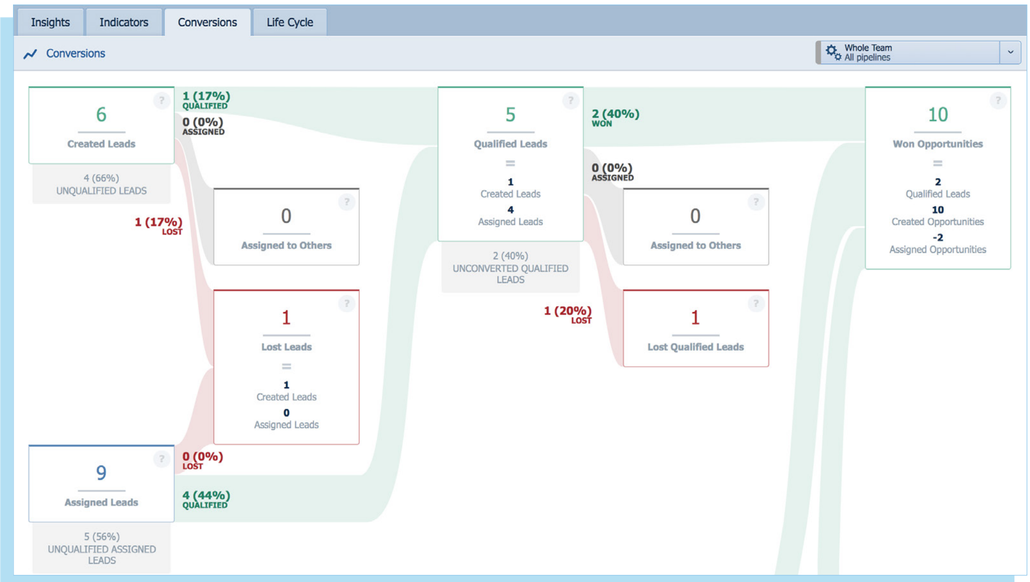
Pipeliner also, using the cybernetic principle of reducing complexity to simplicity, renders data in a state that it's no longer overwhelming. It can happen that someone gets overwhelmed by data, maybe even frightened of it, to the point they can't even see anything in it anymore. For that reason we have created the Pivot Table in Pipeliner CRM, which reduces data to only 2 or 3 indicators which everyone can understand.

We have applied artificial intelligence to our Navigator feature (the first screen seen when logging into Pipeliner), so that a sales manager can put priorities right in front of the sales rep—a cold lead, a warm lead, a hot lead—and they immediately know what to do.

The Lead Engine

All of this boils down to Pipeliner's lead engine. Through it you can flexibly visualize, flexibly sort, flexibly create lead processes, and flexibly qualify leads. Lead data is fed to Navigator, and is utilized in Pipeliner's powerful reports. And Pipeliner's Performance Insights feature allows you, as a sales manager, to follow the flow of the data and see all the conversation rates, so you can incrementally increase the efficiency of the process.

And finally, Pipeliner is the only CRM solution that can show you precisely when and how leads are being lost, through it's Archive feature. You can even assign "lost reasons" to any lead that is lost, so that you can tabulate them later and know the major reason for losing leads.



"Failure is simply the opportunity to begin again, this time more intelligently."

— Henry Ford

Chapter 2

Precise Opportunity Management Through CRM

At the very heart of running a sales pipeline is *opportunity management*. Opportunity management consists of, first, setting up a sales process. This means knowing the various stages that your opportunities pass through, from lead all the way to close. When you know how long a deal takes to make it through the pipeline, and how long it should take for an opportunity to make it through each stage of that pipeline, you've got a fairly accurate sales process.

A note, though, is that a sales process should be *dynamic*. When you find flaws in the sales process, or changes happen in the marketplace necessitating changes to it, you need to be able to rapidly make those changes and keep right on doing business. Pipeliner CRM is flexible enough that you can instantly make such sales process changes when needed, and it requires very little training.

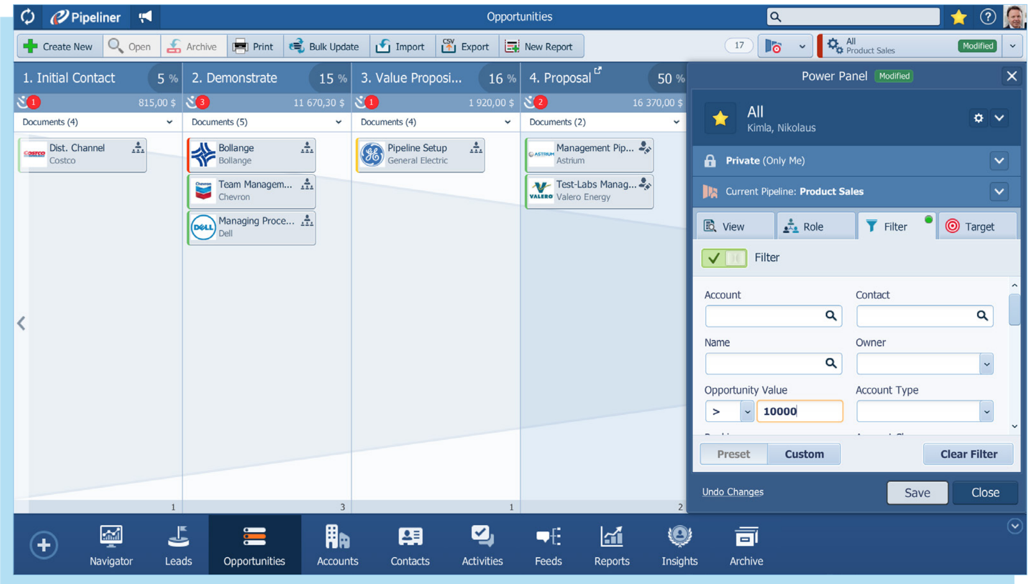
Visualization

An important aspect of opportunity management is *visualization*. The easier it is for a sales manager to visually see the pipeline and opportunities, the more effective sales management will be.

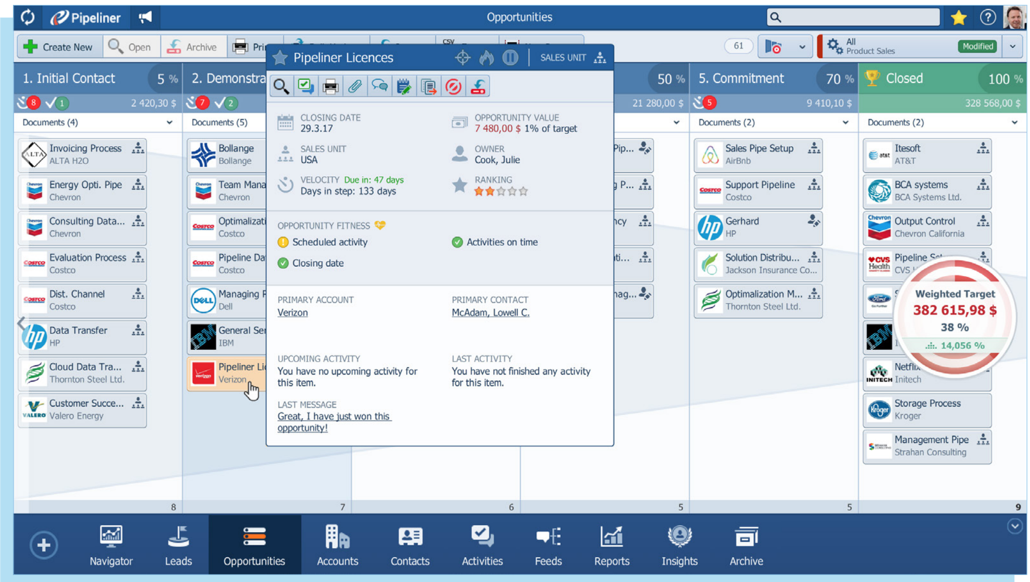
But for Pipeliner, it's not just visualization but *instant dynamic* visualization. Data is being manipulated instantly and dynamically, by or right with the reps being managed. Data changed is immediately seen by anyone involved.

Pipeliner CRM provides five different views of opportunities, so that a sales manager can choose which is best for them.

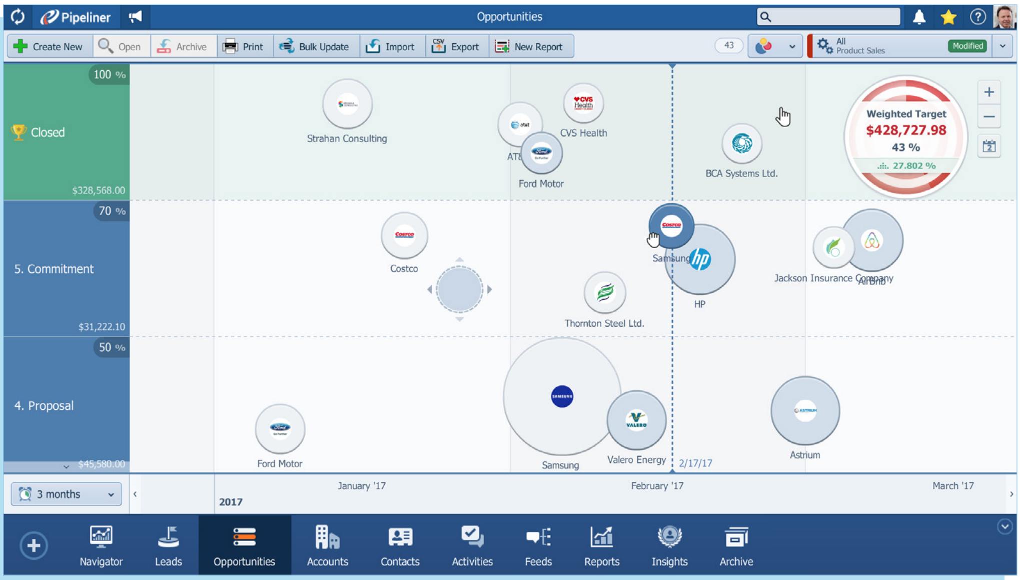
Filter View—instantly filter data so that you can have the precise view you need. You can filter and view tasks based on any field. Views that will be regularly used can be saved.



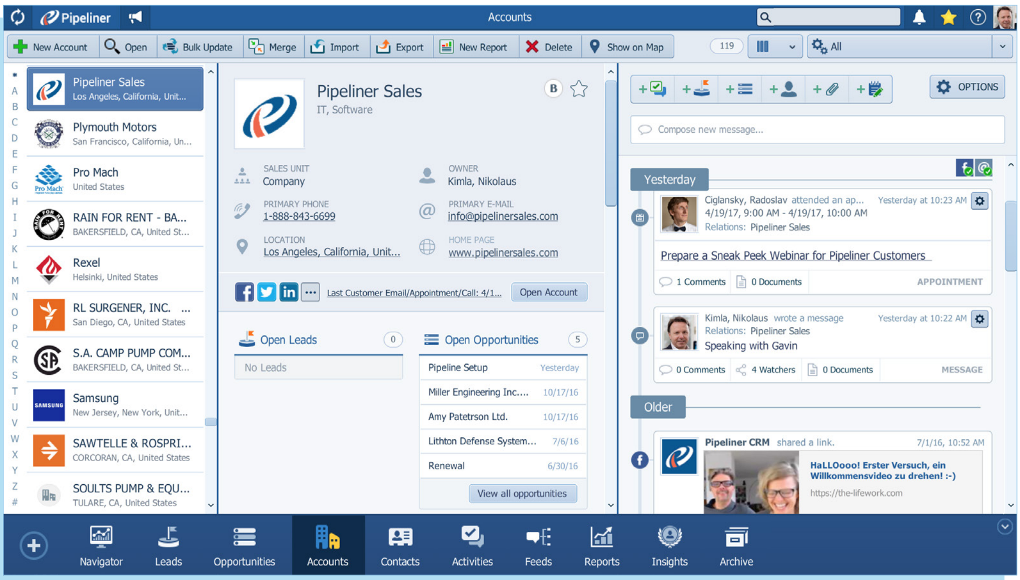
Pipeline View—a graphical representation of your sales process. From left to right, opportunities are shown within the sales process stages in which they currently reside. You can hover over them or click on them for further detail. The Pipeline View also applies to Pipeliner's unique Archive, where lost deals are stored complete with all data.



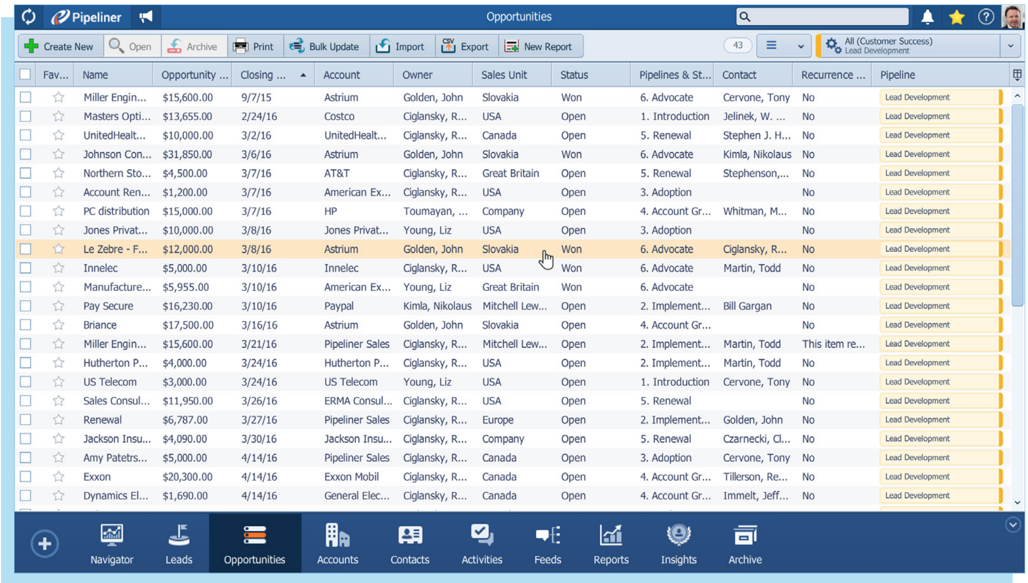
Bubble Chart View—a 3D map of opportunities which includes 3 crucial dimensions: the sales process stage in which the deal resides, the estimated close date and the deal size.



Compact View—with which you can, at a glance, view the last time a prospect was touched, the sales opportunities that involve them, and activity from their running feed (latest internal messages, social CRM updates or emails). Compact View can also be applied to opportunities, leads, accounts, contacts, and opportunities within the Archive, which is the place where lost deals can be viewed.

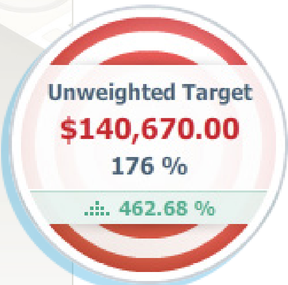


List View—see your leads, opportunities, accounts, contacts or opportunities in a column/row format, totally customizable for your particular needs.



The Target

Opportunity management, in each of its phases, should be totally aligned to the sales target for that sales period. Pipeliner is also unique in this regard in that the target for the current sales period is always in view, and therefore always in mind for the sales team and sales manager. Any system should be geared around the target—*what must be accomplished* in any given time frame, be it a week, month, quarter, half-year or year.



Pipeliner CRM offers five different target views, for varying aspects of the target.

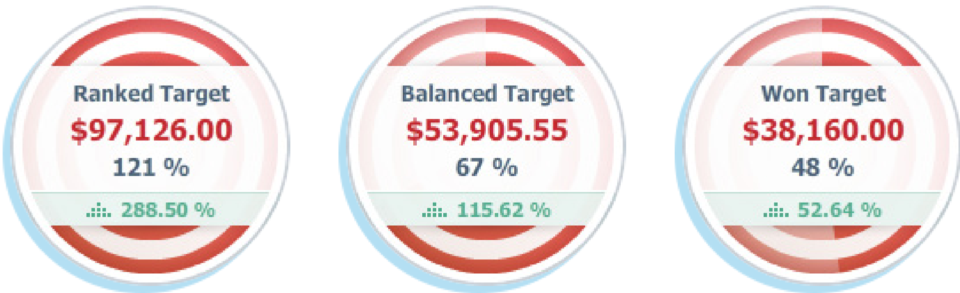
Unweighted Sales Target: The value of all opportunities in a pipeline without any closing probability percentages. This can be useful if you have some historical data that says, for example, that a rep closes 10 percent of all opportunities. You would look for the Unweighted Sales Target to be at least 10 times the goal.

Weighted Sales Target: The Weighted Target is equal to the sum of the total opportunity values in each sales stage, multiplied by the probability of closure for that sales process stage.

Ranked Target: Each rep has the ability to apply a personal ranking to each of their opportunities, from one to five stars. The Ranked Target shows their level of confidence in their opportunities.

Balanced Target: The Balanced Target can be looked at as a "worst case scenario," because it balances the Weighted Target and the Ranked Target.

Real Target: The Real Target represents the actual closed or won opportunities.



Document Management

An important aspect of opportunity management is speed through the pipeline. In each pipeline stage, it often happens that documents or collateral must be attached to emails or otherwise provided to the client. It's a substantial benefit if a sales rep doesn't have to go poking around outside CRM for a proposal or template, since they're right there one click away. Pipeliner offers this functionality—and in fact no other CRM system allows such simple and easy access for the attachment of documents in each stage.

War Room Concept

At the heart of pipeline management is the War Room Concept, which was learned from IBM based on their 40 years of experience with a similar approach (We will be going into more detail on this concept in the last chapter). Pipeliner's Power Panel, which allows precise filtering of rep or team performance statistics, is the core functionality of the War Room Concept. Through the filter a sales manager can see if a specific deal is moving (sales velocity), what kind of ranking the sales manager gave it, and how it's progressing. The sales manager can rapidly view this data before meeting with a particular rep about a deal.

From a sales management perspective, we have to look at the War Room Concept approach from two different angles: *deal management*, and *pipeline management*. The two are often confused, and such a confusion can be a source of inefficiency when it comes to sales management.

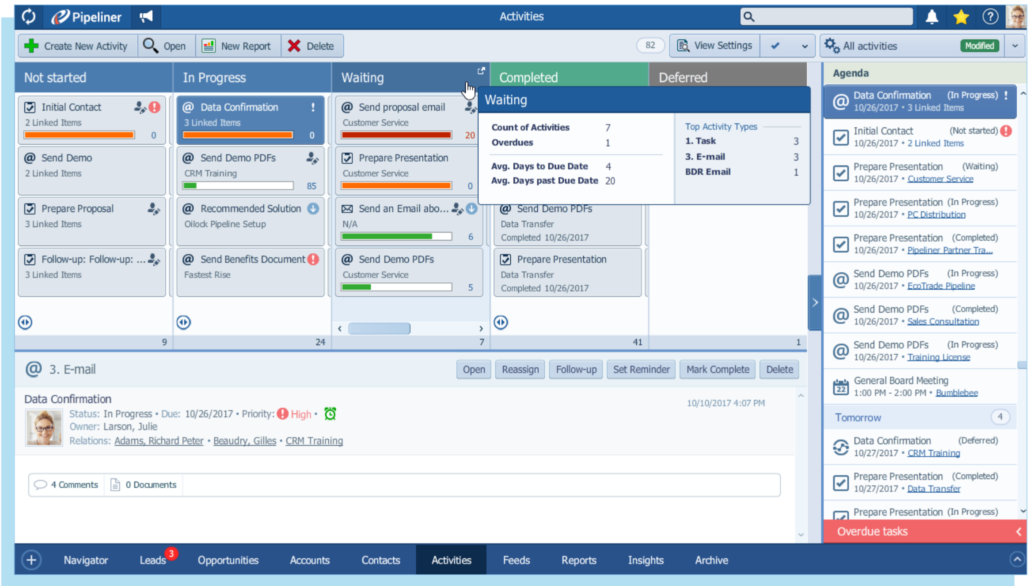
Deal Management

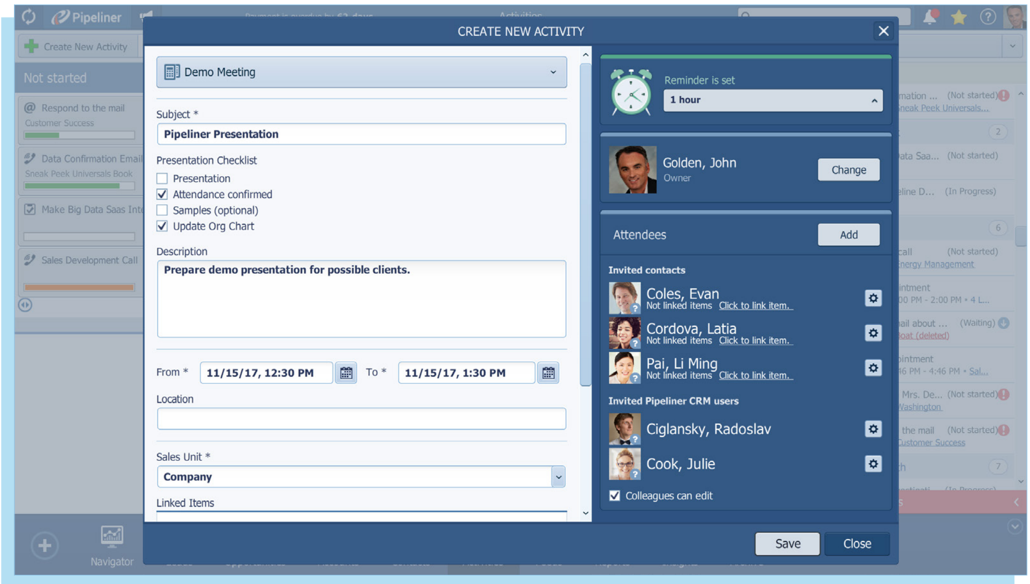
Deal management applies to how a specific deal is progressing, and what activities should be conducted to move that particular opportunity forward.

A common mistake made by salespeople is not fully isolating buyer or prospect issues relating to the product or service being sold. The rep will consider that because a presentation or call seemed to go well, that the prospect is happy with the deal. The deal is at serious risk, though, when the salesperson doesn't specifically know what problem their offering will solve for the client. If they haven't isolated the need, they most likely haven't checked the other three points *besides* need: budget, authority (does the decision maker have the authority to make the purchase?), and timeframe (will this purchase be made within a reasonable amount of time?). A "feelgood" deal may be somewhat satisfying to the rep, but the rep won't be able to move it to the next stage of the pipeline.

In terms of stages, deal management doesn't always move in the forward direction. Sometimes a deal will actually move backwards out of necessity. For example, as a sales rep you might be dealing with a parts buyer, who is almost to the point of closing, when that buyer is fired. A new buyer comes on and you are able to interest them—but you now must go back to stage 1, whereas your previous contact was already at stage 4.

Pipeliner CRM fully empowers deal management with features such as org chart, buying center, task and activity management, and more. A sales manager should have a very good overview of deals, and with these tools, they will. Additionally, the seller's activity should always be in response to buyer's action as an opportunity moves through a sales stage—another unique Pipeliner feature. This functionality allows for a very tight opportunity concept which allows for all necessary activities such as appointments, calls, emails and more.





Pipeline Management

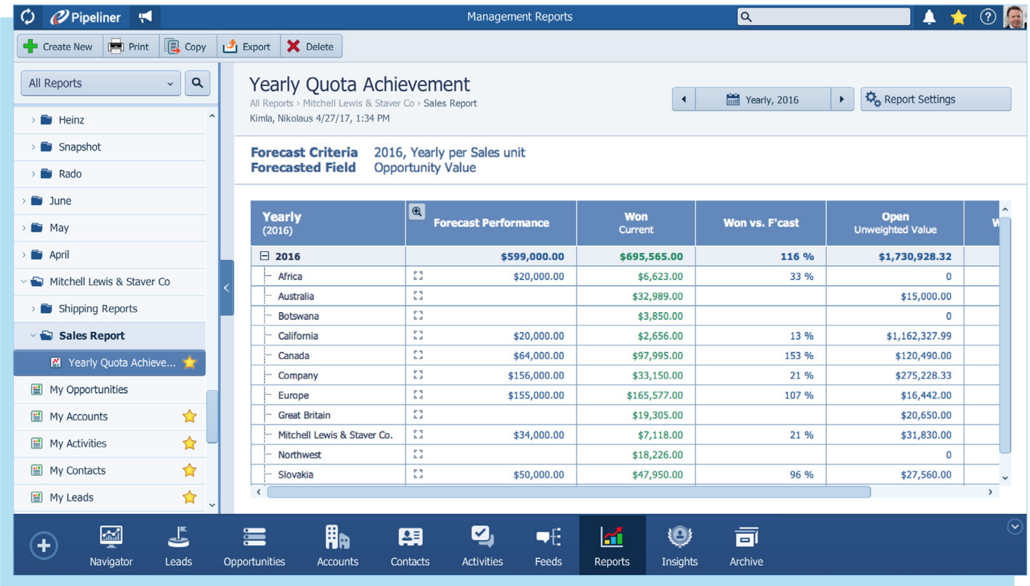
While deal management addresses single deals, pipeline management is all about examining all the deals in the pipeline and evaluating their value, and whether or not there are enough of them. Meetings should be valuable meetings, and opportunities should be real opportunities, not leads mistaken for opportunities. Proper activity management, in which certain tasks must be completed before an opportunity can be moved to the next stage, is vital to effective pipeline management. Pipeliner CRM offers this as another of its totally unique features.

With pipeline management, you're looking at the entire pipeline, as opposed to specific deals. How many deals are in a particular rep's pipeline? Given that rep's closing ratio, are there enough deals in that pipeline to make quota?

As an example, if the rep usually closes 3 out of 10 deals, and the quota is $50,000, there should be in the neighborhood of $180,000 worth of deals in the pipeline if the quota is going to be attained.

Remember that every salesperson is different; they have different closing ratios, different rates of deal movement, and different average deal sizes. You have to act accordingly in managing each rep. One rep may need 5 times as many deals in a pipeline to make a quota than another.

These are all the factors that go into sales management. If they are not all present, then it isn't sales management that's being done. Instant pipeline visualization, which is what Pipeliner makes extremely easy, is what is needed for a sales manager to share data with the sales rep being managed. If a sales manager is only going over complex reports by himself, how can the sales rep be changed for the better?



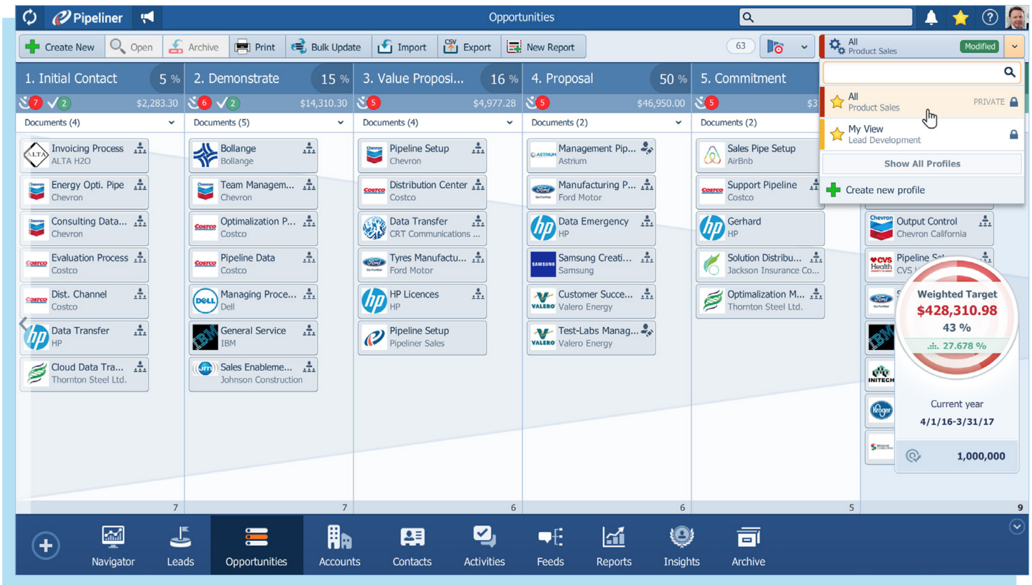
Because of its visual nature, Pipeliner is not only a sales tool but a psychological one. It influences a salesperson. They see their visual data and say, "Oh, my goodness!" From this visual approach it is much easier to come up with actions that will fill up a rep's pipeline with more opportunities. If this isn't done, they will never make it.

Both pipeline management and deal management can be conducted easily with Pipeliner. You can optimize them automatically—create reports and simply update them weekly. And wherever you go in Pipeliner, you can create an instant report based on the view at that moment.

Looking At the Same Data

For the sake of simplicity as well as transparency, the data seen by the sales rep in Pipeliner is the very same data seen by the sales manager. The only difference is that the sales manager can see data from all the other reps, whereas a sales rep can see only their own data. Transparency is the heart of great pipeline management.

All of this adds up to perfect, precise opportunity management!



"There are no secrets to success. It is the result of preparation, hard work, and learning from failure."

— Colin Powell

Chapter 3

Precise Account Management Through CRM

Account management is a considerable job—and one of the most important for a sales professional. Account management consists of several key functions, all of which actually add up to happy customers. Account management is most precisely conducted through CRM.

Existing accounts are the foundation and stability of a company. Moreover, it is far less complex and costly to keep an existing account satisfied and happy than it is generating new business.

For all of these reasons account management is a primary important function of an enterprise.

Account Classes

For any company there are very important accounts, there are many who fall "in the middle," and there are those who bring up the rear and are less important. They're all important to one degree or another because they provide income—but it's vital to get accounts properly classified.

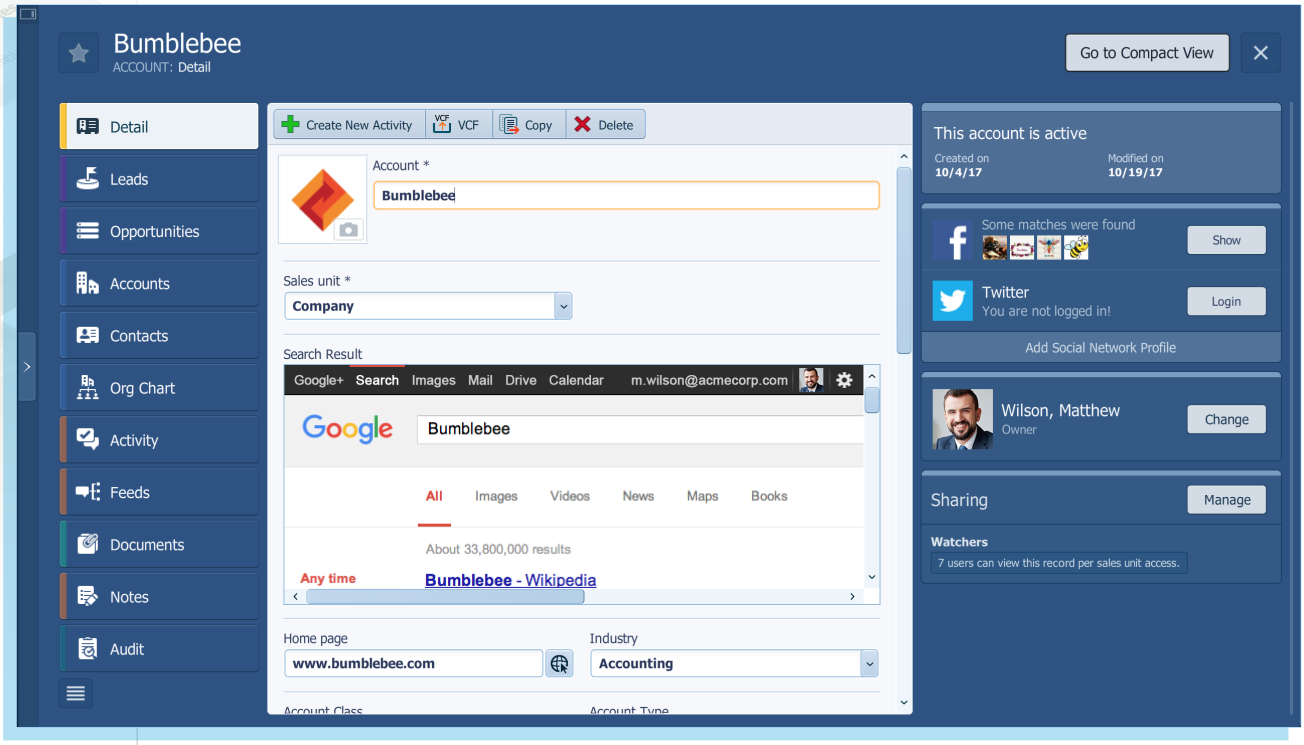
Any company will establish its own parameters for classifying accounts. Such parameters can include level of revenue, renewal, maintenance, potential and more. These classifications allow the company to accurately deal with and service accounts.

The reasons for such differentiation are obvious. An example is someone who walks into an airport, ready to fly out. A frequent flyer, a customer who spends lots of money for travel on a particular airline, can check in a bit late and not be turned away. Someone flying coach for the first time, however, will likely be turned away for being late—and all levels of service follow along the same lines.

Classifying Accounts Through CRM

Trying to classify all of your accounts, and keep track of their activities and issues, is virtually impossible without a powerful and efficient CRM solution like Pipeliner. You can differentiate accounts by class—however you set those classes up—and then, through Pipeliner's precision filters, you can filter each class and look at them separately when needed. You can create reports on classes, share them with team members in a report, and set goals for a week, month, quarter, half-year or year.

Pipeliner empowers you to create intelligent fields so that you will have insights into customers. For example, a field could become active if the account's number of seats start declining, so that the success manager could take action. Or, someone could be alerted when an account has a certain number of open support tickets, so that account could be properly serviced. Not paying attention and taking care of your accounts means that you're risking your most valuable asset: your account base.



Policy

Account classes dictate how you treat your customers, especially your important customers, and these classifications and their actions must be the subject of precise policy.

While technology will provide you all the necessary data you need to write policy, the technology cannot write the policy for you. You must do that. **Policy does not come from CRM—but it is certainly executed through CRM.**

That policy must really be nailed down. And it's not only a matter of how you treat your best customers (although that is obviously very important), but also how you treat your *worst* customers. It can happen that you look at an account and realize that you put plentiful time into servicing them, but get very little back. You finally have to ask yourself, "Why are we keeping that customer?" Disengaging from a non-cost-effective customer will also free your staff for other, more important activities. Remember: the only truly limiting factor we all share in common is time. Freeing it up, when possible, is very important.

Time obviously isn't scalable—but policies are. Get them down and in force now, for in the words of Mikhail Gorbachev, "Life punishes those who come too late." An important customer not well-treated will likely wander off to a competitor.

Account Cost

But important customers—like *any* customers—should always be monitored for account cost. Unless it is examined and brought out into the light, cost of account can stay hidden and impact you when you least expect it. For example you have a SaaS customer that brings you $100k per year in renewals, which is good; after 5 years you've brought in $500k. But in order to bring in that $100k per year, you've got to have 4 people working on the account, who actually cost you $120k per year. So it's obvious that policies should cover account cost, too.

Evaluating Prospects

Utilizing data from CRM, such as information on activities that normally take place with a certain type of account, you can evaluate a prospect and approximate where that prospect will fit in with your classes.

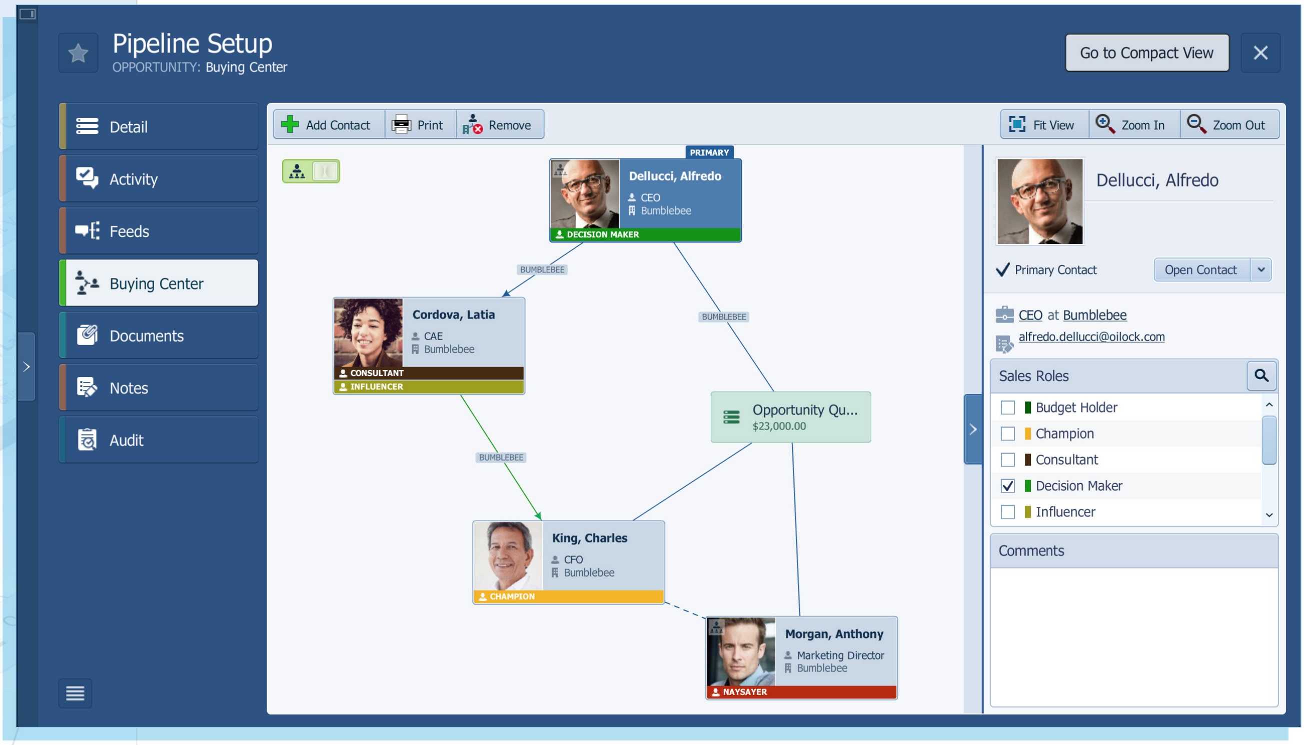
When qualifying a potential account, you should not only qualify by the traditional factors (budget, authority, need and timing) but also for *profit*. Remember, if you don't make money with every customer, you'll soon be out of business. Sure a costly account might be a springboard to other customers...but what if that doesn't work?

Org Chart and Buying Center

Pipeliner CRM has two interrelated features that are vital for account management: the *Org Chart* and the *Buying Center*.

The Org Chart visually shows you your account's hierarchy—where in your prospect company your buyer stands, and who they report to. You can also see the "chain of command" and where your deal might need to travel to be approved.

The Buying Center visually shows all the influence on the purchase, and where it comes from—even if it comes from outside the company, as in the case of a consultant.



It can also happen that 2 or more companies within your database are connected—for example, if one owns another. With Pipeliner, you can show all relationships between related companies.

Vital Views and Analyses

All of this means proper account management. It is done through analyzing activities, accurately classifying your accounts, creating and enforcing account management policies, properly evaluating prospects, and making full visual use of the Org Chart and Buying Center. Pipeliner CRM facilitates it all, ensuring the entire team is all going in the same direction.

"For every sale you miss because you're too enthusiastic, you will miss a hundred because you're not enthusiastic enough."

— Zig Ziglar

Chapter 4

The War Room—Crucial to Sales Success

As covered briefly in Chapter 2, The War Room is a vital concept in sales management.

A physical war room, in the military, is a space in which generals, officers and battle coordinators visually plan out battle tactics and strategies for specific operations. In business the term has come to mean a meeting space built for the specific purpose of providing a dedicated location for stakeholders and project teams to share a location and visually communicate tasks and activities associated with the execution of critical projects.

I first ran across the war room concept in an IBM demonstration many years ago, and a short time back wrote my own book on the subject entitled *Leading from the War Room: Building a Battle-Ready Sales Force*. I also recently read a very interesting book on the subject called *Sales Growth: Five Proven Strategies from the World's Sales Leaders*.

War Room Importance

Why is a war room important? Think about being in a war room, with a battle operation occurring. If the operation is complex, how can a general or officer make immediate and effective decisions? A war room must be very actively dynamic and very visual—otherwise one could make wrong decisions, which of course has been done many times (remember the total disaster that was the Vietnam War?).

Luckily General Dwight D. Eisenhower, in his war room for the invasion of Normandy at the end of World War II, made the right decisions. Can you imagine what it must have been like, just logistically, to organize the coordinated beach landing of 156,000 troops? Today technology makes it possible, and Eisenhower didn't have anything like that.

The Sales War Room

Moving over to sales, the idea is to control and manage all of your sales resources in one location, in a way that they are all visually available and all data is present.

The book I recently read, *Sales Growth*, provided an example of a modern sales war room, in which large printed forms were posted as a board on the wall. The board was labeled "Sales Team Performance Board," and had headings such as "must-win deals" under which someone (presumably the sales manager) could write them.

The problem with such a board, however, is that with it there cannot possibly be dynamic visualization, as all data has to be entered (or removed) by hand.

The War Room Meeting

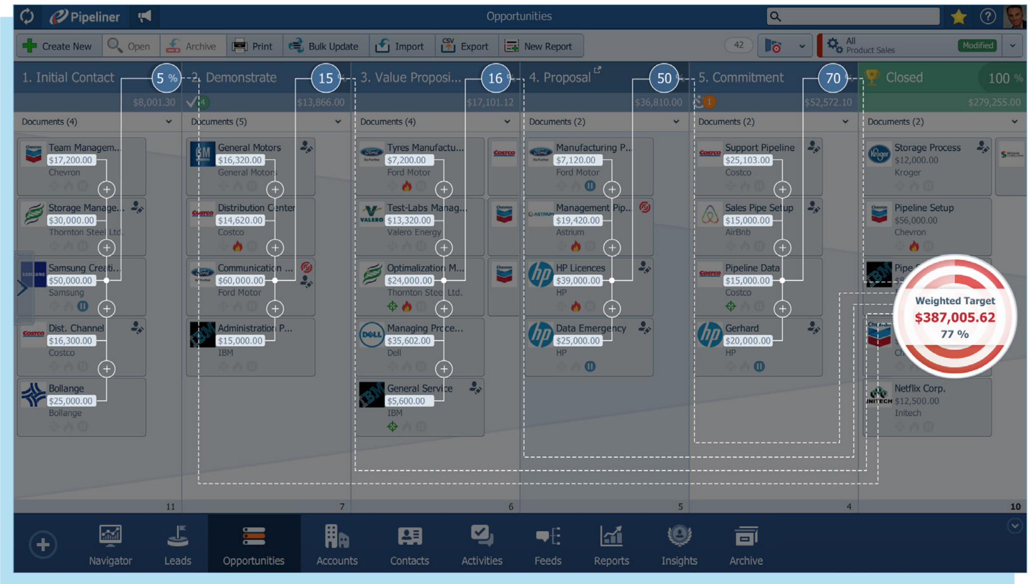
The only truly efficient way a war room concept can actually be operated in sales is with a product such as Pipeliner CRM. Let's take a look at how a war room meeting could be run utilizing Pipeliner's totally unique features.

A war room meeting should be conducted regularly (weekly is best), and should focus on what needs to be accomplished to make quota by the end of the month, quarter, half year or year, depending on the sales period the company uses. The war room meeting does not take the place of meetings a sales manager might have with individual sales reps about particular deals, and would not attempt to take up individual deals as such a meeting would be far too long.

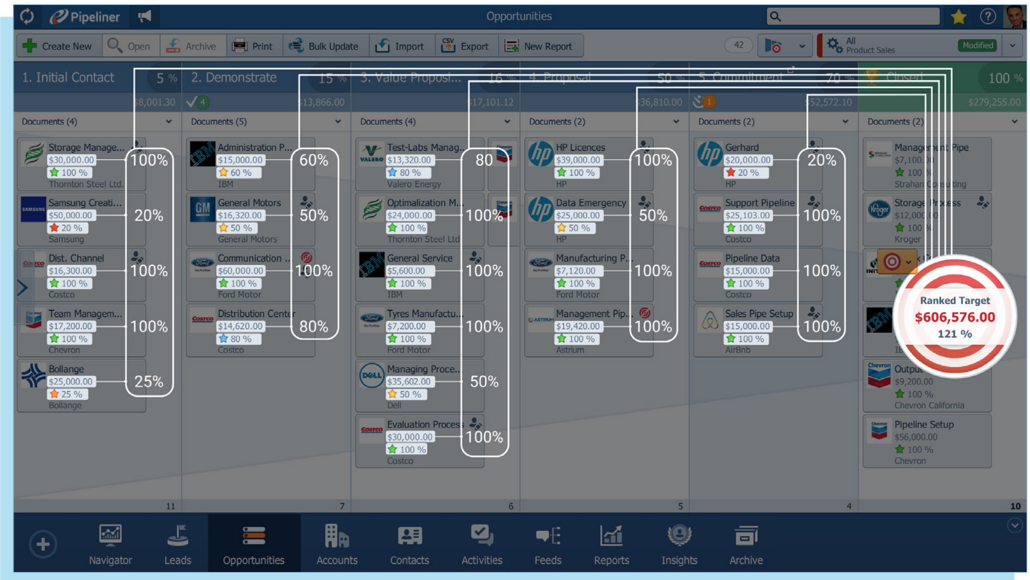
The war room meeting is centered around the overall target for that sales period. You'll see in my example that we are using an Unweighted Target. This is one of five target types available in Pipeliner CRM:

Unweighted Sales Target: The value of all opportunities in a pipeline without any closing probability percentages. This can be useful if you have some historical data that says, for example, that a rep closes 10% of all opportunities. You would look for the Unweighted Sales Target to be at least 10x the goal.

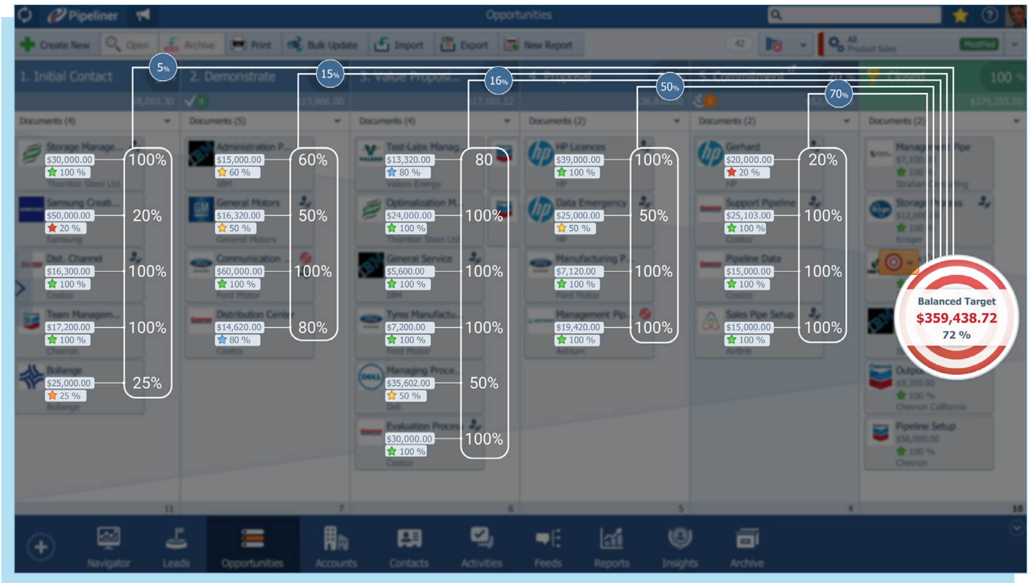
Weighted Sales Target: The Weighted Target is equal to the sum of the total opportunity values in each sales stage, multiplied by the probability of closure for that sales process stage.



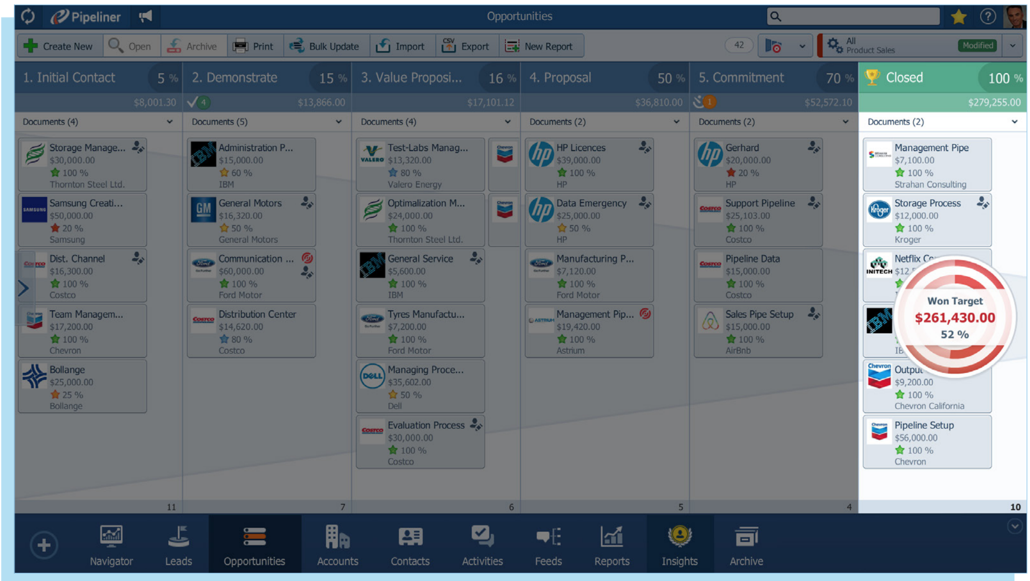
Ranked Target: Each rep has the ability to apply a personal ranking to each of their opportunities, from one to five stars. The Ranked Target shows their level of confidence in their opportunities.



Balanced Target: The Balanced Target can be looked at as a worse case scenario, because it balances the weighted pipeline and the ranked pipeline.

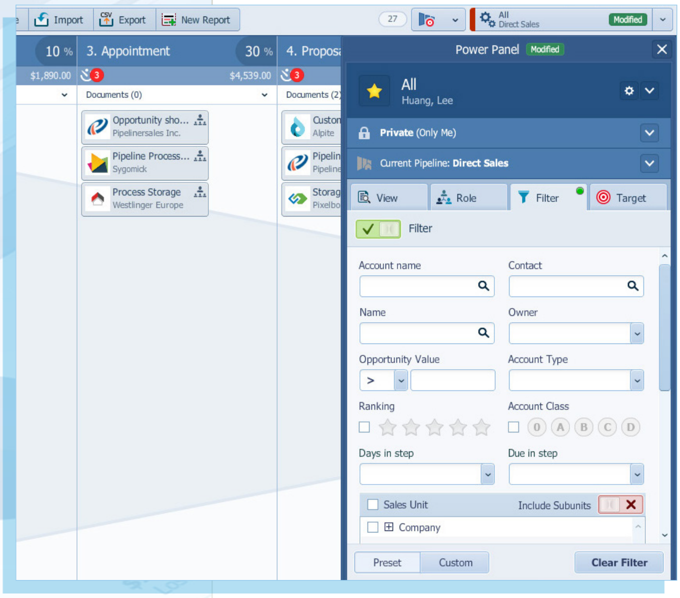


Won Target: The Won Target represents the actual closed or won opportunities.



Now, let us say that we've got a target for the month, but there are only 10 days left in the month.

When you've only got that much time left in the sales period, you might find that deals in the first sales stage—in our example the Proposal stage—couldn't possibly close in the time left in the sales period. You can see in our example that the overall target including Stage 1 deals comes to just over $200,000.



So using Pipeliner's Power Panel filter, we can exclude the deals in Stage 1 from the overall target. We can immediately see, visually, what the pipeline looks like without those deals.

You might also find that the deals in the second stage—in our case Negotiation—won't very likely close by the end of the sales period, either. So we can exclude those as well, and now we visually see what the pipeline looks like without Stage 1 and Stage 2. That just leaves us the deals in the last three stages.

Looking at the target after excluding deals from Stage 1 and Stage 2, we find that we have potential deals worth $192,000 in the pipeline. Unfortunately, those deals are only worth 72% of our quota. If we managed to close every single one of those deals—which of course would only happen in dreams—we still wouldn't have the quota. If we had 300% of the quota in potential deals, we could afford to lose some and still make it.

A sales manager in conducting a war room meeting can filter down even further—a specific deal can be excluded from the overall target, and the target can be seen without particular deals included. In this example we might exclude a particular deal because a proposal has been sent and the buyer hasn't even responded. That deal is not likely to close in the next 10 days.

Particularly useful in a war room meeting is the capability to filter deals by *ranking*. As noted above under target types, sales reps can apply a personal ranking to each of their deals, from 1 to 5 stars. Ranking shows the level of confidence a rep has in a deal. In the meeting, it might be seen that a rep has ranked a deal 80%, and the sales manager could question this: *Do you really think there's that much chance that deal will come in?*

Now we can filter by Fitness, and see how fit each of these deals are: green (fit, on target), red (immediate action required) or yellow (attention needed).

Or you can filter by rep, and only see the deals for a particular salesperson. Questions can be asked about individual deals.

So after some figuring, let us say that we now have a possibility of bringing in $100,000 worth of business in the last 10 days of the month. Again, we know we won't bring in all of that, but at least now we have a clearer picture.

At this time, if you felt the need, you could now run an instant report, with one click, on the filter view you're now looking at.

What is the outcome of such a meeting? Probably that you have to create more deals, or engage in some marketing activity, or perhaps pull together a team to bring in a particular deal.

The War Room is Security

In a war room you're visually demonstrating the strategy and tactics you're using to win the game. It can greatly enliven a team and cause them to stand up and say, "We can do this!" The war room serves to fully line up what it will take to make that quota.

War room visualization immediately shows you how secure you are. It helps companies and individuals to reduce risk and fully leverage opportunities. All of that accumulates into action.

Just as a note, no CRM can perform this kind of instant visualization except Pipeliner. While others are writing on paper forms on the wall, we're making an entire current pipeline visible within seconds.

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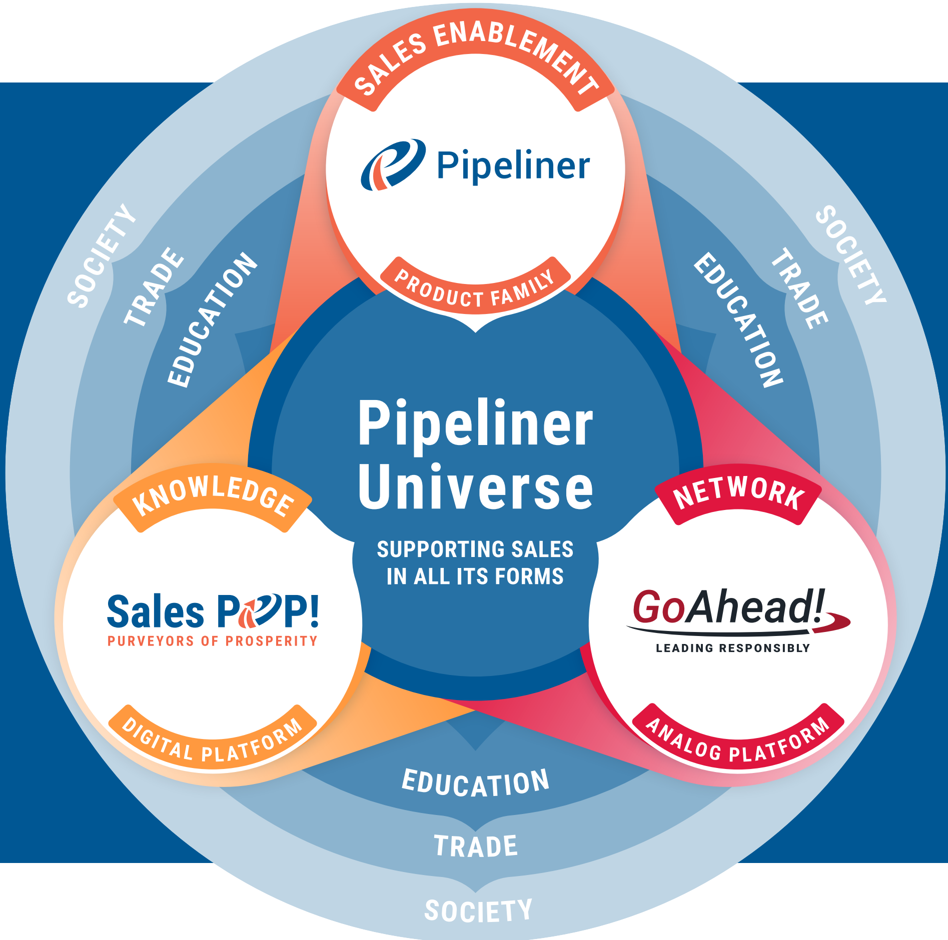

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Pipeliner CRM is a technology platform built to enable Salespeople & Sales Managers to effectively & efficiently manage their pipeline and drive increased revenue. The combination of its intuitive interface and sophisticated backend, Pipeline CRM delivers *Instant Intelligence, Visualized* to give sales organizations a competitive edge.

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