

SYSTEMATICALLY IMPROVING SALES FORECAST ACCURACY

Bob Apollo | Inflexion-Point | 12-May-2016



50+ PROJECTS



SALES FORECAST ACCURACY

NO BETTER THAN A COIN FLIP?

Average win rate of forecasted deals remains stubbornly stuck below 50%

CSO Insights



LAYERS OF UNPREDICTABILITY



Overall Forecast

Sales Teams/Regions

Individual Salespeople

Individual Opportunities

THE CLASSIC SYMPTOMS

**UNRELIABLE
CLOSE DATES**

**DEPENDING
ON MIRACLES**

**REPEATEDLY
MISSING THE
FORECAST**

**UNJUSTIFIED
CONFIDENCE**

**INACCURATE
STAGES**

DISCIPLINE
PROCESS
RIGOUR

DISCIPLINE
PROCESS
RIGOUR

***“If you can't describe what you
are doing as a process, you
don't know what you're doing.”***

W Edwards Deming

BUYING-ALIGNED SALES PROCESS

- INACTIVE
- 1 EXPLORING
- 2 JUSTIFYING
- 3 DEFINING
- 4 SELECTING
- 5 VALIDATING
- 6 APPROVING
- IMPLEMENTING

**Defined by the
key phases in
your customer's
typical buying
journey**

CLEAR STAGE DEFINITIONS

INACTIVE

Passively consuming relevant information

1 EXPLORING

Actively exploring the issue and implications

2 JUSTIFYING

Determining the economic impact on the business

3 DEFINING

Agreeing decision process and basis of decision

4 SELECTING

Seeking consensus across the decision team

5 VALIDATING

Seeking to eliminate any remaining decision risk

6 APPROVING

Establishing the best possible justification

IMPLEMENTING

Expecting the projected results to be achieved

WITH UNAMBIGUOUS MILESTONES

INACTIVE

AGREES TO TALK TO US ABOUT THE ISSUE

1 EXPLORING

ACKNOWLEDGES A NEED WE CAN ADDRESS

2 JUSTIFYING

COMPELLING CASE FOR CHANGE AGREED

3 DEFINING

OPPORTUNITY IS REAL, WINNABLE AND WORTH WINNING

4 SELECTING

CONFIRMED WE ARE THEIR PREFERRED OPTION

5 VALIDATING

PROJECT IS SUBMITTED FOR FINAL APPROVAL

6 APPROVING

WE RECEIVE A BOOKABLE ORDER

IMPLEMENTING

CLEAR GUIDANCE TO SALESPEOPLE

INACTIVE

1 EXPLORING

2 JUSTIFYING

3 DEFINING

4 SELECTING

5 VALIDATING

6 APPROVING

IMPLEMENTING

EXAMPLE:

DURING THE JUSTIFYING STAGE

Things you are expected to know:

- Have you uncovered (and have they agreed) a compelling case for change?
- Have they agreed that our solution is a good fit against their needs?
- What is the likelihood they will take action (and why)?

Things you are expected to do:

- ☑ Complete Solution Fit checklist
- ☑ Complete Cost of Inaction model
- ☑ Qualify and document intent

ONE-PAGE B2B COMPLEX SALES PROCESS FRAMEWORK

| INACTIVE | 1: EXPLORING | 2: JUSTIFYING | 3: DEFINING | 4: SELECTING | 5: VALIDATING | 6: CONFIRMING | IMPLEMENTING |
|---|--|--|---|---|---|--|---|
| HOW OUR PROSPECT'S PRIORITIES TYPICALLY EVOLVE FROM STAGE TO STAGE | | | | | | | |
| The prospect appears to be satisfied with their current situation and is not currently in the market for new solutions | Something has happened to disturb the status quo and draw the prospect's attention to a potentially important business issue | The prospect is trying to decide whether there is a sufficiently powerful reason to justify action in response to the issue | The prospect has decided to act and are in the process of defining their requirements, priorities and decision criteria | They are evaluating their shortlisted options against their defined criteria and selecting their preferred vendor | They are conducting due diligence, negotiating commercial and financial terms and finalising their internal business case | They are submitting the recommended solution and associated internal business case for final formal approval | They are implementing their chosen solution and expecting to achieve the predicted results and benefits |
| TYPICAL BEHAVIOUR | TYPICAL BEHAVIOUR | TYPICAL BEHAVIOUR | TYPICAL BEHAVIOUR | TYPICAL BEHAVIOUR | TYPICAL BEHAVIOUR | TYPICAL BEHAVIOUR | TYPICAL BEHAVIOUR |
| Passively consume relevant information | Actively explore the issue and implications | Determine the economic impact on the business | Agree decision process and basis of decision | Seek consensus across the decision team | Seek to eliminate any remaining decision risk | Establish the best possible justification | Expect the projected results to be achieved |
| CRITICAL QUESTION | CRITICAL QUESTION | CRITICAL QUESTION | CRITICAL QUESTION | CRITICAL QUESTION | CRITICAL QUESTION | CRITICAL QUESTION | CRITICAL QUESTION |
| What issues and trends do I need to be aware of? | Does this issue require serious investigation? | Is there a sufficiently compelling reason to act? | How are we going to choose the best solution? | Are we all agreed on our preferred solution? | Have we negotiated the best possible outcome? | Do we have formal approval to proceed? | Would I recommend the solution to others? |
| HOW WHAT WE NEED TO KNOW AND DO EVOLVES FROM STAGE TO STAGE | | | | | | | |
| We need to identify our most valuable prospects, educate them on critical issues and establish a reputation as experts | We need to learn more about the prospect's situation, shape their thinking and start the qualification process | We need to confirm technical and commercial fit and decide whether opportunity is real and winnable | We need to shape their requirements, influence their decision criteria, identify our competition and get on their shortlist | We need to develop a compelling proposal, become their preferred solution, and eliminate all other available options | We need to eliminate all remaining issues, agree mutually acceptable terms, and get ready for final formal approval | We need to fully support our sponsor(s) in their submission of the project to the final formal approval process | We need to ensure that the project delivers the expected benefits and that the customer will recommend us to others |
| NEED TO KNOW | NEED TO KNOW | NEED TO KNOW | NEED TO KNOW | NEED TO KNOW | NEED TO KNOW | NEED TO KNOW | NEED TO KNOW |
| <ul style="list-style-type: none"> How do we identify our ideal prospects? What critical issues should we focus on? How can we detect indications of interest? | <ul style="list-style-type: none"> How did they become aware of the issue? What impact is the issue having on them? Who else is likely to be affected by the issue? | <ul style="list-style-type: none"> Is there a compelling case for change? How good is our solution fit? What is the likelihood they will take action? | <ul style="list-style-type: none"> What other options are they considering? Who is on the decision making team? How will they decide which one to adopt? | <ul style="list-style-type: none"> What do we need to do to get selected? Have we established clear differentiation? How can we eliminate all other options? | <ul style="list-style-type: none"> What do we need to do to agree terms? How can we eliminate any reservations? How can we optimise business case? | <ul style="list-style-type: none"> What determines if the project is approved? How can we support the approval process? How can we maximise our chances of success? | <ul style="list-style-type: none"> Are expected benefits being achieved? Is customer prepared to recommend us? Are there any prospects they could refer us to? |
| NEED TO DO | NEED TO DO | NEED TO DO | NEED TO DO | NEED TO DO | NEED TO DO | NEED TO DO | NEED TO DO |
| <ul style="list-style-type: none"> Research the market Build target database Targeted marketing | <ul style="list-style-type: none"> Problem fit checklist Identify stakeholders Qualify interest | <ul style="list-style-type: none"> Solution fit checklist Complete COI model Qualify intent | <ul style="list-style-type: none"> Create buying vision Influence criteria Qualify process | <ul style="list-style-type: none"> Position for success Establish superiority Confirm selection | <ul style="list-style-type: none"> Finalise contract terms Eliminate reservations Finalise business case | <ul style="list-style-type: none"> Support sponsor Prepare for order Get approved | <ul style="list-style-type: none"> Support project rollout Deliver benefits Get recommended |
| CRITICAL MILESTONE | CRITICAL MILESTONE | CRITICAL MILESTONE | CRITICAL MILESTONE | CRITICAL MILESTONE | CRITICAL MILESTONE | CRITICAL MILESTONE | CRITICAL MILESTONE |
| The prospect agrees to talk to us about the issue | They acknowledge a need we can address | We conclude they are likely to take action | We conclude deal is real and winnable | We are informed that we are their preferred option | The project is submitted for final approval | We receive a bookable order | We receive a bookable order |
| INACTIVE | 1: EXPLORING | 2: JUSTIFYING | 3: DEFINING | 4: SELECTING | 5: VALIDATING | 6: CONFIRMING | IMPLEMENTING |

The entry stage is defined by where the customer is in their decision process. Before an opportunity can advance to the next stage, both the buyer's critical questions *and* the vendor's critical milestones must be satisfied.

Clear Forecasting Guidelines

FORECAST CATEGORIES

WON

All contractual paperwork has been received and the order has been booked

COMMIT

All risks have been eliminated and we are confident the order will be received by the due date

PROBABLE

We have a credible plan to close, everything is positive and on track, but work remains to be done

UPSIDE

We have a credible plan to close, but closure in the current period depends on everything going right

PIPELINE

There is no realistic chance that the opportunity will close in the current forecast period

CLEAR FORECAST GUIDELINES

WON

COMMIT

PROBABLE

UPSIDE

PIPELINE

FORMAL FORECAST GUIDELINES

COMMIT can only be used for deals where:

- **Close date relates to a compelling event**
- **Deal is already at “Approving” stage**
- **All risk factors have been eliminated**

PROBABLE can only be used for deals where:

- **Customer agrees close date is credible**
- **Already at “Approving” or “Validating” stage**
- **High level of positive momentum**
- **Limited, manageable risk factors**

UPSIDE can only be used for deals where:

- **Customer agrees close date is credible**
- **No dependency on “unnatural acts”**

CLOSE DATES



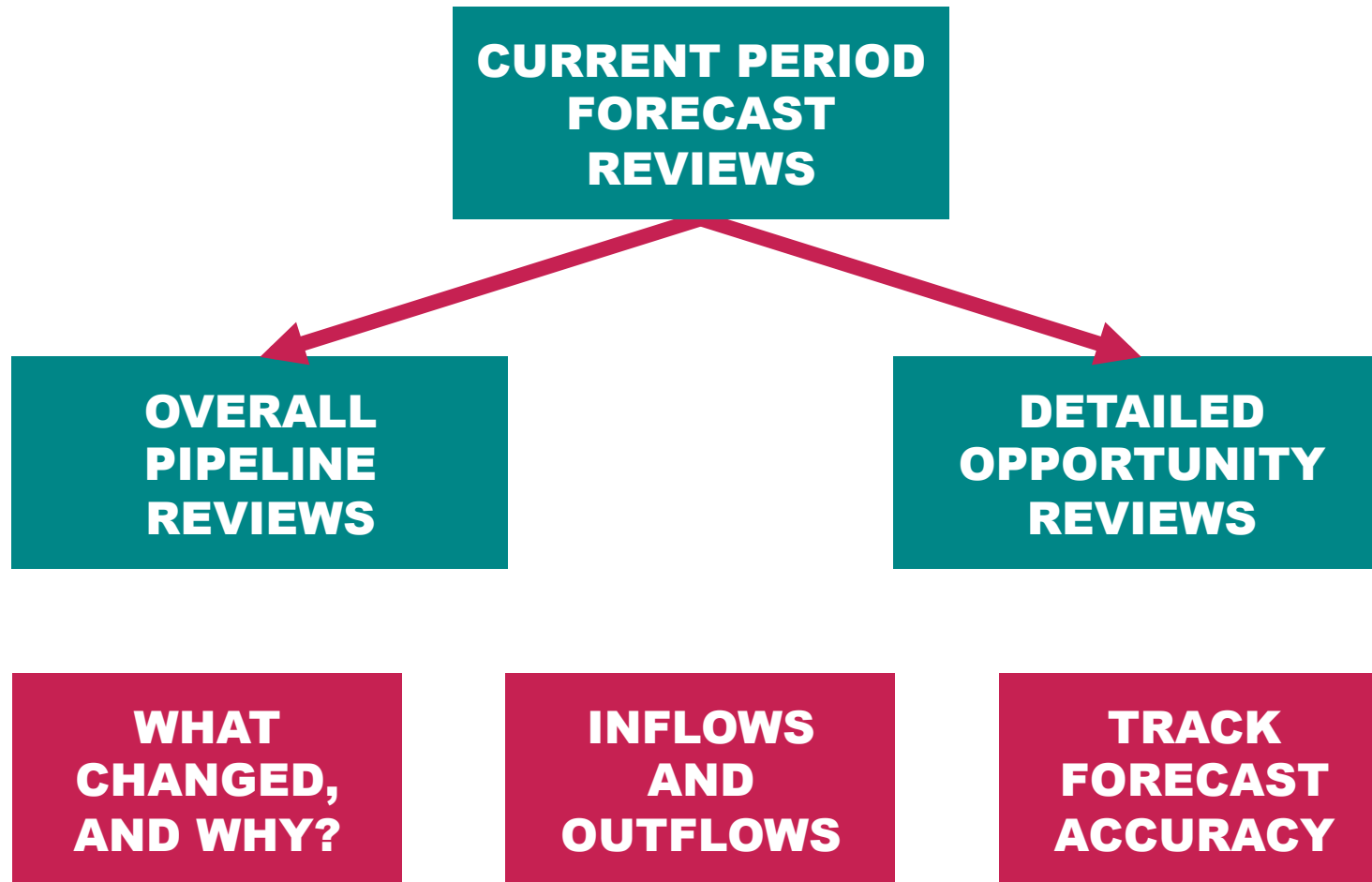
Major cause of forecast inaccuracy

Repeated slippage a **very negative indicator**

Require sales people to justify date

Require sales people to assess confidence in date separately from confidence in winning

MULTI-DIMENSIONAL FORECASTING



SUMMARY

Clearly Defined Sales Process

Stages, Milestones, Expectations

Common Language, Universally Adopted

Based on Customer Buying Process

Clear Forecast Guidelines

Forecast Categories

Close Date Discipline

Ask High Value Questions

Clear Measures and Metrics

Beyond the Basics

Ensuring Your Sales Process is Adopted

THE CRITICAL TRANSFORMATION

ADMINISTRATION



LIBERATION



A SIMPLE METAPHOR

NEGATIVE

NEUTRAL

POSITIVE

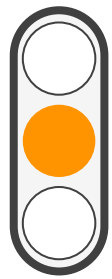


**KEY ACTION OVERDUE
NEGATIVE SITUATION
CRITICAL FACTS UNKNOWN**

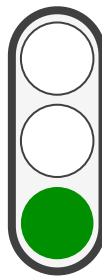
**KEY ACTION SCHEDULED
NEUTRAL SITUATION
PROCEED WITH CAUTION**

**KEY ACTION COMPLETED
POSITIVE SITUATION
PROCEED WITH CONFIDENCE**

OVERALL OPPORTUNITY QUALITY



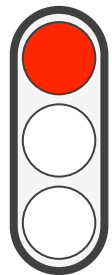
**COMPELLING
CASE FOR
CHANGE**



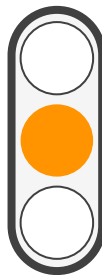
**STRONG
SOLUTION
FIT**



**IDEAL
CUSTOMER
PROFILE**



**ACCESS
TO
FUNDS**



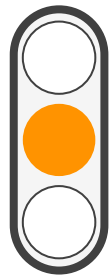
**CHAMPION
IS A
MOBILISER**



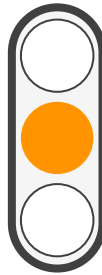
**CRITICAL
EVENT
IDENTIFIED**

CRITICAL FACTORS PER STAGE

EXAMPLE: PHASE 3 - DEFINING



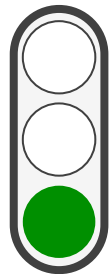
**INFLUENCED
THEIR
REQUIREMENTS**



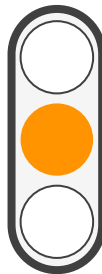
**DECISION
TEAM
IDENTIFIED**



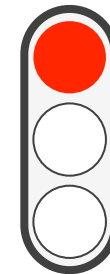
**DECISION
CRITERIA
KNOWN**



**DECISION
PROCESS
DEFINED**



**CHAMPION
IS A
MOBILISER**



**DECISION
TIMETABLE
CREDIBLE**

PROVEN POWER OF CHECKLISTS



INTEGRATED GUIDELINES IN CRM

The screenshot displays a Salesforce CRM interface. At the top, the Salesforce logo is on the left, a search bar in the center, and user information 'Paul Hansen' and 'Help & Training' on the right. Below this is a navigation bar with tabs for Home, Chatter, Files, Leads, Accounts, Contacts, Opportunities, Reports, Dashboards, Products, and Forecasts. The main content area is titled 'Overview' and 'ARPEIDIO'. It features a 'Create New...' button and a 'Recent Items' list on the left. The central focus is a sales process for 'Globex Platform for Data Storage' (Globex Corporation). The current stage is 'Position', with a suggested stage of 'Qualify'. A progress bar shows stages: Identify, Qualify (Suggested stage), Position (Current stage), Validate, and Negotiate. Below this is a 'PROCESS' section with a 'Cancel' button on the left and a 'Save' button on the right. The process is divided into three columns: '3.5 Prioritizing the decision criteria', '0.5 Influencing the decision timeline', and '0.0 Getting the deal across the goal'. Each column contains tasks with status indicators (Completed, In progress, Not started) and a 'Show guide' link. A text box in the '0.5' column contains the text: 'Prospect is pushing back on using a joint plan. Need to change how we are positioning this to get alignment'. The '0.0' column has a text box with the prompt: 'Reflect - write a short statement that...'. At the bottom, a teal banner displays the website 'associationofprofessionalsales.com'.

STAKEHOLDER EVALUATION



Search...

Paul Hansen ▾ Help & Training

Home Chatter Files Leads Accounts Contacts Opportunities Reports Dashboards Products Forecasts +

Create New... ▾

ARPEIDIO Matrix

Recent Items

- [Globex Platform for Data Storage](#)
- [John Peterson](#)
- [Globex Corporation](#)
- [Mike Hanson](#)
- [TB Test Opp](#)
- [Bill Waters](#)
- [John Wilson](#)
- [Jack Wood](#)
- [Retain Data Storage Contract](#)

Recycle Bin

2.2 Group by Stakeholder type ▾ **Stakeholders attributes** >

| Customer stakeholders | Stakeholder type | Access | Cadence | Power structure | Support level |
|--|-------------------|------------------|----------------------|------------------|-------------------|
| Approver | | | | | |
| Edward Stamos (President and CEO) > | Approver | Hard to get | No or little cadence | Power player | Neutral |
| Business Buyer | | | | | |
| Jack Wood (VP Plant Operations) > | Business Buyer | Some access | Some cadence | Strong influence | Advocates for |
| Technical Buyer | | | | | |
| John Wilson (CIO) > | Technical Buyer | Hard to get | No or little cadence | Strong influence | Against |
| Bill Waters (IT Architecture Mgr.) > | Technical Buyer | Always available | Good cadence | No influence | In favor |
| User Influencer | | | | | |
| Mike Hanson (Team Manager) > | User Influencer | Always available | Good cadence | Some influence | In favor |
| John Peterson > | User Influencer | Some access | Some cadence | Strong influence | In favor |
| Coach | | | | | |
| Leanne Tomlin (VP Customer Support) > | Coach | Always available | Good cadence | Some influence | Advocates for |
| Procurement/Legal | | | | | |
| Howard Jones (Buyer) > | Procurement/Legal | Hard to get | No or little cadence | Power player | Advocates against |
| Jill Sanders (Procurement Mgr.) > | Procurement/Legal | Hard to get | No or little cadence | Strong influence | Unknown |
| <input type="button" value="+"/> New stakeholder | | | | | |

THE BIG PICTURE AT A GLANCE



Search...

Mads Mogenshoj Setup Help **ARPELIO Sales**

Home ARPELIO Templates ARPELIO **Consolidated report** Consolidated report dev +

Create New...

Recent Items

- Infrastructure Platform
- 00000100
- Carolyn Crenshaw
- Ace Iron and Steel Inc.
- David Monaco
- Sandra Eberhard
- Pyramid Construction Inc.
- Missouri sites
- Ace Iron Mobile Generators
- Assessment-0000391

Recycle Bin

| Name | Account | Owner | Current stage | Amount | O | R | S | P | S | V | Close date | Last modified |
|---|-------------------------------------|-------|----------------------|--------------|-----|-----|-----|-----|-----|-----|------------|--------------------|
| Storage Capacity Upgrade | American Banking Corp. | mmj | Needs Analysis | \$156,000.00 | | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 30/11/2015 | 19/08/2015 3:04 PM |
| Mobile Generators | Pyramid Construction Inc. | mmj | Qualification | \$450,000.00 | | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 30/09/2015 | 19/08/2015 2:58 PM |
| Burlington Textiles Weaving Plant Generator | Burlington Textiles Corp of America | mmj | Qualification | \$235,000.00 | 1.7 | 3.2 | 0.7 | 2.8 | 0.7 | 1.0 | 18/11/2015 | 19/08/2015 2:36 PM |
| Data Storage Infrastructure | Zenith Industrial Partners | mmj | Negotiation/Review | \$935,000.00 | 1.9 | 1.3 | 1.3 | 1.0 | 5.0 | 1.3 | 30/09/2015 | 19/08/2015 3:12 PM |
| United Oil Office Portable Generators | United Oil & Gas Corp. | mmj | Negotiation/Review | \$125,000.00 | 2.1 | 1.3 | 3.2 | 3.8 | 0.7 | 0.7 | 18/01/2016 | 19/08/2015 2:44 PM |
| Industrial Lightning | Jackson Controls | mmj | Prospecting | \$215,000.00 | 2.1 | 0.7 | 3.2 | 1.9 | 4.1 | 0.7 | 30/09/2015 | 19/08/2015 2:29 PM |
| Mobile Generators | Farmers Coop. of Florida | mmj | Prospecting | \$95,000.00 | 2.2 | 1.3 | 3.2 | 2.5 | 3.2 | 0.7 | 30/09/2015 | 19/08/2015 2:36 PM |
| Pyramid Emergency Generators | Pyramid Construction Inc. | mmj | Prospecting | \$100,000.00 | 2.2 | 3.2 | 3.2 | 0.7 | 0.7 | 3.2 | 25/09/2015 | 19/08/2015 2:39 PM |
| United Oil Refinery Generators | United Oil & Gas Corp. | mmj | Proposal/Price Quote | \$915,000.00 | 2.3 | 0.7 | 1.3 | 1.3 | 5.0 | 3.2 | 18/11/2015 | 19/08/2015 2:35 PM |
| Burlington Textiles Mobile Generators | Burlington Textiles Corp of America | mmj | Prospecting | \$59,000.00 | 2.5 | 5.0 | 0.7 | 5.0 | 0.7 | 1.3 | 30/09/2015 | 19/08/2015 2:33 PM |
| Arizona sites | Zenith Industrial Partners | mmj | Prospecting | \$265,000.00 | 2.7 | 3.2 | 5.0 | 1.3 | 2.5 | 1.3 | 30/09/2015 | 19/08/2015 2:30 PM |
| Mobile Generators | Western Telecommunications Corp. | mmj | Prospecting | \$500,000.00 | 2.7 | 5.0 | 2.5 | 2.2 | 0.7 | 3.2 | 30/09/2015 | 19/08/2015 2:50 PM |
| Development | Aethna Home Products | mmj | Prospecting | \$90,000.00 | 2.7 | 5.0 | 0.7 | 3.2 | 1.3 | 3.2 | 30/09/2015 | 19/08/2015 2:33 PM |
| United Oil Installations | United Oil & Gas Corp. | mmj | Negotiation/Review | \$270,000.00 | 2.8 | 0.7 | 3.2 | 1.0 | 5.0 | 5.0 | 18/02/2016 | 19/08/2015 2:42 PM |
| Dickenson Mobile Generators | Dickenson plc | mmj | Qualification | \$150,000.00 | 2.9 | 0.7 | 5.0 | 4.1 | 0.7 | 3.2 | 18/11/2015 | 19/08/2015 2:41 PM |
| Mobile Generators | Cadinal Inc. | mmj | Prospecting | \$350,000.00 | 3.0 | 3.2 | 5.0 | 3.2 | 1.3 | 2.5 | 30/09/2015 | 19/08/2015 2:37 PM |
| University of AZ SLA | University of Arizona | mmj | Negotiation/Review | \$90,000.00 | 3.5 | 1.3 | 5.0 | 5.0 | 2.5 | 3.2 | 19/10/2015 | 19/08/2015 2:45 PM |
| Missouri sites | American Banking Corp. | mmj | Prospecting | \$110,000.00 | 3.6 | 1.3 | 5.0 | 4.1 | 5.0 | 2.5 | 30/09/2015 | 19/08/2015 2:42 PM |
| Ace Iron Mobile Generators | Ace Iron and Steel Inc. | mmj | Qualification | \$65,000.00 | 3.7 | 5.0 | 3.2 | 3.2 | 4.1 | 3.2 | 30/09/2015 | 19/08/2015 2:35 PM |
| Weaving Plant Generators | Dickenson plc | mmj | Prospecting | \$235,000.00 | 4.3 | 5.0 | 5.0 | 3.2 | 5.0 | 3.2 | 30/09/2015 | 19/08/2015 2:38 PM |
| Mobile Generators | Dickenson plc | mmj | Qualification | \$165,000.00 | 4.3 | 5.0 | 3.2 | 5.0 | 5.0 | 3.2 | 30/09/2015 | 19/08/2015 3:08 PM |
| Infrastructure Platform | Aethna Home Products | mmj | Qualification | \$65,000.00 | 4.5 | 5.0 | 5.0 | 5.0 | 5.0 | 2.5 | 30/09/2015 | 19/08/2015 3:11 PM |
| Ace Iron Mobile Generators | Jackson Controls | mmj | Qualification | \$165,000.00 | 4.7 | 3.2 | 5.0 | 5.0 | 5.0 | 5.0 | 30/09/2015 | 19/08/2015 3:10 PM |

The Compelling Case for Sales Analytics

***“What just happened to my
sales pipeline - and why?”***

Every Sales Leader

TACKLING SPREADSHEET ADDICTION

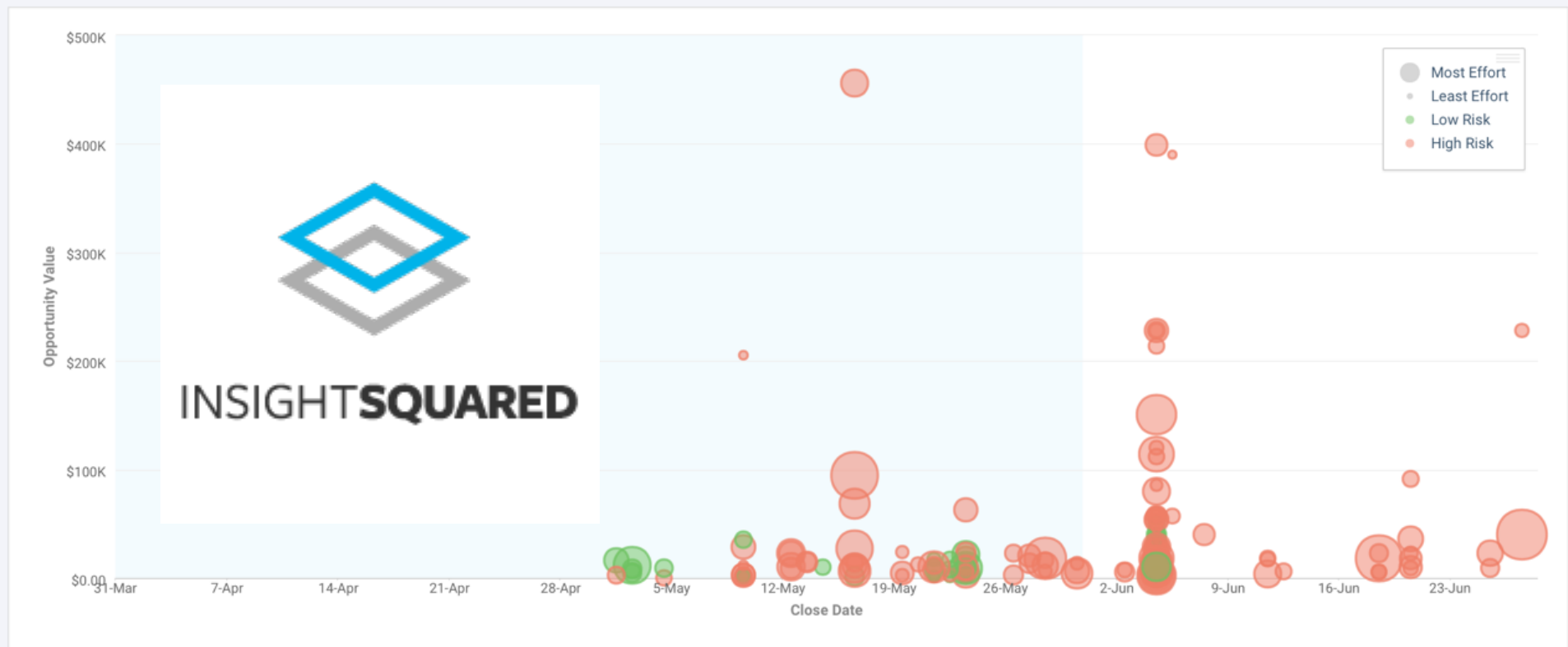
| Company | Project | Sales Rep | Distributor | Confidence | Sales Type | Product | Sale Price | Q1 Units | Q2 Units | Q3 Units | Q4 Units | Year Total | Forecast Amount |
|---------|----------------|-----------|-------------|--------------|--------------|---------|------------|----------|----------|----------|----------|------------|-----------------|
| 7 | Advanced Micro | Tom | Dist2 | High | New Business | AL-2200 | \$32 | 120 | 130 | 60 | 200 | 510 | \$16,320 |
| 8 | McKesson | Sue | Tom | Medium | New Business | AL-2500 | \$48 | 12 | 22 | 22 | 22 | 56 | \$2,688 |
| 9 | Diageo | Tom | Medium | Renewal | AL-2300 | \$35 | 22 | 22 | 22 | 22 | 44 | \$1,540 | |
| 10 | ConAgra | Tony | Tom | Medium | New Business | DL-1200 | \$102 | 12 | 12 | 12 | 24 | \$2,448 | |
| 11 | Harris Corp | Tom | Dist2 | High | New Business | DL-1400 | \$122 | 85 | 70 | 70 | 225 | \$18,910 | |
| 12 | Wellpoint | Tom | Tom | Low | New Business | AL-2500 | \$48 | 65 | 60 | 60 | 185 | \$8,880 | |
| 13 | Cooper | Tom | Dist1 | High | New Business | AL-2500 | \$48 | 60 | 60 | 60 | 180 | \$8,640 | |
| 14 | Dupont | Sue | Tom | Low | New Business | AL-2800 | \$72 | 88 | 88 | 88 | 264 | \$19,008 | |
| 15 | Pfizer | Sue | Dist2 | Low | New Business | AL-2700 | \$55 | 14 | 14 | 14 | 42 | \$2,310 | |
| 16 | Cisco | Sue | Tom | Medium | Renewal | DL-1400 | \$122 | 10 | 10 | 10 | 30 | \$3,660 | |
| 17 | Brocade | Sue | Dist3 | Medium | New Business | AL-2500 | \$48 | 20 | 20 | 20 | 60 | \$2,880 | |
| 18 | ESPN | Tom | High | New Business | AL-2500 | \$48 | 50 | 50 | 50 | 150 | \$7,200 | | |
| 19 | Cisco | Sue | Tom | Medium | Renewal | DL-1400 | \$122 | 50 | 50 | 50 | 150 | \$18,300 | |
| 20 | Del Monte | Sue | Low | New Business | AL-2300 | \$35 | 300 | 300 | 300 | 900 | \$31,500 | | |
| 21 | Lala | Tom | Dist1 | Low | New Business | AL-2300 | \$35 | 300 | 300 | 300 | 900 | \$31,500 | |
| 22 | Hach | Frank | High | New Business | DL-1400 | \$122 | 16 | 16 | 16 | 48 | \$5,808 | | |
| 23 | Coke | Tom | Low | New Business | DL-1400 | \$122 | 270 | 270 | 270 | 810 | \$99,270 | | |
| 24 | Family Dollar | Tom | Dist3 | Low | New Business | AL-2700 | \$55 | 260 | 260 | 260 | 780 | \$42,900 | |
| 25 | Sony | Frank | Medium | Renewal | AL-2500 | \$48 | 145 | 145 | 145 | 435 | \$20,820 | | |
| 26 | Rockwell | Tom | Dist2 | Low | New Business | AL-2300 | \$35 | 190 | 190 | 190 | 570 | \$20,025 | |
| 27 | BMW | Frank | Tom | Medium | Renewal | AL-2200 | \$32 | 300 | 300 | 300 | 900 | \$28,800 | |
| 28 | Kellogg | Tom | High | New Business | AL-2500 | \$48 | 500 | 500 | 500 | 1,500 | \$72,000 | | |
| 29 | Kraft | Tom | Dist1 | High | New Business | AL-2500 | \$48 | 500 | 500 | 500 | 1,500 | \$72,000 | |
| 30 | Coors | Sue | Low | New Business | DL-1500 | \$145 | 80 | 80 | 80 | 240 | \$34,800 | | |
| 31 | Starbucks | Sue | Medium | Renewal | DL-1200 | \$102 | 90 | 90 | 90 | 270 | \$27,540 | | |
| 32 | Altera | Sue | Low | New Business | AL-2800 | \$72 | 200 | 200 | 200 | 600 | \$43,200 | | |
| 33 | Michelin | Tom | Dist1 | High | New Business | AL-2800 | \$72 | 200 | 200 | 200 | 600 | \$43,200 | |
| 34 | Dupont | Tom | Medium | Renewal | AL-2200 | \$32 | 300 | 300 | 300 | 900 | \$28,800 | | |
| 35 | Mosaic | Tom | Low | New Business | AL-2500 | \$48 | 190 | 190 | 190 | 570 | \$27,360 | | |
| 36 | IBM | Tom | Medium | New Business | AL-2200 | \$32 | 300 | 300 | 300 | 900 | \$28,800 | | |

POWER OF VISUAL ANALYTICS

What is the current state of our pipeline?

\$6,725,375 of value with close dates this quarter (Q2)

Close Dates [This Quarter](#) with [no filters applied](#)



MANAGEMENT BY EXCEPTION

WHERE ARE THE SPECIFIC RISK FACTORS?

DAYS IN STAGE

LOW MOMENTUM

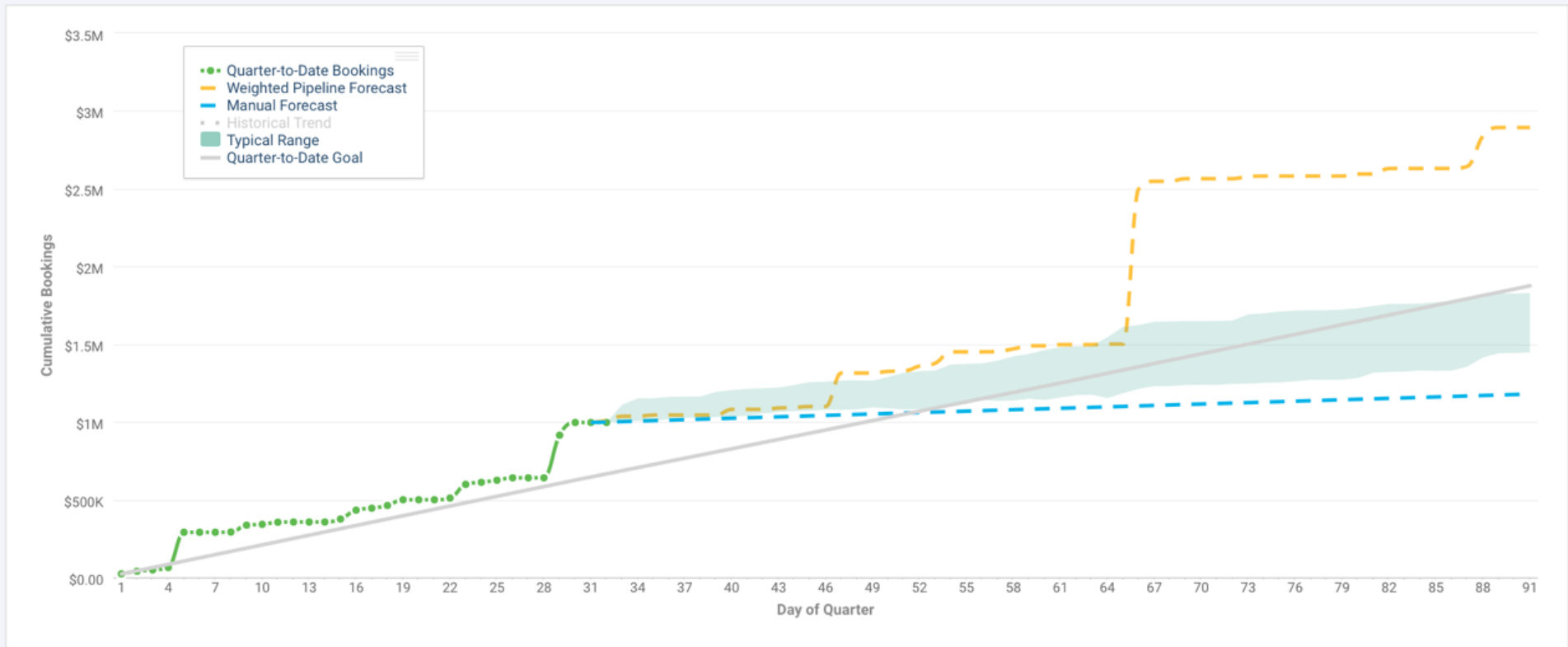
UNUSUALLY HIGH DEAL VALUE

| Risk | Close Date | Opportunity | Owner | Value | Stage | Days in Stage | Momentum | Last Activity |
|------|-------------|---------------------------------------|------------------|-----------|----------------|---------------|----------|--------------------------|
| ✓ | | | Connell | | | 21 | 1 | Opp Sourced, 36 days ago |
| ✓ | | | emens | \$16,200 | 3. Buying Proc | 7 | 4 | Call, 2 days ago |
| ✓ | 03 May 2016 | AFC Enterprises - New Business | Bruce Dern | \$11,628 | 3. Buying Proc | 2 | 12 | Call, 2 days ago |
| ✓ | 03 May 2016 | Moog Inc. - New Business | Frederic Forrest | \$6,700 | 3. Buying Proc | 10 | 3 | Call, 6 days ago |
| ✓ | 03 May 2016 | Ocwen Financial - New Business | Frederic Forrest | \$4,560 | 3. Buying Proc | 6 | 4 | |
| ✓ | 03 May 2016 | Principal Financial - New Business | Richard Clift | \$8,400 | 3. Buying Proc | 2 | 14 | |
| ✓ | 05 May 2016 | T. Rowe - New Business | Isabelle Adjani | \$8,980 | 3. Buying Proc | 2 | 11 | Call, 2 days ago |
| ✓ | 05 May 2016 | Alliance California - New Business | Catherine Burns | \$0 | 2. Eval | 18 | 2 | Connect, 14 days ago |
| ✓ | 10 May 2016 | Ultrapar Participacoes - New Business | Joe Smith | \$11,400 | 2. Eval | 38 | 1 | Opp Sourced, 37 days ago |
| ✓ | 10 May 2016 | Blyth - New Business | | \$35,200 | 2. Eval | 10 | 2 | Opp Sourced, 27 days ago |
| ✓ | 10 May 2016 | Westell Technologies - New Business | | \$205,200 | 1. Qual | 37 | 0 | Opp Sourced, 36 days ago |
| ✓ | 10 May 2016 | Invesco Plc - New Business | | \$2,400 | 1. Qual | 14 | 12 | Connect, 6 days ago |
| ✓ | 10 May 2016 | First Trust/Aberdeen - Upsell | Joe Smith | \$28,500 | 2. Eval | 101 | 5 | Call, 13 days ago |
| ✓ | 10 May 2016 | Novatel Wireless - New Business | Catherine Burns | \$1,200 | 2. Eval | 6 | 8 | Opp Sourced, 9 days ago |
| ✓ | 10 May 2016 | WPP plc - New Business | Catherine Burns | \$2,400 | 2. Eval | 21 | 2 | Call, 14 days ago |
| ✓ | 10 May 2016 | Sumitomo Mitsui - New Business | Catherine Burns | \$1,200 | 2. Eval | 23 | 5 | Connect, 3 days ago |
| ✓ | 10 May 2016 | Endeavour Silver - New Business | Isabelle Adjani | \$2,700 | 2. Eval | 22 | 5 | Call, 9 days ago |

PROJECTION BASED ON HISTORY

\$2,893,545 predicted for this quarter (Q2) based on weighted pipeline, including \$995,826 booked as of today

[This Quarter](#) with [no filters applied](#)

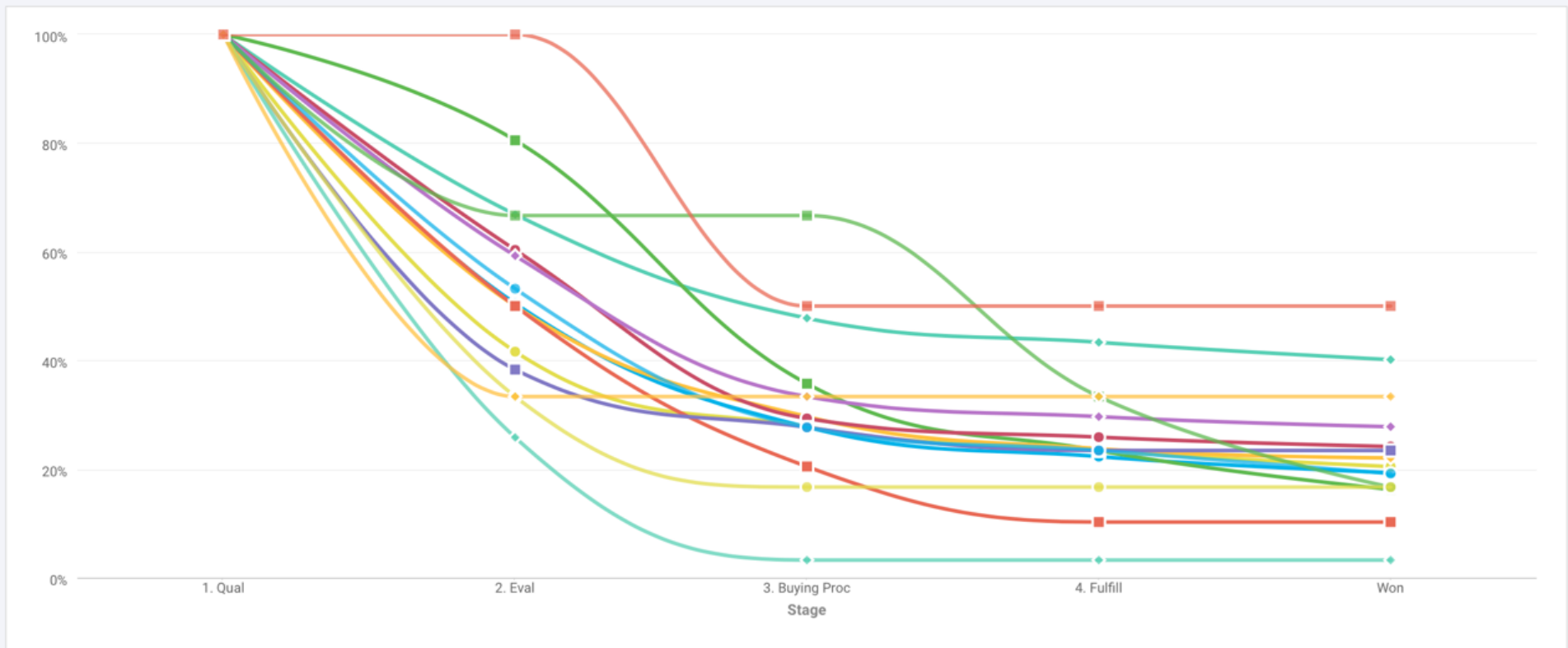


COMPARE SALES PEOPLE

How can our employees improve their sales process?

22% win rate for opportunities closed in the previous 12 months.

[Trailing 12 Months](#) filtered by [OPPORTUNITY TYPE](#) includes New Business



**SYSTEMATICALLY
IMPROVING
SALES FORECAST
ACCURACY**

SUMMARY

- ✓ **Implement Buyer-Aligned Sales Process**
- ✓ **Establish Expectations of Forecasting**
- ✓ **Embed Sales Process into CRM**
- ✓ **Ditch Spreadsheets for Analytics**

| | | |
|-----------------------|----------|-------------------|
| FACT | + | JUDGEMENT |
| ADMINISTRATION | ➔ | LIBERATION |
| COMPLIANCE | ➔ | GUIDANCE |
| UNCERTAINTY | ➔ | CONFIDENCE |

SALES PROCESS GUIDE



<http://www.inflexion-point.com/sales-process-design-form>

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