

## Forecast Management

## Pipeline Management

## Opportunity Reviews

# 3 FUNDAMENTAL SALES MANAGER MEETINGS

**Owner:** Sales Managers

### Forecast Management

**Date:** Monthly

#### Process:

- ☐ Pull list of active opportunities
- ☐ Assess performance vs. budget and previous
- ☐ Commit opportunities for period
- ☐ Make a judgment of total committed amount per opportunity
- ☐ Determine run rate according to territory performance
- ☐ Anticipate obstacles (lack of pipeline coverage or poor execution)

#### Inputs:

- ☐ Deal based forecast: Uses sales stage, timing and opportunity risk to determine the Commitment level.

#### Outcomes:

- ☐ Committed Forecast

#### PARTICIPANTS

Sales Managers,  
Finance, Sales  
Leaders

#### LEADING INDICATORS

Forecast Accuracy,  
Forecast Coverage, Close  
Rate

#### TOOLS

Finance tools (Sales  
performance and  
Budget), CRM

**Owner:** Sales Manager

### Pipeline Management

**Date:** Weekly

#### Process:

- ☐ Follow up agreed and pending action items
- ☐ Review Past Due opportunities
- ☐ Review current pipeline health
- ☐ Assess pull-forward opportunities
- ☐ Discuss Win/Lost opportunities
- ☐ Coach Seller for development
- ☐ Repeat above items for future periods.
- ☐ Review agreed action items

#### Inputs:

- ☐ Active Opportunities
- ☐ Pipeline Insights

#### Outcomes:

- ☐ Action Items to update pipeline status
- ☐ Pipeline Action Plan

#### PARTICIPANTS

Sales Managers  
and Sales Reps

#### LEADING INDICATORS

Pipeline Health: Velocity,  
Deal Size, Win Rate,  
Coverage, Quota Gap

#### TOOLS

Insights from  
descriptive and  
predictive analytics

**Owner:** Sales Rep

### Opportunity Reviews

**Date:** Ad-hoc as needed

#### Process:

- ☐ Present status and strategy of the opportunity and map it to the Close plan
- ☐ Introduce roadblocks to get to the close stage
- ☐ Brainstorm ideas to overcome obstacles
- ☐ Design solution
- ☐ Define/Update close plan
- ☐ Agree resources and change of expectations (amount, timing)
- ☐ Assign tasks

#### Inputs:

- ☐ Opportunity Plan, Account Plans, Close Plan

#### Outcomes:

- ☐ Updated plans

#### PARTICIPANTS

Sales Rep,  
Account Team,  
Marketing &  
Sales Managers

#### LEADING INDICATORS

Sales stage verified  
/desired outcomes  
Close plan: action  
completion

#### TOOLS

Insights from  
descriptive and  
predictive analytics