



Office Hours



Welcome to Office Hours

- A relaxed, informal, free mentoring program
- Held every Monday at Noon Pacific Time
- The recording will be available online, along with many previous week's recordings
- All recordings will be archived in our member's area



The Reasons

- Being a successful small business owner is a great experience!
- But it's tough - you need training
- I want you to get to know me
- I care – I want you to succeed!



Agenda

- In depth discussion of a business success principle
- Closing remarks, special offers, and invitation for next weeks session
- Open Q&A



Today's Topic:

- **Follow-up! Managing Your Sales Pipeline**



The Key Performance Areas



The Key Performance Areas



Agenda

- Why Manage Your Pipeline?
- The Basics
- Advanced Concepts



Why Manage Your Pipeline?

- More sales!
- Efficiency
- Fewer missed opportunities
- It takes a lot more “touches” today than it ever has to close business

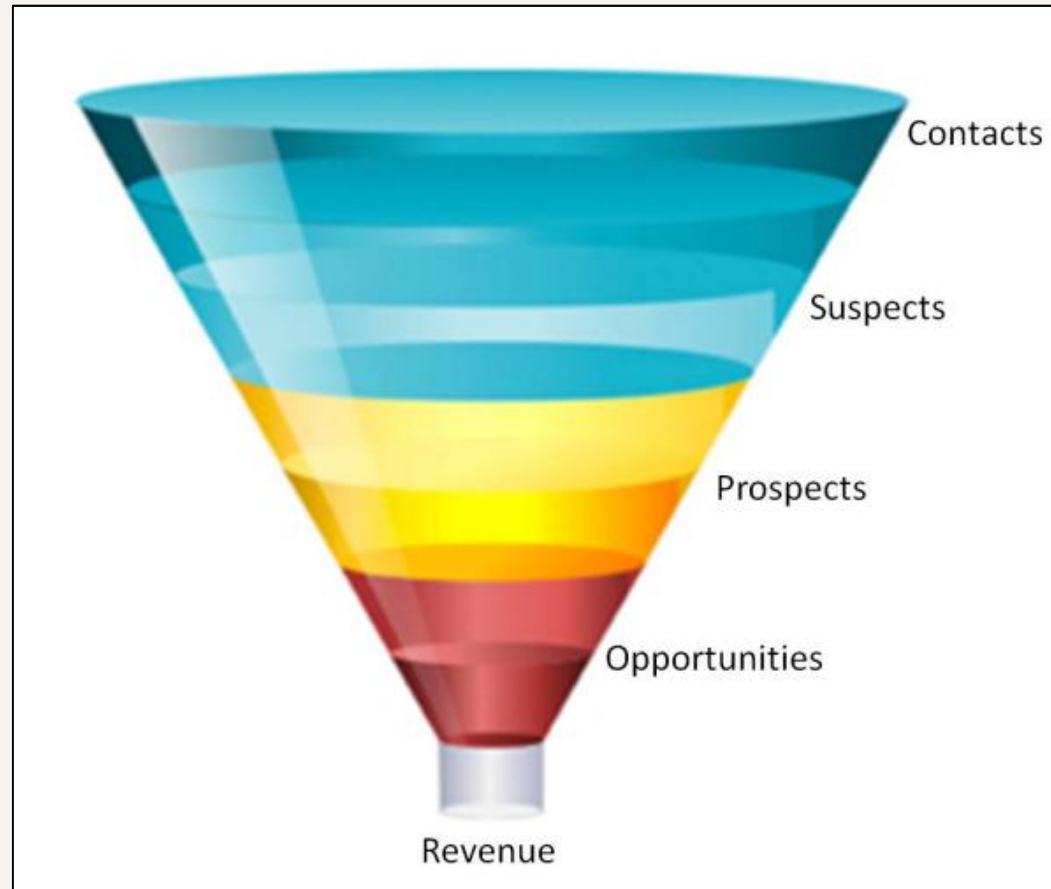


The Basics

- The Sales Funnel
- Tracking systems
- Ranking
- Reminders



The Sales Funnel



www.square2marketing.com



Tracking Systems

- Paper based systems
- Spreadsheets or documents
- Contact management systems (CMS)
(e.g. ACT)
- Customer Relationship Management
Systems (CRM)
(e.g., Salesforce.com, Goldmine, Infusionsoft)



Tracking Systems

- Contact information
- Product being discussed
- Size of deal
- Stage in sales cycle
- Lead source
- Last contact date and next contact date
- Notes
- Anything else important!



Ranking

- By deal size
- By stage in the sales process
- By probability of closing
- By anticipated decision date
- By length of time in the pipeline
- By last contact date
- By next contact date
- By “Energy”



Reminders

- Manual
- Automated



Advanced Concepts

- Pipeline value
- Forecast sales by week or month
- Pipeline by sales rep

- Nurture marketing
- Automated sales systems
- Hybrid systems



Nurture Marketing

- Periodic contact
- Daily, weekly, monthly or random
- Deliver something of value
- Keep top of mind awareness
- Invitations to purchase



Automated Systems

- Invite relationship
- Deliver value
- Ask for the order
- Ask for the upsell



Hybrid Systems

- Chat windows
- Follow-up direct sales calls
- Strategy sessions



Homework / Exercise

- Implement the pipeline system that is right for you
- Download the Sales Pipeline Worksheet
- Get coaching if needed
- Follow-up, Follow-up, Follow-up!



Open Q & A – in a minute

- Comments and questions on the topic of the day
- Any other issues



Success Between the Spaces

- The next CEO Space Business Growth Conference is March 23-30th , 2014
- This cycle, I am introducing a new Group Coaching and Masterminding program
- Weekly sessions to keep the momentum up and help you make Amazing Progress!
- Go to www.SuccessBetweenTheSpaces.com
- No Risk! – Money Back Guarantee



The New Year is Here!

- Offering a day-long virtual workshop for creating your Annual Action plan for 2014
 - Saturday, January 11th
 - Saturday, January 18th
- Go to www.AnnualActionPlan.com



Join Me!

- Join “Paul’s Tribe”
 - a Skype Group
 - Skype Address: paulhoyt
 - Information is private
- Connect with me on Facebook
 - Get your Energy of the Day!



Study!

- Watch the Business Survival Boot Camp
 - Learn key survival strategies
 - Learn about Business Complexity Profiles
 - ... and much more
- Watch other Office Hours recordings
- Then purchase and study
Beyond Business Survival



Beyond Business Survival

- Critical small business owner training
- “What you need to know when you’re the CEO”
- If you don’t get the training you need, you will make a lot of critical mistakes that will **slow you down** or **shut you down!**
- This program can save you \$10,000, \$20,000, \$50,000 or more!



Services

- Available for group coaching, private mentoring, strategic plans, business plans, and financial models
- Programs start at \$200
- Available for radio interviews, webinars, teleseminars, with a very generous affiliate program in place



Next Monday

- Topic is: Go Lean! The Science of Entrepreneurship
- Let me know what topics you would like for me to address: www.PaulsSurvey.com
- Watch Business Survival Boot Camp in the mean time
- Do your homework!



Open Q & A

- Comments and questions on the topic of the day
- Any other issues
- Survey: www.PaulsSurvey.com

Contact Me at paul@paulhoyt.com

call or text: 415.997.8001





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