

A blue industrial pipe system with a valve on a dark grey background. The pipe is bright blue and has several flanges with bolts. A large blue handwheel valve is attached to the pipe on the left side. The background is a dark grey, textured surface.

Best Practices for Managing Your Sales Pipeline

THE CENTER FOR
SALES STRATEGY



At the end of 2025, what
will professional success
look like for you?



Pipeline Management

- Key to evaluating, managing, and improving your sales process.
- Gives you an accurate picture of near-term opportunities and upstream activity that will lead to future opportunities.
- Pipeline management is more than what is pending or forecasted to close.

Pipeline Management



Best Practices to Manage your Sales Pipeline

1. Follow Up

- Buyers today have more choices than ever and they need help to make the right decision.
- In 2007, it took just 3.68 attempts to reach a prospect – today, it takes more than 8!
- 80% of deals require 5+ follow ups to close
- Most sales professionals give up or forget after 1-2 calls.
- Make follow up a priority and use your tools.

Best Practices to Manage your Sales Pipeline

2. Focus on the Best Leads

- It takes about the same amount of time to close each deal.
- Spend the time to qualify your lead and spend your time with the highest priority leads.
- Use consistent criteria to determine which leads are most worth of your time and attention
 - Dollar Potential
 - Access
 - Fit

2 Qualifying Criteria

Dollar Potential

- Is there evidence that they spend at a level needed to be successful?
- Could they potentially be one of our largest accounts?
- Do they have Key account potential?

Access

- Have you identified the decision maker and potential decision influencers?
- What do you need to do to gain access to the decision maker and are you committed to doing that?

Fit

- Evaluate the fit factors that will have the most influence?



Best Practices to Manage your Sales Pipeline

3. Drop Dead Leads

- Know when to walk away
- A lead is dead:
 - When they clearly state they're not interested
 - When they are consistently unresponsive
 - When they can't be pushed through to the next stage of the pipeline
- Identify these dead leads quickly, so you can move on to the next opportunity.

Best Practices to Manage your Sales Pipeline

4. Monitor Pipeline Metrics

- Consistently monitor your pipelines key sales metrics and conversion rates, which includes things like:
 - The number of viable deals in your pipeline
 - The average size of the deals in your pipeline
 - The average time to close a deal
 - Conversion rates:
 - Discover to Proposal
 - Discover to Close
 - Proposal to Close

Know Your Math



\$80,000 to book in developed business for 2025

\$320,000 in presentations out the door with a 25% closing ratio

At a \$10,000 average deal size, you need eight closed deals

Need 32 presentations to new accounts

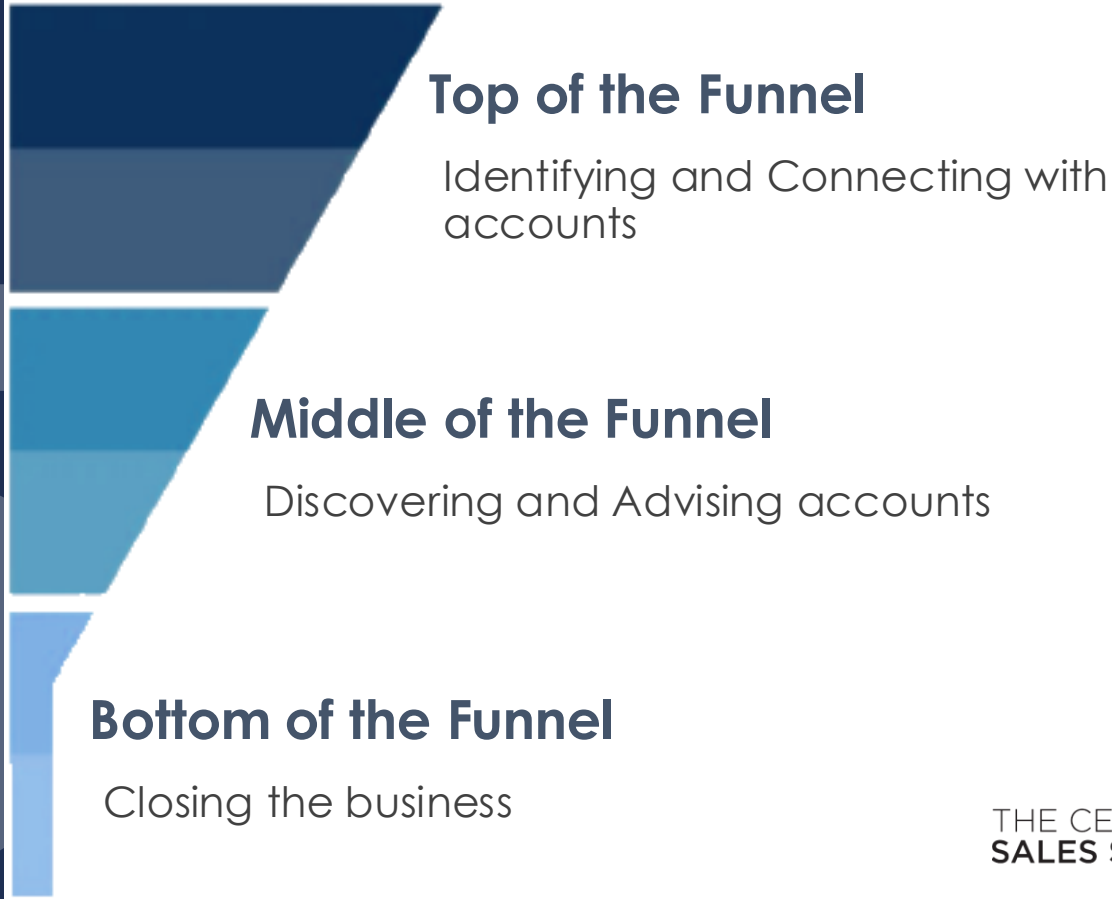
Best Practices to manage your Sales Pipeline

4. Monitor Pipeline Metrics

- Use the insights from your pipeline metrics to develop a personal growth plan and have an accountability partner
- Tracking the results over time will give you a strong indication of how any changes or improvements you make to your sales process are contributing towards overall growth.

Best Practices to Manage your Sales Pipeline

5. A Strong Pipeline is Balanced



6. Schedule Time for New Business Development

- Block time in your calendar daily for business development efforts
- Schedule time for prospecting – daily, weekly, monthly
- Schedule time blocks for follow up

7. Keep Deals Moving

- Follow the three-week rule
- Identify deal killers early in the sales process and move on
- Reduce the number of days between follow-ups and give your prospects more information up front to help shorten their decision-making time
- Email velocity should increase in the week before closing

Best Practices to Manage your Sales Pipeline

The last week of a deal is the most crucial for email velocity.

Healthy deals have a significant increase in email exchanges as you zero in on a signature.

IN A CLOSED-WON DEAL

11.5



emails that go back and forth during the last week.

IN A CLOSED-LOST DEAL

1.35



emails that go back and forth during the last week.

Best Practices to Manage your Sales Pipeline

8. Update Your Pipeline Regularly

- Your sales pipeline can start to get a little disorganized and chaotic – which will make you inefficient and could lead to lost sales.
- Make sure that you're keeping details up to date by adding regular notes and information for each stage of the sales process.
- Remove any pending deals after 30 days (unless you are actively negotiating)

Self-Reflection

- What is the biggest challenge in your pipeline today?
- What is one change you will make to better manage your pipeline?



Questions?

Alina McComas

VP, Senior Consultant

AlinaMcComas@CSScenter.com