



Improve Sales Performance - Design and Develop Effective Opportunity Pipeline Management

SOEE what's new...

The design and development of **opportunity pipeline management** is arguably one of the most important ingredients to **performance success**. Opportunity pipeline analytics must balance efficient process design with effective data capture, while connecting enabling technology.

Reporting and visibility allow pipelines to be reviewed and challenged to **improve forecast accuracy**. Through transparency, opportunity owners can be coached and supported to elevate confidence in pipeline values, funnel stage position, and estimated close dates.

Lack of focus and discipline to pipeline oversight will create frustration with missed forecasts, data integrity, and impede revenue growth. The erosion of pipeline confidence will create tension throughout the organization and cause unnecessary distractions to “fix” the pipeline.



By understanding the interdependency of **Sales Operations, Sales Enablement, Sales Effectiveness (SOEE)** modeling, opportunity management can significantly improve team performance and create reliable sales forecasting.

SOEE what's the solution...

Developing and implementing the opportunity management process within **Customer Relationship Management (CRM) technology** is critical to strategy planning, analytical insights, and tactical operations. In many cases, opportunity design will be configured to existing business model objectives.

Example Opportunity Management Framework

Data Management	Process Design - Enabling Technology
Pipeline Stage	define funnel stages and actions to advance opportunities
Product - Solution	ensure products, solutions align throughout the organization
Category Type	define sales types; new logo, cross sell, upsell, renewal
Sales Channel	define channels; direct, indirect, partners (reseller, referral, technology)
Competition	capture key competitors for market insights
Valuation - Pricing	opportunity valuation, quota credit, pricing methodology
Inside Sales	identification of appointments set by internal resources
Lead Source	capture marketing and lead generation sources
Lead Development	linkage to internal and external marketing technology
Win - Loss Reason	capture market insights at time of win, loss
Account Linkage	account data linkage to provide segmentation analytics
Contact Linkage	contact data linkage to provide segmentation analytics
Contract Signer	data capture at time of contract signature, renewal planning

SOEE what's the value...

Opportunity management requires purposeful design, discipline, transparency, and ongoing communication. In order to transform and grow, significant time and energy must be dedicated to pipeline oversight. Becoming confident with data, process, analytics, and technology will **create a unified team approach to pipeline governance and enhance sales performance.**