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| 9 Ways Sales Leaders Can Optimize the Sales Pipeline | | |
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| ☐ | Setting the Vision | Make sure the team is aligned with the strategy so that they adhere to the process and fully understand who, what, when, where, and why. |
| ☐ | Make It a Team Process | Involve the staff in pipeline design based on their customer knowledge. |
| ☐ | Open It to the Organization | Invite marketing, finance, IT, and other departments to collaborate and bring their expertise to the design of the pipeline. |
| ☐ | Time Commitment | The pipeline should never stand still. It should be reviewed, revised, and enhanced as you gather information over time. |
| ☐ | Design and Implement Prior to CRM Integration | Make sure you are implementing good data collection and updating processes, and have a useful pipeline design in place before you jump into CRM automation. |
| ☐ | Train to the Maximum | Sales reps may think they understand the sales pipeline and how to use it, but they often don't. It's worth taking the time to train new hires and offer training updates to longtime staffers. |
| ☐ | Train Your Trainers | First-line sales managers may need to be coached on how to help their sales reps make the most of your funnel. It serves two purposes: greater efficiency and a way for manager and reps to bond. |
| ☐ | Design to How Your Customers Buy | Provide enough detail to the funnel design that defines how your customers buy in your particular selling environment. |
| ☐ | Leadership Tool | The sales pipeline process is a way to drive the good behaviors that make for better time and opportunity management and sales performance. |