The Simple Sales Pipeline ®

bh&co.
Bradley Hartmann & Company
DEVELOPING CONSTRUCTION LEADERS SINCE 2011

A STRONG PIPELINE DELIVERS CONFIDENCE

A true sales professional is passionate about their sales pipeline: the anticipated orders they've earned from their list of clients and the targeted prospects they are pursuing.

Why? Because expert sales pros know a.) they are not going to convert every selling opportunity, and b.) they cannot rely on luck to earn their commissions. A clearly constructed, one-page sales pipeline—that values the entire potential book of business—is a necessity. This is why we built the simple sales pipeline, the simplest and most effective web application to organize, value, and communicate your sales pipeline.
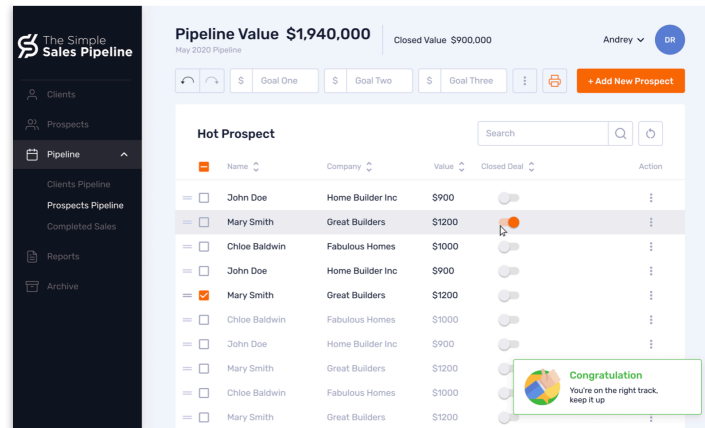
TOTAL VALUE OF PIPELINE, ACCOUNTING FOR CLOSING PROBABILITY

KEEPS YOUR TOP 3 GOALS FOR THE MONTH VISIBLE

A. Vandelay   April 2022
Pipeline value: $521,084

My Top Goals For The Month

| Discuss cabs with Costanza | Close R. Fermano | Earn commitment on new TH project Joe L. |

Clients

#	Name	CO.	$
1	Joe Laumbach	Park Hill Dev	375000
2	Philip	Rock Solid	982
3	Jonathan Canto	Signature	200000

#	Name	CO.	$

Projected Value: $518,384

HOT

#	Name	CO.	$
1	Ron Fermano	Fermano Builders	3000

Projected Value: $2,700

IN PROGRESS

#	Name	CO.	$

Projected Value: $0

TARGET

#	Name	CO.	$

Projected Value: $0

EACH ENTRY INCLUDES CONTACT NAME, COMPANY, AND DOLLAR VALUE.

(AGAIN, WE'RE KEEPING IT SIMPLE HERE. THIS IS NOT ANOTHER CRM WITH 1000 DATA ENTRIES YOU WON'T USE.)

HOT PROSPECTS: 90% CLOSING PROBABILITY

IN PROGRESS PROSPECTS: 33% CLOSING PROBABILITY

TARGET PROSPECTS: FACTOR 10% CLOSING PROBABILITY

CLIENT LIST: FACTORS 90% CLOSING PROBABILITY

ORGANIZING AND VALUING YOUR MONTHLY SALES PIPELINE

A **CLIENT** is defined by loyalty. If they are building it, you are 90% confident you will sell it to them. If you have existing accounts that lack loyalty and behave transactionally—often choosing your competitor over you to save a few nickels—consider them an **IN PROGRESS PROSPECT**.

STEP 1: Enter your CLIENTS or CUSTOMERS in the first column along with the value you expect to sell in the next 30-60 days.

STEP 2: Enter the company names of any HOT PROSPECTS—those prospects you expect to convert into a CLIENT in the next 30 days—and their sales value.

STEP 3: Enter the company names of any IN PROGRESS PROSPECTS—those prospects you are actively involved in conversation with—and their sales value.

STEP 4: Enter the company names of any TARGET PROSPECTS—those prospects you are not in contact with yet, but will be by the end of the month—and their sales value, which will be an educated guess.

ALL PROSPECTS MUST HAVE A VALUE. EDUCATED GUESSES ARE JUST FINE.

CLIENTS		HOT PROSPECT		IN PROGRESS PROSPECT		TARGET PROSPECT	
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
	$		$		$		$
TOTAL $		**TOTAL $**		**TOTAL $**		**TOTAL $**	
X 90%	$	X 90%		X 33%		X 10%	

SUM EACH COLUMN AND MULTIPLY THE % DETAILED FOR EACH. ADD THE 4 COLUMNS TOGETHER AND YOU'RE ALL SET. →

TOTAL PIPELINE VALUE $