

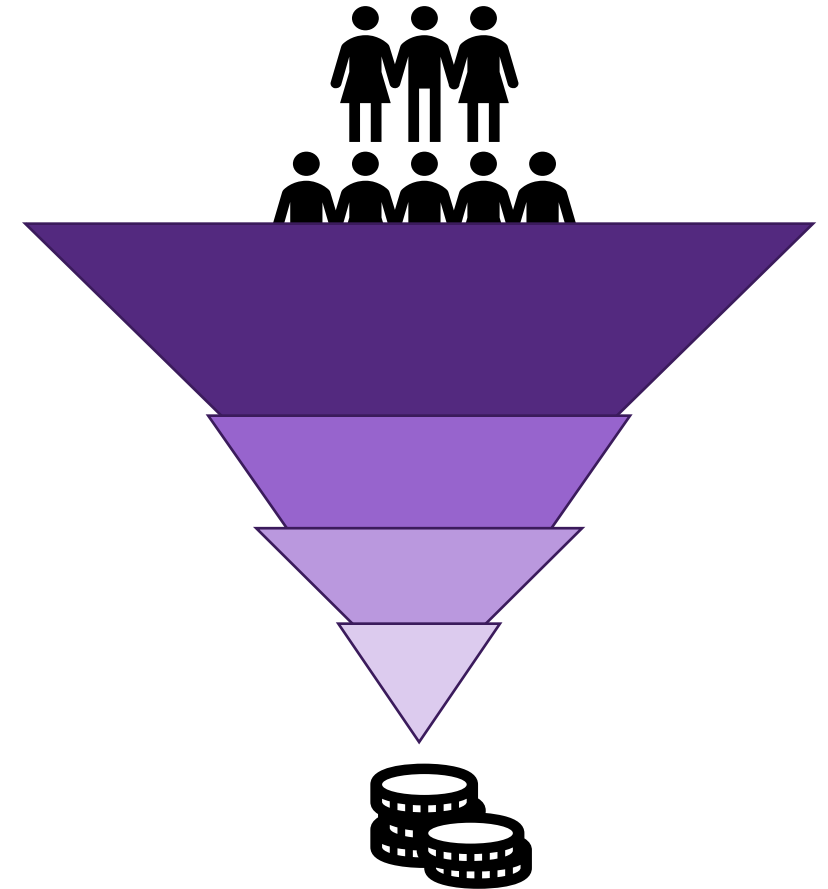
Managing the Sales Funnel

Agenda

- Overview of Sales Funnel Module
- Create Sales Opportunity
- Generate Proposal & Signup Link
- Understanding Timeline Items
- Generate Sales Funnel Reports

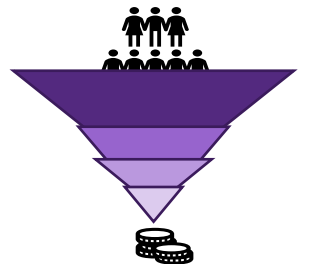
Overview

The GrowthZone Sales Funnel management tool empowers you to monetize and track sales opportunities such as memberships, sponsorships, and subscriptions; track by progress, probability, sales stage, and lead source.



Sales Funnel Value...

- ✓ Enables tracking of successes and setbacks at any point
- ✓ Provides an understanding of the conversion rate at every stage
- ✓ Offers an analysis of final sales data
- ✓ Improves forecasting accuracy
- ✓ Allows for effective decision-making regarding cashflow, budgeting, etc.
- ✓ Helps estimate customer acquisition costs
- ✓ Identifies the most profitable customer acquisition methods
- ✓ Results in higher profit margins



Overview

All the data related to your sales opportunities is tracked in the database, and you will easily be able to report on that information for better planning and forecasting

Status	Reason	Stage	Disposition	Timeline	Timeline Date
Active		Initial Contact		Initial Contact	12/31/2020
Active		Initial Contact		Initial Contact	12/31/2020
Active		Initial Contact		Initial Contact	12/31/2020
Active		Initial Contact	Hot	Initial Contact	12/30/2020

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Overview

For Example: By tracking estimated close dates and recurring revenue, you generate the Sales Funnel report, by month, and use the data for budgeting

Results: 4

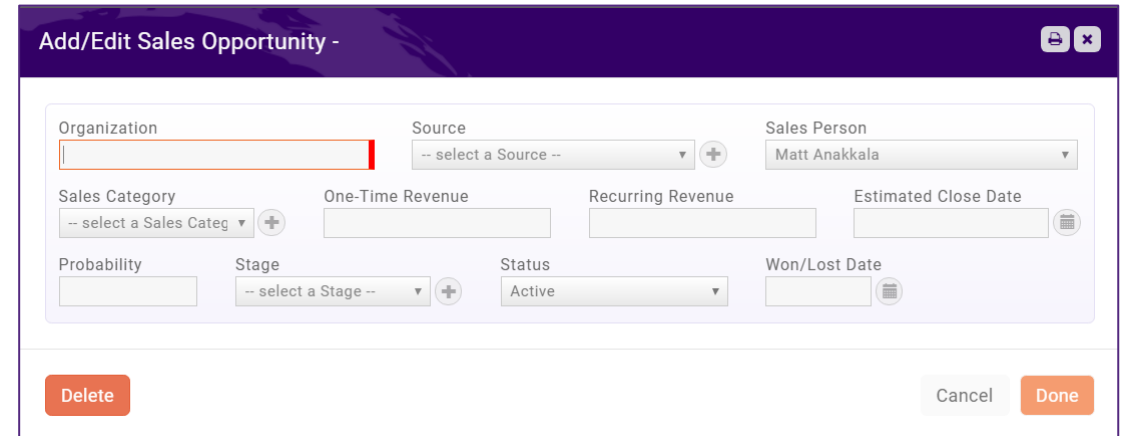
Contact Name	Default Email	Default Phone	Sales Person	Estimated Close Date	One Time Value	Recurring Value	Total Value	Status	Reason	Stage	Disposition	Timeline	Timeline Date
Navin's General Store	genstore@mailinator.com	218-987-2345	Cheri Petterson	1/6/2021	\$50.00	\$400.00	\$450.00	Active		Initial Contact		Initial Contact	12/31/2020
Reeves Insurance Agency	reeves@mailinator.com	218-876-8765	Cheri Petterson	1/13/2021	\$50.00	\$800.00	\$850.00	Active		Initial Contact		Initial Contact	12/31/2020
The Chocolate Shoppe	emilyh@mailinator.com		Joan Anderson	1/19/2021	\$0.00	\$500.00	\$500.00	Active		Initial Contact		Initial Contact	12/31/2020
Valmar Realty	valmar@mailinator.com	(218) 123-9876	Cheri Petterson	1/15/2021	\$50.00	\$700.00	\$750.00	Active		Initial Contact	Hot	Initial Contact	12/30/2020
					\$150.00	\$2,400.00	\$2,550.00						
Count 4													



Creating a Sales Opportunity

A Sales Opportunity may be created for any existing contact in your database (if the contact does not exist – create first)

KB: [Creating a Sales Opportunity](#)



The screenshot shows a web form titled "Add/Edit Sales Opportunity". The form contains several input fields and dropdown menus:

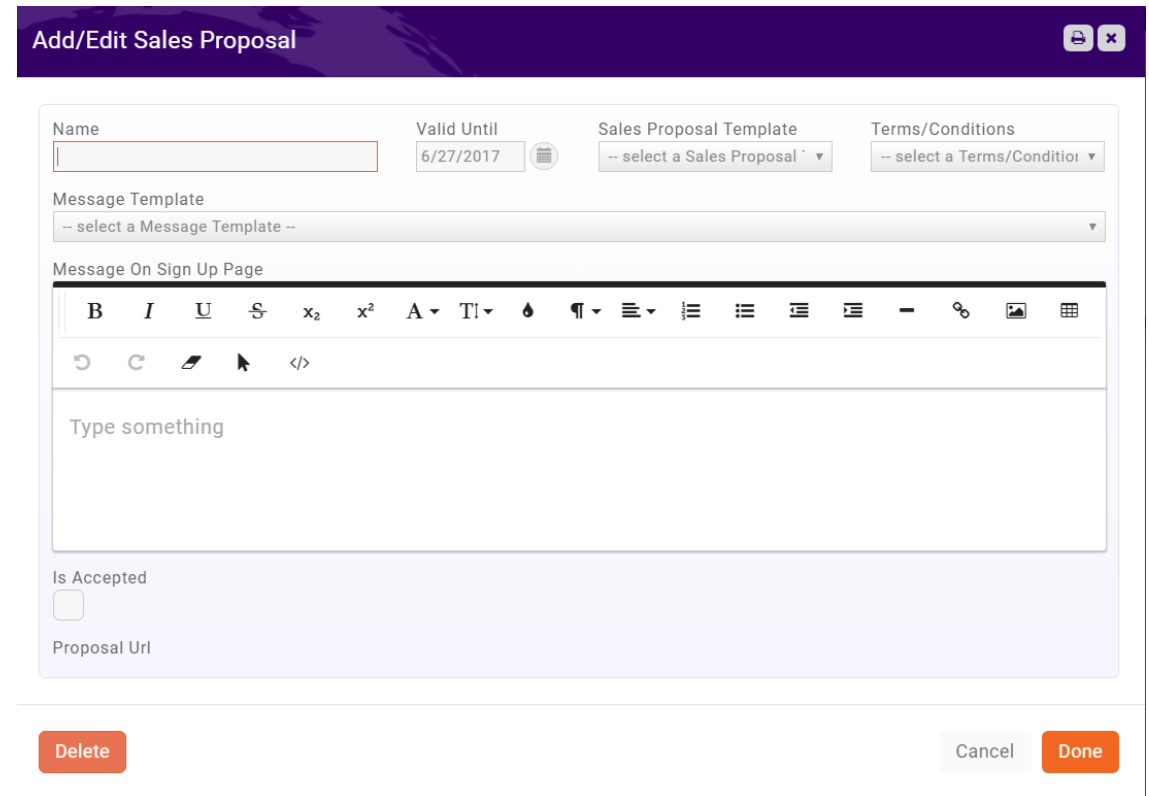
- Organization:** A text input field with a red border.
- Source:** A dropdown menu with "-- select a Source --" and a plus icon.
- Sales Person:** A dropdown menu with "Matt Anakkala" selected.
- Sales Category:** A dropdown menu with "-- select a Sales Categ" and a plus icon.
- One-Time Revenue:** A text input field.
- Recurring Revenue:** A text input field.
- Estimated Close Date:** A date input field with a calendar icon.
- Probability:** A text input field.
- Stage:** A dropdown menu with "-- select a Stage --" and a plus icon.
- Status:** A dropdown menu with "Active" selected.
- Won/Lost Date:** A date input field with a calendar icon.

At the bottom of the form, there are four buttons: "Delete" (orange), "Cancel" (grey), and "Done" (orange).

Create Proposal

Two Step Process:

1. Setup the Proposal
 2. Add Fee Items to the Proposal
- KB: [Create Proposal](#)



The screenshot shows a web application window titled "Add/Edit Sales Proposal". The form contains several fields and controls:

- Name:** A text input field.
- Valid Until:** A date field showing "6/27/2017".
- Sales Proposal Template:** A dropdown menu with the text "-- select a Sales Proposal".
- Terms/Conditions:** A dropdown menu with the text "-- select a Terms/Condition".
- Message Template:** A dropdown menu with the text "-- select a Message Template".
- Message On Sign Up Page:** A rich text editor with a toolbar containing icons for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Subscript (x₂), Superscript (x²), Font Color (A), Text Color (T), Bulleted List, Numbered List, Indent Left, Indent Right, Decrease Indent, Increase Indent, Link, Unlink, Image, and Table. Below the toolbar is a text area with the placeholder "Type something".
- Is Accepted:** A checkbox.
- Proposal Url:** A text input field.

At the bottom of the form, there are three buttons: "Delete" (orange), "Cancel" (grey), and "Done" (orange).

Create Proposal

Add Fee Items

Add/Edit Sales Proposal Items

Membership Type
General Membership

One-Time Fees

Item	Description	Quantity	Price	Disc	Total
Setup	Setup	1	25	\$0.00	\$25.00

Recurring Fees

Item	Description	Quantity	Price	Disc	Total	Frequency
General Member	Default Annual Mem	1	1200	\$0.00	\$1,200.00	Annually

Cancel Done

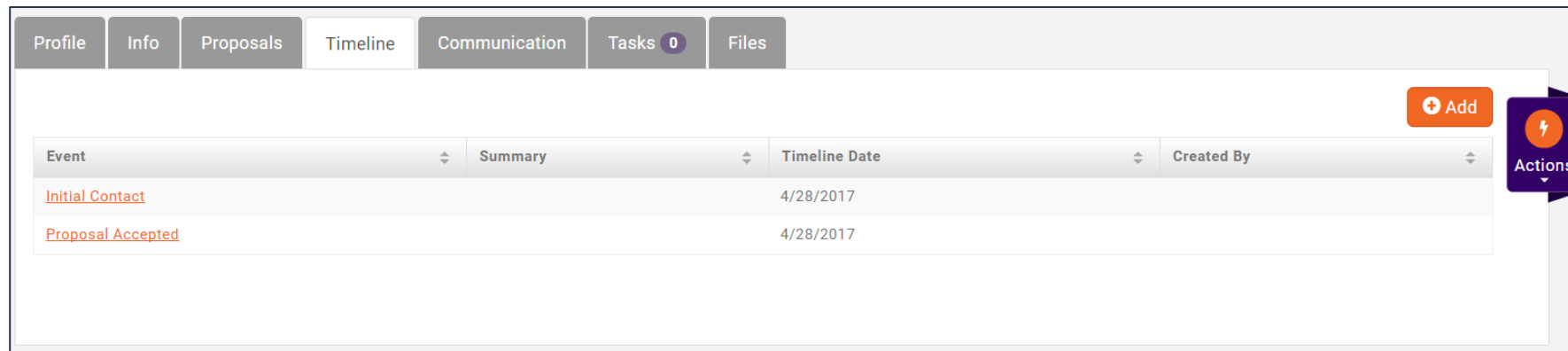
Automated Post-Signup Actions

- Timeline item will be automatically updated
- Email alert will be sent to those who have subscribed
- Proposal will be marked as accepted
- Won/Lost Date will be updated
- The contact will receive an automated email

Time-line items

Time-line items. Your sales opportunity milestones can be tracked with timeline items. Examples of milestones may include when this first became an opportunity, or when you sent the proposal

KB: [Sales Proposal Timeline Items](#)



The screenshot shows a software interface with a navigation bar at the top containing tabs for Profile, Info, Proposals, Timeline, Communication, Tasks (with a '0' indicator), and Files. The 'Timeline' tab is selected. Below the navigation bar is a table with columns for Event, Summary, Timeline Date, and Created By. There are two rows of data: 'Initial Contact' and 'Proposal Accepted', both dated 4/28/2017. To the right of the table is an 'Add' button and an 'Actions' dropdown menu.

Event	Summary	Timeline Date	Created By
Initial Contact		4/28/2017	
Proposal Accepted		4/28/2017	

Sales Funnel Reporting

The Sales Funnel Reports help you understand the effectiveness of sales activities and the efficiency of the sales process:

- Sales Funnel Report
- Sales Opportunity Communication Report
- Sales Proposal Report
- Timeline Summary Report

Sales Funnel Reporting

The **Sales Funnel Report** provides you with many ways to analyze the opportunities in your funnel. For Example: you may analyze based on salesperson, sales source, sales probability, etc.

KB: [Sales Funnel Report](#)

Contact Name	Default Email	Default Phone	Sales Person	Estimated Close Date	One Time Value	Recurring Value	Total Value	Status	Reason	Stage	Timeline	Timeline Date
			Matt Anakkala		\$0.00	\$0.00	\$0.00	Active			Initial Contact	5/11/2018
Aiden's Shoes	aiden@mailinator.com		Sheryl Ressler	5/2/2018	\$50.00	\$1,200.00	\$1,250.00	Active		Initial Contact	Initial Contact	4/11/2018
Antiques on Main Street	dgoerges@mailinator.com	218-765-7654	Cheri Petterson	4/28/2017	\$25.00	\$1,200.00	\$1,225.00	Won	Won	Closed - Won	Proposal Accepted	4/28/2017
Bayview Motel			Brandon Zinda	5/11/2018	\$2,000.00	\$0.00	\$2,000.00	Won	Want member to member benefits	Hot	Proposal Accepted	4/11/2018
Blossom's	blossoms@mailinator.com	215-777-9876	Cheri Petterson		\$25.00	\$1,200.00	\$1,225.00	Active			Initial Contact	
Boardwalk Marina	jmichah@mailinator.com	503-445-5788	Cheri Petterson		\$25.00	\$1,200.00	\$1,225.00	Active			Initial Contact	9/28/2017
Business XYZ			Matt Anakkala		\$0.00	\$0.00	\$0.00	Active			Initial Contact	5/4/2018
Cooking with Susie	soverholser@mailinator.com		Matt Anakkala	4/28/2017	\$25.00	\$1,200.00	\$1,225.00	Won	Won	Closed - Won	Proposal Accepted	4/28/2017
Dollars Drive Landscaping & Nursery	DollarsDrive@paulbunyan.net	218-987-9876	Sheryl Ressler	8/11/2017	\$100.00	\$2,000.00	\$2,100.00	Won	Won	Initial Contact	Proposal Accepted	8/11/2017
Ginny	ginny@mailinator.com		Cheri Petterson		\$25.00	\$1,200.00	\$1,225.00	Won		Closed - Won	Proposal Accepted	5/21/2017

Sales Funnel Reporting

- Sales Opportunity Communication Report will show you a list of sales opportunities, and the number of days since the last communication
- KB: [Sales Opportunity Communication Report](#)

Results		
Sales Person ↕	Prospect Name ↕	Days since contact ↕
Matt Anakkala	.	0
Matt Anakkala	Newtons Farm	7
Matt Anakkala	Business XYZ	7
Cheri Petterson	Antiques on Main Street	9
Cheri Petterson	Blossom's	22

Sales Funnel Reporting

- The **Sales Proposal Report** allows you to generate a list of all the sales proposals you have created
- KB: [Sales Proposal Report](#)

Contact Name ↕	Sales Person ↕	Proposal Name ↕	Valid Until ↕	Status ↕	Stage ↕	Sales Proposal Item ↕	Sales Proposal Item Price ↕	One Time Value ↕	Recurring Value ↕
Antiques on Main Street	Cheri Petterson	General Membership	6/27/2017	Won	Closed - Won	Setup	\$25.00	\$25.00	\$0.00
Antiques on Main Street	Cheri Petterson	General Membership	6/27/2017	Won	Closed - Won	Default Annual Membership	\$1,200.00	\$0.00	\$1,200.00
Bayview Motel	Brandon Zinda	Bayview Motel Sponsorship Proposal	6/10/2018	Won	Hot	Bronze Level Sponsorship	\$2,000.00	\$2,000.00	\$0.00
Blossom's	Cheri Petterson	General Membership	7/23/2017	Active	Initial Contact	Setup	\$25.00	\$25.00	\$0.00
Blossom's	Cheri Petterson	General Membership	7/23/2017	Active	Initial Contact	Default Annual Membership	\$1,200.00	\$0.00	\$1,200.00

Sales Funnel Reporting

- The **Timeline Summary Report** summarizes all timeline items for each sales opportunity in your database
- KB: [Timeline Summary Report](#)

Contact Name ↕	Default Email ↕	Default Phone ↕	Sales Person ↕	Stage ↕	Initial Contact Date ↕	Proposal Sent Date ↕	Proposal Accepted Date ↕	Personal Visit Date ↕	Ambassador Call Date ↕	Invite to monthly lunch Date ↕	Personal Invite to BOH Date ↕	Initial Email Date ↕	2nd phone call Date ↕	Drop Date ↕
Joe's Pizzeria	jranard@mailinator.com		Cheri Petterson		3/17/2017									
The Ski Hill			Cheri Petterson	Closed - Won			5/7/2017							
Morgan Golf Club		2185647788	Cheri Petterson	Initial Contact	4/24/2017	4/27/2017	4/27/2017							
Ginny	ginny@mailinator.com		Cheri Petterson	Closed - Won	4/27/2017		5/21/2017	5/4/2017						

Questions?