GRAPHIC
PIPELINE MAP

TOOLKIT MODULE NO. 2

Selling180°

A different approach to sales & achievement

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Graphic Pipeline Map User's Guide

INTRODUCTION

The Graphic Pipeline Map is a key ingredient to productive and meaningful sales meetings. We've all been in new business meetings that were full of hot air and in the end felt like a waste of time. The Pipeline Map is designed to stimulate interactive discussions about new opportunities and to keep people honest and accountable without triggering fear (which shuts people down or causes them to unnecessarily exaggerate). Use the Pipeline Map to facilitate honest dialogue about legitimate opportunities in the pipeline, where things are and what's going to happen next.

The Graphic Pipeline Map can help:

Tell a story about everyone's new business pipeline.

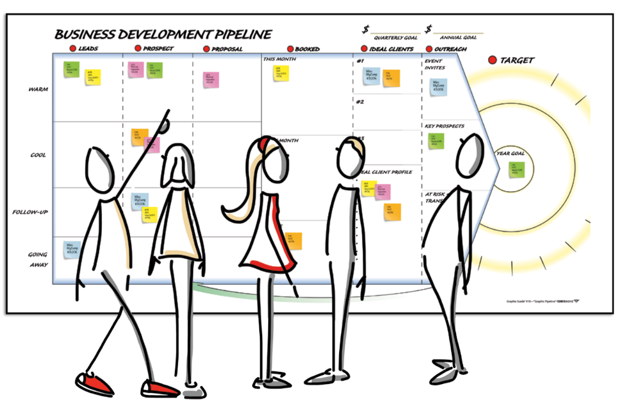
Energize and re-focus a team responsible for new business activity.

Provide a framework for new business brainstorming and accountability.

Celebrate new business victories, share best practices.

WHY DOES THIS **MATTER?**

- The Graphic Pipeline Map creates a centerpiece for weekly or monthly business development meetings. It enhances interactivity and engagement that make the meetings more meaningful, colorful (literally) and productive.
- People exaggerate and lie when it comes to new business opportunities. The Pipeline Map creates a structure that minimizes this tendency so you can get more truth about what's going on (for yourself and your team).
- There is a shared accountability that gets created by looking at and reporting on the Pipeline Map in a group forum. There are checks and balances to ensure movement of opportunities on, off or through your pipeline. There is less tolerance for deal stagnation when using the Pipeline Map process.
- This is a constant visual reminder (when posted on a wall) of the key goals, priorities and focus related to new business development.
- Provides a forum for group collaboration and sharing. Creates a framework for reviewing what is working and what is not working in prospecting efforts and conversation execution.



HOW TO **USE IT**

The Pipeline Map is meant to be seen every day by the primary leader of the new business development process and team. It can be placed on a wall within a private office or on a wall where a larger group of people can see and access it easily.

An individual can use the Pipeline Map for their own purposes of tracking and brainstorming related to their new business development efforts. It is designed primarily to be used as a template for leading new business updates (weekly or monthly meetings) for a group of people (5–20) who are either formally or informally involved in new business development activities.

Use the smaller 11" x 17" Pipeline Maps for preparation, brainstorming during the meeting and for individual participants to record takeaway commitments from the meeting. The smaller maps are not essential to the process and can be used as needed.

Keep in mind:

- To ensure longevity, we recommend foam core backing or laminating the Pipeline Map.
- This process does not replace your CRM system but is a complementary system focusing on qualified opportunities.
- Make sure you have different colored sticky notes for each individual representative or producer.
- Use a felt-tip marker that is easy to see from a distance when filling out sticky notes.
- List the name of prospect and estimated deal size in large, legible print.
- If your sales meeting is in a different location than where you usually hang the Pipeline Map, make sure it's easily portable and can be brought into another room for the meeting.

STEP #1 INTRODUCE THE PROCESS

One of the more critical aspects of the Graphic Pipeline Map is having the group understand and buy into the process. See yourself as a facilitator (not manager) who is responsible for creating an environment that gets to the truth and challenges everyone to speak concisely.

The intent of the Pipeline Map (and corresponding new business pipeline review meeting) is to complement your current CRM system. The interactive, visual format (and best-practice teachings that support it) challenges all participants to take a more realistic view of the current pipeline and also stimulate more focused brainstorming and accountability for attracting the right kinds of new business to fuel sustained growth. The format of the Pipeline Map ensures opportunities keep moving (left to right, up to down) and challenge everyone to move things forward or OFF the pipeline more quickly.

THE KEY PRINCIPLES BEHIND IT ARE:

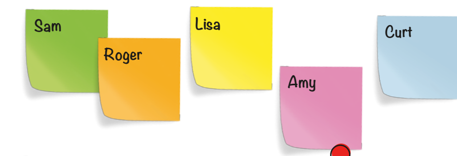
1. Seeing things visually (with color and deal size) make it much harder for someone to hide or be in denial, and gives a real feel for where things are (what's working, what's not, what needs to be focused on).
2. The Pipeline Map forces the user to move things—forward, down or out. It does not tolerate things lingering for more than a few weeks, and always encourages movement, action and accountability.
3. It's a reminder of your key goals (yearly, quarterly, monthly) and where things are relative to meeting them.
4. It's a reminder to focus on outreach to current key (ideal) clients and identify new (ideal) potential clients and commit to specific actions.

TIPS

- The meeting (or call) should last no more than 30 minutes.
- Remember, the goal is to not make anyone feel or look bad.
- Everyone should strive to be brief, clear and realistic in their sharing.
- Commit to challenging each other to better qualify new opportunities and keep them moving along the Pipeline Map, with the goal of minimizing stalled deals.
- Make clear commitments and specific next steps the rule, not the exception.

CHALLENGE **AMBIGUITY,** *always.*

BUSINESS DEVELOPMENT PIPELINE



TARGET

Assign each salesperson a different colored sticky note and post them (with their name) on the top.

YEAR GOAL

Could be a top-line revenue number, a new business number, profitability, etc. The more clear and simple, the better.

	LEADS	PROSPECT	PROPOSAL
WARM	Inbound requests for proposals or new business inquiries from what seem to be qualified prospects or existing clients. Also, outreach to qualified prospects.	Qualified prospect where at least one initial meeting or call has been scheduled or has already happened. Seems like a solid opportunity.	
COOL	Once a "warm lead" stalls or gets further qualified.		
FOLLOW-UP	Action needed to move opportunity into warm or cool prospect box or move it off the Pipeline Map.		
GOING AWAY	Time to send a Stalled Deals email *(see Module 5).*		For some reason, the proposal has stalled and you are not in control or clear about what's happening next. Respectfully move them in or out of your pipeline (for now). *See Module 5: Stalled Deals.*

BOOKED

THIS MONTH

NEXT MONTH

FUTURE

Place to show new business booked more than two months out. Or large and exciting new opportunities not yet ready to put on the Pipeline Map.

IDEAL CLIENTS

#1

Names of three ideal clients where you see additional new business opportunity. This list can change periodically.

#2

#3

IDEAL CLIENT PROFILE

Brainstorm and write down the qualities of your ideal clients. Be specific, and keep your language simple and meaningful.

OUTREACH

EVENT INVITES

Designed for brainstorming outreach to existing key clients for periodic client reviews, referrals, introductions, or outreach to past clients or other key relationships.

KEY PROSPECTS

AT RISK + TRANSITION

List "At Risk" clients who may be unhappy or be up for renewal or where your key contact is leaving.

When a promising prospect stalls, send a Stalled Deals email to re-engage them and schedule a clear next step or finalize that something has changed and you're going to move on. Goal of a Stalled Deals email or vm is to get a response and get the truth *(see Module 5).*

Once current relationships and/or new opportunities have been profiled, move to Leads or Prospect sections to track next-step actions.

STEP #2
REVIEW AND UPDATE

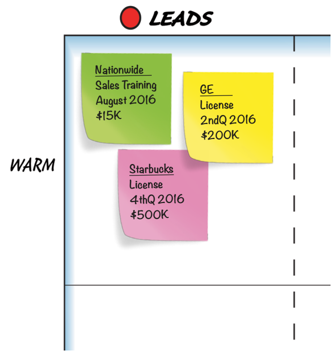
GOALS, OBJECTIVES AND IDEAL CLIENT PROFILE

1. When appropriate, review the current month's and next month's important numbers (i.e., revenue, gross profit, new contracts, etc.).
2. Setting specific financial yearly and quarterly goals will help focus the team on what they need to do. Keep it simple.
3. Quick reminder of the ideal client profile and the kinds of business you're looking for more of to reach goals and fuel sustainable growth.

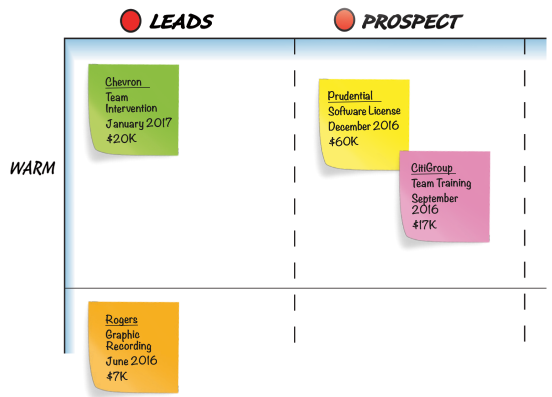
TIPS

- Have clear commitments. Clarify how long the meeting is and stick to it religiously. Confirm who is expected to attend and if this is mandatory. Ensure all participants are clear what is expected of them and their participation in the meeting.
- Don't hesitate to remind the group to manage their time and energy with prospects wisely. This is what leads to sustainable growth.

STEP #3 CURRENT PIPELINE UPDATES



Assign a different color sticky to each participant. When a prospect or job is assigned to an individual, put the **NAME** of the customer, what **TYPE** of job it is, the **DATE** of delivery, and what the anticipated **REVENUE** will be.

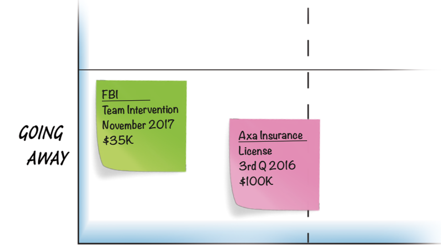


Go around the room asking each participant if they have anything new to add or any project to move. Each participant is responsible for moving their current projects (symbolized by their stickies) forward (left to right), or down (top to bottom).

Use this as an opportunity to ask qualifying questions of the opportunity (e.g., Find out budget or money expectations early + Uncover true decision makers (who else cares) + Uncover pain, urgency, compelling reason + Have a clear next step at the end of every conversation).
See Module 4: Effective Calls & Meetings.

Use this as a chance to clarify what you know and what you don't know about this opportunity.

We commit to not stalking prospects or clients, ensuring we have appropriate time in between contacts (at least 5–7 working days). We use phone, vm, or email and occasionally overnight letters as our primary means of communication.



We are always willing to use the "going away" email or vm in the spirit of trying to re-engage people or move them off our radar for now.

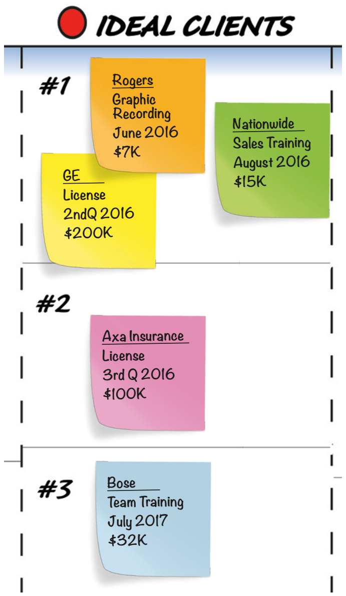
Everyone commits to clear and specific next steps and to holding themselves accountable.

We understand that sometimes the best action to take for the moment is no action at all.

TIPS

- Every two weeks, everything needs to move to a next step on the Pipeline Map or get challenged to be moved OFF (for now).
- Encourage the group to use their small versions of the Graphic Pipeline to track their leads during the week.

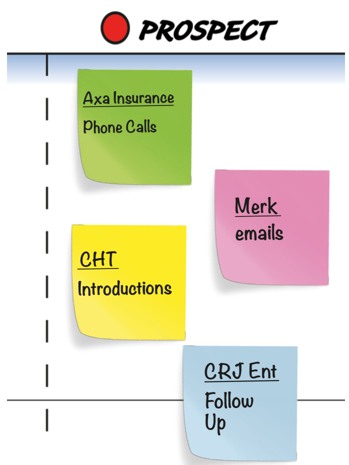
STEP #4 OUTREACH CAMPAIGNS

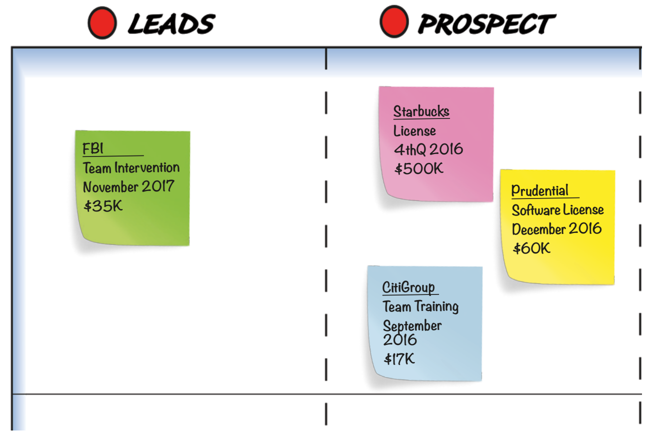


Identify opportunities within current ideal clients for new business, referrals, introductions. Use the ideal client section and discussion to also identify new prospects that fit much of this same profile and commit to action steps to reach out to key prospects.

List any upcoming networking opportunities where you might get in front of potential ideal prospects.

Discuss some targeted cold prospecting that everyone can do. List specific actions and prospects on the color sticky notes of each person.





When someone has completed an outreach, move the sticky note into the Leads or Prospect area, depending on how well qualified they have been and what action has been taken.

TIPS

- Have each participant commit to one business development "stretch" action item each week.
- Periodically lead the group through the exercise of creating or tweaking the ideal client profile.
- Encourage the group to use their small versions of the Graphic Pipeline to strategize new outreach scenarios for their ideal clients during the week.
- Create a common language used by entire organization related to new business development.

QUICK REMINDERS

1 Just because something gets moved off the Pipeline Map and the discussion, does not mean you can't keep them on your mailing list and in your CRM system for contact in 3 or 6 months.

2 Every two weeks (or less) everything should be moving, either from a warm to a cool prospect or to a follow-up or going away action. Or moving to the proposal section and then moving into booked business or down to a cool prospect or follow up action, etc. The key is to keep things moving, ideally every week, but at least every two weeks.

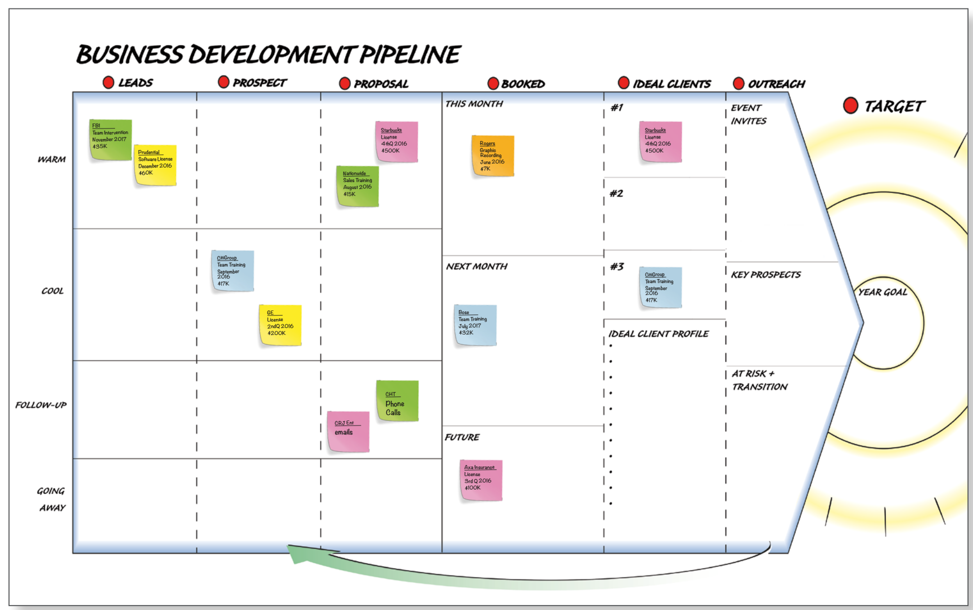
3 If you have a larger group and limited time, ask everyone about their top 1–3 opportunities and focus on those.

4 It is not essential that the Pipeline Map holds every single prospect or client or possible new business opportunity. You have a CRM system to capture all the details. It is most important to talk about high-level prospects, larger-sized deals, ideal clients and prospects. Use the Pipeline Map and this time to talk about the things that are most going to help you grow.

5 Use the Pipeline Map and process around it to instill new thinking and process discipline. The Pipeline Map is designed to hone your skills and common language for qualifying opportunities and more effectively spend more energy on the right kinds of things.

FINAL THOUGHTS

What if you could have consistent pipeline meetings and discussions where everyone is honest, sharing meaningful information about their prospecting process and there is a shared sense of accountability where everyone wants to step up, learn and improve? The Graphic Pipeline Map is designed to support improvements in sales process, execution and minimize the ways that reps or producers can exaggerate, hide and deflect the truth about what they have going on. This is a learning tool first and foremost, designed to stimulate more meaningful sharing and dialogue. New business development doesn't have to be painful. It can be colorful, dynamic and fun. Commit to using the Graphic Pipeline Map and meeting process for six months and you will start to see tangible changes in team engagement and bottom-line results.



The Selling180 Toolkit is a radical departure from normal sales techniques. Everything outlined in these modules is designed to help you maintain greater control over your process and reduce the amount of lost time and energy you spend in not having enough of the right kinds of business in your pipeline.

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TOOLKIT MODULE NO. 1

THE IDEAL CLIENT

We attract more of what we clearly define. We get more of what we generally tolerate. Use this template to clarify your ideal clients and make a plan to find them.

TOOLKIT MODULE NO. 2

GRAPHIC PIPELINE MAP

Use this powerful graphic template to create a snapshot of where your business development efforts are without self-deception and excuses.

TOOLKIT MODULE NO. 3

EFFECTIVE EMAILS

Learn how to create outreach emails that don't get immediately dismissed. Create emails that are clear and compelling, that separate you from your competition, and ensure you are coming from a position of strength and equality.

TOOLKIT MODULE NO. 4

EFFECTIVE CALLS & MEETINGS

If you have a clear structure for each new conversation, you and your prospect will be freed up to engage in a more disarming and meaningful dialogue. Learn the three things you can do to make sure you get the most out of that conversation you worked so hard to get.

TOOLKIT MODULE NO. 5

STALLED DEALS

You had a great call or meeting with a prospect, you thought things were moving along and now you can't get a response. Crickets. Sound familiar? Learn techniques that will get a response 75% of the time.

TOOLKIT MODULE NO. 6

REFERRALS

The best way to find new business is from referrals from people who already know and do business with you. Learn the keys to consistently receiving referrals and what to do when you get them.