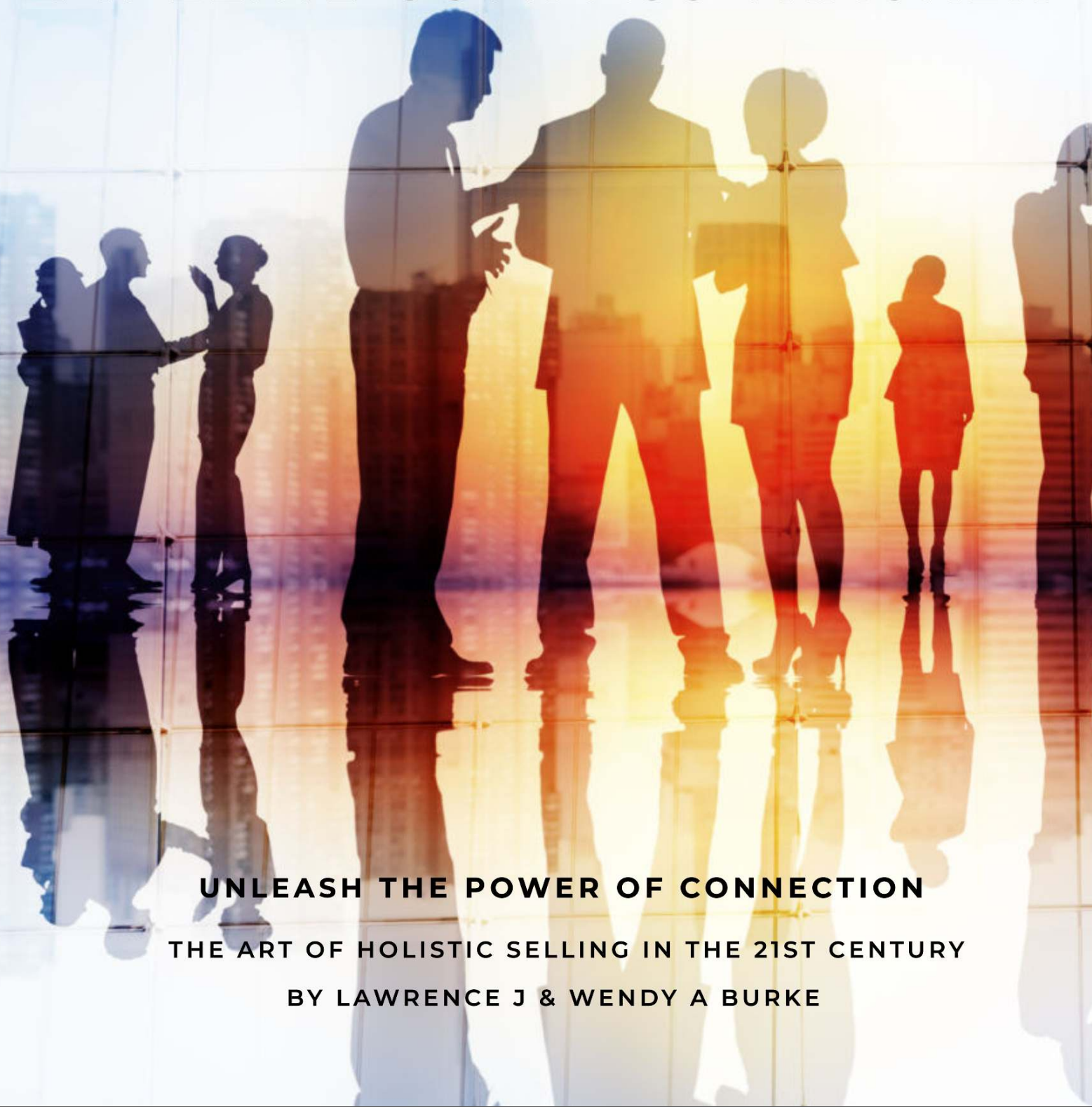


VICTORY MANAGEMENT

THE SALES PROCESS PIPELINE COMPASS TRACKER



UNLEASH THE POWER OF CONNECTION
THE ART OF HOLISTIC SELLING IN THE 21ST CENTURY
BY LAWRENCE J & WENDY A BURKE

How To Use Your Sales Compass Tracker

Sales Compass Tracker						
Victory Management Compass Tracker 		NAME: MANAGER: MONTH ENDING:		STAGES 1. Lead 2. Contact/Appointment 3. Qualified 4. Trial & Test 5. Agreed terms 6. First Order 7. FUP		
Accounts						
1. Buying Customers	Contact	Last Update	Product	Value/Mth	Stage	
				£0		
				£0		
				£0		
				£0		
				£0		
				£0		
				£0		
				£0		
Total Value of Buying Customers				£0		
2. Prospect Accounts	Contact	Last Update	Product	Value/Mth	Stage	
				£0		
				£0		
				£0		
				£0		
				£0		
				£0		
				£0		
				£0		
Total Value of Prospect Accounts				£0		
3. Target Accounts	Contact	Last Update	Product	Value/Mth	Stage	
				£0		
				£0		
				£0		
				£0		
				£0		
				£0		
				£0		
				£0		
Total Value of Target Accounts				£0		
Total Value of Prospect (2) & Target (3) Accounts				£0		
4. Lost Accounts	Contact	Reason	Value/Mth			
			0			
			£0			
			£0			
Total Value of Lost Accounts			£0			
Accounts						
5. Forecast Accounts	Contact	Last Update	Product	Competition	Value	
					£0	
					£0	
					£0	
					£0	
					£0	
Total Value of Forecast Accounts					£0	
6. Future Suspects Accounts and Opportunities	Contact	Last Update	Product	Competition	Value	
					£0	
					£0	
					£0	
					£0	
					£0	
Total Value of Suspect Accounts and Opportunities					£0	
Total Value of Forecast (5) and Future Suspect and Opportunities Accounts (6)					£0	
Competitor Activity						
Competitor	Customer	Last Update	Tactical approach			

How to use your Sales Compass Tracker

Sales compass tracker and how to use it

Thank you for downloading your sales compass tracker. I created this tracker more out of frustration, as a sales manager often when reviewing my team monthly they all used something completely different or came with very little information and had no true system. They would all bring different creative pieces of paper or spreadsheets, they lacked Vision, Clarity, Visibility and Focus, things had to change!

If you're a sales manager this document will be invaluable to you, your life will be so much simpler and less stressful once you ask your team to complete the compass tracker, you will achieve clarity, transparency and visibility of what your team are doing and their planned activity is going to be for the next 30-60 days

Depending on your sales cycle, but more importantly both your teams and you will have your fingers on the pulse and have a clear road map so you can focus on opportunity cost activities.

We understand that most salespeople are probably using a CRM system and we think CRM systems are in fact excellent tools and it's probably a requirement of your job to actually complete it for your company, so we suggest that if you use a CRM for your company then please continue to do so.

That said many if not most salespeople are actually more visual than analytical, and we've discovered that having a simple Visual document which only takes a few minutes a week to complete will even help you to complete your CRM more efficiently and quickly.

With this powerful sales compass tracker you will always know exactly at a glance where you are with your prospects, leads, and customers it only takes a few minutes once a week to update, in fact, it is so quick you can complete it on the run.

Another benefit of this compass tracker is that you know what your target is for the month or quarter and what you plan to complete. As you populate this tracker it will give you figures where you might be in comparison against your target.

We divided the compass tracker into different sections. These sections will give you clarity and direction just like a compass does.



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1 Buying Customers: These are customers that you feel confident will buy, both existing customers and new customers. It's always a good idea to monitor your new buying customers for at least three months just to make sure everything is going to plan and they are continuing to buy. The last thing you want is after investing so much time and closing them is to lose them in that period.

2 Prospect Accounts: These are warm customers that you've been talking to. These customers are progressing through the later stages, but have not yet agreed terms. We will talk about the stages after we explain the remaining sections.

3 Target Accounts: let's explain the difference between your target and prospect accounts and your forecast. It's easy to remember that your prospect and target customers are customers that you've been talking to and more importantly are **qualified**. You are moving these customers through the stages getting ready to close them.

4 Lost Accounts: You'll also find a section for lost customers it's always good to record what you've lost and why so you can learn and fix or modify whatever caused the loss, as you invested in building their relationship you can even fix the issues and go back at a later date, never burn your bridges always be courteous and gracious.

5 Forecast Accounts: These are customers that you are collecting information on and building relationships with. You may be connecting with them (via LinkedIn, occasional call), sending them video messages, or sending them other documentation. Remember your forecast is just like the weather you're not sure whether it's going to rain or not, you are not sure whether these are qualified yet, you're still working on them, your building the relationship.

6 Future Suspects Accounts and Opportunities: You need to be always filling your future suspects and opportunities, it has to be a constant flow of filling your sales funnel.

There is also a section for competitor activity. It's always good to be ahead of the game to be aware of your competitors. **You will learn more about that during your sales training course with us.**

Also, all the formulas have been entered for you, so all you need to do is fill in the data and it will calculate your sales funnel, we suggest you save an original sheet on file before you start just in case you delete something by mistake.

Let's now talk about the different stages : There are seven crucial key stages 1-7 ,all are critical and crucial steps to securing the deal



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1 Lead: This is the first stage. It is the discovery zone. Remember it's just a lead, it may have been passed on to you or it could have come through Telesales or Telemarketing. Your task is to investigate and build a relationship, but it is equally important to make sure you do a quick basic qualification. **Do not waste time on disqualified or weak leads.**

2 Contact/Appointment: Once you are satisfied they fit your target lead profile and you have assured yourself that your products or services match their needs, then arrange to have an appointment whether it's online via video or an in-person customer visit. Again remember you are investing time and money, be prepared for that appointment. **You will learn how to prepare for contact appointments during your sales training with us.**

3 Qualified: You now have a well-qualified prospect, well done. **During this process you might find that you need to re-qualify (e.g., soft close, test the water). You must leave the appointment satisfied that the potential customer is a good fit for your service or product and that they are a customer ready to move on.**

4 Trial & Test: You have now moved your target customer to stage four. This is where you test your product or you test your service in more detail. Decide how they are going to test your product or service. It is crucial to be part of that process to maximise their experience. Be ready to answer questions. You need to be the expert, the oracle, the "go to guy". **You will learn more about how to be the expert during your sales training with us.**

5 Agree Terms: At this point, you are at the closing stage where you are agreeing terms, pricing, delivery time timescale, etc. This is a vital part of the process. **You will learn in detail the most effective ways to agree terms in your sales training with us.**

6 First Order: Ask for the business and take the order. **Often many sales people really struggle with asking for the order, after you have done the Victory Management sales course with us you will not be one of them.**

7 Follow Up (FUP): You're not finished yet. Yes you have taken the order, but now you need to make sure that everything is working as it should and the service is exactly how it should be. **Remember they are hopefully going to be giving you referrals, testimonials and repeat business.**

These proven techniques are crucial for you to be a successful salesperson and sales manager. Equally as important, they will provide you a much more positive attitude and better well-being because you will be in control and have a more constructive review and "one to ones" with your Manager.

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Using the Sales Compass Tracker you will sell more because:

You will be more - Focused, Confident, Motivated and Excited

You will have more - Vision, Clarity, Visibility and Peace of Mind

Now image how much more effective and successful you will be if you couple this Sales Compass Tracker Tool with attending our sales course. We are looking forward to taking you to the next level and helping you reach your true potential. For more information and Special discounted pricing please check your Victory Management emails.

Victory Management



Wendy Angela CoFounder Victory Management

Thank you for taking the time to download this **“Sales Tracker Compass”** document.

I am sure you will find this document really useful and will help you to achieve the vision and clarity you need as you move forward with your sales pipeline. When my partner and I created the Victory Management sales training concept back in 2008 we combined both of our many years of real life sales and customer care experience in order to produce a training programme that would help lead you to core values of, Give service value, Sell more and Live better lives.

A simple premise we still live by today, we look forward to serving you again and providing you with great added value sales training.

Wendy Angela
Cofounder Victory Management.
