



### Competencies that are addressed:

#### PRIMARY COMPETENCY CATEGORIES:

- **Vision—**

Future-oriented. Develops a future exciting picture of what could and what should be, regardless of what is, for them and their organization.

- **Customer Acquisition—**

Identifies and converts prospects who should be doing business with us into customers who are champions for our organization.

- **Results Oriented—**

Passionate about winning. Dedicated to achieving all-win solutions to situations.

#### RELATED COMPETENCY CATEGORIES:

- **Initiative—**

Proactively makes things happen. Evaluates self and others and takes positive corrective action. Is self-disciplined.

- **Accountability—**

Demonstrates personal responsibility. Holds self and others accountable for outcomes that are in alignment with the direction of the organization.

# Pipeline and Territory Management

## SUMMARY

Effective pipeline and territory management begins with the end in mind. As a salesperson, you first need a specific sales revenue target, then you need to analyze each of the elements that make up that target. Effective planning requires a thorough understanding of projected business from existing accounts as well as current and new prospects. You need to understand how to move from prospects to closed business, and the critical steps and closing ratios for each step. Then you need to create a concrete plan that creates sales results.

## CONTEXT

A great deal of your success in sales depends on the activities that are behind the scenes. No matter how effective you are in face-to-face relationship building and problem solving, your planning and organizational skills will be the most important element of your long-term selling success.

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### At the completion of this module, participants will be able to:

- Project revenue targets from existing accounts and current and new prospects
- Develop a territory plan to create focus and direction for activities
- Identify where clients and prospects are in the sales pipeline

*“A goal without a plan is just a wish.”  
—Antoine de Saint-Exupery*