Sales Pipeline System

The following system was developed in SharePoint for a Tom Ingram and Associates, Inc. client.

The pipeline you see resulted in over $6.5 million sold over 2 ½ years.

(Complex client circumstances – contact us for details)

http://www.tiainc.net/PublicItemsDemoTestDev/SalesPipelineContractsSOWMgmt/Lists/Sales%20Pipeline%20Contracts%20SOW%20Mgmt%203/Allitemsg.aspx

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A	Type	📎	Prospect	Assigned To	Status	Score	Opportunity	Summarize Compelling Need	Year 1 Forecast	Expected
	📄		Pilot Pen		Open	0.955555556	Resets in Target	5=Confirmed urgent dissatisfaction with current merchandising (sales low, costs high, OOS high, otherwise unhappy)	87,000	83,13
	📄		Rand McNally		Open	0.911111111	#CONVSEASEC	5=Confirmed urgent dissatisfaction with current merchandising (sales low, costs high, OOS high, otherwise unhappy)	473,000	430,95
	📄		Cadbury Schwepps		Open	0.888888889	ALLOTHER		565,000	502,22
	📄		Excell Marketing		Open	0.866666667	TRGTOTHER	5=Confirmed urgent dissatisfaction with current merchandising (sales low, costs high, OOS high, otherwise unhappy)	990,000	
	📄		Mead		Open	0.866666667	TRGTBTS	3	396,000	
	📄		3M		Open	0.844444444	WMSEASEC;#WMOTHER; #TRGTSEASEC;#TRGTBTS; #TRGTOTHER;#KMSEASEC; #KMOTHER:#DRUGSEASEC:	3=Suspected need to increase sales or decrease merch costs	1,700,000	1,435,55
	📄		Mead		Open	0.844444444	WMSEASEC;#WMOTHER	5	232,000	195,91
	📄		Avery Dennison		Closed-Won	0.822222222	TRGTBTS, we think Pat G or Scott H closed	4	725,000	596,11
	📄		Avery Dennison		Open	0.822222222	TRGTBTS	5=Confirmed urgent dissatisfaction with current merchandising (sales low, costs high, OOS high, otherwise unhappy)	250,000	205,55
	📄		Beiersdorf		Open	0.8	WMSEASEC;#WMOTHER; #TRGTSEASEC;#TRGTBTS; #TRGTOTHER;#KMSEASEC; #KMOTHER:#DRUGSEASEC:	5=Confirmed urgent dissatisfaction with current merchandising (sales low, costs high, OOS high, otherwise unhappy)	115,000	
	📄		Excell Marketing		Closed-Won	0.8	WMSEASEC;#TRGTSEASEC	5=Confirmed urgent dissatisfaction with current merchandising (sales low, costs high, OOS high, otherwise unhappy)	150,000	
	📄		Rand McNally		Open	0.777777778	WMSEASEC;	2	217,000	168,77
	📄		Avery Dennison		Open	0.755555556	WMSEASEC	3=Suspected need to increase sales or decrease merch costs	153,000	

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Expected Value	Forecast Close Month	Actual Close Month	Actual Close $	Urgency	In Our Sweet Spot / Strength?	Buy on value rather than price?	Co
83,133.333333333	Sept 10			5	5	4	5
430,955.555555556	Dec 10			5	4	5	4
502,222.222222222	Sept 10			5	4	4	5
858,000	Aug 10			5	3	5	5
343,200	Sept 10			5	5	3	3
1,435,555.55555556	Aug 10			5	4	3	5
195,911.111111111	Aug 10			5	4	3	5
596,111.111111111	Nov 10	June 09, Est Post Reps	100,000	5	3	4	5
205,555.555555556	Sept 10			4	4	4	5
92,000	Sept 10			5	4	3	3
120,000	Nov 10		150,000	3	5	4	4
168,777.777777778	Sept 10			4	5	3	2
115,600	Aug 10			3	5	3	4

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A	Competition in Mass, Describe	Niche	Our Category Expertise	Prospect Action Taken	Values Merch	Points Last W
	5	WMSEASEC				82
	4	WMSEASEC;#WMOTHER;#TRGTSEASEC;#OFFSEASEC;#CONVSEASEC	4=We have at least one expert source of category expertise	1=None beyond talking	3= Confirmed spending $1 million+ per year in merch services	2
	5	ALLOTHER				0
	5	TRGTOTHER	3=We have a moderate source of category expertise, at best		3= Confirmed spending $1 million+ per year in merch services	2
	3	TRGTBTS	3=We have a moderate source of category expertise, at best		1= No reliable information on spending on merch services	1
	5	WMSEASEC;#WMOTHER;#TRGTSEASEC;#TRGTBTS;#TRGTOTHER;#KMSEASEC;#KMOTHER;#DRUGSEASEC;	3=We have a moderate source of category expertise, at best	4.3=Invites us to join internal meeting;#3.5=Usually responds to phone / email within 2 work days;#3.4=Read success story, researched us, checked	3= Confirmed spending $1 million+ per year in merch services	1
	5	WMSEASEC;#WMOTHER				3
	5	TRGTBTS				0
	5	TRGTBTS				1
	3	WMSEASEC;#WMOTHER;#TRGTSEASEC;#TRGTBTS;#TRGTOTHER;#KMSEASEC;#KMOTHER;#DRUGSEASEC;				1
	4	WMSEASEC;#TRGTSEASEC				0
	2	ALLOTHER				1
	4	WMSEASEC	3=We have a moderate source of category expertise, at best	5.1=Discussed our project with his buyer/customer;#3.6=Openly discusses dissatisfaction with current	2= Suspect spending $1 million+ per year in merch services	1

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A	Points Last Week	Notes / Coaching Action Comments	Modified1	Annual Sales, Profits, Employees	Approach	Better Spend $ on Merch vs. Trade	Com
	82	Called 5/30 to review any questions and request reporting definitions---Tom asked that I	40,395.547326389				5=None current p
	2	Borders is only key retailer where we are not strong	40,395.54849537			4=Suspect Sales Increase better with Merch $ Spent	5=None current p
	0	NOT PURSUING CONFECTION CANDY Ask Shane	40,395.548576389		Seasonal: Halloween, Christmas, Easter, Mothers Day		
	2	Other retailers - have good provider: Shopko, Pamida, Fred Meyer:	40,443.607465278			5=Confirmed, Sales Increase better with Merch $ Spent	5=None current p
	1	PAT AGREES TO HAVE SCOTT CONTACT TARGET NAT ACCT MGR (ONLY) FOR	40,395.548668982			3=Unknown	3=Some dissatisfa
	1	Continuity Merch / Compliance checks, Out of stocks key issue Target OOS in	40,395.548703704	Public $24,462.0 million sales 76,239 employees	Seasonal: mjan/Mar: Get Organized , Back to School	4=Suspect Sales Increase better with Merch $ Spent	3=Some dissatisfa
	3	5/28 spoke with Jim - we will be bidding on a $500-600K program in q4. Follow-up in two	40,395.548761574		Seasonal: Jan/ Mar Get Organized, Back to School		3=Some dissatisfa
	0	Called three times week ending of 4/19/2008 spoke with Galen he sent me to Ed Dyson sent e-	40,395.54880787		seasonal back to school		3
	1	LM 5/27/2008 Called 5/19/2008 told to call after Holiday Price Proposal Sent Conference Call	40,395.548831019		seasonal back to school		5=None current p
	1	vm/em 5/22 sent email to dave with success story	40,395.548854167		Secondary Displays		5=None current p
	0	Called 1 Times LM week end 4/19/2008 2 E-mails Spoke 3 calls with on 4/8/2008	40,395.548888889		Resets, Ordering, Surge Seasonal		5=None current p
	1	Sent Gwen e-mail on 4/18/2008	40,395.548923611	Fiscal Year-End December 2007 Sales (mil.) $47.8 (est.) 2007 Employees 636	Seasonal: Memorial Day,		3=Some dissatisfa
	1	- continue to follow up with local guy in Bentonville and provide success stories	40,395.548946759	Public $6,307.8 million sales (2007) 37,300 employees (2007) 2006 Sales: $5,575,900,000 2006 Gross Profit:	Seasonal: Back to School	3=Unknown	3=Some dissatisfa

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Competition, Rating in Mass	Created1	Message They Responded to & Ho	Mfr's Gross Margins	Modified By1	Other Comments / Info	Products
5=None or major dissatisfaction with current provider confirmed	40,395.458368056	Previous experience with category		Tom Ingram		
5=None or major dissatisfaction with current provider confirmed	40,395.458368056	Success story e-mails - P&G series of successes	4=High	Tom Ingram		Maps and Travel guides
	40,395.458275463			Tom Ingram		
5=None or major dissatisfaction with current provider confirmed	40,395.458287037	Scott had done work for before, trusted Scott's word, liked REPS coverage	5=Extremely High	Karen Kidd		
3=Some reason to believe there is dissatisfaction with current provider	40,395.458321759		3=Moderate	Tom Ingram		Office BTS
3=Some reason to believe there is dissatisfaction with current provider	40,395.458252315	E-mail campaign success stories, probabaly 17% sales gain in WM, to Moe Nozari Head of US Consumer	4=High	Tom Ingram	The company has six operating segments: display and graphics (specialty film, traffic control materials); health care (dental and medical	HBC and BTS
3=Some reason to believe there is dissatisfaction with current provider	40,395.458321759			Tom Ingram		
3	40,395.458263889	Got lead from calling main switch board.		Tom Ingram		Office and School Suppl
5=None or major dissatisfaction with current provider confirmed	40,395.458263889	Conference Call with REPS Mangt on 5/7/2008 proposal sent follow up on 5/21/2008Confernce Call 4/25/2008 we are working on a pricing		Tom Ingram		Office and School
5=None or major dissatisfaction with current provider confirmed	40,395.458275463	Previous realtionship		Tom Ingram		
5=None or major dissatisfaction with current provider confirmed	40,395.458287037			Tom Ingram		
3=Some reason to believe there is dissatisfaction with current provider	40,395.458368056	FACE TO FACE ON 4/23/2008 sent e-mail 4/23/2008. We will be moving forward. Rand will send NDA. Got lead from rep in Pilot stores. Sent success		Tom Ingram		Rand McNally lets you k you stand. The largest c mapmaker in the world, t famous for its top-selling
3=Some reason to believe there is dissatisfaction with current provider	40,395.458263889	Worked through switch board until I got Galen Wong and Ed Dyson's names called them directly to discuss BTS 17% gain in WM	3=Moderate	Tom Ingram	Avery Dennison is easy to label: It's a global leader in the making of adhesive labels used on packaging, mailers, and	Office and School

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