

Funnel ScoreCard®

Opportunity Evaluation and Loss Review Process

Overview

Funnel ScoreCard® provides sales organizations a method to quickly and systematically identify the best opportunities to pursue. This program offers the framework to make fact-based decisions around resource allocation and time management.

For those concerned with improving forecasting, strengthening funnel integrity, and directing resources toward the right sales objectives, a customized *Funnel ScoreCard®* helps assess opportunity potential. The final product will include objective evaluation criteria developed by recognizing and understanding key factors that impact the organization's ability to win. The scorecard is then validated by analyzing previous sales opportunities and, over time, is updated as needed. Working with a scorecard allows organizations a way to rank and prioritize the opportunities to pursue, while highlighting the steps that will move them forward.

Funnel ScoreCard® eliminates guesswork and helps salespeople pinpoint where they stand with each opportunity in the funnel. Additionally, this program facilitates win/loss reviews by using the scorecard to identify which criteria were met and what information remained unknown during the sales cycle. This allows organizations to recognize the contributing factors in a win or loss in order to apply best practices to future sales opportunities.

Funnel ScoreCard® may be the right solution if your company is trying to:

- Recognize where to allocate limited resources for the greatest return.
- Assess available information about the sales opportunity.
- Identify critical next steps to progress through the sales cycle.
- Facilitate win/loss reviews that improve future sales actions.
- Improve forecast accuracy.

Accuracy is Obtainable

Many sales organizations view accurate forecasts as a difficult challenge to overcome. However, more than two-thirds of sales leaders at World-Class Sales Organizations are confident that they are accurately predicting sales.

Our forecasts are highly accurate



"The *Funnel ScoreCard®* is definitely a valuable tool that I have already begun to integrate into my day-to-day routine."

— Director, Manufacturing

Program Facts

Funnel ScoreCard®

Who Should Attend

The *Funnel ScoreCard*® design session should include top-performing salespeople and sales management. By utilizing the best practices and information these individuals have on why they win, the scorecard becomes a credible tool in the eyes of the rest of the organization.

How Your Organization Will Benefit

Enable field sales to:

- Quickly score opportunities to determine how they should be prioritized when selling time is limited.
- Identify key pieces of unknown information to quickly move the opportunity through the funnel.
- Replicate the best practices of the top sellers in the organization.

Enable sales management and senior leadership to:

- Make informed decisions on resource allocation when resources are limited.
- Guide salespeople on the right opportunities to pursue.
- Easily identify coaching opportunities where key pieces of information are consistently missing.

Delivery Options

This program is a customized offering delivered via a live, on site workshop. Duration is 1.5 days to design the *Funnel ScoreCard*® with the option to add half day “application” sessions for the remaining sales force.

Related Offerings

Strategic Selling® – Comprehensive strategy for winning complex sales.

Conceptual Selling® – Communicate effectively to uncover and align with the customer’s buying process.

Securing Strategic AppointmentsSM – Research and plan to successfully secure time with key contacts.

Large Account Management ProcessSM (LAMP®) – Strategic planning for protecting and growing key accounts.

Sales Access ManagerSM – Sales process integration with relationship management systems (CRM).

Strategic Selling® **Funnel Management** – Implementing customized funnel management.

About Miller Heiman

Miller Heiman helps companies and individuals that compete for high-value, business-to-business sales develop strategies, processes and skills to consistently win business – especially when the sales process is complex and the marketplace demanding. We are the world’s largest sales performance consulting and training firm and the preeminent thought leaders in the space. Quite simply, nobody knows sales performance better than we do. With corporate headquarters in the United States, United Kingdom, and Australia, Miller Heiman offers programs worldwide in 20 languages.