Manager Coaching Kits

pipeline builder collection

Focusing on early stages of the sales process, the collection approaches strategies for identifying new opportunities from three different angles:

1. Publicly Traded Accounts
2. Privately Held Accounts
3. Financial Performance and Trend Analysis

The output of each kit is an account-specific Opportunity Profile for creating new near-term and strategic opportunities. Each kit requires approximately 2 hours for team members to complete and may be flexibly used in groups or one-on-one.

KIT 1: Identifying Opportunities: Publicly Traded Customers

Objective	Know it Now Course References
To efficiently utilize recommended source documents to identify customer need and convert acquired insight into new selling opportunities with publicly traded customers.	Customer Insight, Current Situation and Business Change, Winning Access

KIT 2: Identifying Opportunities: Privately Held Customers

Objective	Know it Now Course References
To overcome challenges posed by a lack of account information available on privately held customers to identify new selling opportunities.	Customer Insight, Current Situation and Business Change, Winning Access

KIT 3: Identifying Opportunities: The Story Behind the Numbers

Objective	Know it Now Course References
To help team members more effectively identify new selling opportunities by analyzing customer financial performance and trends.	Customer Insight, Financial Statement Analysis, Winning Access

This 3-Kit collection

This 3-Kit collection is designed to expand the number of opportunities in a seller's pipeline.

1. Publicly Traded Accounts
2. Privately Held Accounts
3. Financial Performance and Trend Analysis

Opportunity Profiles

This collection facilitates manager-team member collaboration to:

- understand the customer's industry
- validate key customer initiatives
- align solution value with need
- create messaging to win access