

Strategic Funnel Management

PipelinePro CRM adds a dynamic and systematized process to managing pipelines. It regulates activities and progress driven by customer buying cycles and eliminates missed opportunities.

100% control delivers unbeatable accuracy.

PipelinePro delivers 100% control over every step of the funnel process. Each opportunity comes with a built in management system that provides ultra accurate forecasting and instant diagnostics for improving activities and goals associated with the system.



MosaicCRM changes the game from simple 'recording' to smart pipeline management.

PipelinePro is just one of many strategic tools I have designed into MosaicCRM that enable your organization to achieve and maintain complete control over managing pipelines and the activities surrounding the process. In an instant you and each salesperson can see their progress, what to do next and what's missing... all geared to help them achieve greater success. For a demonstration, please contact me at your convenience.

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Define the objectives and your pipeline management system is in place.

The program makes managing a focused pipeline and the activities surrounding it unbeatable through a fully structured process that is fully automated: set your objectives and this PipelinePro CRM will absolutely manage the process from activities to email updates. Your team is up and running in no time flat and spending more time selling!

Report View For		Activity Objective Analysis			
Melinda Bentley	Group View				
<ul style="list-style-type: none"> Group View All Sales CA Alberta/Prairie Sales CA BC Sales CA CCR Canada CA Eastern Sales CA Expedite Sales CA NAM Sales CA Ontario Sales Canada Sales Dynamex AE Sales Dynamex NAM Sales US CCR US Denver/St Paul Sales 					
		Calls			
Objective	Scheduled	Completed	Require		
200	5	0	195		
		Appointments			
Objective	Scheduled	Completed	Require		
50	1	0	49		
		Proposal			
Objective	Scheduled	Completed	Require		
25	0	0	25		
Appt. Required This Week: 12		Scheduled Appt.: 1	Completed Appt. : 1	Appt. Required : 10	

1. INDIVIDUAL, TEAM, GROUP AND REGION VIEWS

MosaicCRM makes it easy to view results by individual, group, or region with a single click. The advanced Hierarchy scheme provides completely confidential access by each user.

Management can view those who report to them as a Group and/or Region for instant analysis of combined results.

2. ACTIVITY OBJECTIVES ANALYSIS

Possibly for the first time ever, you will know what is missing when it comes to activities. Plus you can monitor the results for Calls, Appointments, and Proposal Activities.

- Set 'Objectives' for each by individual
- Monitor Scheduled, Completed and 'Gap' activities required to meet objectives
- Drill down to This Week's Appointment Activity results

Dial into an instant analysis and strategic moves with Pipeline Pro

Monitoring what enters the Pipeline and what happens next is all defined by MosaicCRM. Aging is critical to next stage monitoring.

Report View For		Possible Opportunities Stage 1							
Melinda Bentley	Group View	Account Name	Opened	Updated	Next Contact	Aging	Product	\$ Value	Net Value
		MyContactCard	03/29/2007	03/29/2007	00/00/0000	1	Expedite	72,000	0
		Apex Manufacturing Group	03/29/2007	03/29/2007	00/00/0000	1	Bio Transport	150,000	0
		Platinum Plating Co.	03/29/2007	03/29/2007	04/04/2007	1	Franchise	90,000	0
		Velocity Partners LLC	03/29/2007	03/29/2007	04/06/2007	1	Warehousing	5,900	0
		Polar Cap Investments	03/29/2007	03/29/2007	00/00/0000	1	Consulting	0	0
		test account	03/30/2007	03/30/2007	00/00/0000	0	Bio Transport	155	2
		006	---- Totals ----			001		318,055	2

POSSIBLE OPPORTUNITIES ANALYSIS

Every stage is defined and monitored and provides a plan view of upcoming Accounts where the User is working on Possible Opportunities

AUTOMATIC ACTIVITY SCHEDULER

Each Stage Analysis report includes 'Next Contact' date, where none exist; a bold red colored field alerts the user to schedule an activity! Then MosaicCRM will automatically schedule an Activity ensuring nothing is forgotten or missed.

'Active' Opportunities Analysis

Five individual Pipeline Stages analyzed individually for an accurate projection in each step of the Sales process and how these relate to the Pipeline content management.

First Meeting Stage 2							
Account Name	Opened	Updated	Next Contact	Aging	Product	\$ Value	Net Value
MyContactCard	03/29/2007	03/29/2007	00/00/0000	1	Overnight	36,000	0
Apex Manufacturing Group	03/29/2007	03/29/2007	00/00/0000	1	Consulting	60,000	0

Drill Down Stage 3 (30%)							
Account Name	Opened	Updated	Next Contact	Aging	Product	\$ Value	Net Value
MyContactCard	03/26/2007	03/26/2007	00/00/0000	4	Dedicated Fleet Services	99,000	0

Proposal Stage 4 (60%)							
Account Name	Opened	Updated	Next Contact	Aging	Product	\$ Value	Net Value
MyContactCard	03/29/2007	03/29/2007	00/00/0000	1	Franchise	48,000	0
Apex Manufacturing Group	03/29/2007	03/29/2007	00/00/0000	1	Distribution	50,000	0
Giant Distribution Inc.	03/29/2007	03/29/2007	00/00/0000	1	Outsourcing	260,000	0

KNOW WHAT WHEN AND WHAT IS MISSING
Probability values assigned to each Opportunity and Net Values are shown in addition to the Total Value.

Each has a current 'status' of the Stage including 'Aging' accounting for the number of days since the opportunity was created. In addition, 'Last Updated' date provides a running time of when Stage was last updated.

Every stage is defined and monitored and provides a plan view of upcoming Accounts where the User is working on Possible Opportunities

Stalled Opportunity Analysis

This summary report provides the sales person and management with a view and process to salvage stalled opportunities. When an Opportunity is rolled back to this status, an **automatic Email Alert and Follow Up activity** is scheduled for the Manager.

Stalled Opportunities Stage 0								
Account Name	Opened	Updated	Next Contact	Aging	Product	\$ Value	Net Value	
SalesWare, Inc.	03/27/2007	03/27/2007	04/02/2007	3	Expedite	24,000	0	
MyContactCard	03/29/2007	03/29/2007	00/00/0000	1	Same-Day Air	35,000	0	
Apex Manufacturing Group	03/29/2007	03/29/2007	00/00/0000	1	On Demand	12,000	0	
Giant Distribution Inc.	03/29/2007	03/29/2007	00/00/0000	1	Same-Day Air	24,000	0	
Platinum Plating Co.	03/29/2007	03/29/2007	04/04/2007	1	On Demand	52,600	0	
Panda Bears LLC	03/29/2007	03/29/2007	00/00/0000	1	Bio Transport	56,000	0	
006				---- Totals ----		001	203,600	000

Setting Objectives

It's easy to set Objectives for each salesperson. Update or modify these instantly.

Calls-

Appointments

Proposals

Automated Email Alerts/ Scheduled Activity Updates

MosaicCRM adds the extra feature of Alerts where critical changes or needs require immediate attention.

Stalled Opportunity Alert

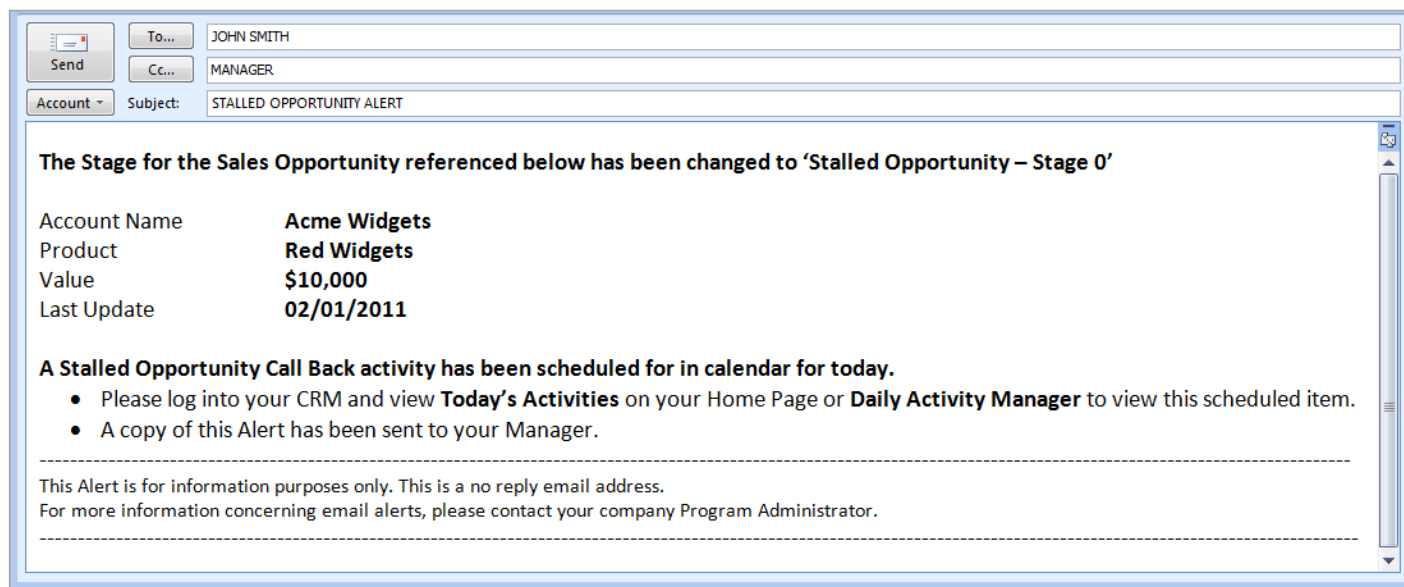
When an Opportunity changes to Stalled Status, an email is immediately sent to the sales person’s manager together with a Call Back activity added to their calendar.

Proposal - 60% Opportunity Alert

When an Opportunity changes to Proposal Stage 4 status, an email is immediately sent to the sales person’s manager together with a Follow Up Action activity added to their calendar.

Verbal Agreement – 90% Opportunity Alert

When an Opportunity changes to Verbal Agreement Stage 5 status, an email is immediately sent to the sales person’s manager together with a Follow Up Action activity added to their calendar.



Closed Opportunity Alert

When an Opportunity changes to Active Close Stage 6 status, an email is immediately sent to the sales person’s manager together with a Follow Up Action activity added to their calendar.

Pipeline Aging Alert

When an Opportunity reaches a prescribed ‘aging’ without any change in the Stage, an email is immediately sent to the salesperson and sales person’s manager together with a Follow Up Action activity added to their calendar.

Close Date Past Due Alert

When an Opportunity Close Date is Past Due, an email is immediately sent to the salesperson and sales person’s manager together with a Follow Up Action activity added to their calendar.