

Crowe Sales Pipeline Management

For Microsoft Dynamics® CRM



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Overview

Crowe Sales Pipeline Management from Crowe is an adaptable add-on solution to Microsoft Dynamics® CRM that makes it easier to manage and analyze information about your opportunities, forecasts, goals, territories, and salespeople. Automatic currency exchange calculations let you view expectations and results in the local currency for individual sales territories. Crowe Sales Pipeline Management gives you the power to forecast measurable performance in revenue against individual and organizational goals, and can be easily customized for a wide range of sales processes.

Crowe Sales Pipeline Management view

Microsoft Dynamics CRM | SALES | Sales Pipeline Mana... | Create | Remy LeBeau | AbleBridge Sales P...

NEW ACTIVITY | NEW RECORD | IMPORT DATA | ADVANCED FIND

Sales Pipeline Management

PERIOD | TERRITORY | PIPELINE

Year: 2014 | Quarter: Q1 Q3 Q2 Q4

Division: North America | Region: [All] | District: [All] | Owner: [All]

Include Upside | Include Committed | Include Closed

Group Results By: [No Grouping]

SEARCH | RESET

PIPELINE SUMMARY					
Forecast	\$7,544,000.00	Goal	\$7,500,000.00	Upside	\$262,000.00
Closed	\$6,641,000.00	% of Goal	100.59%		
Committed	\$903,000.00				

Potential Customer	Topic	Est. Close Date	Est. Revenue	Forecast Status	Sales Stage	Probability	Committed	Owner	Division	Region	District
Tesco	Benefits Plan Review Proj...	5/6/2014	\$215,000.00	Closed	5 - Won	75	✓	Kurt Wagner	North America	East	Southeast
American HealthCa...	Big Data Analysis	6/23/2014	\$90,000.00	Upside	4 - Verbal	60		Lucas Bishop	North America	East	Southeast
Weetabix	Big Data Analysis	5/16/2014	\$195,000.00	Closed	5 - Won	85	✓	James Howlett	North America	West	Northwest
Nokia	Business Review / Audit	5/18/2014	\$171,000.00	Closed	5 - Won	85	✓	Lucas Bishop	North America	East	Southeast
American HealthCa...	Computer Upgrade	6/4/2014	\$129,000.00	Closed	5 - Won	20	✓	James Howlett	North America	West	Northwest
Courtyard	Consulting Engagement	6/6/2014	\$121,000.00	Closed	5 - Won	70	✓	Max Eisenhardt	North America	East	Northeast
Technip	Consulting Engagement	6/2/2014	\$214,000.00	Closed	5 - Won	20	✓	Bobby Drake	North America	Central	South Central
			\$7,806,000.00								

50 rows loaded

Filter section

The Filter section is where you specify the Opportunity criteria you wish to use as your search parameters. The Opportunity records that meet your search criteria will be displayed in the Detail section.

PERIOD ▾	TERRITORY	PIPELINE ▾	Group Results By
Year <input type="text" value="2014"/> ▾ Quarter <input type="checkbox"/> Q1 <input type="checkbox"/> Q3 <input checked="" type="checkbox"/> Q2 <input type="checkbox"/> Q4	Division <input type="text" value="North America"/> ▾ Region <input type="text" value="[All]"/> ▾ District <input type="text" value="[All]"/> ▾ Owner <input type="text" value="[All]"/> ▾	<input checked="" type="checkbox"/> Include Upside <input checked="" type="checkbox"/> Include Committed <input checked="" type="checkbox"/> Include Closed	<input type="text" value="[No Grouping]"/> ▾ <input type="button" value="SEARCH"/> <input type="button" value="RESET"/>

Period – filters Opportunities by year and quarter. The Fiscal Year settings in Microsoft Dynamics CRM determine the date periods for your organization. You can also filter period by date range.

Reference: Period by Date Range

PERIOD ▾

Start Date ▾

End Date ▾

Territory – filters Opportunities by sales territory. The sales territory settings in Microsoft Dynamics CRM determine the sales territory hierarchy.

Pipeline – filters Opportunities by sales pipeline status. Each sales pipeline status identifies where an Opportunity falls within your sales forecast. You can also filter Pipeline by sales stage and probability of close.

Reference: Pipeline by Stage and Probability

PIPELINE ▾

Sales Stage ▾

Probability to

Group results by – grouping options can be applied to the Opportunity records in the Detail section. Opportunities can be grouped by pipeline status, sales stage, division, region, district or salesperson.

Reference: Group results by district

The screenshot displays the Microsoft Dynamics CRM Sales Pipeline Management interface. At the top, there are navigation tabs for 'NEW ACTIVITY', 'NEW RECORD', 'IMPORT DATA', and 'ADVANCED FIND'. The main header shows 'Sales Pipeline Management' with a 'Create' button and user information for Remy LeBeau.

Below the header, there are filter sections for 'PERIOD', 'TERRITORY', and 'PIPELINE'. The 'PERIOD' section is set to Year 2014, Quarter Q2. The 'TERRITORY' section is set to Division North America, Region Central, District [All], and Owner [All]. The 'PIPELINE' section has checkboxes for 'Include Upside', 'Include Committed', and 'Include Closed', all of which are checked. A 'Group Results By' dropdown is set to 'District'. There are 'SEARCH' and 'RESET' buttons.

Below the filters is a 'PIPELINE SUMMARY' section with the following data:

Forecast	\$2,136,000.00	Goal	\$2,400,000.00	Upside	\$199,000.00
Closed	\$1,820,000.00	% of Goal	89.00%		
Committed	\$316,000.00				

Below the summary is a table of pipeline items. The table has columns for Potential Customer, Topic, Est. Close Date, Est. Revenue, Forecast Status, Sales Stage, Probability, Committed, Owner, Division, Region, and District. The items are grouped by district: Great Lakes and South Central.

Potential Customer	Topic	Est. Close Date	Est. Revenue	Forecast Status	Sales Stage	Probability	Committed	Owner	Division	Region	District
Great Lakes \$707,000.00											
Logan Nursing & R...	Systems Implementation	4/11/2014	\$155,000.00	Closed	5 - Won	85	✓	Mark Butler	North America	Central	Great Lakes
Gardens Care Center	Data Consolidation	4/16/2014	\$217,000.00	Closed	5 - Won	85	✓	Bridget Bender	North America	Central	Great Lakes
Lake Worth Nursin...	Product SKU JJ202	5/7/2014	\$136,000.00	Closed	5 - Won	65	✓	Bridget Bender	North America	Central	Great Lakes
Logan Nursing & R...	Data Integration	6/24/2014	\$199,000.00	Upside	4 - Verbal	85		Bridget Bender	North America	Central	Great Lakes
South Central \$1,628,000.00											
Technip	Consulting Engagement	6/2/2014	\$214,000.00	Closed	5 - Won	20	✓	Bobby Drake	North America	Central	South Central
Mitsubishi	Data Integration	4/15/2014	\$177,000.00	Closed	5 - Won	85	✓	Bobby Drake	North America	Central	South Central
Carlsberg Group	New Taps	4/15/2014	\$183,000.00	Closed	5 - Won	75	✓	Bobby Drake	North America	Central	South Central
Southern HealthCa...	Printers	5/16/2014	\$148,000.00	Closed	5 - Won	85	✓	Bobby Drake	North America	Central	South Central
			\$2,335,000.00								

At the bottom of the table, it says '15 rows loaded'.

Pipeline Summary

The Pipeline Summary provides revenue summaries by pipeline status (forecast, closed, committed, upside). Sales goal information is displayed for the territory selected in the Filter section. This provides real-time analysis of forecasted revenue vs. sales goals.

PIPELINE SUMMARY					
Forecast	\$7,162,000.00	Goal	\$7,500,000.00	Upside	\$644,000.00
Closed	\$6,641,000.00	% of Goal	95.49%		
Committed	\$521,000.00				

Sales Pipeline Definitions – pipeline statuses are defined in the Product Configuration section of Sales Pipeline Management. They can also be changed to better reflect your sales organization's unique pipeline definitions. The default definitions are:

Sales Pipeline Definitions ×

Forecast
The total amount being forecast. This is the sum of Closed and Committed opportunities.

Upside
Opportunities that are estimated to close in the specified period but have not been Committed.

Committed
Opportunities that have been Committed to close in the specified period.

Closed
Opportunities that have been Closed-Won in the specified period.

% of Goal
The percentage of Forecast amount to Goal for the specified period.

Details

The Details section displays the Opportunity records returned based on the search criteria defined in the Filter section.

+ NEW ✎ EDIT 🗑 DELETED 📄 EXPORT <input type="text"/> 🔍 🔧 🔄												
▲	Potential Customer	Topic	Est. Close Date	Est. Revenue	Forecast Status	Sales Stage	Probability	Committed	Owner	Division	Region	District
▲ Great Lakes				\$707,000.00								
	Logan Nursing & R...	Systems Implementation	4/11/2014	\$155,000.00	Closed	5 - Won	85	✓	Mark Butler	North America	Central	Great Lakes
	Gardens Care Center	Data Consolidation	4/16/2014	\$217,000.00	Closed	5 - Won	85	✓	Bridget Bender	North America	Central	Great Lakes
	Lake Worth Nursin...	Product SKU JJ202	5/7/2014	\$136,000.00	Closed	5 - Won	65	✓	Bridget Bender	North America	Central	Great Lakes
	Logan Nursing & R...	Data Integration	6/24/2014	\$199,000.00	Upside	4 - Verbal	85		Bridget Bender	North America	Central	Great Lakes
▲ South Central				\$1,628,000.00								
	Technip	Consulting Engagement	6/2/2014	\$214,000.00	Closed	5 - Won	20	✓	Bobby Drake	North America	Central	South Central
	Mitsubishi	Data Integration	4/15/2014	\$177,000.00	Closed	5 - Won	85	✓	Bobby Drake	North America	Central	South Central
	Carlsberg Group	New Taps	4/15/2014	\$183,000.00	Closed	5 - Won	75	✓	Bobby Drake	North America	Central	South Central
	Southern HealthCa...	Printers	5/16/2014	\$148,000.00	Closed	5 - Won	85	✓	Bobby Drake	North America	Central	South Central
	Nokia	Printers	4/12/2014	\$176,000.00	Closed	5 - Won	85	✓	Bobby Drake	North America	Central	South Central
	Robinson's Rifles	Product SKU AX305	4/15/2014	\$146,000.00	Closed	5 - Won	85	✓	Eric Belmear	North America	Central	South Central
	New London Hospi...	Data Consolidation	5/6/2014	\$136,000.00	Closed	5 - Won	75	✓	Eric Belmear	North America	Central	South Central
	Robinson's Rifles	Product SKU AX305	5/9/2014	\$132,000.00	Closed	5 - Won	75	✓	Whitney Gray	North America	Central	South Central
	Global Connect Te...	Printers	6/23/2014	\$125,000.00	Committed	4 - Verbal	85	✓	Bobby Drake	North America	Central	South Central
	CommCare	Product SKU JJ202	6/23/2014	\$106,000.00	Committed	4 - Verbal	85	✓	Eric Belmear	North America	Central	South Central
	New London Hospi...	Data Consolidation	6/28/2014	\$85,000.00	Committed	4 - Verbal	85	✓	Whitney Gray	North America	Central	South Central
				\$2,335,000.00								
15 rows loaded												

Toolbar – you can create a new Opportunity, or delete or edit existing Opportunities. You can also search for an Opportunity record. The icons on the right provide multi-currency and sub-group display options.



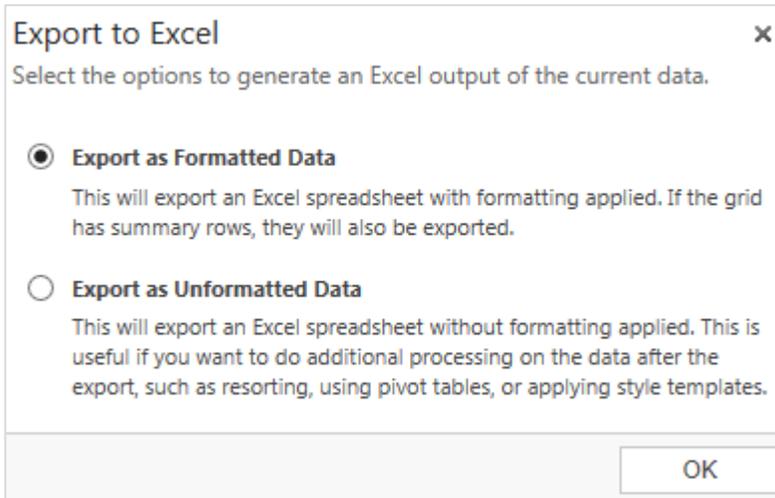
Edit mode

Inline and multi-record editing allow for quick sales pipeline updates.

SAVE CHANGES		CANCEL CHANGES		Potential Customer	Topic	Est. Close Date	Est. Revenue	Forecast Status	Sales Stage	Probability	Committed	Owner	Division	Region	District
Great Lakes							\$707,000.00								
Bridget Bender							\$552,000.00								
<input checked="" type="checkbox"/>	Gardens Care Center	Data Consolidation	4/16/2014		\$217,000.00	Closed	5 - Won	85	<input checked="" type="checkbox"/>	Bridget Bender	North America	Central	Great Lakes		
	Lake Worth Nursing Home	Product SKU JJ202	5/7/2014		\$136,000.00	Closed	5 - Won	65	<input checked="" type="checkbox"/>	Bridget Bender	North America	Central	Great Lakes		
<input checked="" type="checkbox"/>	Logan Nursing & Rehabilitation	Data Integration	6/24/2014		\$199,000.00	Upside	4 - Verbal	85	<input type="checkbox"/>	Bridget Bender	North America	Central	Great Lakes		
Mark Butler							\$155,000.00								
	Logan Nursing & Rehabilitation...	Systems Implementati...	June 2014		\$155,000.00	Closed	5 - Won	85	<input checked="" type="checkbox"/>	Mark Butler	North America	Central	Great Lakes		
South Central							\$1,628,000.00								
Bobby Drake							\$1,023,000.00								
	Technip	Consulting Engagemer	22 23 24 25 26 27 28		\$214,000.00	Closed	5 - Won	20	<input checked="" type="checkbox"/>	Bobby Drake	North America	Central	South Central		
	Mitsubishi	Data Integration	29 30 1 2 3 4 5		\$177,000.00	Closed	5 - Won	85	<input checked="" type="checkbox"/>	Bobby Drake	North America	Central	South Central		
	Carlsberg Group	New Taps	6 7 8 9 10 11 12		\$183,000.00	Closed	5 - Won	75	<input checked="" type="checkbox"/>	Bobby Drake	North America	Central	South Central		
	Southern HealthCare Managem...	Printers	5/16/2014		\$148,000.00	Closed	5 - Won	85	<input checked="" type="checkbox"/>	Bobby Drake	North America	Central	South Central		
<input checked="" type="checkbox"/>	Nokia	New Hardware	4/12/2014		\$176,000.00	Closed	5 - Won	85	<input checked="" type="checkbox"/>	Bobby Drake	North America	Central	South Central		
	Global Connect Technology	Networking	6/23/2014		\$125,000.00	Committed	4 - Verbal	85	<input checked="" type="checkbox"/>	Bobby Drake	North America	Central	South Central		
Eric Belmear							\$388,000.00								
<input checked="" type="checkbox"/>	Robinson's Rifles	Product SKU AX305	4/15/2014		\$146,000.00	Closed	5 - Won	85	<input checked="" type="checkbox"/>	Eric Belmear	North America	Central	South Central		
							\$2,335,000.00								

Export to Excel

Export Opportunities in the Details section to Microsoft® Excel® as formatted or unformatted data.



The dialog box titled "Export to Excel" contains the following text and options:

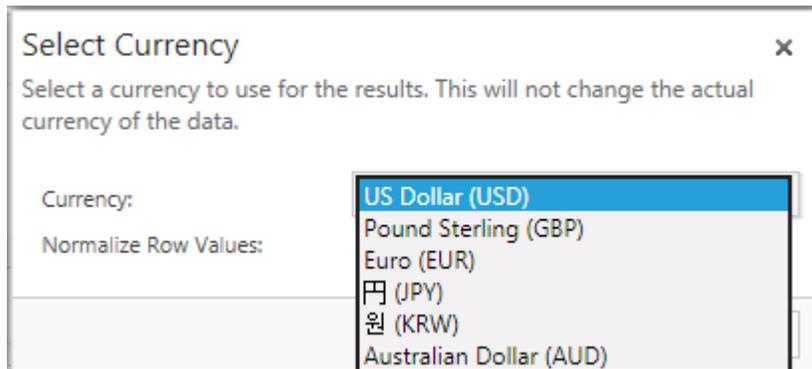
Select the options to generate an Excel output of the current data.

- Export as Formatted Data**
This will export an Excel spreadsheet with formatting applied. If the grid has summary rows, they will also be exported.
- Export as Unformatted Data**
This will export an Excel spreadsheet without formatting applied. This is useful if you want to do additional processing on the data after the export, such as resorting, using pivot tables, or applying style templates.

OK

Multi-currency display

Multi-currency support is inherited from the currencies and exchange rates in Microsoft Dynamics CRM.



The dialog box titled "Select Currency" contains the following text and options:

Select a currency to use for the results. This will not change the actual currency of the data.

Currency: US Dollar (USD)
Pound Sterling (GBP)
Euro (EUR)
¥ (JPY)
₩ (KRW)
Australian Dollar (AUD)

Normalize Row Values:

If "Normalize Row Values" is selected, both Summary and Details sections will use the selected currency. If unchecked, only the Summary section will reflect the currency change. A global sales organization can view Opportunity records in the local currency for each particular sales territory.

Opportunity fields for Sales Pipeline Management

The Microsoft Dynamics CRM Opportunity form contains the information necessary to manage your sales pipeline.

Sales Pipeline Management			
Probability	70	Division	 North America
Sales Stage	4 - Verbal	Region	 Central
Committed	<input type="checkbox"/>	District	 Great Lakes
Owner *	 Remy LeBeau		

Key fields for Sales Pipeline Management (SPM)

- Est. Revenue – potential revenue value of the Opportunity. The Est. Revenue field is the basis for the calculation of money fields displayed in the Summary section.
- Est. Close Date – the date you are estimating the Opportunity to close. The Est. Close Date field is the basis for the Period filter in the Filter section.
- Sales Stage – defines where the Opportunity is in the sales cycle. The Sales Stage field is a component used to calculate Pipeline Status definitions.
- Owner – the salesperson responsible for the Opportunity. The Owner field is the basis for the Owner filter in the Filter section.
- Division, Region & District – represents the sales territory of this Opportunity, which is the territory to which the Owner is assigned. If the Owner of an Opportunity is changed, the division, region and district are automatically updated.

Territory and Goal Management

The Sales Territory module in Microsoft Dynamics CRM is used to determine your organization's sales territories.



Sales Territories

Create new sales territories and assign territory managers. Add and remove members, modify territory information, and delete territories.

The Goals module in Microsoft Dynamics CRM is used to determine your sales organization's goals. Crowe provides a Goal Management interface that makes setting up and editing goals very easy. The Goal Management module is found on the Navigation pane.

Reference: Goal Management, Rollup example

Microsoft Dynamics CRM					
SALES					
Goal Management					
NEW ACTIVITY NEW RECORD IMPORT DATA ADVANCED FIND					
EDIT SELECT YEAR					
	Salesperson ↑	Q1 FY14	Q2 FY14	Q3 FY14	Q4 FY14
▲	APAC	\$1,200,000	\$1,200,000	\$1,200,000	\$1,200,000
▷	ANZ	\$500,000	\$500,000	\$500,000	\$500,000
▷	Japan	\$500,000	\$500,000	\$500,000	\$500,000
▷	Korea	\$200,000	\$200,000	\$200,000	\$200,000
▲	EMEA	\$4,125,000	\$4,125,000	\$4,125,000	\$4,125,000
▷	Central Europe	\$825,000	\$825,000	\$825,000	\$825,000
▷	Northern Europe	\$1,650,000	\$1,650,000	\$1,650,000	\$1,650,000
▷	Southern Europe	\$825,000	\$825,000	\$825,000	\$825,000
▷	Western Europe	\$825,000	\$825,000	\$825,000	\$825,000
▲	North America	\$7,500,000	\$7,500,000	\$7,500,000	\$7,500,000
▷	Central	\$2,400,000	\$2,400,000	\$2,400,000	\$2,400,000
▷	East	\$3,000,000	\$3,000,000	\$3,000,000	\$3,000,000
▷	West	\$2,100,000	\$2,100,000	\$2,100,000	\$2,100,000

Reference: Goal Management, Edit Mode example

Goal Management

SAVE CHANGES		CANCEL CHANGES			
▲	Salesperson ↑	Q1 FY14	Q2 FY14	Q3 FY14	Q4 FY14
▷	APAC	\$1,200,000	\$1,200,000	\$1,200,000	\$1,200,000
▷	EMEA	\$4,125,000	\$4,125,000	\$4,125,000	\$4,125,000
▲	North America	\$7,500,000	\$7,500,000	\$7,500,000	\$7,500,000
▲	Central	\$2,400,000	\$2,400,000	\$2,400,000	\$2,400,000
▲	Great Lakes	\$1,200,000	\$1,200,000	\$1,200,000	\$1,200,000
	Bridget Bender	\$300,000	\$300,000	\$300,000	\$300,000
	Carrie Coen	\$300,000	\$300,000	\$300,000	\$300,000
	Mark Butler	\$300,000	\$300,000	\$300,000	\$300,000
	Remy LeBeau	\$300,000 ×	\$300,000	\$300,000	\$300,000
▲	South Central	\$1,200,000	\$1,200,000	\$1,200,000	\$1,200,000
	Bobby Drake	\$300,000	\$300,000	\$300,000	\$300,000
	Eric Belmear	\$300,000	\$300,000	\$300,000	\$300,000
	Eric Landon	\$300,000	\$300,000	\$300,000	\$300,000
	Whitney Gray	\$300,000	\$300,000	\$300,000	\$300,000
▷	East	\$3,000,000	\$3,000,000	\$3,000,000	\$3,000,000
▷	West	\$2,100,000	\$2,100,000	\$2,100,000	\$2,100,000

Update or edit sales goals for any salesperson for any quarter. When a new salesperson is added and assigned a territory, a new goal record is automatically created in the Goal Management module of Microsoft Dynamics CRM.

About Crowe

At Crowe, our mission is to help you make smart decisions today, for lasting value tomorrow. We can show you how to streamline business operations and increase business success with Microsoft Dynamics CRM and Crowe Sales Pipeline Management.

Our approach is unique.

We view Microsoft Dynamics CRM as a flexible business platform rather than just a “front office” application. Any organization, in any industry, can use it to define and manage information about its relationships.

Our clients are from a wide industry spectrum: wealth managers, Christmas tree brokers, insurance agents, coffee manufacturers, non-profit education providers, biotechnology research and development companies; all with relationships and the need to manage information about people, money, products, services, and things unique to their organizations.

Our experience is delivering CRM project success.

Crowe has been implementing customer relationship management (CRM) technology from the inception of contact management applications through the evolution to sales force automation and ultimately into customer relationship management systems. Our logical CRM project implementation methodology is proven and delivers success. We have helped hundreds of companies streamline sales, marketing and service operations with CRM technology solutions.

We know Microsoft Dynamics CRM.

Crowe has worked with Microsoft CRM since before its release in 2003 through its growth into the market-leading CRM platform it is today. In 2006 Crowe made the strategic decision to focus solely on Microsoft Dynamics CRM and we've never looked back. Its flexibility, familiar user interface, interoperability with the Microsoft® Office platform – including Outlook® – and its top-flight functionality make it a sound investment in CRM strategy.

Crowe is focused on your success.

Our strengths are our people and their personal commitment to each customer engagement. Our logical approach, the quality of our effort, and our seriousness and professionalism are the keys to our accomplishments. At Crowe, we measure our success by your success.