Stay on Top of Your Game with the Pipeline

As a sales professional, you need a clear view of your performance on a continuing basis. Also, it is well known that an organized sales rep is a better sales rep- this can distinguish you from the competition. JOBZ! makes it easy to accomplish both goals. It's all about the Pipeline.

It's as easy as 1, 2, 3:

1) On a daily basis, use the ORGANIZE pull-down sorts in JOBZ! to help keep yourself organized, especially the Pending and Working sorts.

Job Status- the key to staying Organized

Working jobs:

Click the truck icon to ship it.

JOBZ! will automatically update a job's Status when you send a Proposal (from In Estimating to Pending), when you turn in an SOP (from Pending to Working) and when you output an Invoice Draft (from Working to Billed), so most of the organizing is already done for you. However, once a job has moved to Pending or Working Status, you need to pay attention.

The Pending and Working job sorts will actually help identify jobs that need your attention. When the Invoice Date drifts into the past, JOBZ! will remind you to correct it, or to change the status. Only after you make the corrections will you be shown the complete list of jobs you have in those Status categories. If a job is still Pending then it logically should have an Invoice Date in the future, right? Or if it has gone away, then change the Status to Dead. If it appears in Working, but has an Invoice Date in the past, then it probably should be in the Status of either Shipped or Billed (or else have the anticipated Invoice Date adjusted).

For another thing, if you make use of the Follow Up Date when you quote a job, you can keep an eye on when you need to follow up on quotes you have placed. Just click the Follow Up button on the Pending list.

2) Run your own Pipeline report. This will give you an overview of what the current month and near future are looking like.

Organize

- List Found
- List All
- Sort
- Today
- This Week
- Things To Do
- Follow Up
- In Estimating
- Pending
- Pending Likely
- Pending Projects
- Working
- Working Projects
- Sort POs
- WIP
- Shipped
- Shipped-Approved
- Shipped-Not Approved
- Billed

Reports:
- **Pipeline**
- Forecast
- Current Sales

Tracking box on QUOTE. Say Yes and give it a % of likelihood that you will make the sale.

Tracking	Pending Jobs List
Follow Up	Mon, May 23, 20—
Likely Sale?	Yes 75%
Pipeline	$14,890

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Keep notes to yourself about a job.

You are prompted when emailing proposals to add the job to your Pipeline. Just do it! You can also do it on the QUOTE screen, Tracking box. This is also where you can set a Follow Up Date. Keep your Pending jobs current as to Invoice Date and Likelihood of sale. (If a job is just a variation or alternate version, it does not need to be in the Pipeline. Pick one of the variations to include in your Pipeline.) The % of likelihood will be applied to the average price of all the quantities you are quoting.

3) When a job ships out, or is billed, change the job's status and invoice date accordingly.

Again, JOBZ! will automatically change the Status to Billed when you produce an Invoice Draft. You will now have an accurate record of your billed sales. Running the Working sort will help identify which jobs should be ready to invoice, based on the Invoice Date slipping into the past.

That's it! Use these features to stay on top of your game. And incidentally, when a Manager runs the Pipeline, it will include your Pipeline. Just sayin'...

Pipeline by Rep

■ Eric Clapton   ■ Jerry Garcia   ■ Jim Taylor   ■ Jimi Hendrix   ■ Jimmy Buffett
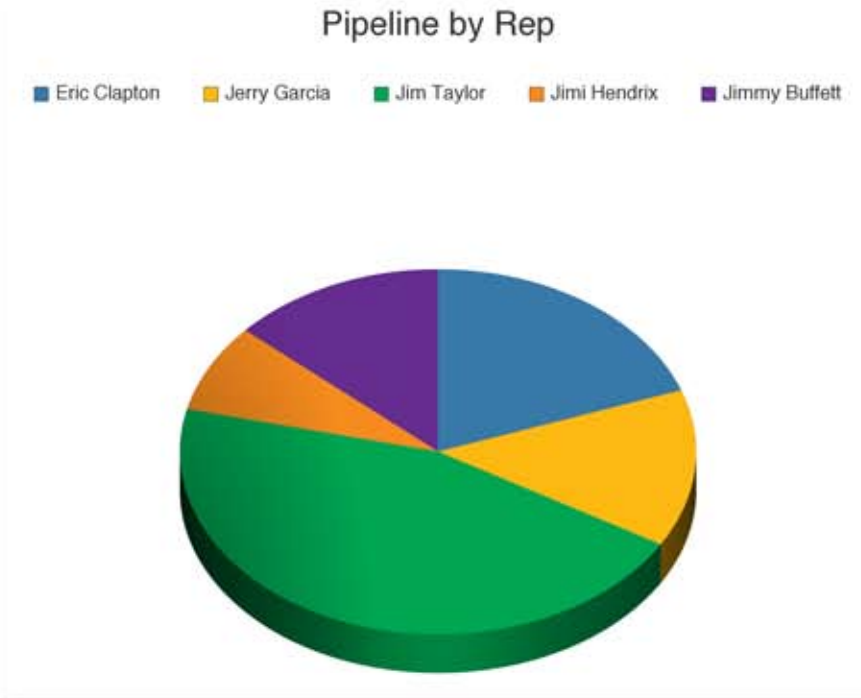
Following page is an example of a sales rep's pipeline.

Pipeline

May 4, 2016

Invoice Month, Year	Plant, Job #, Status, Likelihood %, Invoice Date			Sale
May 2016				
8 & 1/2 X 11 - Job One	*CARP 10160-14*	*Shipped*	5/3/16	$2,096
	May Jim Taylor Shipped			$2,096
TXMO Communications, LLC - Barking Dog Software	*CARP 10156-14*	*Working*	5/6/16	$10,729
8 & 1/2 X 11 - A JOBZ! Digital Est. Rack	*CARP 01-21659*	*Working*	5/9/16	$4,033
Carpe Data - Guatemala	*SF 10184-15*	*Working*	5/9/16	$789
24 Seven - Memos Database Tutorial	*CARP 01-21778*	*Working*	5/9/16	$2,468
Panoramic Press - Four Part Harmony	*CARP 01-21779*	*Working*	5/9/16	$750
11 by Seventeen - MSM Brochure 24p	*SF 10155-14*	*Working*	5/11/16	$48,500
8 & 1/2 X 11 - Broker Function	*SF 10157-14*	*Working*	5/13/16	$69,134
Carpinteria Arts Center - Art Gallery Post Card	*SF 10199-16*	*Working*	5/27/16	$624
11 by Seventeen - Test Schedule	*SF*	*Working*	5/27/16	$1,184
11 by Seventeen - Tax Code Booklet	*CARP 123456*	*Working*	5/31/16	$4,924
	May Jim Taylor Working			$143,136
	May Jim Taylor Total			**$145,232**
	May 2016 Total			**$145,232**
June 2016				
11 by Seventeen - Heidelberg Service Brochure 2017	*PDX*	*Pending 100%*	6/6/16	$47,169
11 by Seventeen - Heidelberg Presentation Folder 2017	*PDX 10165-14*	*Pending 50%*	6/8/16	$39,738
11 by Seventeen - Heidelberg Web Press Brochure 2017	*CARP 01-189*	*Pending 75%*	6/9/16	$14,890
11 by Seventeen - Heidelberg Sheetfed Brochure 2017	*PDX*	*Pending 90%*	6/9/16	$27,324
Panoramic Press - JOBZ! Preflight Checklist	*SF 10196-16*	*Pending 100%*	6/10/16	$20,172
Presentation Design Group - Presentation Display 2	*CARP 01-21760*	*Pending 75%*	6/10/16	$21,759
TXMO Communications, LLC - Ipsum Dolor Sit Amet Lorem	*PDX 10130-13*	*Pending 100%*	6/16/16	$455,476
	June Jim Taylor Pending			$626,527
	June Jim Taylor Total			**$626,527**
	June 2016 Total			**$626,527**
	Grand Total			**$771,759**