CONCEPT

Sales Management and Professional Selling: Pipeline, Forecasting and Team Coaching

12 – 16 July 2027
London - Central London four-star



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Introduction:

Many sales teams miss targets not for lack of effort but because sales management is informal: territories are unbalanced, quotas are set top-down, pipeline stages mean different things to each representative and forecasts rely on optimism rather than evidence. This Core Concept course gives sales managers a practical operating system for planning, running and coaching a sales team. Participants define a team selling process, manage pipeline and forecast with CRM data, set KPIs and coach to them, and build a Sales Management Operating Plan for their own team.

Course Objectives:

- Translate company revenue targets into a sales plan with segmented territories, capacity estimates and defensible quotas
- Design a team selling process with stage definitions, exit criteria and standard sales activities for each stage
- Manage the pipeline using coverage, conversion and velocity measures and run evidence-based pipeline reviews
- Produce a sales forecast by category and improve its accuracy through CRM data discipline
- Coach sales representatives through structured one-to-ones and deal reviews tied to leading indicators
- Build a Sales Management Operating Plan covering targets, pipeline rules, KPIs, incentives and coaching cadence

Target Audience:

- Managers responsible for sales team targets, territories and revenue results
- Supervisors and team leaders accountable for the daily activity and performance of sales representatives
- Senior sales representatives preparing to take on team leadership responsibility
- Sales operations managers responsible for CRM, reporting and forecast preparation
- Business unit managers who carry a revenue target and direct a sales team

Course Outline:

Day 1: Sales Management Foundations and Sales Strategy

- Sales Manager Role Map: Planning, Pipeline, Forecast, Coaching and Measurement
- Revenue Target Breakdown by Product, Segment and Channel
- Ideal Customer Profile and ABC Customer Segmentation
- Sales Coverage Models: Field, Inside and Channel Sales
- Current-State Sales Team Diagnostic Scorecard

Day 2: Territory Planning, Quotas and the Team Selling Process

- Territory Design Using Account Potential and Workload Balancing
- Sales Capacity Model and Headcount Planning Worksheet
- Quota Setting Methods: Top-Down, Bottom-Up and Blended
- Sales Process Stage Definitions with Buyer-Verified Exit Criteria
- Professional Selling Sequence: Prospecting, Discovery, Proposal and Close Playbook

Day 3: Pipeline Management, Forecasting and CRM Discipline

- Pipeline Coverage Ratio and Stage Conversion Rate Analysis
- Sales Velocity Formula: Deal Count, Value, Win Rate and Cycle Length
- Forecast Categories: Commit, Best Case and Pipeline
- Weighted and Historical Forecasting Methods Compared
- CRM Data Standards: Mandatory Fields, Next Steps and Close Date Rules

Day 4: Sales KPIs, Coaching and Team Performance Risks

- Leading and Lagging Sales KPIs Dashboard Design
- Pipeline Review Meeting Agenda and Deal Inspection Questions
- Structured One-to-One Coaching Conversation and Skill Observation Sheet
- Forecast Risk Signals: Stalled Deals, Slipped Close Dates and Sandbagging
- Sales Incentive Plan Basics: Pay Mix, Accelerators and Unintended Behaviours

Day 5: Case Study Practice and the Sales Management Operating Plan

- Multi-Sector Case: Underperforming Regional Sales Team Diagnosis
- Case Territory, Quota and Pipeline Rebuild with Peer Challenge
- Team Operating Rhythm: Weekly, Monthly and Quarterly Sales Cadence
- Sales Management Operating Plan Drafting for an Own Team
- Plan Presentation to a Peer Review Panel with Feedback

Skills You Will Gain:

- Sales Territory Design
- Quota Allocation
- Sales Process Design
- Pipeline Analysis
- Sales Forecasting
- CRM Data Governance
- Sales Coaching
- Sales Performance Measurement

Why Attend This Course:

- Replace informal targets and gut-feel forecasts with a planning and forecasting method your team can repeat every quarter
- Run shorter, sharper pipeline reviews that expose risk early and lead to clear next steps for each deal
- Test your territory, quota and coaching decisions against peers from other sectors and countries on a realistic case
- Return with a peer-reviewed Sales Management Operating Plan ready to apply to your own team

Conclusion:

Consistent sales results come from a managed system rather than individual heroics. This course moves from sales strategy and customer segmentation, through territory, quota and selling process design, to pipeline, forecast and CRM discipline, and then to the KPIs, coaching and incentive choices that shape team behaviour. The final day applies the method to a realistic case and to each participant's own team, producing a Sales Management Operating Plan that sets the operating rhythm for the quarters ahead.