

Revenue Continuity & Pipeline Velocity Checklist

Your quick-hit checklist to maintain pipeline and revenue continuity.

In light of recent world events, companies around the globe are struggling to maintain business and revenue continuity. Here's a quick checklist to help you navigate these trying times.

The million-dollar question:

How does my business make it to the other side of this crisis?

THERE ARE 3 KEY AREAS THAT ARE CRITICAL TO MANAGEMENT OF THIS CRISIS



Prioritize the health and safety of your people Keep on top of updates, understand the situation, apply that to the safety of your workforce



Address business continuity immediately Assess cash flow and financial or operational risks, and stress-test business scenarios



Communicate liberally Proactively communicate to all constituents in your business

In the new environment, B2B companies must adapt and pivot to remain competitive. To see where your current crisis strategy stacks up, ask yourself these five questions:

- Have you stayed engaged with your workforce and mapped out contingency plans?
- How are your prospects and customers being affected by this crisis?
- How can your solution help your customers succeed?
- What are your customers most concerned with at this time?
- What have you learned from this experience to be better prepared for next time?



If you could use help in one of more of these areas, use this checklist to help you ensure revenue continuity and pipeline velocity.

Culture

- ✓ Put the health and safety of your workforce above everything else
- ✓ Ask your team directly what they need from you as a leader
- ✓ Be transparent regarding crisis and contingency plans
- ✓ Set up weekly virtual all-hands meetings to address any questions or concerns
- ✓ Establish a routine, structure the workday, and maintain communication among teams

Positioning

- ✓ 'Halt all trading' – stop doing everything you're doing to assess, adjust, and pivot your messaging and positioning
- ✓ In communications with prospects and customers, be empathetic and understanding of the severity of the current crisis.
- ✓ Talk to your colleagues on the front lines (i.e. sales, client success) or your customers directly to find out exactly what your they're dealing with and the challenges they're facing
- ✓ If your capabilities are essential right now, inform your prospects and customers that you're here to help, explaining how you can help make their lives easier
- ✓ If your capabilities will be essential once this crisis is over, focus on building rapport, establishing relationships, and checking in on your current customer base

Sales interactions

- ✓ Maintain momentum; don't sit back and wait for this to pass. You will end up with a gap in pipeline and/or revenue that may have been avoided
- ✓ Don't stop reaching out – people have more time in their days, and they are answering emails and phone calls.
- ✓ Be consultative and empathetic with prospects, don't go for the hard sell
- ✓ Focus on building relationships; this is not the time for sales small talk. Use this time to relate to your customers, genuinely asking how they're doing and how they're coping with the crisis
- ✓ Refine your online and social presence, providing useful, relevant content positioning yourself as a thought leader and industry expert your prospects and customers can turn to for guidance

Customer success

- ✓ In interactions with customer, aim to provide them with a peace-of-mind and a sense of stability
- ✓ Be proactive; consistently be adjusting and aligning your strategy to meet market conditions
- ✓ Make yourself available and easily accessible, provide direction, and be a consultative partner to your customers throughout this uncertain time
- ✓ Track metrics and progress of your initiatives to make real-time, data-driven decisions on the direction of the engagement
- ✓ Set up virtual check-ins or coffee dates (with video) with your customers to stay connected

Contingency

- ✓ Get your leadership team together and pull information from both your own collective experiences and best practices surrounding working from home and crisis contingency
- ✓ Look at all aspects of closure and potential revenue impacts
- ✓ Ask yourself: What if? And map out a plan to address every foreseeable situation and circumstance
- ✓ Assess the skillsets of your workforce, and cross-train where applicable
- ✓ Communicate your crisis contingency plans across your organization where needed



HOW WE CAN HELP

Companies like Pulse Secure, Marketo, and SAP rely on Televerde to provide end to-end sales and marketing services.

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