



PMO

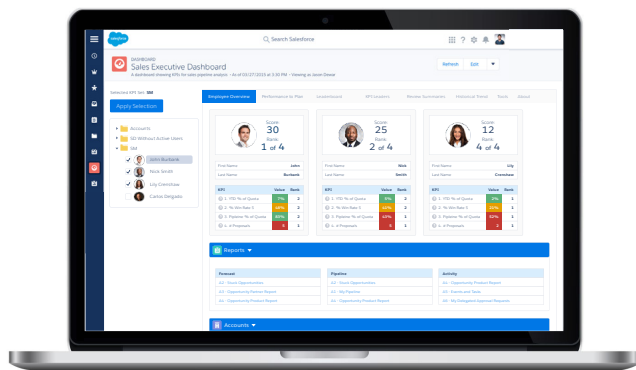
Performance Management Optimizer



Sales Competency Coaching

Performance Management Optimizer™ (PMO) is a completely configurable, native Salesforce® app designed to track sales teams and reps performance across the end-to-end sales cycle. Configured to your specific KPI's, it allows managers to easily identify the coaching needs of individual reps to drive overall elite sales performance.

Effortlessly measure sales teams productivity.



- Build a solid link from sales training to ROI in real-time.
- Improve coaching ability & effectiveness of sales managers.
- Quickly identify gaps in activity, skills and competencies.
- Track KPI's across end-to-end sales cycle.



Overview of Employee KPI Ranking

Employee Overview

Performance to Plan

Leaderboard

KPI Leaders

Review Summaries

Historical Trend

Tools

About

Score: 30
Rank: 1 of 4

First NameJohn
Last NameBurbank

KPI	Value	Rank
1. YTD % of Quota	7%	2
2. % Win Rate 5	48%	2
3. Pipeline % of Quota	83%	2
4. # Proposals	5	1

Score: 25
Rank: 2 of 4

First NameNick
Last NameSmith

KPI	Value	Rank
1. YTD % of Quota	5%	2
2. % Win Rate 5	41%	2
3. Pipeline % of Quota	43%	1
4. # Proposals	9	1

Score: 12
Rank: 4 of 4

First NameLily
Last NameCrenshaw

KPI	Value	Rank
1. YTD % of Quota	2%	1
2. % Win Rate 5	21%	1
3. Pipeline % of Quota	52%	1
4. # Proposals	2	1

View real-time key performance metrics for your team. Select multiple users to compare overall scores and rankings at the individual KPI level.

Leaderboard

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Snapshot Date

2/18/2016

Last Refresh Date

2/18/2016 at 12:00 AM

Name	Rank	Score	1. YTD % of Quota	2. % Win Rate 5	3. Pipeline % Quota	4. # Proposals
John Smoak	1	30	7%	48%	83%	5
Nik Nikic	2	25	5%	41%	43%	5
Lily Yip	3	12	2%	21%	52%	2
Carlos Cortes	4	9	2%	17%	36%	2

Team and individual rankings on leading, leaning and lagging KPI's.

KPI Leaders

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1. YTD % of Quota

Name	Value	Rank
 John Smoak	7%	2
 Nik Nikic	5%	2
 Lily Yip	2%	2
 Carlos Cortes	2%	1

2. % Win Rate 5

Name	Value	Rank
 John Smoak	48%	2
 Nik Nikic	41%	2
 Lily Yip	21%	2
 Carlos Cortes	17%	1

3. Pipeline % Quota

Name	Value	Rank
 John Smoak	83%	2
 Nik Nikic	43%	2
 Lily Yip	52%	2
 Carlos Cortes	36%	1

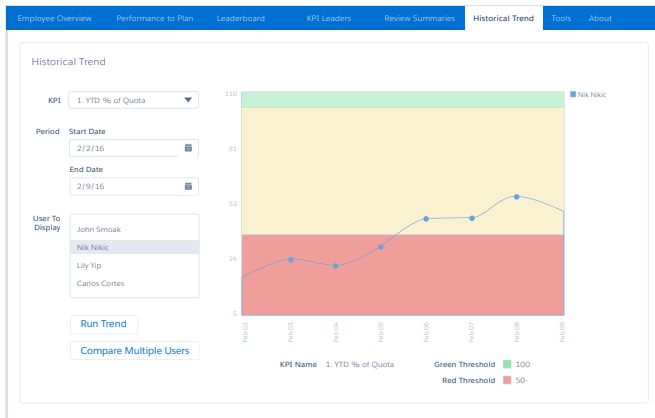
4. # of Proposals

Name	Value	Rank
 John Smoak	5	2
 Nik Nikic	9	2
 Lily Yip	2	2
 Carlos Cortes	2	1

View rankings at the individual KPI level for each member of your team.



Historical Trend



Overview of how KPI's are progressing over time. Run trends on an individual user or compare multiple users simultaneously with adjustable timeframes.

Review Summaries

Last Review

Review Name	Review Date	Review Type	User Reviewed
007-12/15/2015-Annual-John-Smoak-Carlos-Cortes	xx/xx/xxxx	Annual	John Smoak

Open Activities

Action	Subject	Due Date	Assigned To	Status	Priority	Comments
View	Subject...	xx/xx/xxxx	Carlos Cortes	Not Started	A1	Comments...
View	Subject...	xx/xx/xxxx	Lily Yip	Not Started	A2	Comments...
View	Subject...	xx/xx/xxxx	Nik Nikic	Not Started	A3	Comments...

Notes

Action	Title	Body
View	Title...	Body text...
View	Title...	Body text...
View	Title...	Body text...

Activity History

Action	Subject	Due Date	Assigned To	Status	Priority	Comments
View	Subject...	xx/xx/xxxx	Carlos Cortes	Not Started	A1	Comments...
View	Subject...	xx/xx/xxxx	Lily Yip	Not Started	A2	Comments...
View	Subject...	xx/xx/xxxx	Nik Nikic	Not Started	A3	Comments...

Perform reviews with your team using the built in review functionality. Capture notes and actions throughout the review process and revisit snapshots of previous reviews.

Tools

PMO Tools and Utilities

Historical Trend
PMO Objectives
Recent Reviews
Performance Comparison
Calculate Historical Performance
Pipeline Waterfall

Expand the capabilities of the PMO with additional tools and modules. Leverage Objectives to set goals based on real KPI metrics and see real-time progress. View the current stage of your Opportunity pipeline using Pipeline Waterfall.