

Sales KPIs Dashboard



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Introduction

These dashboards show some commonly used metrics for sales management based on standard fields.

You can easily customise the dashboards to fit the needs of your organisation, e.g. your target levels and organisational structure.

The dashboard has been organised so that the top 3 graphs are on top of each column to make it possible to have them on the home page.





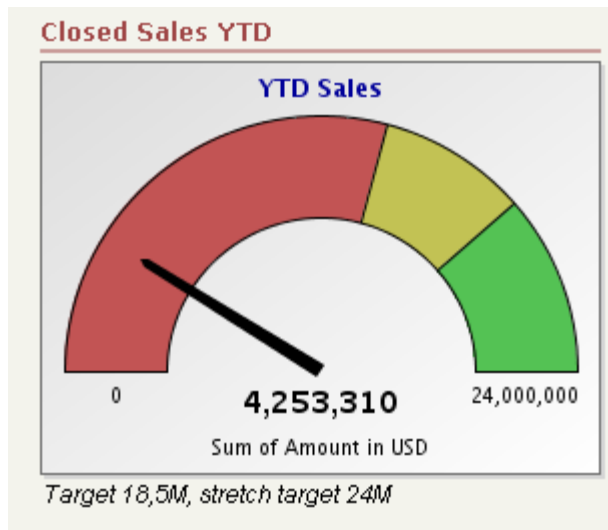
Closed Sales YTD

■ Setup

- ▶ This dashboard component is based on a Matrix report which summarises all closed opportunities for the current fiscal year

■ Objective

- ▶ Gain aggregate insight into how your business is running in your current fiscal year
- ▶ Compare closed volume to the overall fiscal year target



Report Options:

Summarize information by: Summarize information by: Territories: Interval: Current FY:

Relationship to Opportunity: Opportunity Status: Probability:

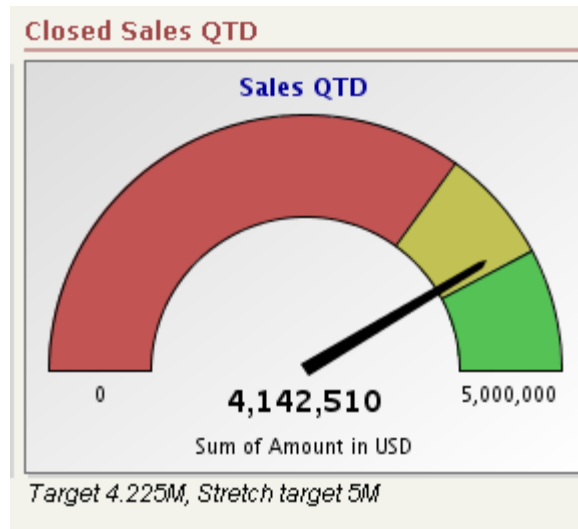
Generated Report:

Sum of Amount	Close Month				Grand Total
Opportunity Owner	2/1/2006	3/1/2006	4/1/2006	5/1/2006	
☐ Amy Lojack	USD 879,895.96	USD 0.00	USD 0.00	USD 12,500.00	USD 892,395.96
☐ Andy Macrola	USD 840,334.00	USD 0.00	USD 355,000.00	USD 0.00	USD 1,195,334.00





Closed Sales QTD



Org Drill Down:

Report Options:

Summarize information by: Territories: Interval: Current FQ:

Start Date: End Date:

Relationship to Opportunity: Opportunity Status: Probability:

[Run Report](#) [Hide Details](#) [Customize](#) [Save](#) [Save As](#) [Delete](#) [Printable View](#) [Export Details to Excel](#)

Generated Report:

Filtered By: [Edit](#)
Stage equals Closed Won [Clear](#)

Opportunity Name	Amount	Account Name
Close Month: 1 (12 records)		
	USD 4,142,510.28	
New Pacific Life Hot Opportunity	GBP 500,000.00	Pacific Life
Owens Unsell	USD 550,000.00	Owens Corning

■ Setup

- ▶ This dashboard component is based on a report which summarises all closed opportunities for the current fiscal quarter

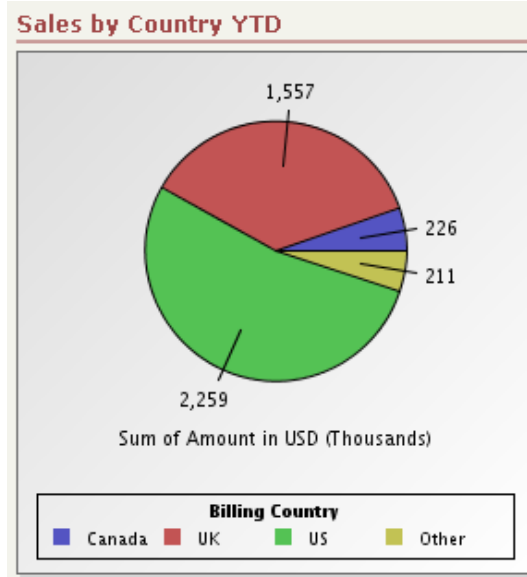
■ Objective

- ▶ Show the revenue closed this fiscal quarter
- ▶ Compare achievements with targets, base and stretch





Closed Sales by Country



■ Setup

- ▶ This dashboard component is based on a summary report which summarises all closed opportunities this year by billing country

■ Objective

- ▶ Identify the business value in each country
- ▶ Take action on regional business units lagging behind revenue targets

Report Options:

Summarize information by: Territories: Interval: Current FY:

Start Date: End Date:

Relationship to Opportunity: Opportunity Status: Probability:

Generated Report:

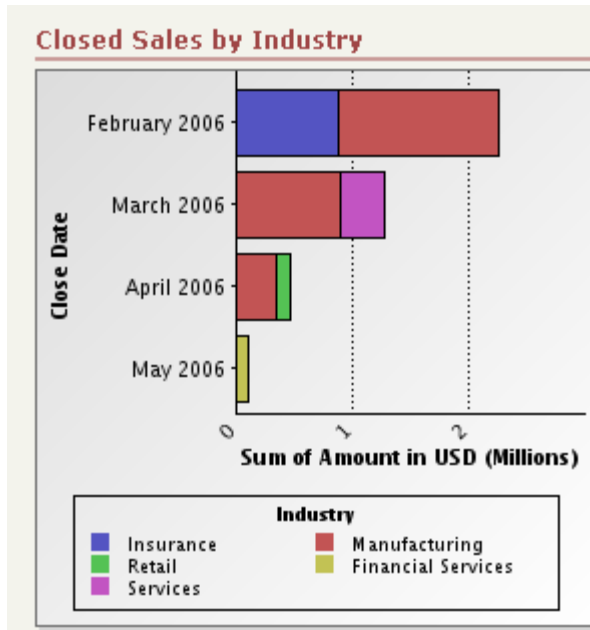
Filtered By: [Edit](#)
[Opportunity Owner](#) does not contain [admin, master](#) [Clear](#)

Account Name	Opportunity Name	Amount	Opportunity Owner
☐ Billing Country: Canada (3 records)			
		USD 226,100.00	
Yates Printers	Yates Printers - Flash Stevenson	USD 74,100.00	Flash Stevenson
Yates Printers	Yates Printers - Peter Parkerson	USD 17,000.00	Peter Parkerson





Closed Sales by Industry



■ Setup

- ▶ This dashboard component is based on a matrix report which summarises all closed opportunities by industry and closed month

■ Objective

- ▶ Monitor and compare revenue achievements by month and industry segment

Report Options:

Summarize information by: Summarize information by: Territories: Interval:

Relationship to Opportunity: Opportunity Status: Probability:

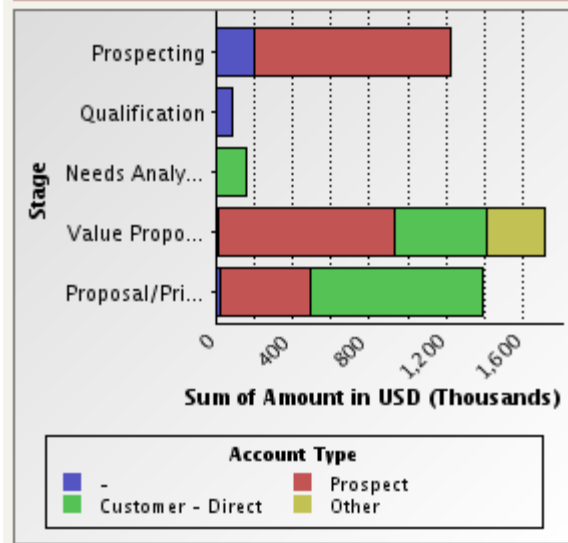
Sum of Amount		Close Date				Grand Total
Industry	Billing Country	February 2006	March 2006	April 2006	May 2006	
☐ Insurance	UK	USD 879,895.96	USD 0.00	USD 0.00	USD 0.00	USD 879,895.96
	Sub Total	USD 879,895.96	USD 0.00	USD 0.00	USD 0.00	USD 879,895.96
☐ Manufacturing	DE	USD 0.00	USD 0.00	USD 0.00	USD 12,500.00	USD 12,500.00





New Business Pipeline

New Business Pipeline



All open opportunities

Report Options:

Summarize information by: Summarize information by: Territories: Interv:

Relationship to Opportunity: Opportunity Status: Probability:

	Sum of Amount	Account Type				Grand Total
	Stage	-	Prospect	Customer - Direct	Other	
☐	Prospecting	USD 201,900.00	USD 1,023,011.11	USD 0.00	USD 0.00	USD 1,224,911.11
☐	Qualification	USD 87,000.00	USD 0.00	USD 0.00	USD 0.00	USD 87,000.00

■ Setup

- ▶ This dashboard component is based on a matrix report. The information is summarised by Sales Stage and Account Type

■ Objective

- ▶ Overview of the sales pipeline by stage
- ▶ Identify where your new opportunities comes from – existing base or new customers





Key Opportunities (Pipeline)

■ Setup

- ▶ This dashboard component is based on the opportunity summary report with 2 specific filter settings: Amount greater than USD 400.000 and Close Date Next 90 Days

■ Objective

- ▶ Identify current key opportunities to ensure they get the right attention

Key Opportunities (Pipeline)

Opportunity Name	Sum of Amount
Cardinal 6 GC 5000	USD 860K
Edge 6 GC 5000	USD 860K
LLoyds 6 GC 5050	USD 800K
Abbott Freezer container	USD 491K
ATB Financial upsell opportunity	USD 450K

>400K + < 90 days

Report Options:

Summarize information by: Territories: Interval: Current FY:

Relationship to Opportunity: Opportunity Status: Probability:

[Run Report](#) [Hide Details](#) [Customize](#) [Save](#) [Save As](#) [Delete](#) [Printable View](#) [Export Details to Excel](#)

Generated Report:

Filtered By: [Edit](#)
Amount greater than "USD 400,000" [Clear](#)
AND Close Date equals NEXT 90 DAYS [Clear](#)

Opportunity Owner	Amount	Close Date	Stage	Probability (%)	Owner Role
☐ Opportunity Name: Abbott Freezer container (1 record)					





Neglected Opportunities

Neglected Opportunities	
Opportunity Name	Sum of Amount
Cardinal 6 GC 5000	USD 860K
Edge 6 GC 5000	USD 860K
LLoyds 6 GC 5050	USD 800K
United Partners - 915k	USD 542K
Edge - 35k	USD 473K
ATB Financial upsell opportunity	USD 450K
Top Hat 2	USD 377K
United Partners - 235k	USD 355K
United Partners - 160k	USD 160K
No activity last 30 days	

Report Options:
Summarize information by: Territories: Interval: Current FY: End E:

Relationship to Opportunity: Opportunity Status: Probability:

Filtered By: **1 AND (2 OR 3)** [Edit](#)
1. Stage not equal to **Closed Won**
2. Expected Revenue greater than "USD 150,000"
3. Last Activity less or equal **LAST 30 DAYS**

Opportunity Owner	Type	Amount	Expected Revenue	Close Date	Stage	Prob.
☐ Opportunity Name: <u>ATB Financial upsell opportunity</u> (1 record)						
		USD 450,000.00				
<u>Larry Robertson</u>	Existing Customer - Upgrade	USD 450,000.00	USD 225,000.00	6/21/2006	Value Proposition	
☐ Opportunity Name: <u>Cardinal 6 GC 5000</u> (1 record)						
		USD 860,000.00				

■ Setup

- ▶ This dashboard component is based on the opportunity summary report with 3 specific filter settings: Stage not equal to Closed Won, Expected Revenue greater than USD 150.000 and Last Activity less or equal 30 Days

■ Objective

- ▶ Identify opportunities which need your immediate attention
- ▶ Engage in corrective action (ensure the opportunities are worked on or update not logged activities)





Top 10 Partner Opportunities

Top 10 Partner Opportunities

Opportunity Name	Sum of Amount
Cardinal Inc. - Clark Kentman	USD 164K
Yates Printers - Clark Kentman	USD 119K
Rouge Degg - Clark Kentman	USD 101K
Yates Printers - Peter Parkerson	USD 87K
Yates Printers - Flash Stevenson	USD 74K
Yates Printers - Harry Potterham	USD 74K
Yates Printers - Phillipe Perot	USD 74K
Cardinal Inc. - Flash Stevenson	USD 73K
Cardinal Inc. - Phillipe Perot	USD 73K
Cardinal Inc. - Harry Potterham	USD 73K

Closing this FY, by value

Report Options:

Summarize information by: Partner Summarize information by: Opportunity Name Relationship to Opportunity: All opportunities Opportunity Status: Any Interval: Close Date

	Sum of Amount	Opportunity Name						
	Partner	Albertson's - Bobby Reseller	Blue Star Storage- Bobby Reseller	Cardinal Inc. - Amy Lojack	Cardinal Inc. - Clark Kentman	Cardinal Inc. - Flash Stevenson	Cardinal Inc. - Harry Potterham	Cardinal Peter Parkerson
☐	Abbott Distribution	USD 0.00	USD 0.00	USD 0.00	USD 73,000.00	USD 0.00	USD 73,000.00	USD 0.00
☐	ACME	USD 0.00	USD 0.00	USD 0.00	USD 90,600.00	USD 73,000.00	USD 0.00	USD 12,000.00

■ Setup

- ▶ This dashboard component is based on a matrix report summarised by Partner and Opportunity Name

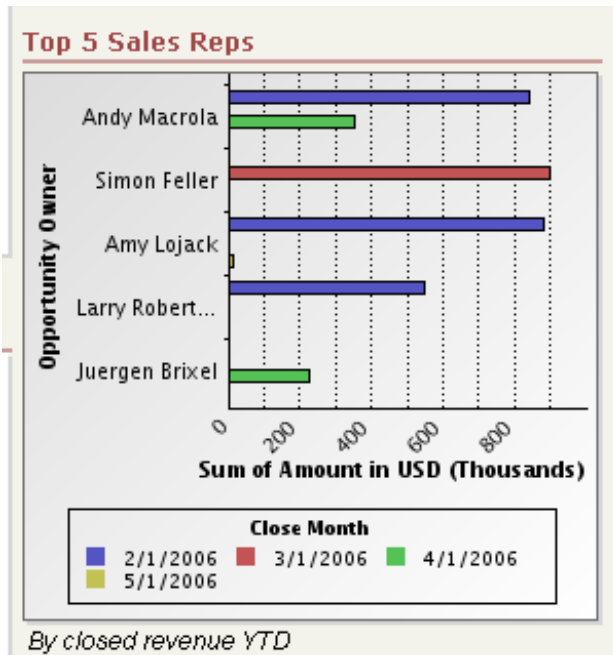
■ Objective

- ▶ Insight on the effectiveness of your Partner Relationship Management (PRM)
- ▶ Identify the largest current partner opportunities to support them correctly





Top 5 Sales Reps



■ Setup

- ▶ This dashboard component is based on an opportunity matrix report summarised by Opportunity Owner

■ Objective

- ▶ Identify who your top deal closers are year to date
- ▶ Get the top performers to share knowledge and best practices

Report Options:

Summarize information by: Summarize information by: Territories: Interval:

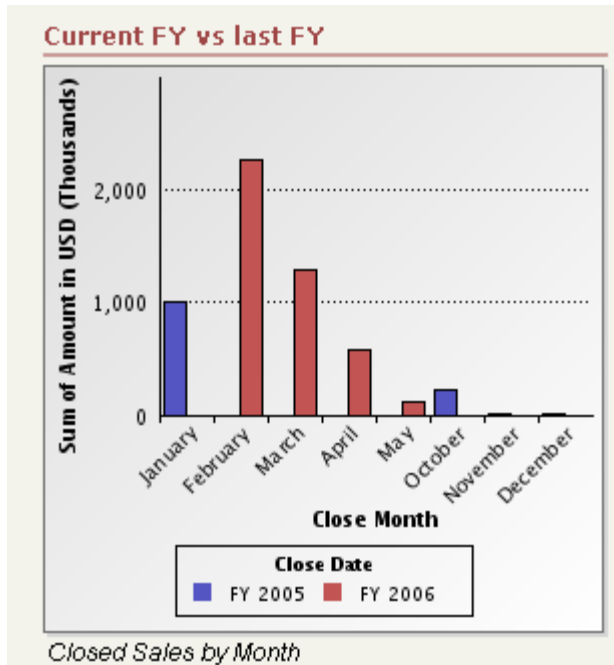
Relationship to Opportunity: Opportunity Status: Probability:

	Sum of Amount	Close Month				Grand Total
	Opportunity Owner	2/1/2006	3/1/2006	4/1/2006	5/1/2006	
☐	Amy Lojack	USD 879,895.96	USD 0.00	USD 0.00	USD 12,500.00	USD 892,395.96
☐	Andy Macrola	USD 840,334.00	USD 0.00	USD 355,000.00	USD 0.00	USD 1,195,334.00





This Year vs Last Fiscal Year



■ Setup

- ▶ This dashboard component is based on an opportunity matrix report summarized by Closed Month and Close Date

■ Objective

- ▶ Compare current fiscal year with last year's sales by month
- ▶ Will help understanding cyclical variances

Report Options:

Summarize information by: Summarize information by: Territories: Interval:

Relationship to Opportunity: Opportunity Status: Probability:

Start Date: End:

Filtered By: [Edit](#)

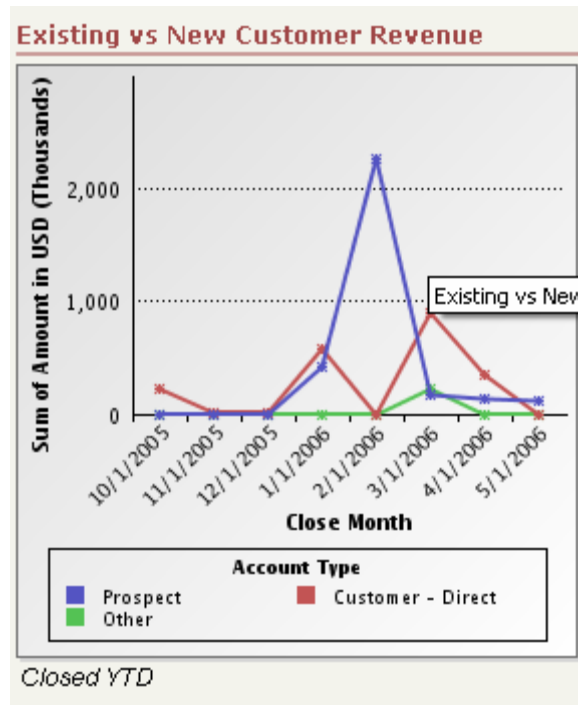
Opportunity Owner does not contain admin, master [Clear](#)

	Sum of Amount	Close Date		Grand Total
	Close Month	FY 2005	FY 2006	
☐ January		USD 996,165.00	USD 0.00	USD 996,165.00
☐ February		USD 0.00	USD 2,270,229.96	USD 2,270,229.96





Existing vs New Customer Revenue



■ Setup

- ▶ This dashboard component is based on an opportunity matrix report summarized by Account Type and Close Date

■ Objective

- ▶ Identify what customer type revenue is coming from and enhance CRM activities accordingly

Report Options:

Summarize information by:

Account Type

Summarize information by:

Close Month

Relationship to Opportunity:

All opportunities

Opportunity Status:

Closed Won

Probability:

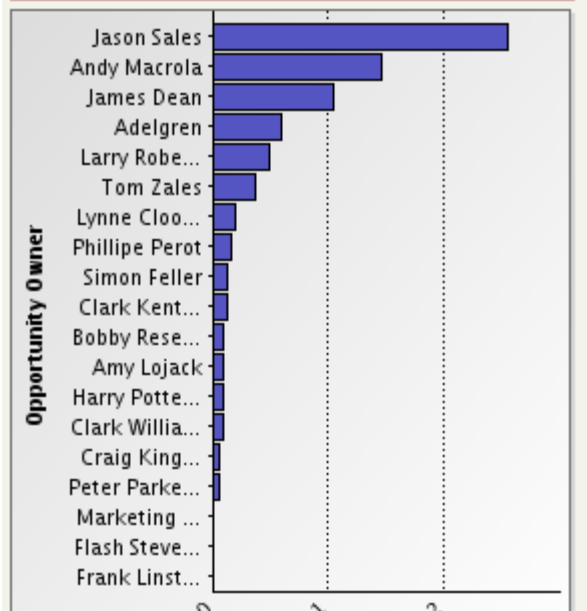
All





Opportunities by Rep

Opportunities by Reps



Report Options:

Summarize information by:

Opportunity Owner

Territories:

All

Interval:

Close Date

Current FY

Start Date

2/1/2006

End Date

1/31/2007

Relationship to Opportunity:

All opportunities

Opportunity Status:

Open

Probability:

All

Opportunity Name	Type	Lead Source	Amount	Expected Revenue	Close Date	Next Step	Stage	Probability (%)	Age	Owner Role	Created Date	Account
Opportunity Owner: Adelgren (2 records)			USD 605,000.00									
ATB 10 Containers	New Customer	-	USD 350,000.00	USD 140,000.00	4/26/2006	-	3 Present Proposal	40%	13	President	4/19/2006	ATB Fin
LLoyds 6 GC 5050	New Customer	-	USD 255,000.00	USD 102,000.00	5/19/2006	-	3 Present Proposal	40%	11	President	4/21/2006	Owens

■ Setup

- ▶ This dashboard component is based on an opportunity summary report summarised by opportunity owner

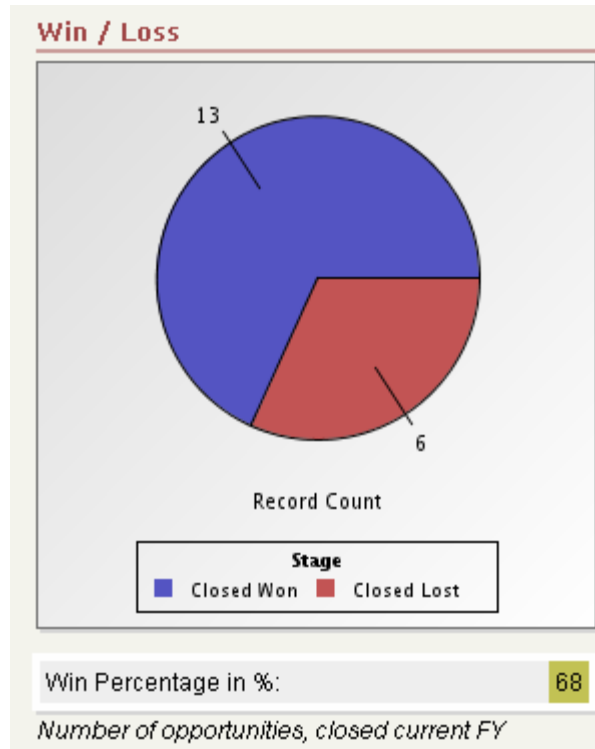
■ Objective

- ▶ Identify the total amount of each sales rep
- ▶ Help to identify who is recording opportunities accurately





Win/Loss Ratio



Filtered By: 1 OR 2 [Edit](#)
1. Stage equals Closed Won
2. Stage equals Closed Lost

☐ Stage: Closed Won (13 records)
☐ Stage: Closed Lost (6 records)
Grand Totals (19 records)

Filtered By: 1 OR 2 [Edit](#)
1. Stage equals Closed Won
2. Stage equals Closed Lost

	Win/loss ratio
☐ Stage: Closed Won (13 records)	100.0%
☐ Stage: Closed Lost (6 records)	0.0%
Grand Totals (19 records)	68.4%

■ Setup

- ▶ This dashboard component is based on a summary report summarised by sales stage
- ▶ Filters need to be set to include the correct record values (closed won, lost)
- ▶ A 2nd report handles the Win percentage figure (custom formula)
- ▶ The color highlighting is setup in the dashboard component

■ Objective

- ▶ Effectiveness of deal closure
- ▶ Examine why deals are get lost, know why deals get won

Custom Summary Formulas New				
Action	Display	Label	Description	Formula
Edit Del	☒	Win/loss ratio		{IWON:SUM} / {ICLOSED:SUM}





Lead Status



■ Setup

- ▶ This dashboard component is based on a lead summary report summarised by Lead Status

■ Objective

- ▶ Identify number of leads without any activities
- ▶ Distribute leads to your sales reps and ensure their correct handling

Report Options:

Summarize information by:

Lead Status

View:

All Leads

Interval:

Create Date

Custom

Start Date

End Date

Filtered By: [Edit](#)

Lead Status equals ,Open - Not Contacted,Working - Contacted [Clear](#)

☐ Lead Status: Open - Not Contacted (319 records)

☐ Lead Status: Working - Contacted (13 records)

Grand Totals (332 records)





Lead Source

Lead Source	
Lead Source	Record Count
-	24
Web	16
Phone Inquiry	8
Partner Referral	15
Partner Application	1
Purchased List	296

■ Setup

- ▶ This dashboard component is based on a lead summary report summarised by Lead Source

■ Objective

- ▶ Identify which lead sources generate leads and which don't
- ▶ Allocate marketing budgets to the right lead generating sources

Report Options:

Summarize information by: View: Interval:
Start Date End Date

[Run Report](#) [Show Details](#) [Customize](#) [Save](#) [Save As](#) [Delete](#) [Printable View](#) [Export Details to Excel](#) [Add to Campaign](#)

Generated Report:

☐ Lead Source: - (24 records)
☐ Lead Source: Web (16 records)
☐ Lead Source: Phone Inquiry (8 records)
☐ Lead Source: Partner Referral (15 records)
☐ Lead Source: Partner Application (1 record)
☐ Lead Source: Purchased List (296 records)
Grand Totals (360 records)



Thank you



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