

Moving the deal forward just got easier...
Gain insights. Build trust. Close deals.

Contents

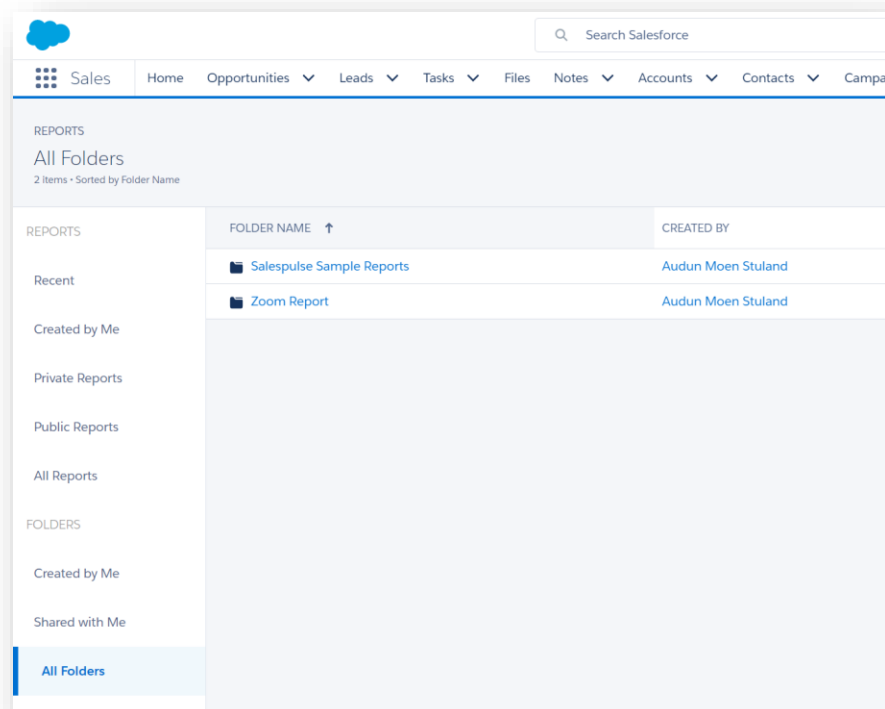
Introduction	2
Pre-Built reports	2
Example Lightning reports	4
Sales Amount pr Planning Stage	4
Sales Feedback pr industry	5
Example Classic reports	6
NPS (By Industry)	6
Sales Feedback – Next steps.....	7
Classic Dashboards	8
My Sales feedback – Sales reps own feedback dashboard	8
My Coaching Dashboard – Sales managements coaching dashboard	9
Lightning Dashboards	10
My Sales Feedback - Sales reps own feedback dashboard.....	10
My Coaching Dashboard – Sales managements coaching dashboard	11
Company Performance Dashbord	12
Feedback details	13
Salespulse Coaching – Opportunity details	14

Introduction

This document contains example dashboards and reports that you can build based on the feedback data from the Salespulse App. Salesforce Dashboards contains of different reports. The reports we use in this document is provided as sample reports together with the Salespulse app when you install it in your Salesforce org.

Pre-Built reports

You will find the sample reports by navigating to the Reports tab and click on **All Folders**



The reports that comes with the Salespulse app have prefeks Sample Report and you find them in the Salespulse Sample Reports folder

Sales			
Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter			
REPORTS All Folders > Salespulse Sample Reports 13 Items - Sorted by Report Name			
REPORTS	REPORT NAME ↓	DESCRIPTION	FOLDER
Recent	Sample Report: Watchlist	How many respondents answered negatively to a certain question?	Salespulse Sample Reports
	Sample Report: Sales rep details	Feedback pr salesrep detailed down to individual KPIs	Salespulse Sample Reports
Created by Me	Sample Report: Sales Feedback pr Stage	Average feedback detailed pr opportunity stage	Salespulse Sample Reports
Private Reports	Sample Report: Sales amount pr opp stage	What is the opportunity amount pr feedback planning stage	Salespulse Sample Reports
Public Reports	Sample Report: Overall Feedback Score	What is the average feedback for certain questions?	Salespulse Sample Reports
	Sample Report: NPS (Overall)	What is our overall Net promoter Score?	Salespulse Sample Reports
All Reports	Sample Report: NPS (By Industry)	What is our Net Promoter Score in each Industry?	Salespulse Sample Reports
FOLDERS	Sample Report: Leaderboard	Which employee has the best feedback?	Salespulse Sample Reports
Created by Me	Sample Report: Heatmap Sales Rep	What is the average response per user for questions in a grouping?	Salespulse Sample Reports
	Sample Report: Feedback on Opportunities	What is the correlation between feedback and probability to close on an Opportuni...	Salespulse Sample Reports
Shared with Me	Sample Report: Feedback By Industry	What is the average feedback in a given industry?	Salespulse Sample Reports
All Folders	Sample Report: Details pr acc.	Feedback score pr account,customer,opportunity	Salespulse Sample Reports
	Sample Report : Next steps agreed	Which customer have agreed next steps - Yes or No	Salespulse Sample Reports

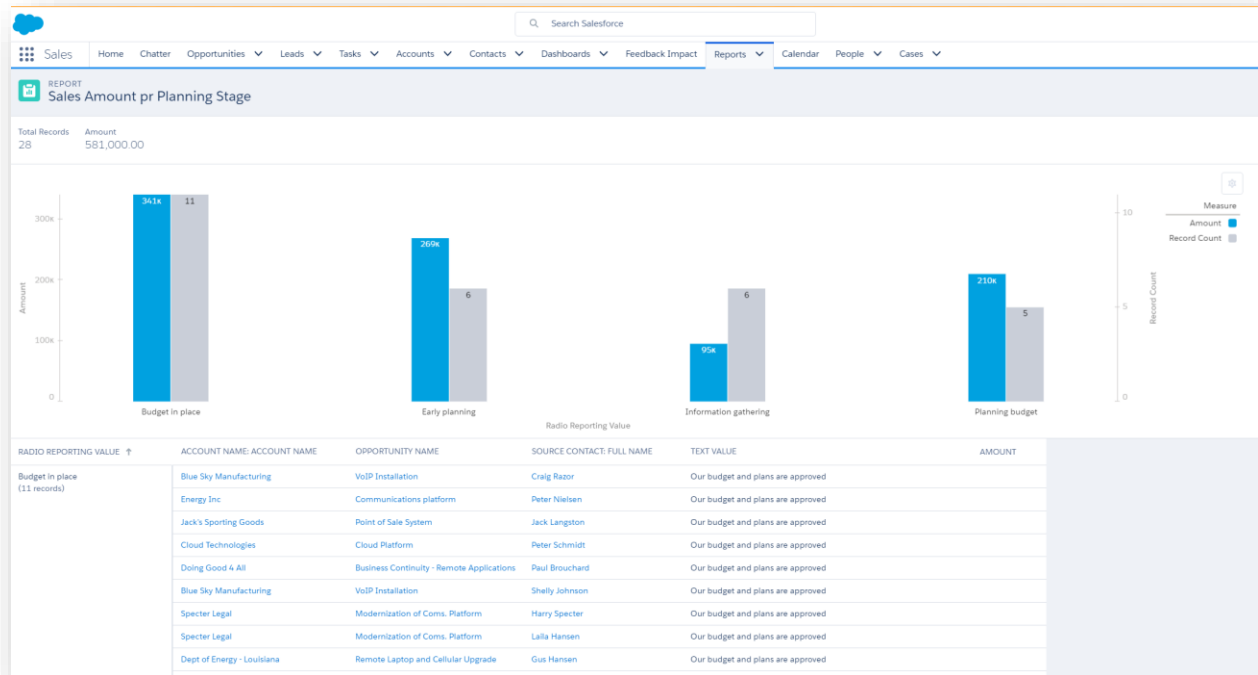
All reports can be easily modified and changed to include other Salesforce data. The feedback data from the Salespulse app is available together with the rest of your Salesforce data when you build new reports.

Example Lightning reports

Sales Amount pr Planning Stage

Find where the customer is in his decision process, where are the low hanging opportunities?

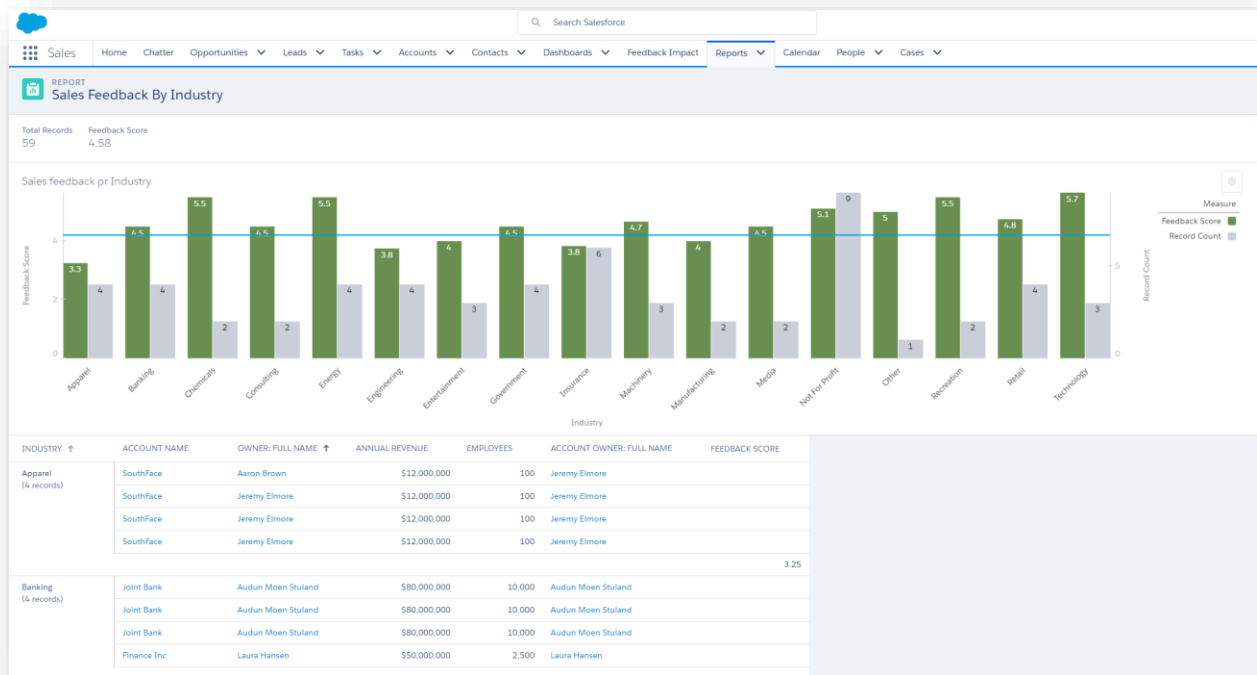
The report *Sales Amount pr Planning Stage* shows the opportunity value from the opportunities detailed down to where the customer say they are in their process of taking this forward. This is one of the standard questions in the Sales meeting evaluation survey.



Sales Feedback pr industry

Are there any industries where your sales reps are better than others? Maybe your sales process and approach is perceived differently in different industries?

The report *Sales Feedback pr industry* shows the average sales feedback from the customers detailed down to industry. It proved the average feedback score from the matrix questions and also how many replied you have pr industry. The report also contains the opportunity amount so you could analyze feedback, industry and opportunity amount to find your “best” industry and the industry where you need to work on your messaging and approach.

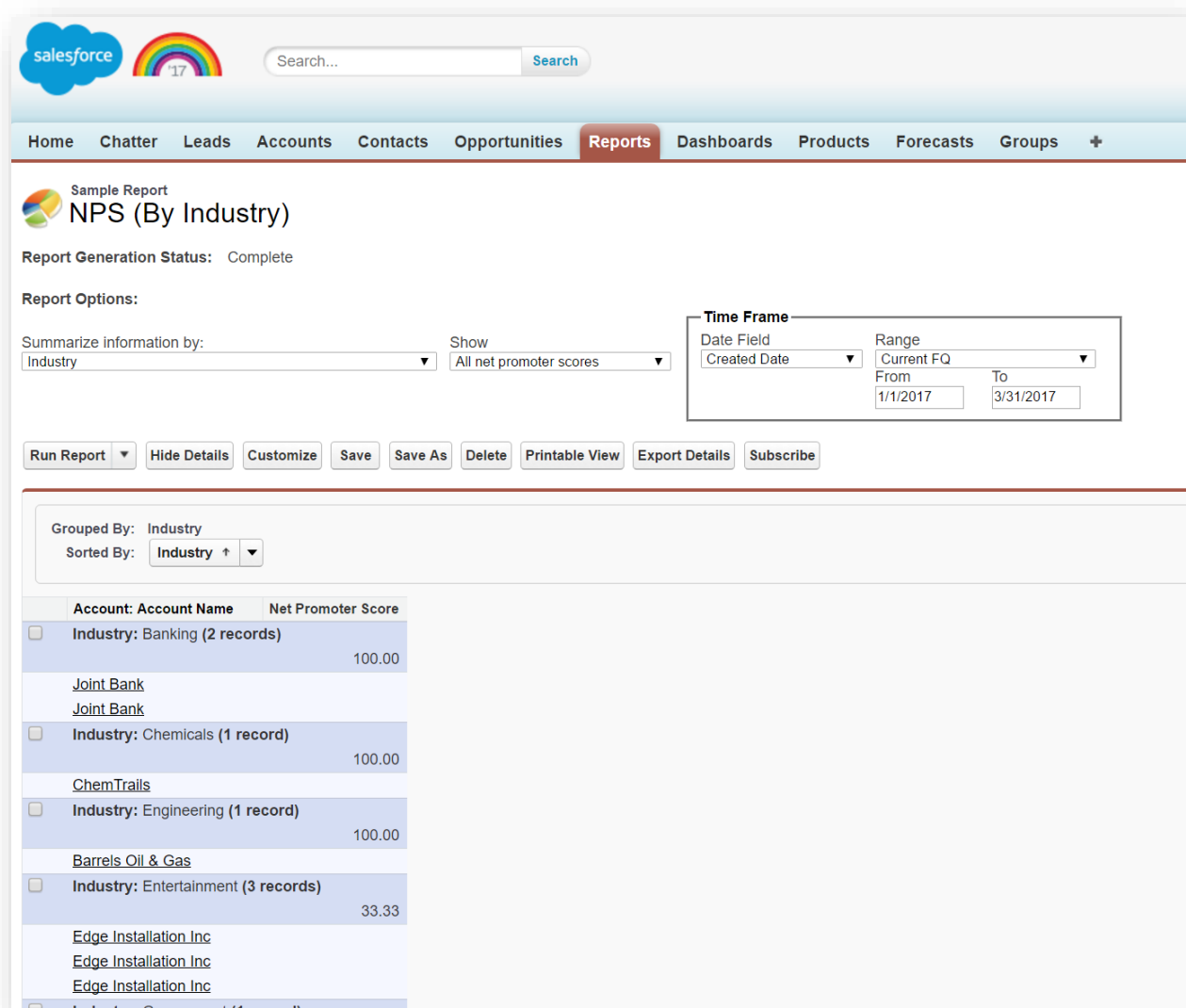


Example Classic reports

NPS (By Industry)

Evaluate the NPS pr industry, find sweet spots and industries that don't really seem to fit with your sales process and products/services

The report *NPS (By Industry)* shows the Net Promoter Score distributed by Industry. You can expand this report with other segments in your Salesforce setup.



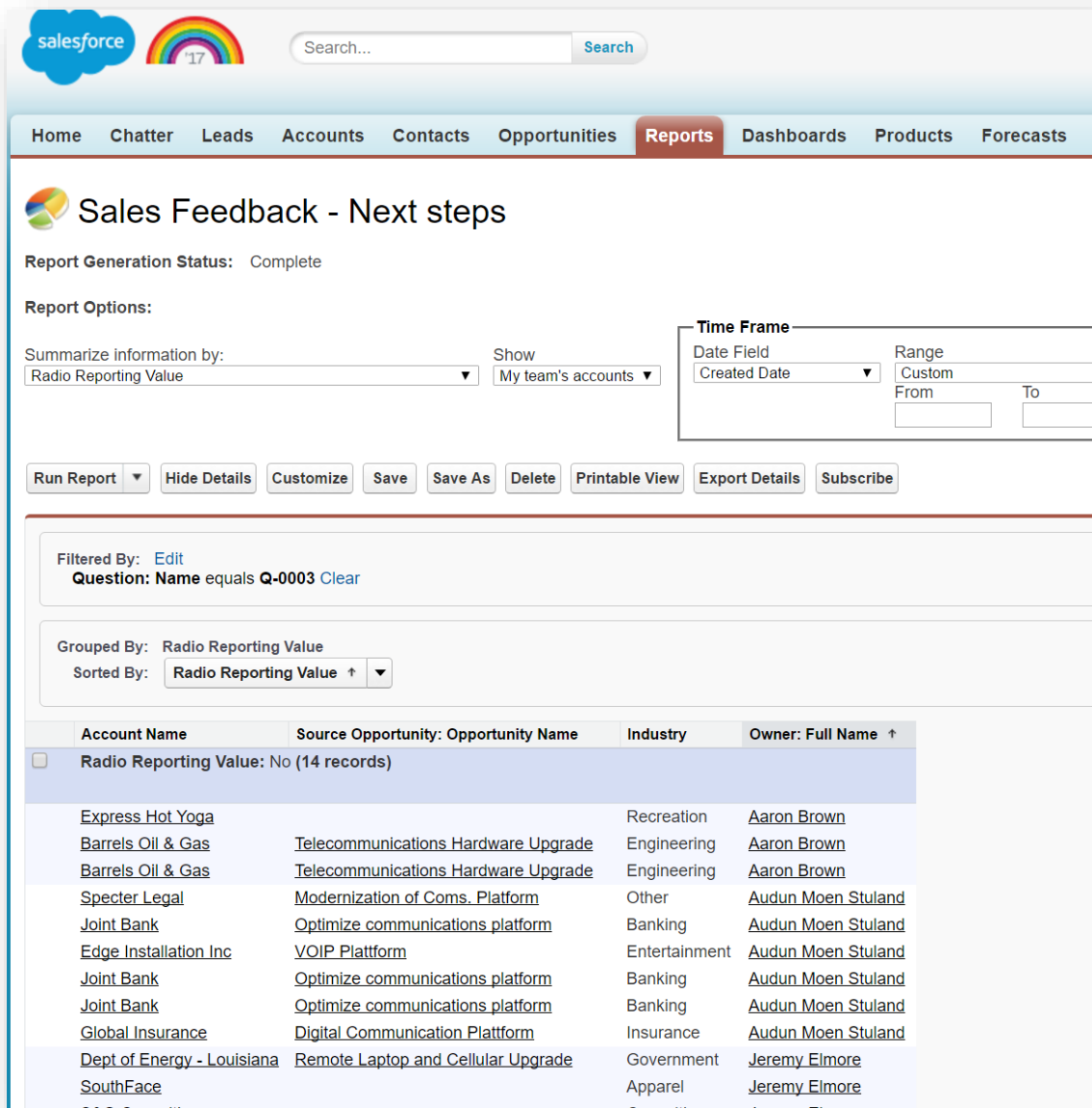
The screenshot shows the Salesforce interface for the 'NPS (By Industry)' report. The top navigation bar includes Home, Chatter, Leads, Accounts, Contacts, Opportunities, Reports (active), Dashboards, Products, Forecasts, and Groups. The report title is 'Sample Report NPS (By Industry)' with a status of 'Complete'. Below the title, there are 'Report Options' including a dropdown for 'Summarize information by:' set to 'Industry', a 'Show' dropdown set to 'All net promoter scores', and a 'Time Frame' section with 'Date Field' set to 'Created Date' and 'Range' set to 'Current FQ' from '1/1/2017' to '3/31/2017'. Action buttons include 'Run Report', 'Hide Details', 'Customize', 'Save', 'Save As', 'Delete', 'Printable View', 'Export Details', and 'Subscribe'. The report is grouped by 'Industry' and sorted by 'Industry'. The data table shows the following:

Account	Account Name	Net Promoter Score
☐ Industry: Banking (2 records)		100.00
	Joint Bank	
	Joint Bank	
☐ Industry: Chemicals (1 record)		100.00
	ChemTrails	
☐ Industry: Engineering (1 record)		100.00
	Barrels Oil & Gas	
☐ Industry: Entertainment (3 records)		33.33
	Edge Installation Inc	
	Edge Installation Inc	
	Edge Installation Inc	
☐ Industry: Government (4 records)		

Sales Feedback – Next steps

Evaluate if your customer has the same perception as you on next steps agreed. Customers who tells you no steps have been agreed is a good customer to re-engage quickly.

The report *Sales Feedback – Next steps* shows which customers have replied that they agreed next steps or not. You can double check that the customer have the same perception on this area as you have from the meeting. The customers who say you did not agree to next steps gives you a good compelling reason to call back and reconnect.



The screenshot shows the Salesforce interface for the 'Sales Feedback - Next steps' report. The report generation status is 'Complete'. The report options include 'Summarize information by: Radio Reporting Value' and 'Show: My team's accounts'. The time frame is set to 'Created Date' with a custom range. The report is filtered by 'Question: Name equals Q-0003' and grouped by 'Radio Reporting Value'. The sorted order is 'Radio Reporting Value'.

Account Name	Source Opportunity: Opportunity Name	Industry	Owner: Full Name
Radio Reporting Value: No (14 records)			
Express Hot Yoga		Recreation	Aaron Brown
Barrels Oil & Gas	Telecommunications Hardware Upgrade	Engineering	Aaron Brown
Barrels Oil & Gas	Telecommunications Hardware Upgrade	Engineering	Aaron Brown
Specter Legal	Modernization of Coms. Platform	Other	Audun Moen Stuland
Joint Bank	Optimize communications platform	Banking	Audun Moen Stuland
Edge Installation Inc	VOIP Platform	Entertainment	Audun Moen Stuland
Joint Bank	Optimize communications platform	Banking	Audun Moen Stuland
Joint Bank	Optimize communications platform	Banking	Audun Moen Stuland
Global Insurance	Digital Communication Platform	Insurance	Audun Moen Stuland
Dept of Energy - Louisiana	Remote Laptop and Cellular Upgrade	Government	Jeremy Elmore
SouthFace		Apparel	Jeremy Elmore
P.O. Consulting		Consulting	Jeremy Elmore

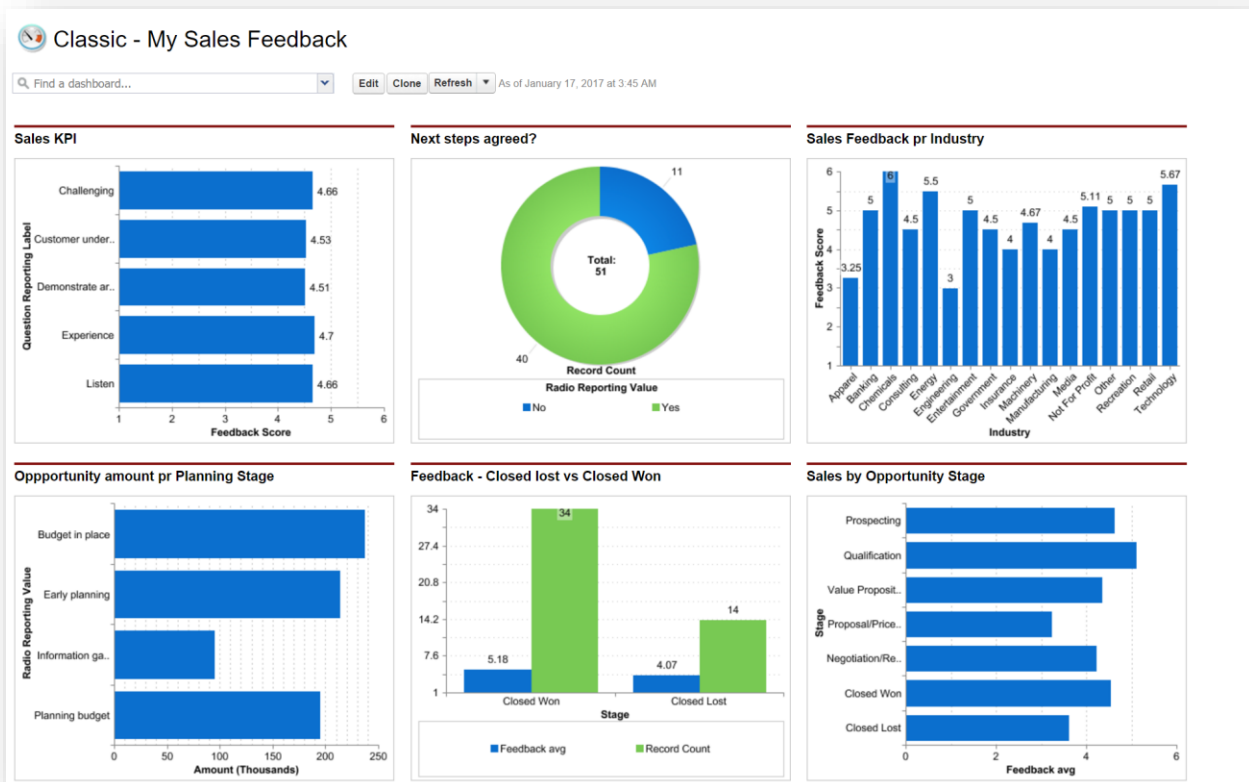
Classic Dashboards

The pre-built reports can be used to set up dashboards for the individual sales reps and sales manager for sales coaching.

My Sales feedback – Sales reps own feedback dashboard

The dashboard is tailored to give the individual Sales rep an overview of where his strength and weaknesses are as well as evaluate each sales opportunity for better assessment of next steps. The following reports are used:

- *Sample Report: Overall Feedback Score*
- *Sample Report: Next steps agreed*
- *Sample Report: Feedback By Industry*
- *Sample Report: Sales amount pr opp stage*
- *Sales Feedback Closed lost vs Closed Won*
- *Sample Report: Sales Feedback pr Stage*

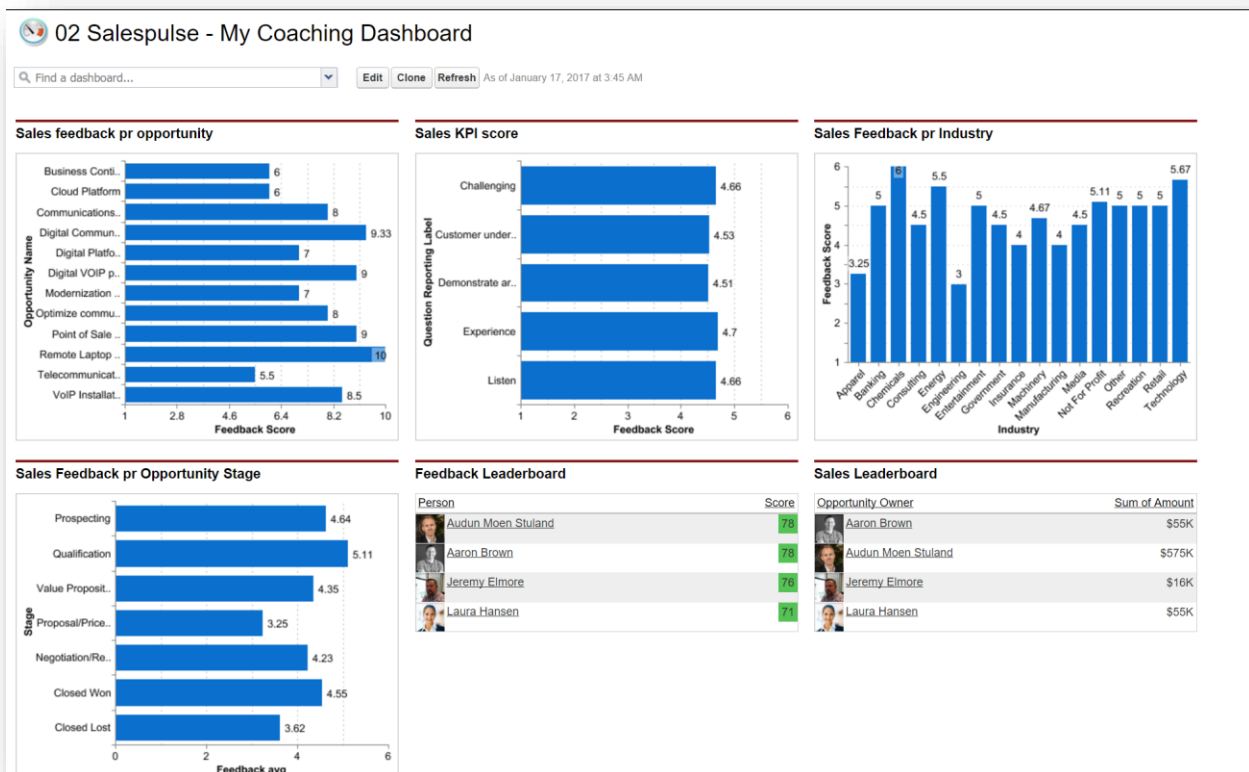


My Coaching Dashboard – Sales managements coaching dashboard

The dashboard is tailored to give sales management feedback on sales reps performance. Each chart can be further explored by clicking on them and go down to the details

The following reports are used:

- *Sample Report: - NPS Feedback pr Opportunity*
- *Sample Report: Overall Feedback Score*
- *Sample Report: Feedback By Industry*
- *Sample Report: Sales Feedback pr Stage*
- *Sample Report: Leaderboard*
- *Sales Leaderboard*



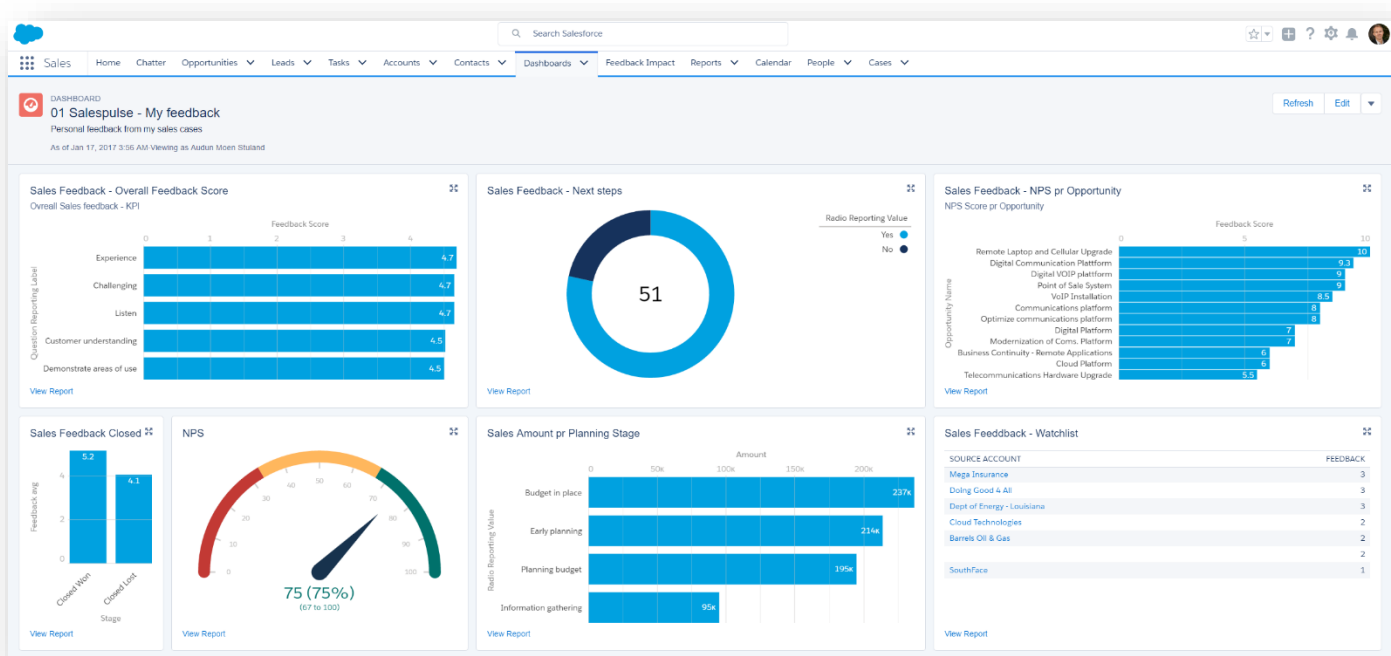
Lightning Dashboards

My Sales Feedback - Sales reps own feedback dashboard

The dashboard is tailored to give the individual Sales rep an overview of where his strength and weaknesses are as well as evaluate each sales opportunity for better assessment of next steps.

The following reports are used:

- *Sample Report: Overall Feedback Score*
- *Sample Report : Next steps agreed*
- *Sales Feedback - NPS Feedback pr Opportunity (Not part of the Salespulse app)*
- *Sales Feedback Closed lost vs Closed Won (Not part of the Salespulse app)*
- *Sample Report: NPS (Overall)*
- *Sample Report: Sales amount pr opp stage*
- *Sample Report: Watchlist*

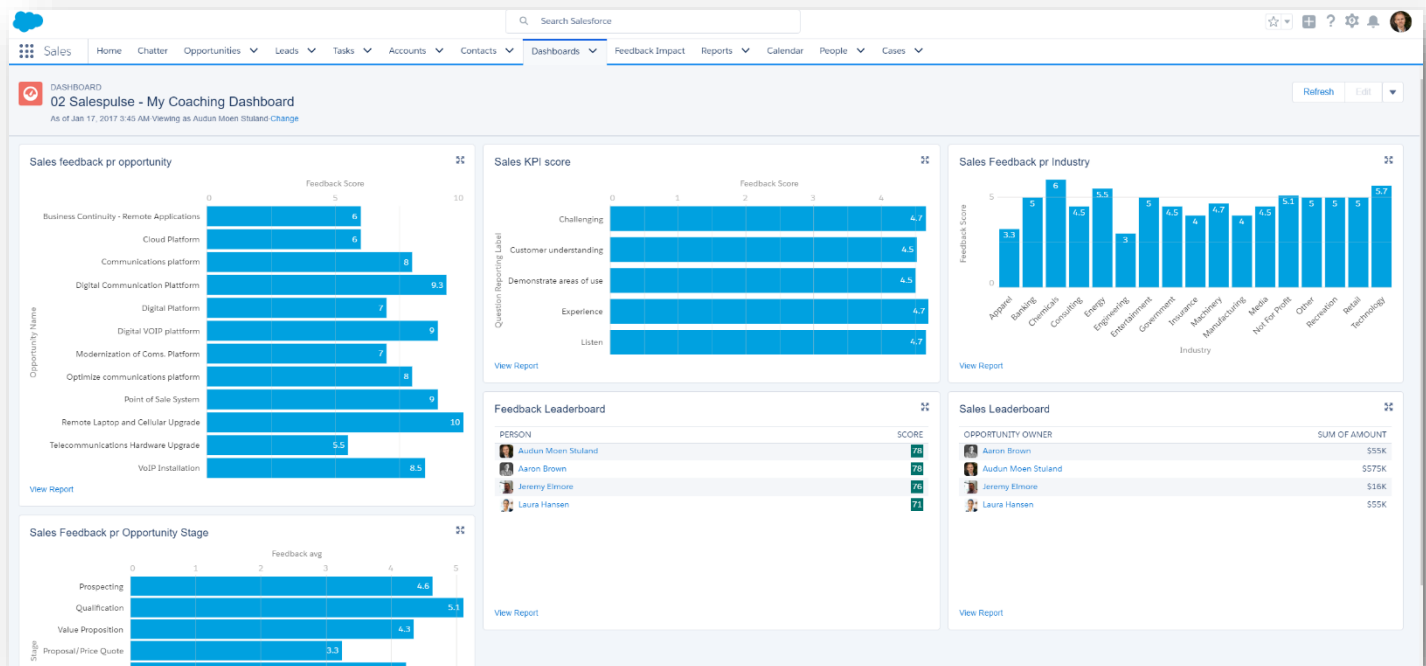


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- *Sales Leaderboard*





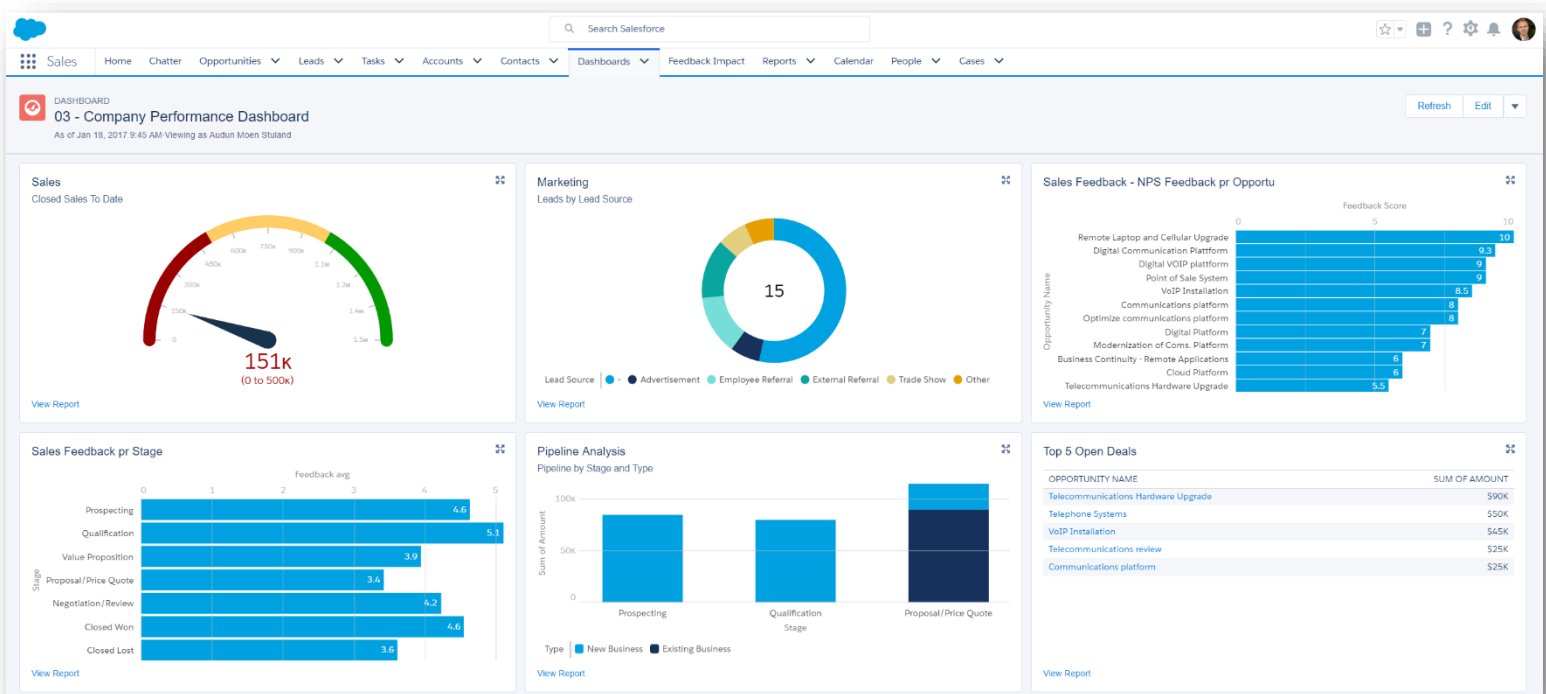
By Clicking on the different charts you can drill down to more details in the chart, you can also View the full Report for even more details

Company Performance Dashbord

The dashboard is tailored to give an overview of company performance together with sales management feedback.

The following reports are used:

- *Sample Report: Closed Sales*
- *Sample Report: Leads by Lead Source*
- *Sales Feedback - NPS Feedback pr Opportunity*
- *Sample Report: Sales Feedback pr Stage*
- *Sample Report: Sales Pipeline by Stage*
- *Sample Report: Open Deals*

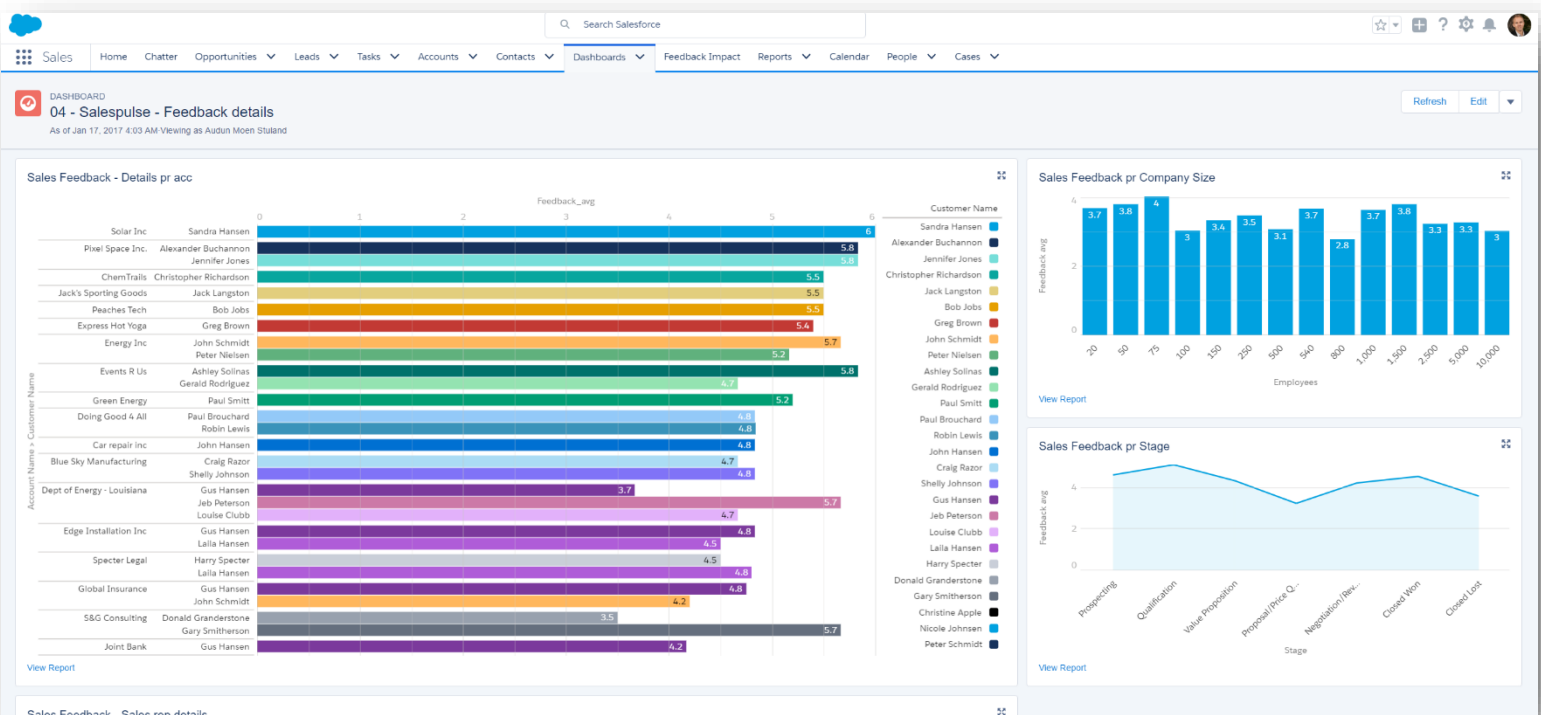


Feedback details

The dashboard is tailored to give sales management more details down to opportunities, industry and stages. Are there any specific stages in the sales process where we get better feedback than others? Any changes in the feedback from long standing accounts that we need to look out for?

The following reports are used:

- *Sample Report: Sales Feedback - Details pr account*
- *Sales Feedback pr Company Size (not part of the Salespulse app)*
- *Sample Report: Sales Feedback pr Stage*
- *Sample Report: Sales Feedback - Sales rep details*



Salespulse Coaching – Opportunity details

The dashboard is tailored to give more details on sales reps and sales opportunities. Compare sales reps to find strengths and weaknesses and possibly put sales reps together to learn from each other.

The following reports are used:

- *Sample Report Sales Feedback - Sales rep details*
- *Sales Feedback - Details pr acc*

