THE ULTIMATE CHECKLIST FOR SALES TEAMS

THAT USE SALESFORCE

GALVIN

A CLOUD CONSULTING COMPANY

SALESFORCE FOR SALES

Salesforce is the leading CRM and too many sales organizations are under utilizing it. Over the years we have identified that the main reason sales teams are not effectively using Salesforce is **because they don't know why they are using it.**

SALES MANAGERS WHO ONLY TRACK QUOTAS ARE LAZY

Sales quotas are relatively easy to track because these are opportunities that are won on a specific date, with actual dollars associated with each one. Unfortunately, too many sales managers and executives only measure sales quotas to evaluate the performance of a sales person. Although sales quotas are important to the financial responsibility of each sales person, they only tell the story of what happened. **Pipeline metrics, on the other hand, are where most of the focus needs to be when evaluating the performance of a sales person and a sales team.**

Use the following checklist from our Salesforce for Sales program to jumpstart your Salesforce implementation.

Sales Executives need better metrics to evaluate the performance of their sales teams. **Galvin's Salesforce for Sales Program** helps sales organizations effectively use Salesforce by clearly defining a series of sales focused reports & dashboards that gives more detail into the pipeline and sales activities that all sales executives crave.

QUOTAS

Lay the groundwork for your sales team by setting a sales goal (Quota) for the company and for each sales person. This is the amount of revenue you expect a sales person to bring in per month, quarter and/or year.

- [ ] Company Sales Goal

Annual	Quarterly	Monthly
ex.$24,000,000	*ex.$6,000,000*	*ex.$2,000,000*

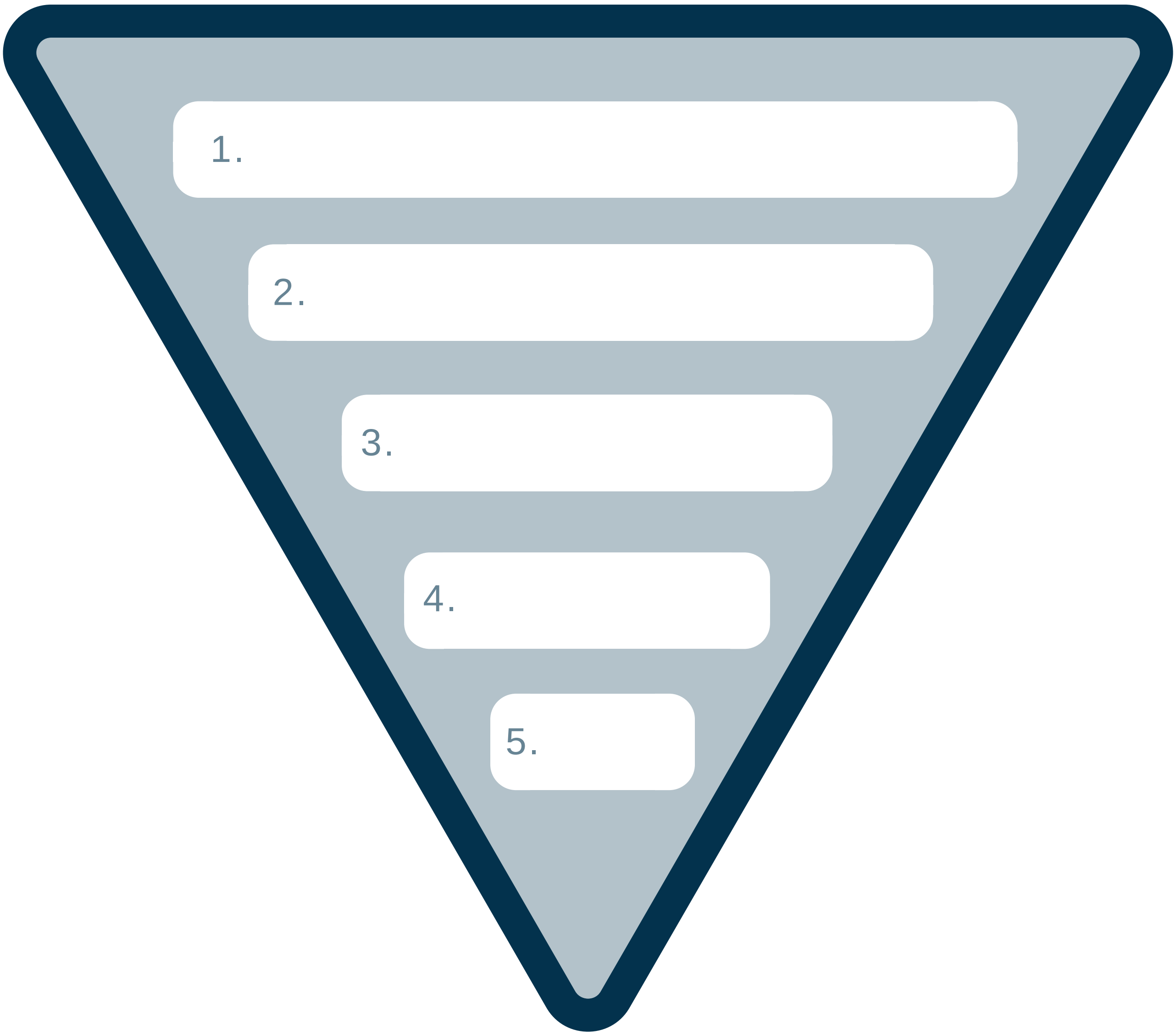
- [ ] Individual Sales Goals

Name	Annual	Quarterly	Monthly
ex.Joe Central	*$2,000,000*	*$500,000*	*$167,000*

PIPELINE METRICS

Very few sales teams have a clear picture into their pipeline. A stunning two-thirds of sales reps aren't meeting their quota and the reason is because companies have not instilled pipeline metrics that would determine if they are on track to meeting their quota. Successful companies set clear pipeline metrics that are tracked on a weekly basis.

- [ ] Defined Sales Stages



Extra Reading

Getting Started with Your Sales Funnel

http://galvintech.com/getting-started-with-your-sales-funnel/

PIPELINE METRICS

Pipeline Quota

In addition to sales quotas there needs to be **pipeline quotas** too. A pipeline quota is the amount of revenue the company and each sales person should have in their pipeline. The general rule is that a pipeline should be 3x the quota. So if an annual sales goal is $24,000,000 then there should always be $72,000,000 in the pipeline.

Company Pipeline Quota

$_________

Individual Pipeline Quotas

$_________

$_________

$_________

$_________

$_________

$_________

Sales pipelines have to be clean and accurate otherwise the numbers aren't real.

Successful Sales Reps "Clean Their Room" in Salesforce.com

http://galvintech.com/successful-sales-reps-clean-their-room-in-salesforce-com/

ACTIVITY

Activity = Money. Sales people have to do the necessary activities that generate a pipeline and ultimately close deals. Sales executives always want more visibility into activity metrics because they want to make sure accounts and opportunities aren't getting ignored. But sales people don't want to track their activities in Salesforce because they say "its too hard."

It's actually **quite easy to track activities** in Salesforce and if sales executives want to see these activities then they have to set clear metrics and hold sales people accountable to them.

- [ ] Activity Focus

Prospecting ___%

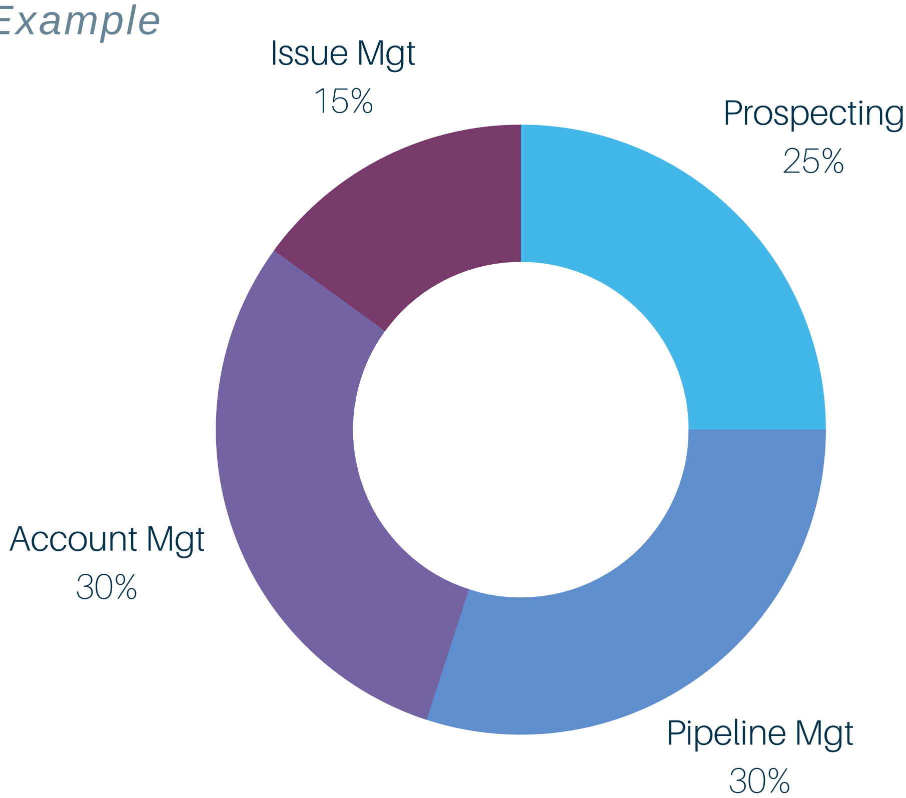
Pipeline Mgt ___%

Account Mgt ___%

Issue Mgt ___%

Sales people spread their time each week across prospecting, pipeline management, account management and issue management. Sales executives need to set expected targets each week on how much time they want their sales people spending in each.

Example



ACTIVITY

- [ ] Number of New Contacts

____ new contacts added into Salesforce every ____ week(s).

- [ ] Number of Calls

____ calls made every ____ week(s)

- [ ] Number of Meetings

____ meetings made every ____ week(s)

- [ ] Number of Touches

____ touches every ____ week(s) to existing contacts.

Improving Client Relationships with a Simple "Touch" Report in Your CRM
http://galvintech.com/improving-client-relationships-with-an-easy-crm-touch-report/

Here is Another Idea

Instead of tracking the number of activities each week try creating a point system. Points are calculated on completed activities. For example, a call is 1 point whereas a client meeting is 6 points. Read more here.

http://galvintech.com/get-your-salespeople-to-actually-put-data-into-salesforce-com/

WHAT'S NEXT?

Now that you have your quota, pipeline and activity metrics defined you are now ready to setup your sales dashboard.

Your dashboard will consist of charts and reports that will measure these metrics. Then, as you setup and configure your Salesforce instance you know what custom fields and validation rules to add that will ensure you are getting the data you need to close more deals.

We always tell our clients that the initial goal is to run your sales meetings completely out of Salesforce. All the spreadsheets and emails you used in the past are no longer valid. Going forward every sales meeting will be run from a new Salesforce dashboard.

> *If it's not in Salesforce then it doesn't exist*

How Galvin Helps

Galvin is a Salesforce Consulting company that helps companies do more with Salesforce. When implementing Salesforce for sales teams Galvin takes an approach that is based on defining the metrics and then **changing the sales culture** so these metrics can be achieved by ONLY using Salesforce.

Salesforce for Sales is a program offered by Galvin that focuses on implementing and configuring Salesforce so sales teams can effectively use it on a daily basis. Galvin will configure the Salesforce environment for your company, with an end results that is specific to your sales and business needs.

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