

3 DASHBOARDS FOR VIRTUAL SALES MANAGEMENT

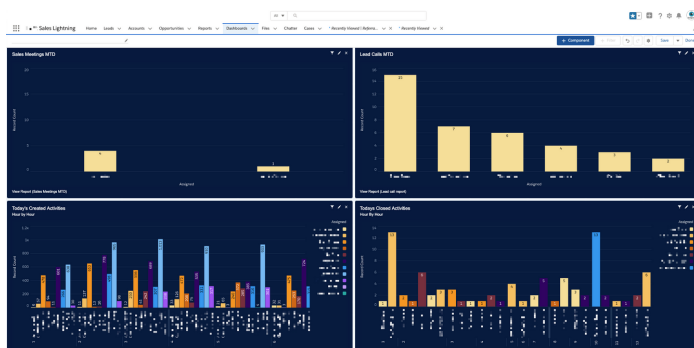
IF IT ISN'T IN SALESFORCE, IT DOESN'T EXIST

With typical routines upended, your CRM is more important than ever.

As a sales management tool, there are three dashboards that are critical to monitor that will give the ideal view of what your organization needs to monitor the most.

1 LEAD AND OPPORTUNITY MANAGEMENT

Visualize the data at the top of your funnel for easy tracking. With a Lead and Opportunity Dashboard, you can clearly see your pipeline and make decisions based on it. The different dashboard components can be organized by stage and tailored to fit your specific sales cycle and needs so the business and the business data align completely.



2 SALES TEAM ACTIVITIES

Now more than ever, you'll want to see what activities are moving deals. What actions are most effective? Are calls lagging while virtual meetings soar? More than just a monitoring tool, this dashboard lets you capture efficiencies in the process at an especially critical time for everyone.

3 KPIs FOR LEADERSHIP

Rather than cherry picking, this dashboard provides a clear and concise view of your most important business information. We know the importance of leadership making well informed decisions quickly. In times of economic uncertainty, it's even more important for this dashboard to be aligned with your specific business needs to support that decision making.



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BUILDING THE RIGHT DASHBOARDS

If you're just getting started, Salesforce has a great dashboard pack with different out of the box options you can download and add to your organization's CRM.

[Click here](#) to download those resources.

If you have Salesforce dashboards your team uses that haven't been updated in some time, it may be wise to review them.

- Do they still align with your current business needs?
- Is there any noise you can remove to keep things as simple and clear as possible?
- What is missing from that data that you should be monitoring for the business?

UNSURE YOUR TEAM IS ROUTINELY TRACKING THE RIGHT METRICS?

Great technical solutions require adoption for them to deliver value to your team. If we can provide complimentary adoption strategies, let us know.



If we can give any guidance, we'd love to help you navigate this uncertain time.

We want to offer our support, especially while everything is feeling a little upended.

We're available to talk out strategy and technical questions — no strings attached.

Give us a call at **919-978-7711** or email info@cloudgiants.com to set up a time.

Whether that means reviewing dashboard metrics, troubleshooting a specific issue, or general adoption strategies — we're here to help.

