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8/26/24

CRM Sales Dashboard Measurement Planning

A screenshot of a sales dashboard

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**Think Like a Business Owner** **(Step 1)**:

**1a. What are the high-level goals of the business as a whole?**

Increase Revenue, Decrease Costs, Increase Profit, Expand customer base, Have good brand reputation

**1b. How do the sales teams support those business goals?**

Mainly focused on **revenue** but also in a way they impact customer perception, customer retention, and customer satisfaction (doesn’t seem like this company is subscription or membership based but customer satisfaction is still important so these large businesses can buy from Maven Tech again instead of competitors).

Sales teams are in charge of actually making the sales of products to businesses. Finding customers, contacting them, initiating the sale, hopefully closing the sale (and making as much profit as possible).

**1c. What are the most important goals for the sales teams?**

Bring in revenue, be efficient, ensure customer satisfaction, customer retention (try to establish relationships with businesses to keep purchasing from us?)

**1d. What questions should we try to answer for the managers of sales teams?**

(Thinking below – sales agents that are being managed)

Revenue: How is team revenue generation changing over time? Is it satisfactory or not? What factors are driving those changes and how can I capitalize on what works and intervene in what doesn’t work?

Efficiency: Is my team operating at maximal efficiency or improving over time? What are areas of improvement for my team?

Customer Satisfaction: Is my team leaving good impressions on customers they interact with? Are they also improving in this ability over time?

Team member performance: How is each team member contributing to overall performance? Who are doing the best and who are doing the worst? Why?

How can we quantify the above metrics in relation to benchmarks or goals of a certain period (quarterly or yearly goals)? Are we on track to meeting or exceeding those goals? If not, what is holding us back and how can we fix it?

(Think above – what would the manager want to know in relation to who they report to?)

Assumed Hierarchy: Sales Managers -> Regional Sales Managers -> Director of Sales -> COO -> CEO

(Regional Manager) What is my team’s performance relative to the other managers in my region (revenue, customer satisfaction, efficiency, etc.)

(Regional Manager) What is my team’s performance relative to established benchmarks or quarterly goals (did my team outperform goals in a certain quarter)

(Regional Manager) What is my team’s performance relative to total revenue of my region?

(Sales Director) How is my team doing relative to all the other teams (basically grouping by manager)? (best performing manager can eventually be promoted or have higher commission – however it probably is relative to region as well). (same key metrics of profit, revenue, satisfaction, efficiency).

**1e. What actions can you imagine leadership taking based on the data we present?**

Sales Managers want to quickly discern if their team’s performance relative to expectations or goals are on track to meet or surpass them. In contrast, they also want to be able to spot problematic issues or areas for improvement that are detracting from performance and address them as quickly as possible.

It is ideal for managers to be able to track drivers of output and also the outcomes of changing those drivers. For example, a manager would want to (a) identify if a specific employee is decreasing overall customer satisfaction due to many complaints and inform them. In addition, the manager would then like to (b) be able to view the trend of how customer satisfaction relative to that sales agent changes over time to see if the output they care about (relative to high-level business goals) is actually improving as well.

So, the actions the manager would take based on the data is identify under-performing aspects of overall performance and understand WHY that is happening. The same could be said for over-performing aspects so the manager can see what WORKS WELL and continue to push those strategies or justify the changes they implemented before.

Individual employees can be incentivized based on performance and be considered for promotions, bonuses, etc. Under-performing employees need to be identified AS SOON AS POSSIBLE and rectified.

**Know your Audience (Step 2):**

**2a. Who are the primary stakeholders and what are they most interested in? What are their goals?**

Primary stakeholders are sales managers. They are most interested in having the best team as possible at a given time.

Their goals are to continually improve their team’s performance over time AND spot problem areas and detracting factors as soon as possible so they can deal with them effectively.

More specifically, sales managers have the goals of guiding their team to increase revenue generation over time, improve customer satisfaction, and be more efficient (and/or upskill so they continue to improve).

**2b. What information would they need to do their job well?**

They need to be able to see trends of performance over time as it pertains to their team as a whole (is their team improving over time) AND in relation to each individual team member (what are areas that individual team members can work on).

They need to be able to see revenue trends, customer satisfaction trends, and sales pipeline efficiency trends. They also need to be able to confirm whether or not they are on track to meet any goals/benchmarks. If not, they need to be able to understand WHY they are not and resolve those issues as fast as possible.

**2c. (Hierarchy) (Above) What are the regional sales managers and director of sales most interested in? (Below) What are the individual sales agents interested in?**

Regional Sales Managers are interested in the effective guidance of the teams that they oversee (may have multiple sales managers below them). Similar to individual sales managers, regional managers want to be able to track their progress towards certain benchmarks and identify areas for improvement or understand why issues are happening within their teams (which teams need more attention than others).

Individual sales agents are interested in summaries of how they are contributing to team-wide goals and what is working/not working with their approaches? Which opportunities are panning out vs. not? Are they not generating as much revenue as expected? Why is that happening and what can they do to change that? The same goes for the other performance areas.

**2d. What information do individual sales agents need to make themselves more effective?**

They want to monitor their performance relative to key team goals (profit, efficiency, satisfaction) over time (they want to be improving or show they’re above benchmarks). It would also help to inform them on performance relative to other agents in their region so they can know if they need to improve.

They want to identify areas of improvement for themselves. Probably also insights on closed/lost deals and patterns within them (how can they improve their own probability of closing deals or bringing in higher value deals).

Note: This probably doesn’t typically relate to dashboards but employees should also be aware of how their performance is being viewed by their managers. They want to perform their responsibilities as best as they can but they also want to understand whether that is satisfactory in the eyes of their managers so they can work towards bonuses, promotions, more impactful work, among other potential benefits. They also want to proactively spot anything that may detract from how they are viewed so they can fix those aspects before it is too late.

**Define the KPIs (Step 3):**

**3a. Map the overall business goals and information needs to IMPACTFUL KPIs and show what component metrics are needed to calculate them.**

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**Identify Data Sources (Step 4):** (this would inform where the data comes from to put INTO a database or other means of data storage for analysis)

**4a. Map each KPI and supporting metric above to potential data sources, owner, and desired update frequency**

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