CRM Reporting Views – Project Documentation

📊 Sales & Product Performance Report

✅ Purpose

This report consolidates performance metrics at both the sales agent and product level to help leadership understand revenue contributions, identify top performers, and optimize sales operations.

🔍 Key Features

Integrated View: Combines data from the sales pipeline, products, and sales teams to show the full context of each deal.

Agent-Level Metrics:

- Total deals closed
- Total revenue generated
- Average deal size
- Win rate (won vs. total opportunities)
- Number of active months
- Distinct customers served

Product-Level Metrics (via related dashboards):

- Total units sold
- Number of unique customers
- Average order value
- Revenue tiers (High, Mid, Low)

Performance Tiering: Agents are segmented into Top, Mid, and Low performers based on revenue.

Recency Indicator: Highlights how recently each agent made a sale.

🧾 Customer Value Report

✅ Purpose

This report analyzes customer (account) behavior to uncover lifetime value, purchasing diversity, and account engagement trends. It supports sales strategy and retention planning.

🔍 Key Features

Comprehensive View: Merges account attributes (sector, revenue, region) with sales outcomes.

Account-Level Metrics:

- Total number of deals
- Total revenue generated
- Number of products purchased
- Number of sales agents interacted with
- Length of customer relationship (months active)
- Time since last order

Customer Tiering:

- VIP: High spenders (≥ $100K)
- Regular: Mid-level accounts (≥ $30K)
- New: Emerging or low-value accounts

Advanced KPIs: Includes Average Monthly Spend and Average Deal Value for better segmentation.