

# Customer Quarter Performance

Select a sales manager to view their report:

Melvin Marxen

Maven Tech

Total Sales

\$671K

Last QTR \$768K

All Teams Average \$467K

→

Avg. Sale Value

\$2,760

Last QTR \$2,666

All Teams Average \$2,343

Avg. Weeks to Close

6.96

Last QTR 6.80

All Teams Average 7.08

New Opportunities

244

Last QTR 629

All Teams Average 194

Potential to Close

\$542K

Engagement opportunities 215

→

**Business Takeaway:** The decline in new opportunities and total sales compared to last quarter suggests a need to focus on lead generation and deal conversion strategies to maintain revenue momentum.

**Business Takeaway:**

- .Agents closing high-value deals rely heavily on discounts. A pricing strategy review is needed to ensure profitability is not compromised.
- .Training for slower-closing agents (e.g., Niesha Huffines) can help improve deal efficiency.

**Business Takeaway:**

- .GTX Pro is the most successful product, but conversion rates across products vary.
- .GTX Plus Basic needs investigation—is it priced too high, or does it need better promotion?
- .GTX Basic has high conversion but lower volume—scaling its

## Performance by Agents

Agent	No. Sales	Total Sales	Avg Sale	Avg. Weeks to Close	% Sales Discounted
Darcel Schlecht	94	\$357,666	3,804.96	6.62	54.73%
Gladys Colclough	41	\$97,317	2,373.59	7.22	56.73%
Jonathan Berthelot	46	\$70,045	1,522.72	7.04	51.29%
Marty Freudenburg	39	\$103,871	2,663.36	6.44	58.29%
Niesha Huffines	23	\$41,889	1,821.26	8.61	56.27%
Total	243	\$670,788	2,760.44	6.96	55.27%

## Sales and Conversion % by Products

Product	Conversion %	Sales	Total Sales Q4
GTX Pro	55.2%	74	\$356,648
GTX Plus Pro	67.5%	27	\$151,538
MG Advanced	51.9%	27	\$91,823
GTX Plus Basic	46.5%	40	\$44,136
GTX Basic	60.8%	45	\$24,970
MG Special	60.0%	30	\$1,673
GTK 500			



Open Opportunities Report:  
View the open opportunities for

Melvin Marxen



Maven Tech

Agent	Product	Account	Engaged Date	▼	Opp Value
Marty Freudenburg	GTK 500	Unknown	Tuesday, August 01, 2017		\$26,768
Darcel Schlecht	GTX Pro	Unknown	Thursday, July 27, 2017		\$19,284
Darcel Schlecht	GTX Plus Pro	Unknown	Saturday, August 05, 2017		\$10,964
Darcel Schlecht	GTX Pro	Isdom	Tuesday, July 25, 2017		\$9,642
Darcel Schlecht	GTX Pro	Unknown	Friday, July 21, 2017		\$9,642
Darcel Schlecht	GTX Pro	Unknown	Monday, July 24, 2017		\$9,642
Darcel Schlecht	GTX Pro	Unknown	Tuesday, July 25, 2017		\$9,642
Darcel Schlecht	GTX Pro	Unknown	Wednesday, July 26, 2017		\$9,642
Darcel Schlecht	GTX Pro	Unknown	Saturday, July 29, 2017		\$9,642
Darcel Schlecht	GTX Pro	Unknown	Monday, July 31, 2017		\$9,642
Darcel Schlecht	GTX Pro	Unknown	Tuesday, August 01, 2017		\$9,642
Darcel Schlecht	GTX Pro	Unknown	Friday, August 04, 2017		\$9,642
Darcel Schlecht	GTX Pro	Unknown	Monday, August 14, 2017		\$9,642



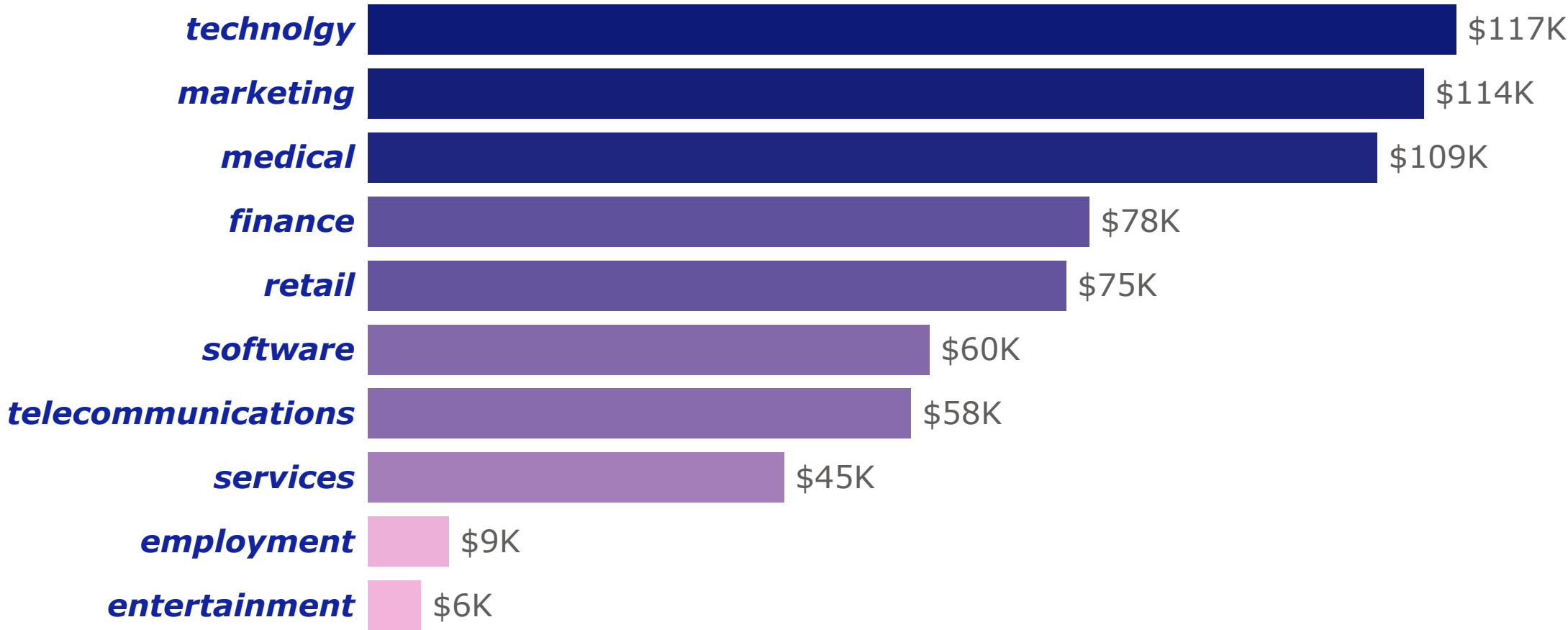
# Customer Quarter Sales

View sales made this quarter by : 

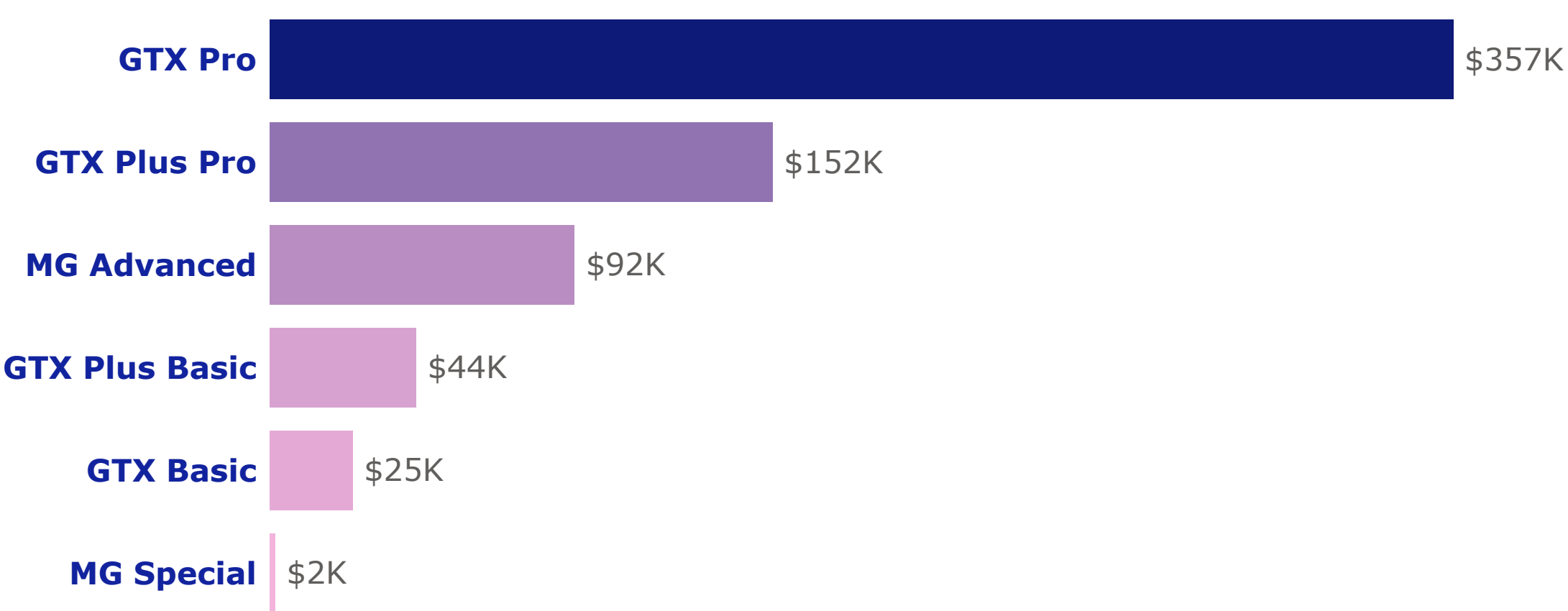
Melvin Marxen

Maven Tech

## Total Sales by Sector



## Total Sales by Product



## Total 5 Accounts



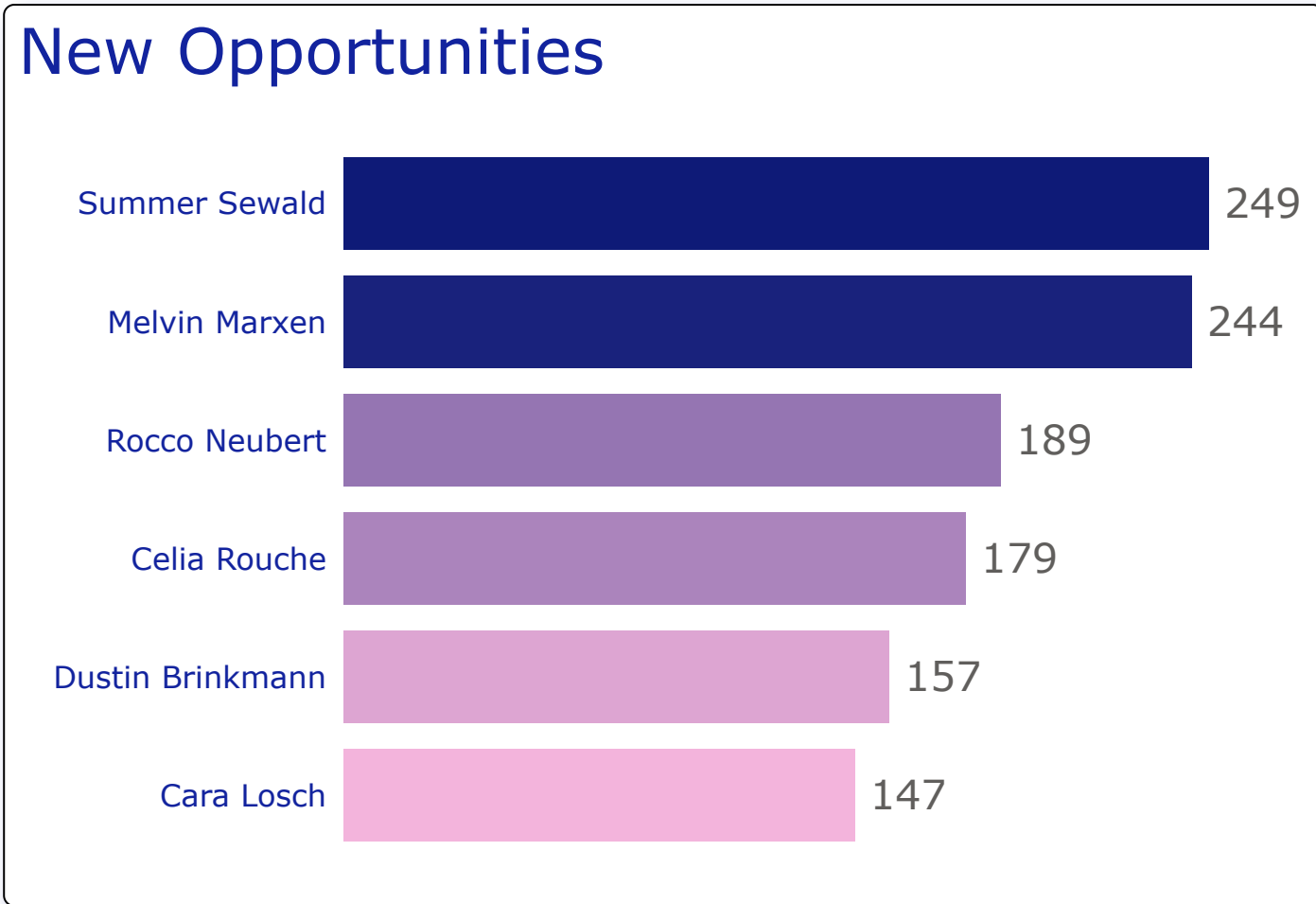
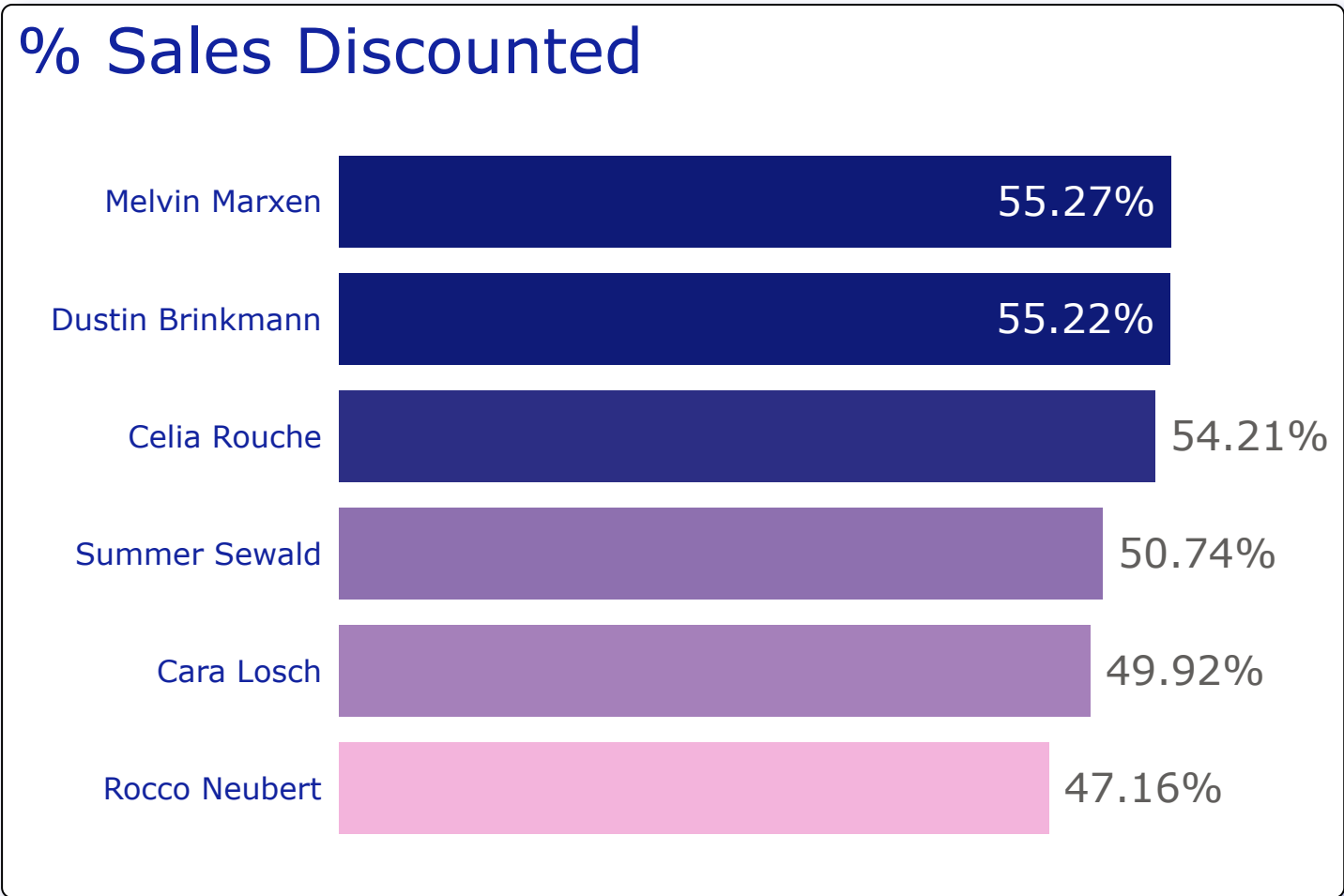
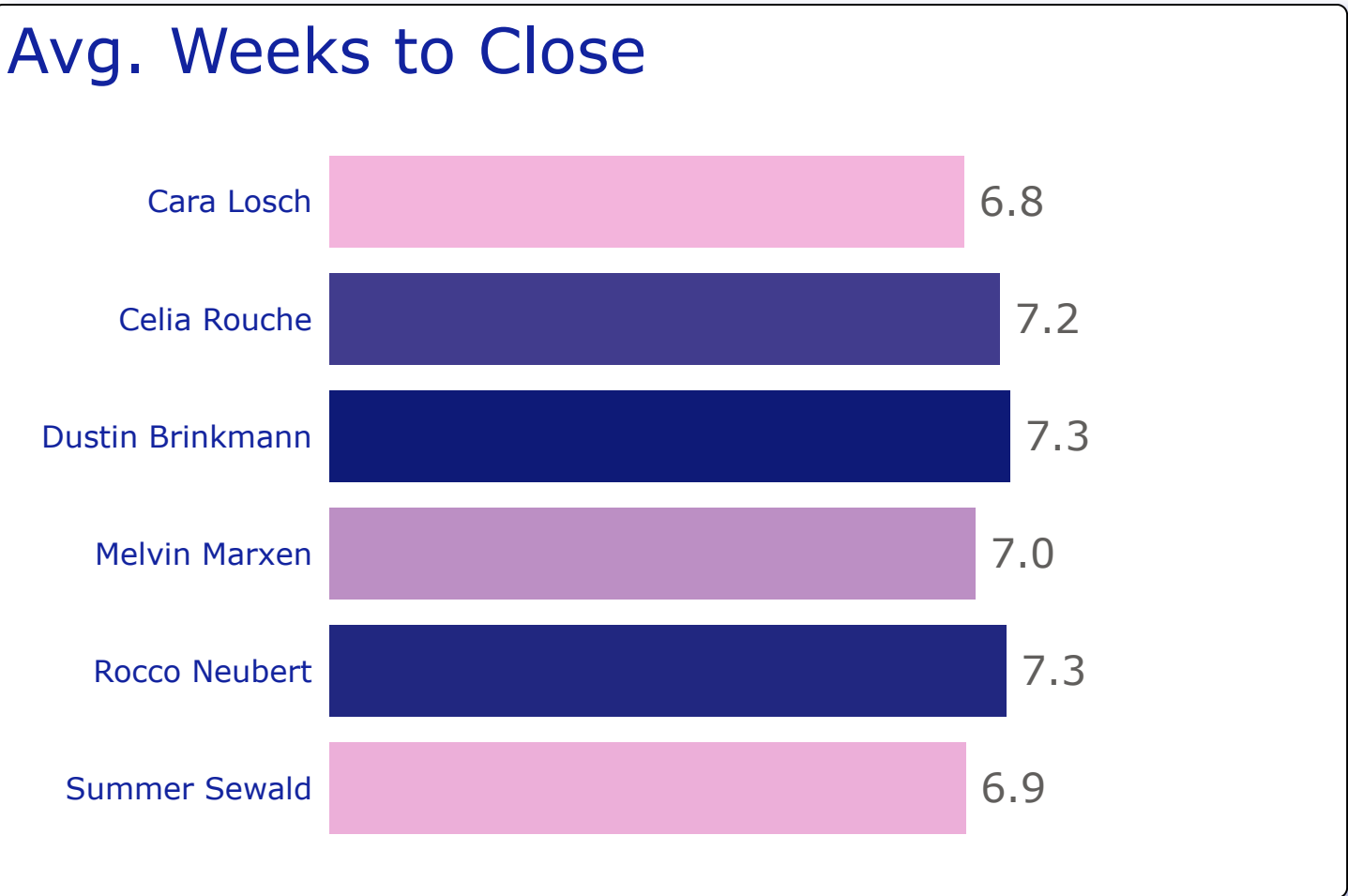
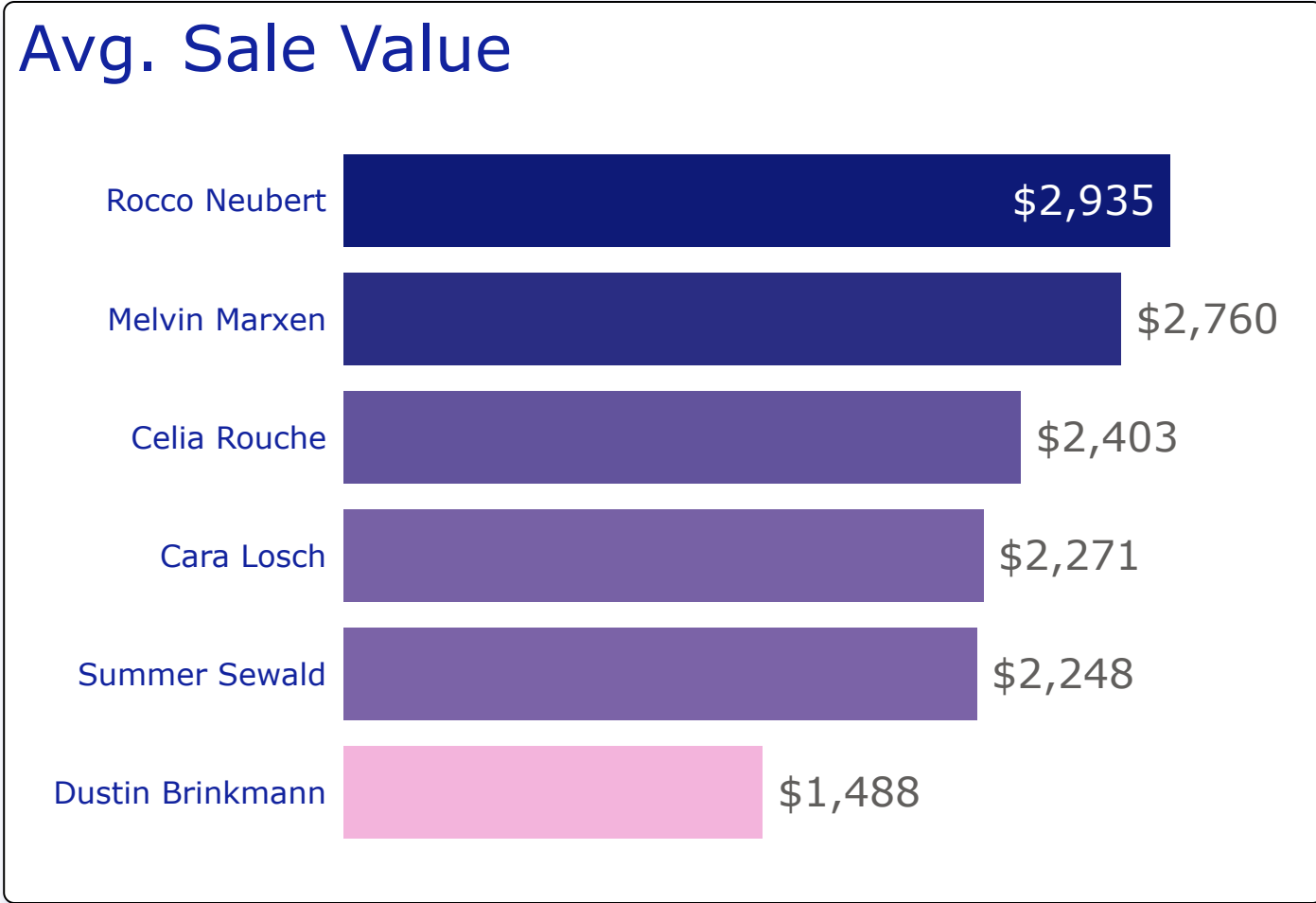
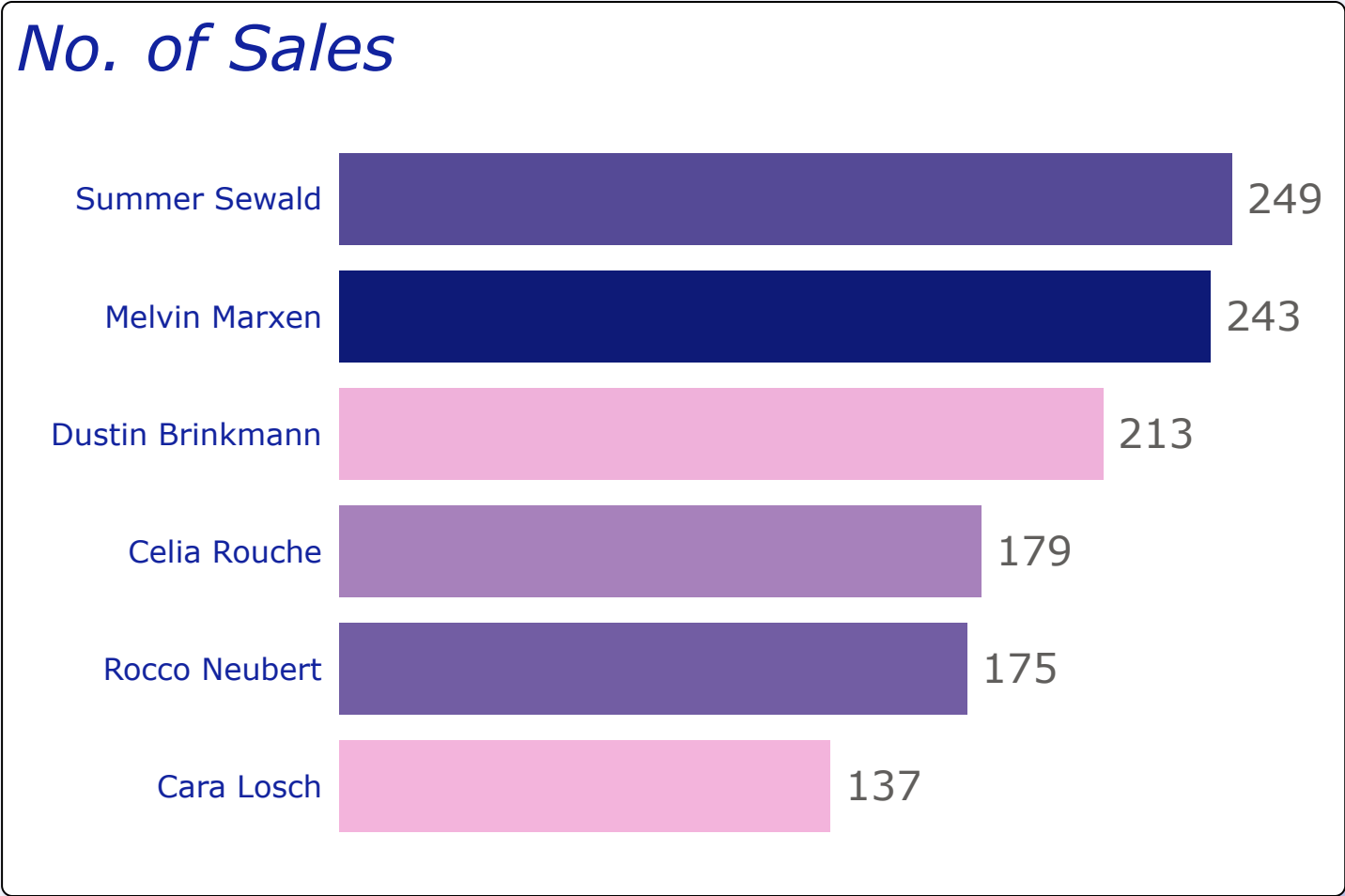
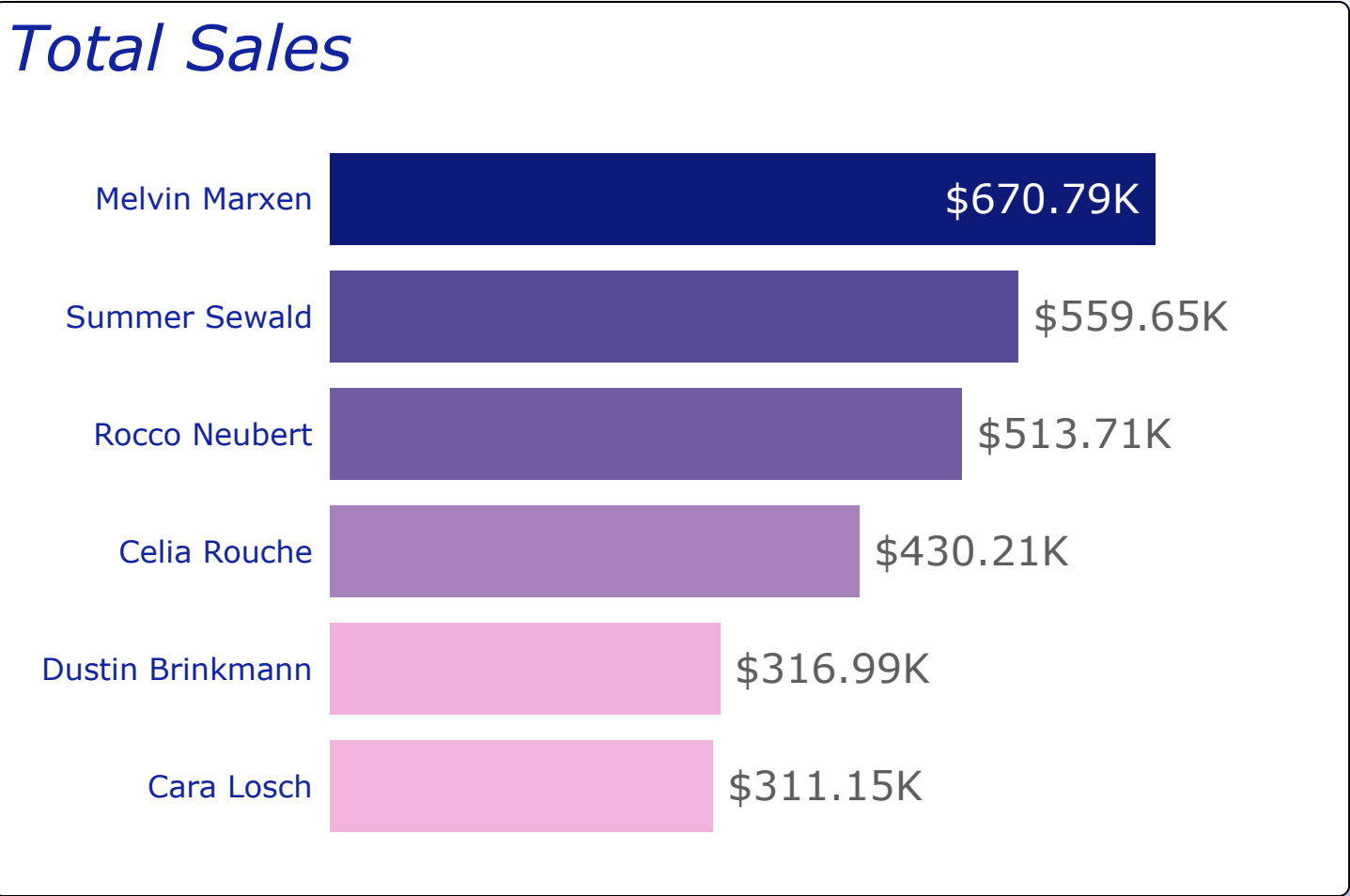
## Sales Details

Agent	Closed Date	Weeks to Close	Account	Product	Closed Value
Gladys Colclough	12/31/2017	8	Gogozoom	MG Special	\$52
Jonathan Berthelot	12/31/2017	13	Codehow	GTX Basic	\$546
Niesha Huffines	12/31/2017	12	Ron-tech	GTX Plus Basic	\$0
Darcel Schlecht	12/30/2017	1	Bioholding	GTX Pro	\$0
Darcel Schlecht	12/30/2017	12	Genco Pura Olive Oil Company	MG Special	\$54
Darcel Schlecht	12/30/2017	14	Treequote	GTX Pro	\$4,570
Darcel Schlecht	12/30/2017	16	Treequote	GTX Pro	\$5,141
Gladys Colclough	12/30/2017	0	Inity	GTX Plus Basic	\$1,052
Gladys Colclough	12/30/2017	1	Genco Pura Olive	MG Advanced	\$3,494
Total					\$2,251,930

# Customer Quarter Performance by Team

View where the team is ranked across all the teams based on quarter metrics

Maven Tech

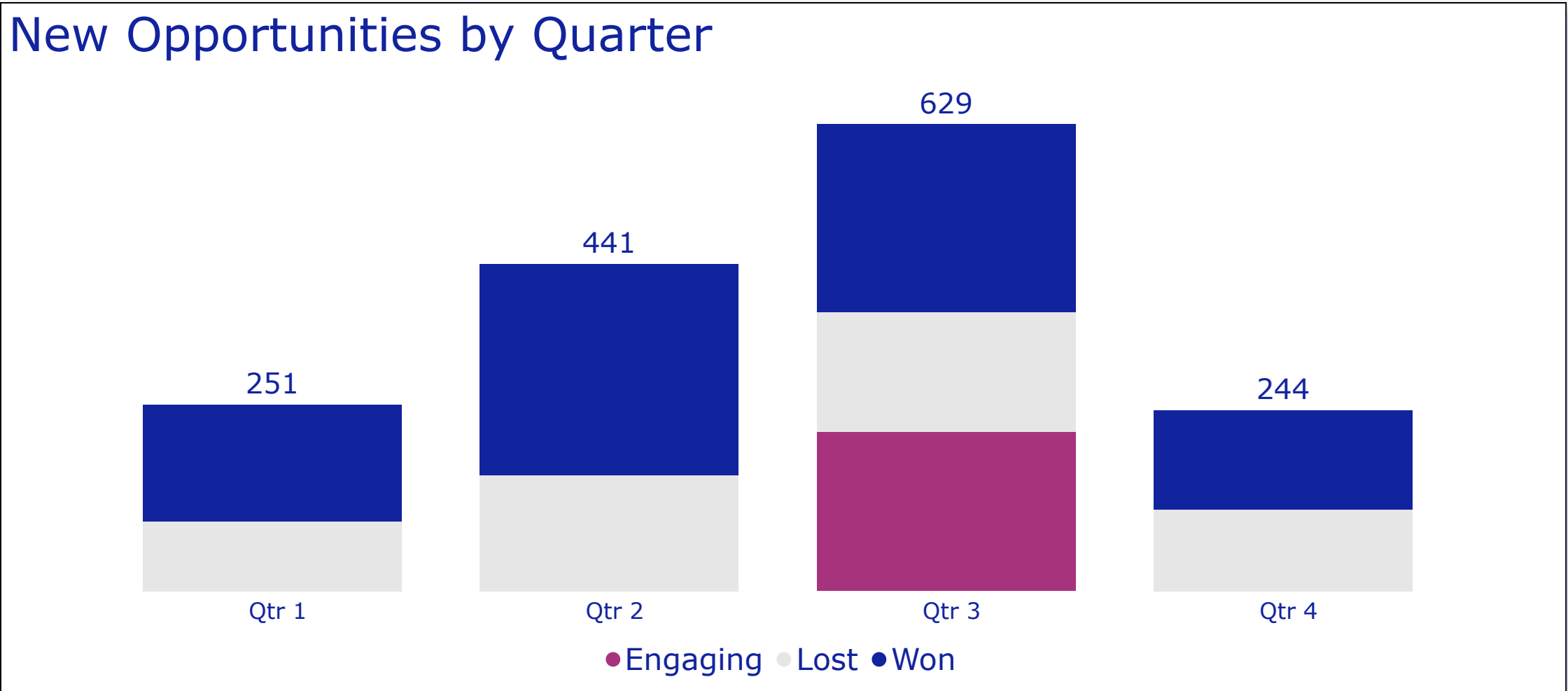
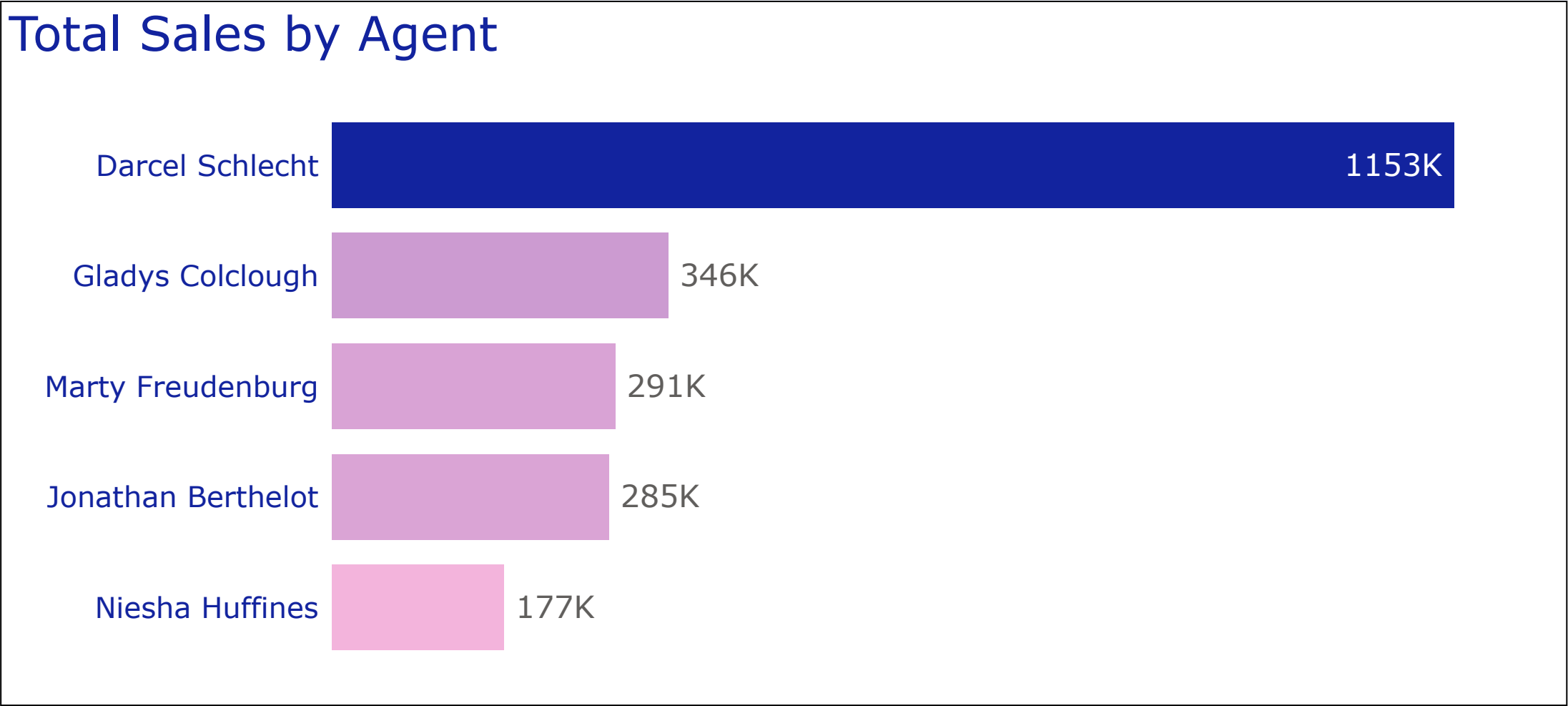
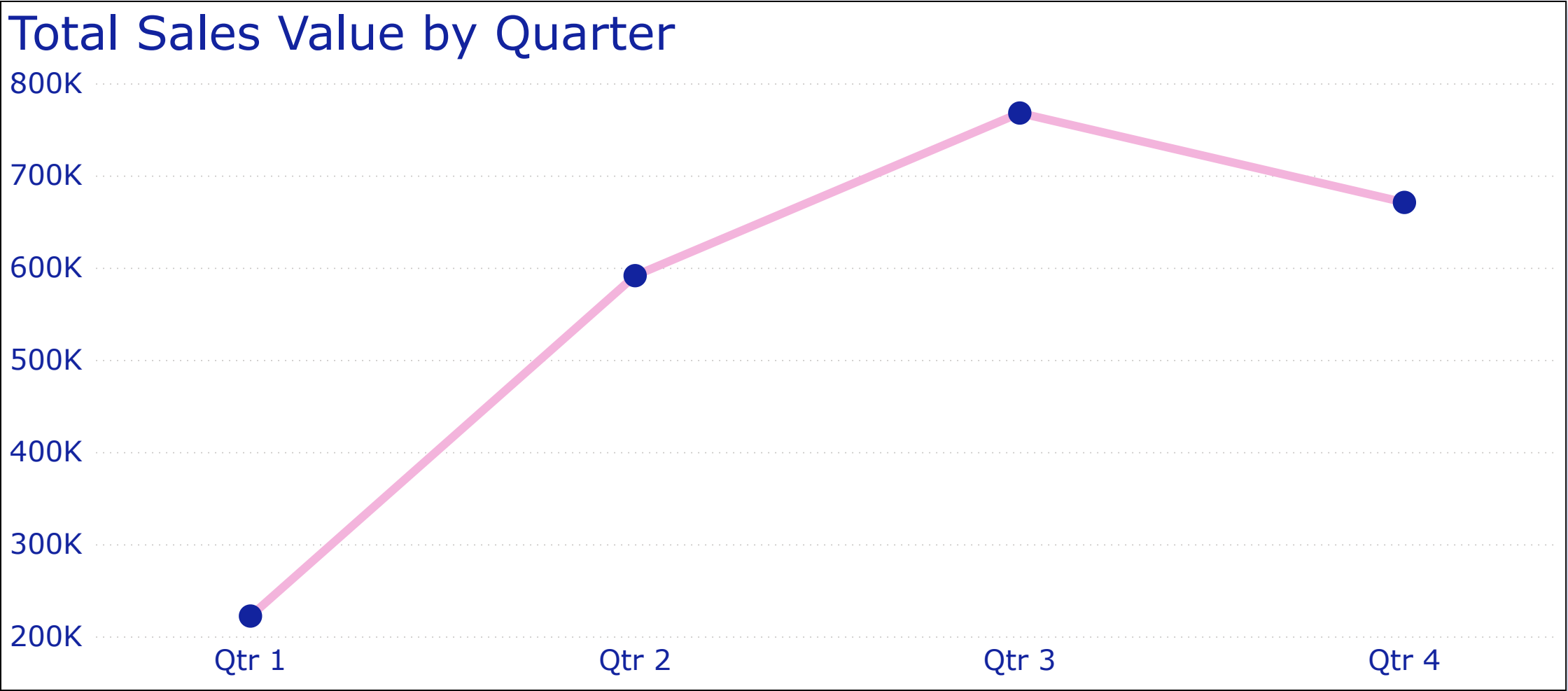


# Performance Over Time

View the 2017 performance by quarter for all teams

Melvin Marxen

Maven Tech



product	Qtr 1	Qtr 2	Qtr 3	Qtr 4
GTX Basic	74.19%	65.48%	59.49%	60.81%
GTX Plus Basic	74.07%	71.83%	72.83%	46.51%
GTX Plus Pro	88.89%	63.89%	69.05%	67.50%
GTX Pro	72.41%	55.34%	60.63%	55.22%
MG Advanced	100.00%	50.00%	61.54%	51.92%
MG Special	93.75%	66.04%	63.64%	60.00%
Total	80.00%	61.67%	64.14%	55.61%