



Sales Force Management

Reporting

Sales Force Management

Sales Report

- ▶ A sales report is an analytical tool
 - ▶ that provides insights into the performance of various sales activities within a company.
- ▶ Armed with powerful visualizations,
 - ▶ sales teams use these reports to find trends and
 - ▶ patterns to improve their service and ensure sales growth.

Sales Force Management

Sales Report

- ▶ They give a picture of the company's practices at a specific moment in time to assess the situation
 - ▶ determine the best decision to make and
 - ▶ the type of action to undertake
- ▶ These reports help in finding potential new market opportunities
 - ▶ that can improve results

Sales Report



Sales Report

- ▶ They can be of various forms:
- ▶ a **daily sales report** format
- ▶ will track sales KPIs that are relevant on a daily basis:
 - ▶ the number of phone calls or meetings set up by a rep,
 - ▶ or the number of leads created.

Sales Report

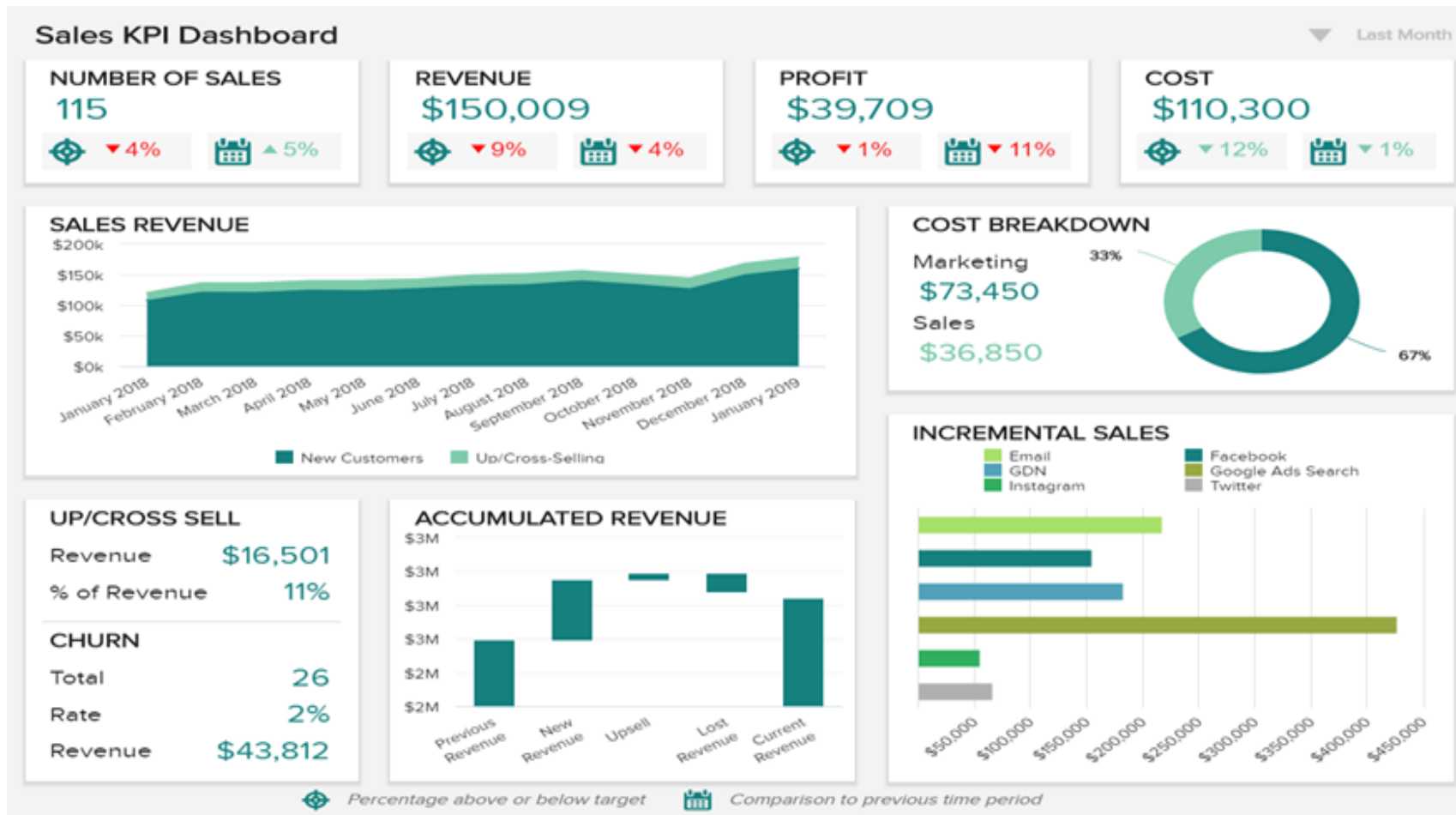
- ▶ Typically,
- ▶ **weekly sales reports** templates
 - ▶ can monitor the number of deals closed by the team or the revenue generated.
- ▶ **A monthly sales report** format
 - ▶ will provide a bigger picture of the activity of each sales rep or the team as a whole.

Sales Report

- ▶ **Monthly Sales Reports**
- ▶ A monthly sales report is used to
 - ▶ monitor,
 - ▶ evaluate,
 - ▶ analyze, and
 - ▶ determine
 - ▶ sales trends on a monthly basis.
- ▶ It includes more long-term measurement of KPIs such as
 - ▶ sales cycle length,
 - ▶ conversion report,
 - ▶ monthly performance report etc.

Sales Report

- ▶ Monthly Sales Reports
- ▶ Sales KPI report



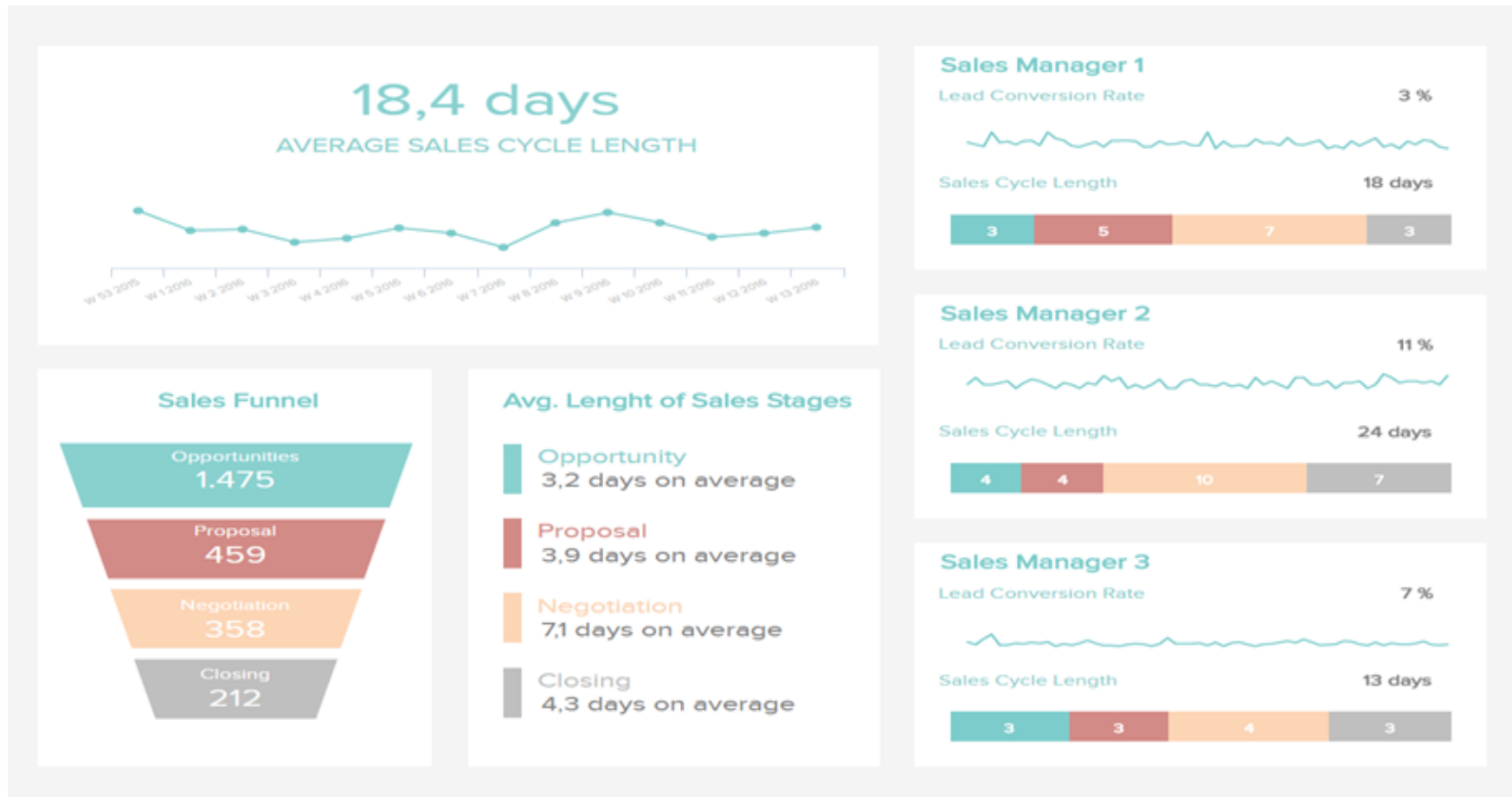
Sales Report

- ▶ Monthly Sales Reports
- ▶ Sales opportunity report



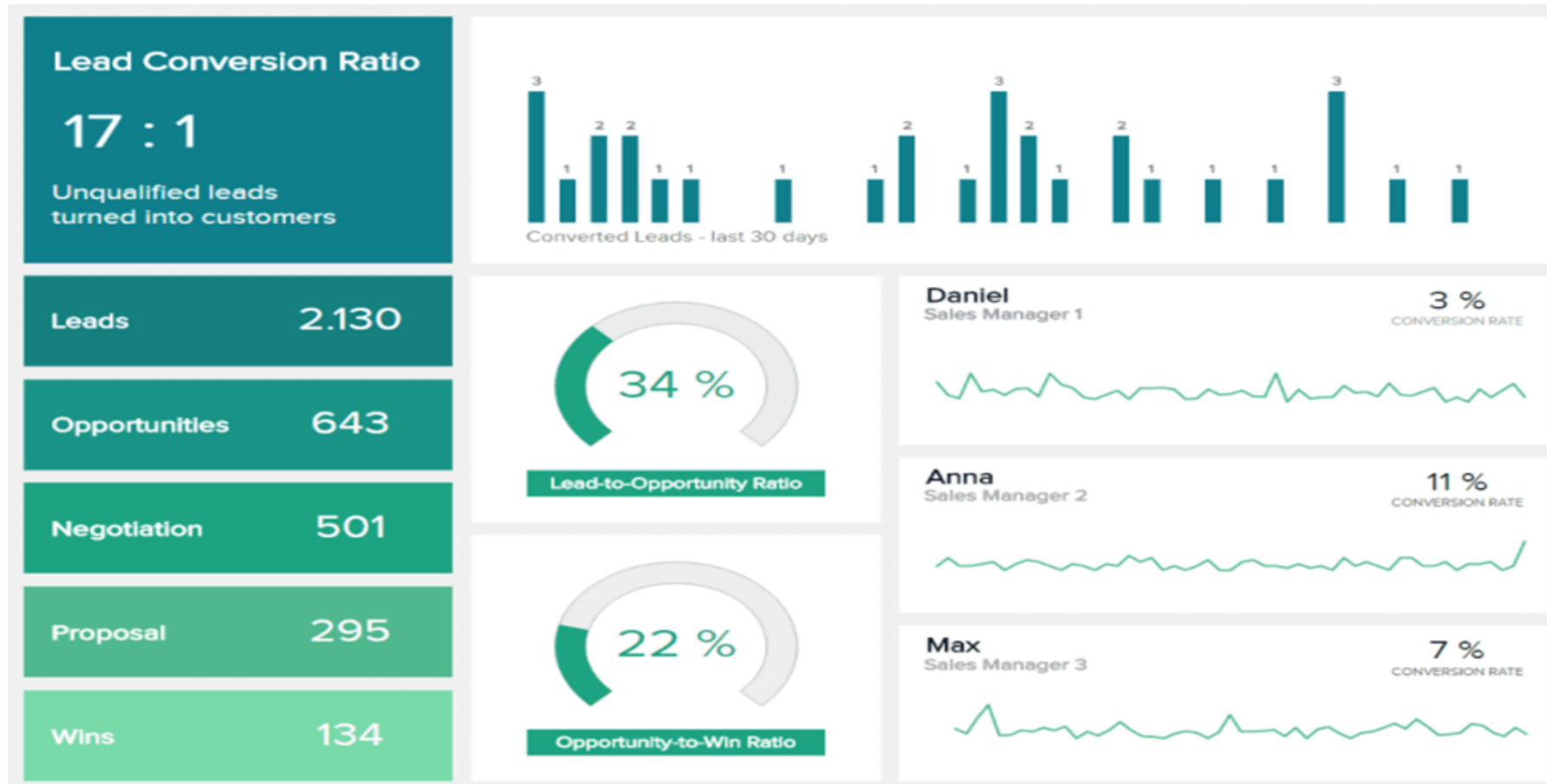
Sales Report

- ▶ Monthly Sales Reports
- ▶ Sales cycle length report



Sales Report

- ▶ Monthly Sales Reports
- ▶ Sales conversion report



Sales Report

- ▶ Monthly Sales Reports
- ▶ Sales performance report



Sales Report

- ▶ **Weekly Sales Reports**
- ▶ A weekly sales report is a measurement tool used by companies and individuals
- ▶ to track sales performance and essential KPIs, such as
 - ▶ lead-to-opportunity ratio,
 - ▶ lead conversion ratio,
 - ▶ sales volume by channel,
 - ▶ total sales per region,
- ▶ among many others, on a weekly basis.

Sales Report

- ▶ **Weekly Sales Reports**
- ▶ A week is arguably the perfect unit of time to measure individual sales rep performance.
- ▶ A month is often too long of a time frame,
 - ▶ leading you to miss out on course correction opportunities until after the fact.
- ▶ single day is often too short to see any real, meaningful outcome-dependent information.

Sales Report

- ▶ **Daily Sales Reports**
- ▶ A daily sales report is a management tool used by
- ▶ businesses, sales reps, and managers in order to extract the most relevant daily sales data
- ▶ such as
 - ▶ the number of closed deals,
 - ▶ client conversations,
 - ▶ opportunities created, and
 - ▶ many other sales-related KPIs