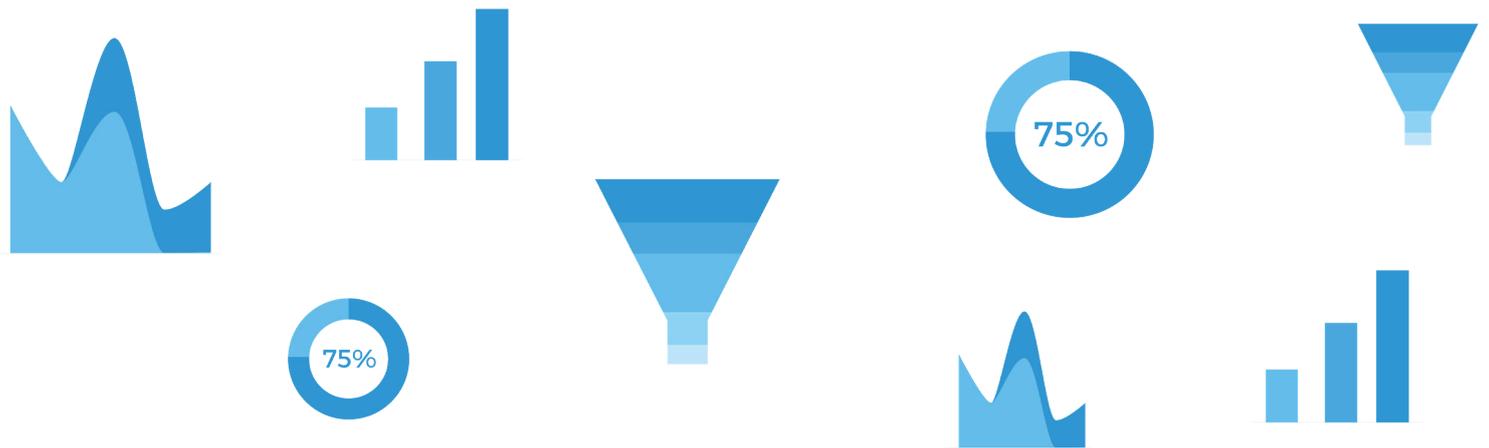


6 Brilliant Sales Leader Dashboards



Business  Analyze[®]

Introduction

The most successful B2B companies are good at analysing their sales pipeline, tracking metrics and forecasting with accuracy.

Yet, while many medium size organisations have growing volumes of sales data readily available in their CRM systems and other company databases, tracking sales and preparing reports still remains a time-consuming task.

Rather than helping their teams hit targets, sales leaders are forced to spend valuable time updating spreadsheets and preparing for meetings.

A sales dashboard helps overcome these problems. Dashboards connect to data and draw up data like a straw, enabling relevant insights to rise onto dashboards – without any manual processes.

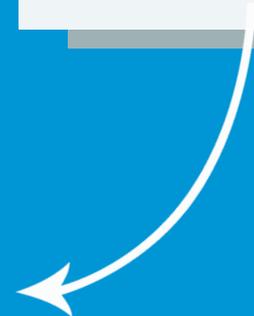
Sales leaders save time and gain access to valuable information that is ready to use. With better and faster insight into what customers want – sales leaders can reduce friction and increase revenues.

In this eBook, we share 6 state-of-the art dashboards that can help you structure sales, set direction and hit targets.

Use these dashboards to help you save time at every step from gathering data, to interpretation and presentation.

Contents

- ◆ Sales budget dashboard
- ◆ Sales pipeline dashboard
- ◆ Sales commission dashboard
- ◆ Motivational scoreboard
- ◆ Customer satisfaction dashboard
- ◆ Product analysis dashboard



What are dashboards used for?

Dashboards help leaders and managers effectively analyze, visualise and share data.

They extract data from one or more sources and present it on charts, graphs, tables and other graphical visualisations.

Visual representations of numbers help us quickly sort information and make decisions based on what we learn. Because pictures are processed 60,000 X faster than text, dashboards can help us learn faster and retain information longer.

Originally designed for PC desktops, dashboards now refer to visualisations on almost any device or screen including mobiles, tablets and TV screens.

Key functions



Automated reporting

More than just visualizing data, many dashboard tools perform calculations and automate the process of preparing weekly, monthly or ad-hoc sales reports.



Sales analysis and forecasting

Analytics dashboards enable leaders to mine data to get a better understanding of sales challenges and opportunities.



Goal-tracking and KPIs

Key facts, figures and KPIs are readily available to use in planning, decision-making and execution.



Coaching and motivation

Because dashboards track all levels of performance, leaders can better support their reps, understand underlying performance-drivers and organise friendly contests that encourage the right behaviour.

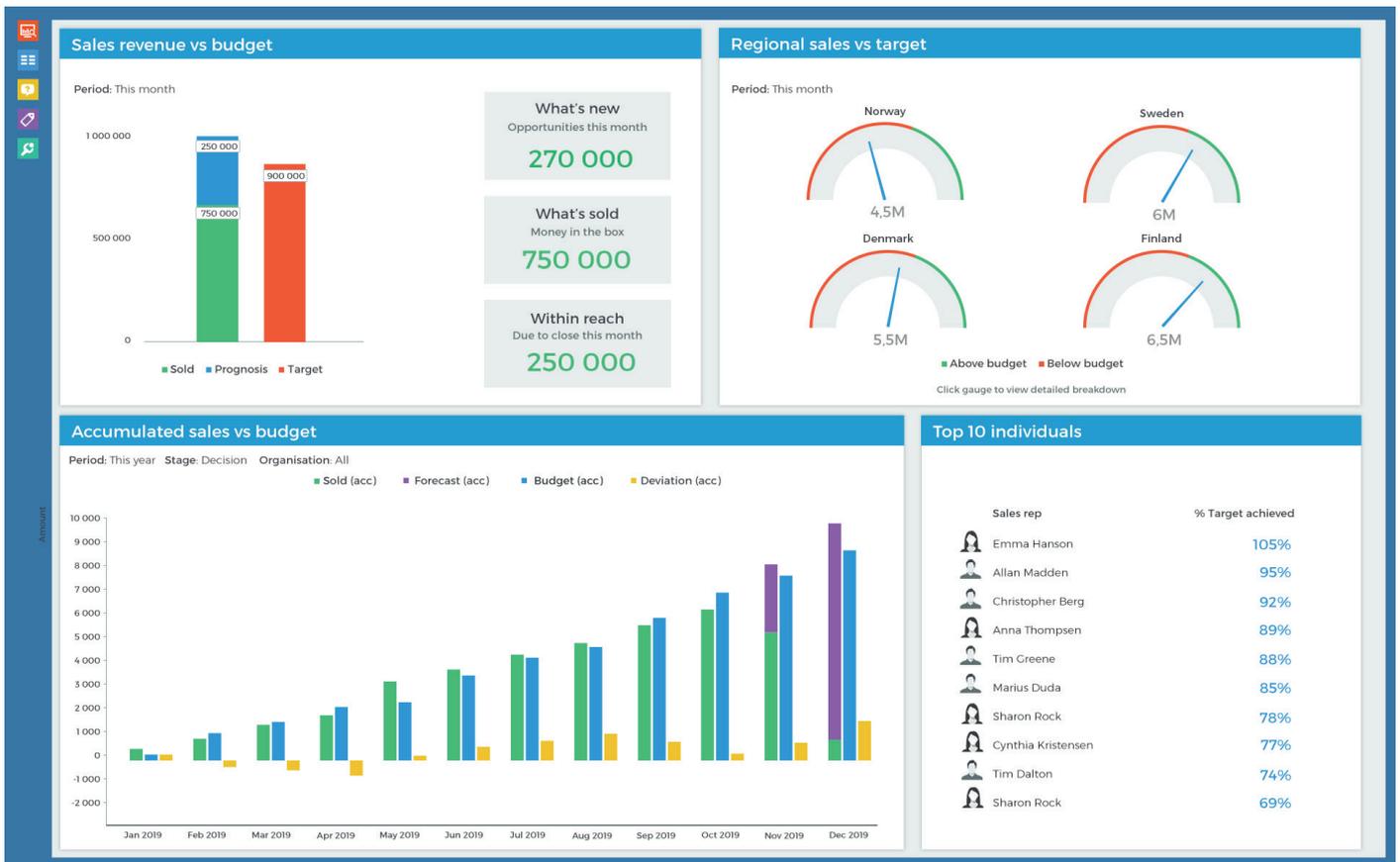
1. Sales Budget Dashboards

Sales budget dashboards track sales and forecasts compared to budget. Equipped with this information, you can evaluate sales performance based on the most recent intelligence, rather than best-guess.

No matter what your target or organisation structure, dashboards provide you with pertinent facts at a glance.

Key facts and metrics:

- ◆ Sold vs. budget and forecast
- ◆ New opportunities (value)
- ◆ Total sold (value)
- ◆ Opportunities due to close (value)
- ◆ Accumulated revenues vs target
- ◆ Top 10 performers vs targets



Tip: Dashboards can be configured with data filters so you can select different parameters and drill-downs to help you understand the underlying data sets.

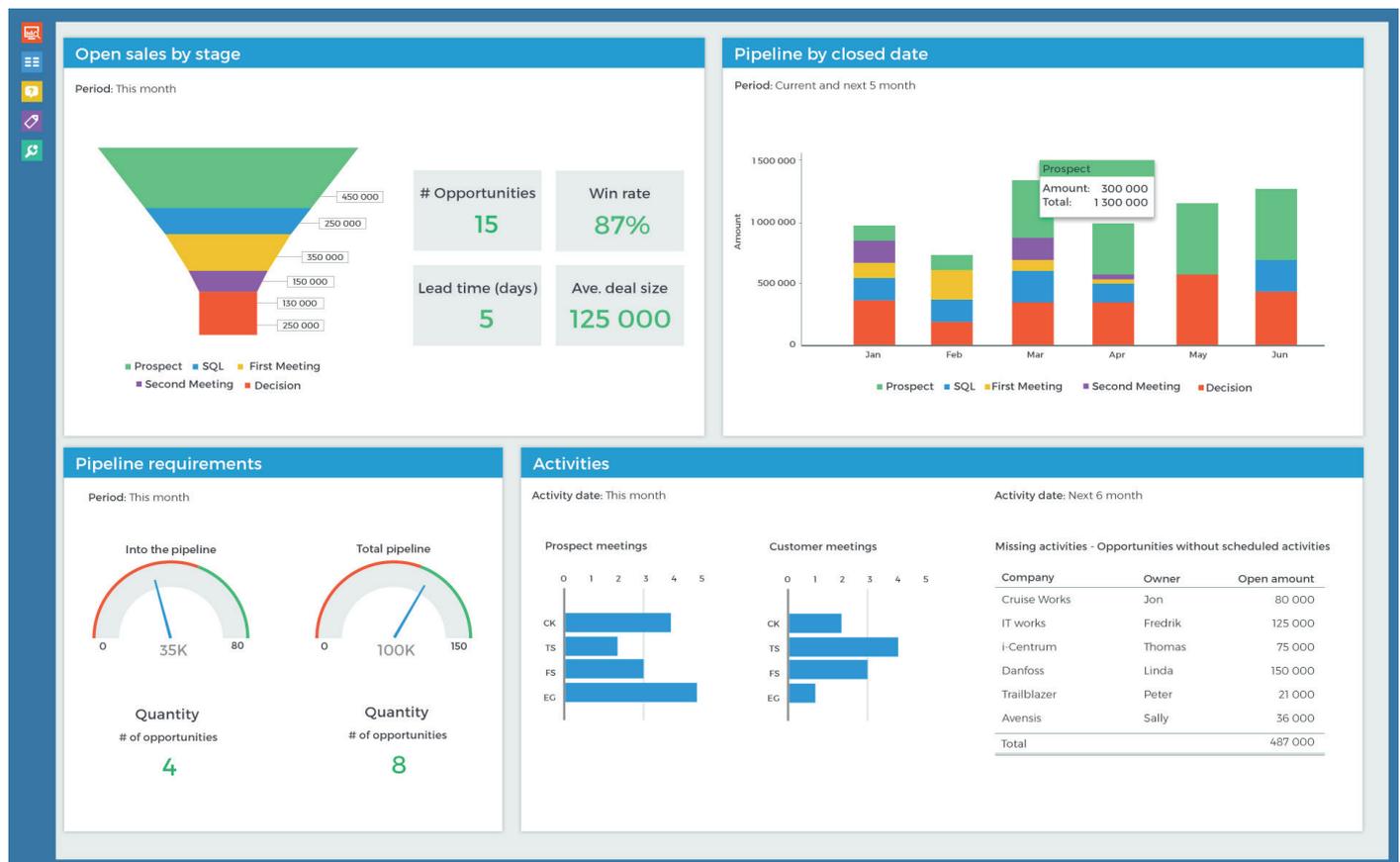
2. Sales Pipeline Dashboards

Sales pipeline dashboards help you maintain a healthy pipeline for consistent and predictable sales performance, and help you understand what you can do to generate more revenue.

These reports provide multiple views of the pipeline, helping you prioritise actions, focus efforts and better guide your team towards desired outcomes.

Key facts

- ◆ Open sales by stage
- ◆ Sales velocity metrics
- ◆ Pipeline by close date
- ◆ Pipeline fill versus requirements
- ◆ Activity report
- ◆ Opportunities missing activity
- ◆ Forgotten activities (planned)



Tip: By sharing pipeline requirement dashboards with marketing you ensure that everyone is working towards the same target for new opportunities.

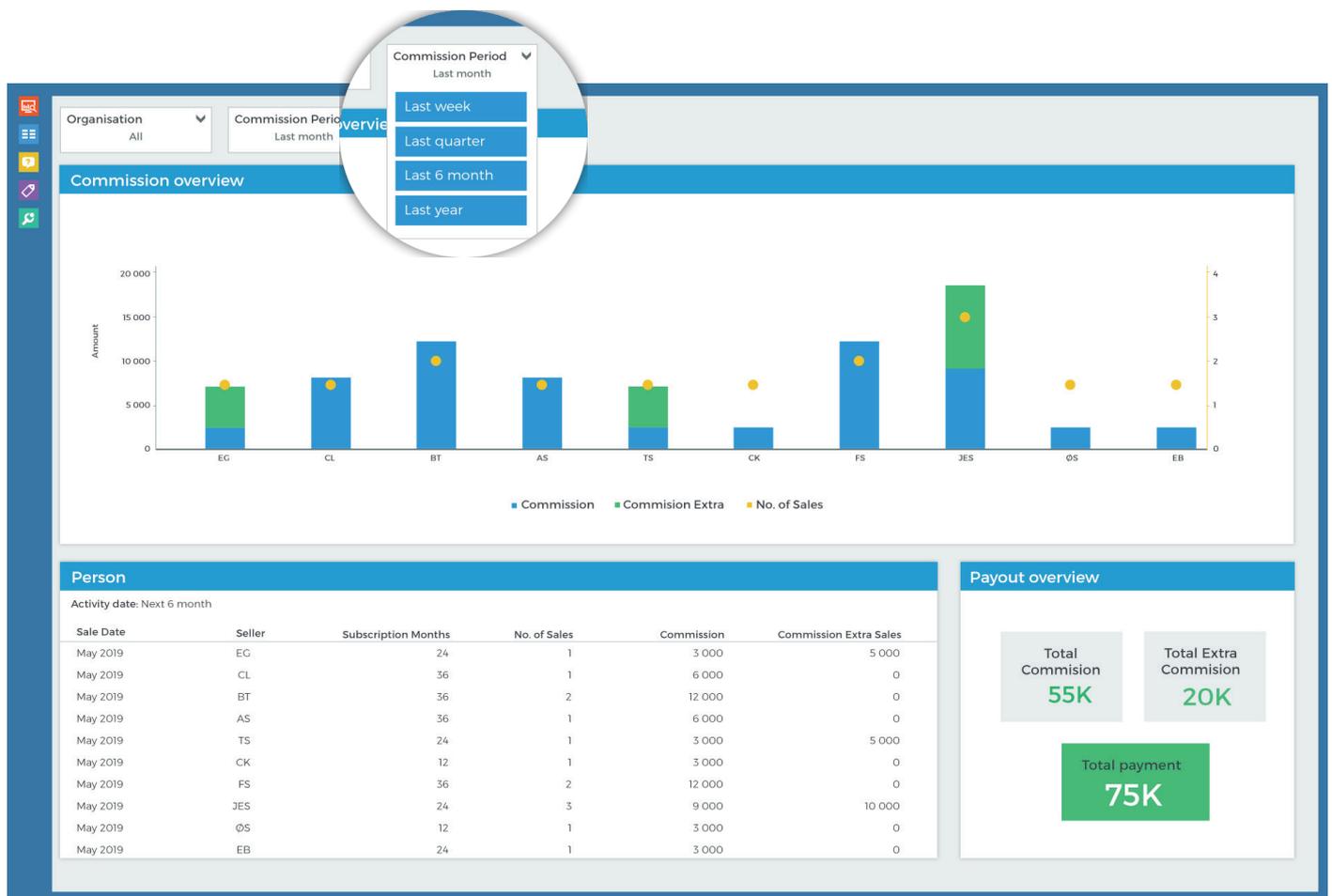
3. Sales Commission Dashboards

Commission dashboards calculate earnings and display results without anyone having to update spreadsheets by hand.

If you grant salespeople access to their own personal reports, they can see their reward as it's earned. Even if they calculate values themselves, seeing real numbers has an extra motivational effect.

Key facts

- ◆ Commission per category
- ◆ Sale commission per period
- ◆ Earnings per person



Tip: Share commission dashboards with agents, distributors or other channel partners to highlight the value of your partnership.

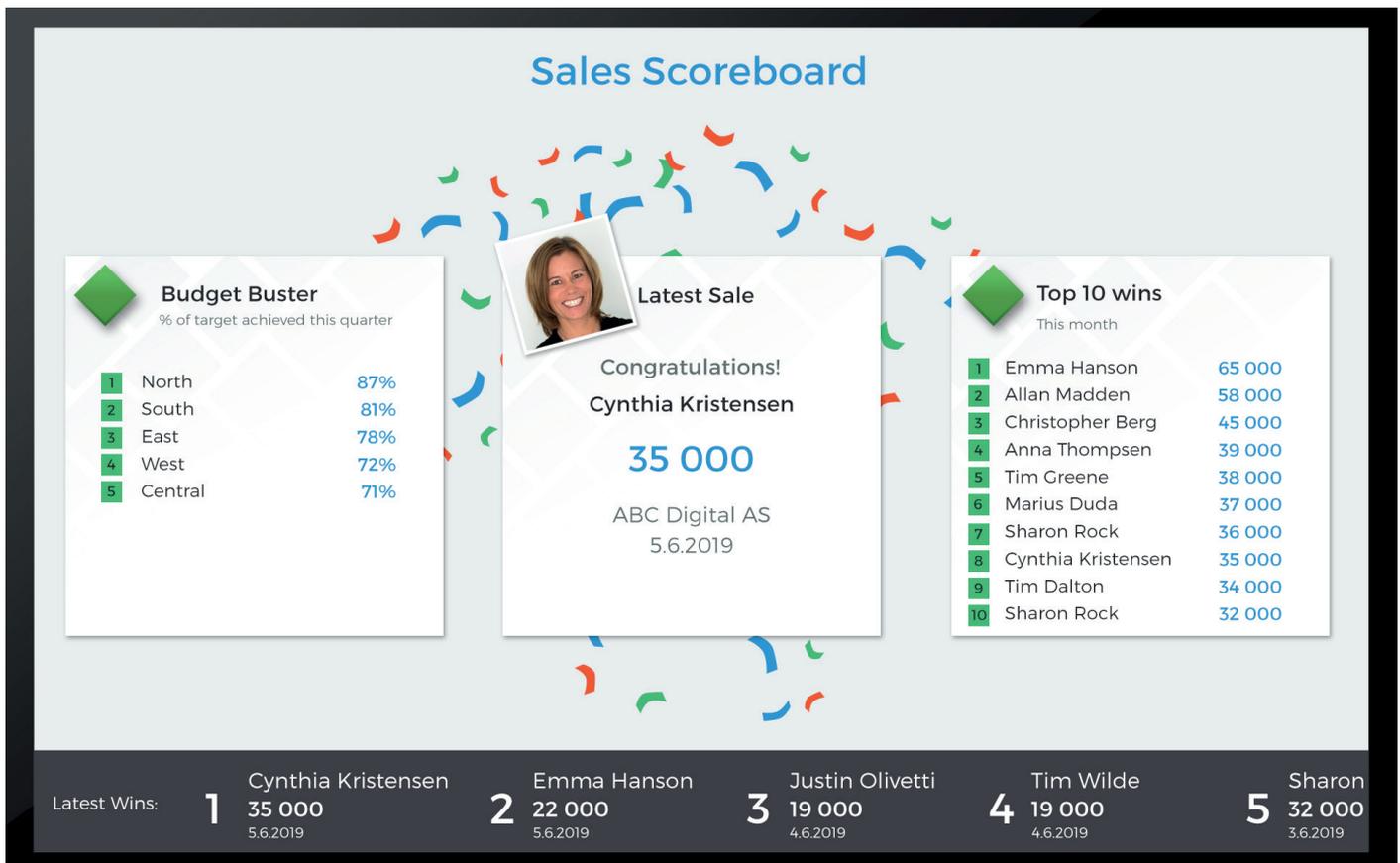
4. Motivational Scoreboards

Scoreboards are specific types of dashboards that motivate actions, showcase achievements and reinforce desired behavior. They can present standings in a sales contest or show the reward someone has received.

Scoreboards can be streamed to strategically placed TV screens or monitors. Each element is carefully selected for maximum motivational effect.

Key facts

- ◆ Function and design is fit to purpose
- ◆ Calculations are automatic
- ◆ Information is updated dynamically
- ◆ Employee pictures are reused from CRM



Tip: Keep the design of these simple so it is easy to focus on what's important and what's changed. Include leading, not only lagging indicators.

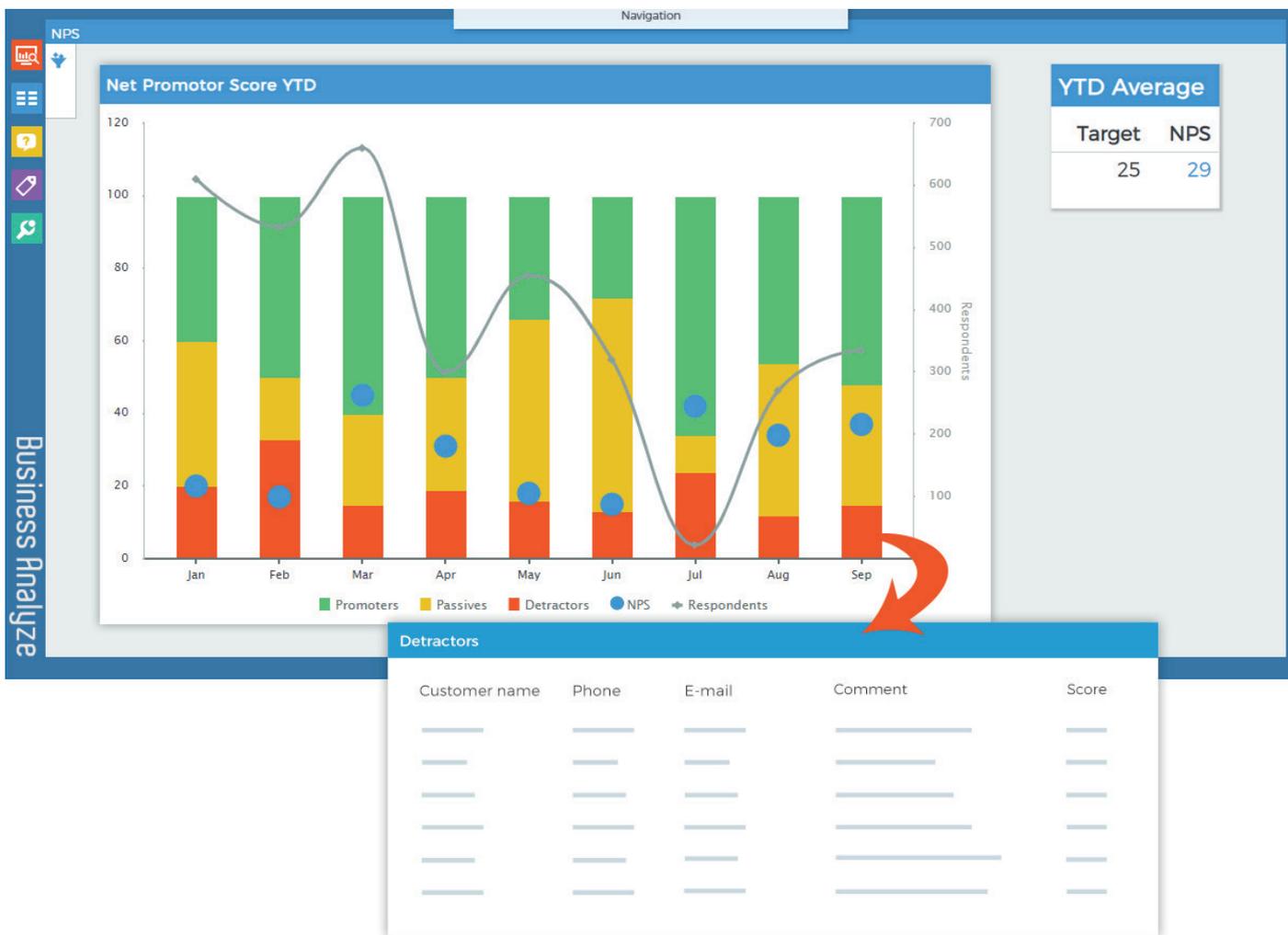
5. Customer Satisfaction Dashboards

Customer satisfaction dashboards are a way to demonstrate commitment and help your organisation keep customer satisfaction top of mind.

These dashboards have many shapes, forms and capabilities. You can benchmark customer satisfaction scores against industry standards, identify satisfaction drivers, and single-out customers that are at risk.

How it works

NPS (net promoter score) is re-calculated and updated whenever a customer submits a response form. Text answers and comments are visible per customer in the drill-down.



Tip: Set up a dashboard so sales reps, customer success or other front-line teams know specifically which customer is dissatisfied. If the report is available on mobile devices, they can see where there are issues on their way to customer meetings.

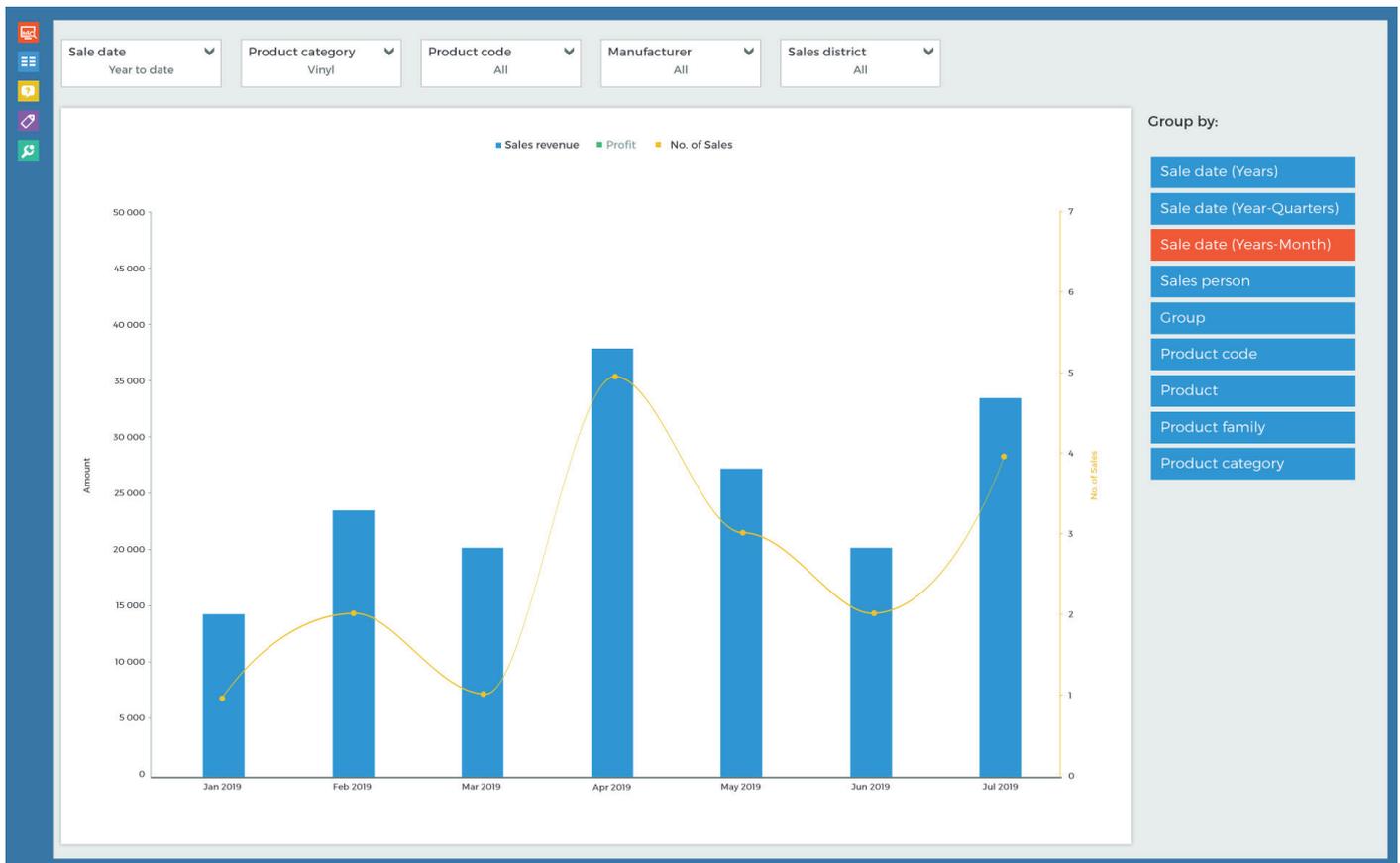
6. Product Analysis Dashboards

Product analysis dashboards help you manage your product portfolio and optimise sales. Find answers to what customers want, where there are cross-selling or upselling opportunities and what you should change in your product line..

This dashboard enables you to run queries to the database and easily navigate multiple layers of information - without needing technical skills.

How it works

- ◆ Select relevant filters
- ◆ Choose grouping
- ◆ Export results to other formats



Tip: If you have product or pricing data in several systems or databases, centralise it into one dashboard so you have a complete picture of sales.

How to set up your dashboards

Now that you've seen some dashboards, you may be wondering how you can get one.

There isn't any one answer, but in general, you can follow these 3 steps:

- 1 Set up your goals or budget**
Start with one target. Enter this into your dashboard tool. The most natural starting point is sales revenue budget. If this isn't important, identify another KPI.
- 2 Connect to data**
You can connect with an API or other data connectors. When you choose a dashboard tool, check with the vendor to see which data sources they support. Because there are different degrees of support, remember to check with other customers about their experience before you choose.
- 3 Access reports**
Sometimes sales dashboards are pre-designed to fit your needs. Other times, you may have to set up custom dashboards. The more experience you have with analytics tools, the easier it is to build reports yourself.

Once dashboards are set up, you can continue to fine-tune them. The important thing is to get started and get a feeling for how data can be used. A free trial or test period will give you a way to assess what is involved without any risk.



“Dashboards are the first thing I check in the morning. I have full view of units that are coming for sale, which ones are listed and when they are sold.”

Bjørnar Tretterud, Sales and Marketing Director,
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