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Managed Inside Sales Services

10 KEY SALES CHARTS TO HAVE ON YOUR CRM DASHBOARD

Introduction

A 31% increase in revenue for a single business is remarkable. When an entire industry vertical increases market share by a third, though, it qualifies as a mega-trend.

According to statistics aggregator Statista, worldwide CRM software revenue swelled to $23 billion in 2014 from just $16 billion in 2011. In terms of percentage growth, that's a massive increase of 44% over that time period. When we're talking about revenue in the billions, if a single company realized 44% growth, it would be extraordinary to say the least. When an entire industry vertical increases its revenue by 44% though, it's a paradigm shift.

A 31% increase in revenue for a single business is remarkable. When an entire industry vertical increases market share by a third, though, it qualifies as a mega-trend.

Sales and marketing professionals have always sought software advantages. But major innovations in the areas of cloud-computing, business intelligence, and mobility have converged to turn contemporary CRM software into something of a prerequisite for managing sales data.

Why is CRM software so in-demand?

Business management software applications generally offer one of two benefits (or both):

• The ability to do things faster
• The ability to do things smarter.

CRM software gives users both advantages.

At the most basic level, CRM software streamlines sales activities with a single integrated environment for communicating with prospects and customers, managing the sales process, executing orders, and providing backend service. More importantly, they provide a business intelligence platform where sales managers can analyze the sales process and optimize processes based on real, live data.

Any business can convert an extemporaneous sales management approach into a data-driven system of continual sales development, with the right KPIs in place. This whitepaper identifies the KPIs and report views that B2B sales teams should have on their dashboard.

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Revenue by Lead Source

Report Type
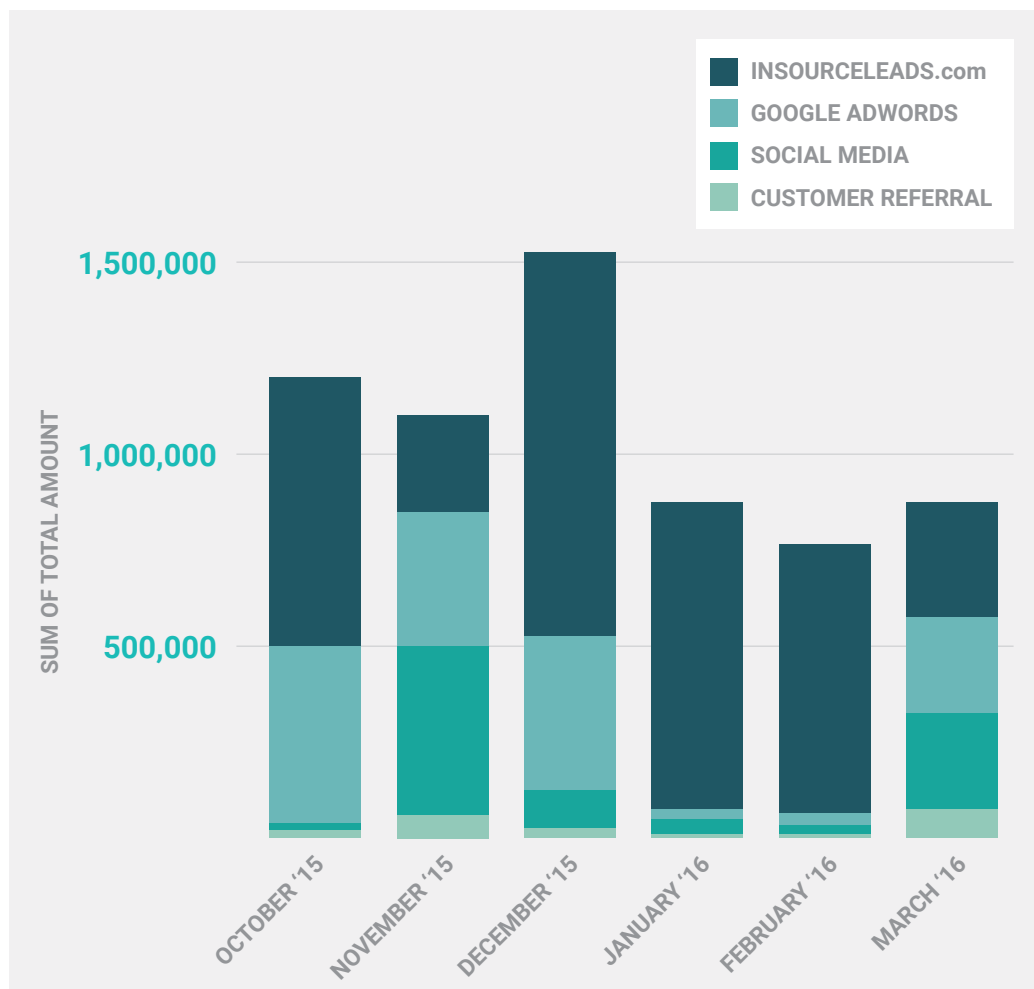Stacked bar graph (defined by month)

Suggested Time Period
Last 6-12 months

What this chart tells you
Which sources are providing the best ROI

WANT TO KNOW which lead sources are contributing most to closed revenue? This chart can tell you where your closed deals are originating, allowing you to compare the revenue generated to the cost of these sources to determine return on investment. In addition, you can see trends over time. So, if you decided to double the Pay-Per-Click budget three months ago, for example, you can determine what kind of spike that increase provided in terms of win revenue.

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Legend:
- INSOURCELEADS.com
- GOOGLE ADWORDS
- SOCIAL MEDIA
- CUSTOMER REFERRAL

Y-axis: SUM OF TOTAL AMOUNT
- 1,500,000
- 1,000,000
- 500,000

X-axis: OCTOBER '15, NOVEMBER '15, DECEMBER '15, JANUARY '16, FEBRUARY '16, MARCH '16

Lead Response Time
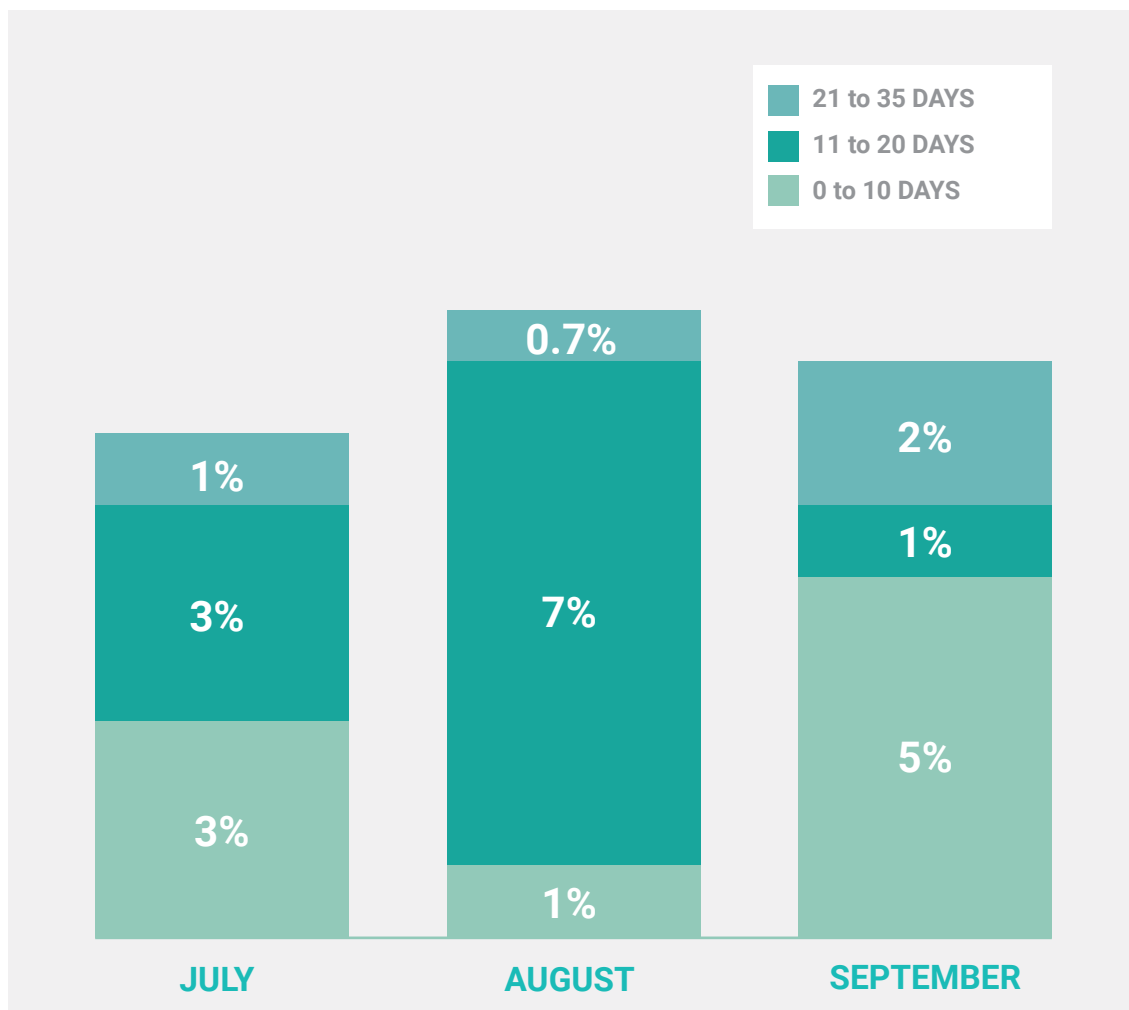
Report Type
Stacked bar graph (defined by month)

Suggested Time Period
Last 3-6 months

What this chart tells you
Response time on sales leads

NOTHING WILL GET under the Marketing department's skin more than sales leads that aren't given speedy follow-up. Organizations should be aware of the amount of time that passes before a salesperson follows up with sales leads. By having inside sales reps log their initial activities with incoming sales leads, you can get a snapshot of lead response times and identify trends.

Legend:
- 21 to 35 DAYS
- 11 to 20 DAYS
- 0 to 10 DAYS

JULY: 1%, 3%, 3%

AUGUST: 0.7%, 7%, 1%

SEPTEMBER: 2%, 1%, 5%

Opportunity Conversion Ratio

Report Type
Line graph driven by matrix report (defined by sales rep)

### Suggested Time Period
Last 5-6 months

What this chart tells you
What your close rate is on active opportunities

DO YOU WANT TO KNOW who the stone-cold closers are on your team? This report and chart will help determine who the good closers are and who may need some improvement. After all, if you can incrementally improve a closers conversion percentage, it can have a huge impact on your team's performance, in aggregate. In addition, the aggregated data in the line graph will help you determine trends in your win ratio – are the increasing, decreasing or staying the same?

OPPORTUNITY CONVERSION RATIO
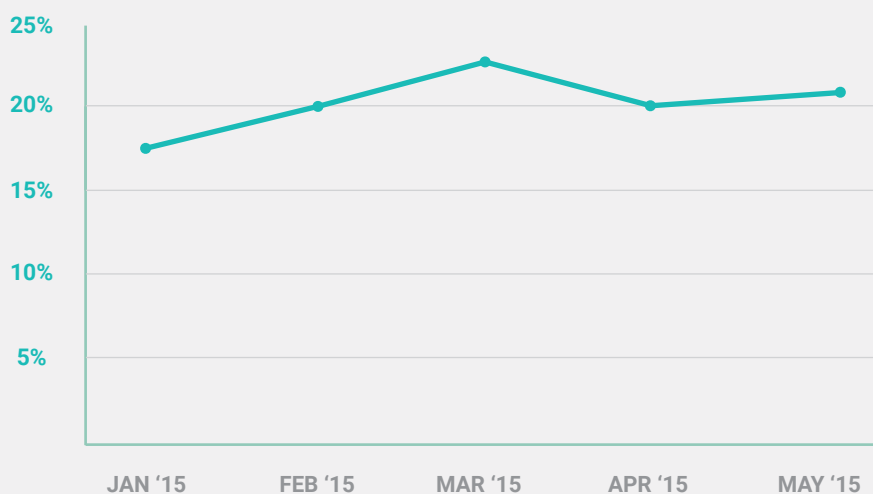
CLOSE RATE OPPORTUNITY OWNER	CLOSE MONTH					AVG
	1/15	2/15	3/15	4/15	5/15	
FRED	20%	21%	22%	23%	25%	22%
TOM	15%	16%	25%	17%	20%	19%
HARRY	15%	18%	19%	22%	23%	24%
MARY	25%	26%	30%	22%	18%	16%
BETTY	10%	18%	17%	15%	20%	20%
AVERAGE	17%	19.8%	22.6%	19.8%	21.2%	20%

Opportunity Movement

Report Type
Stacked bar chart driven by matrix report (defined by stage)

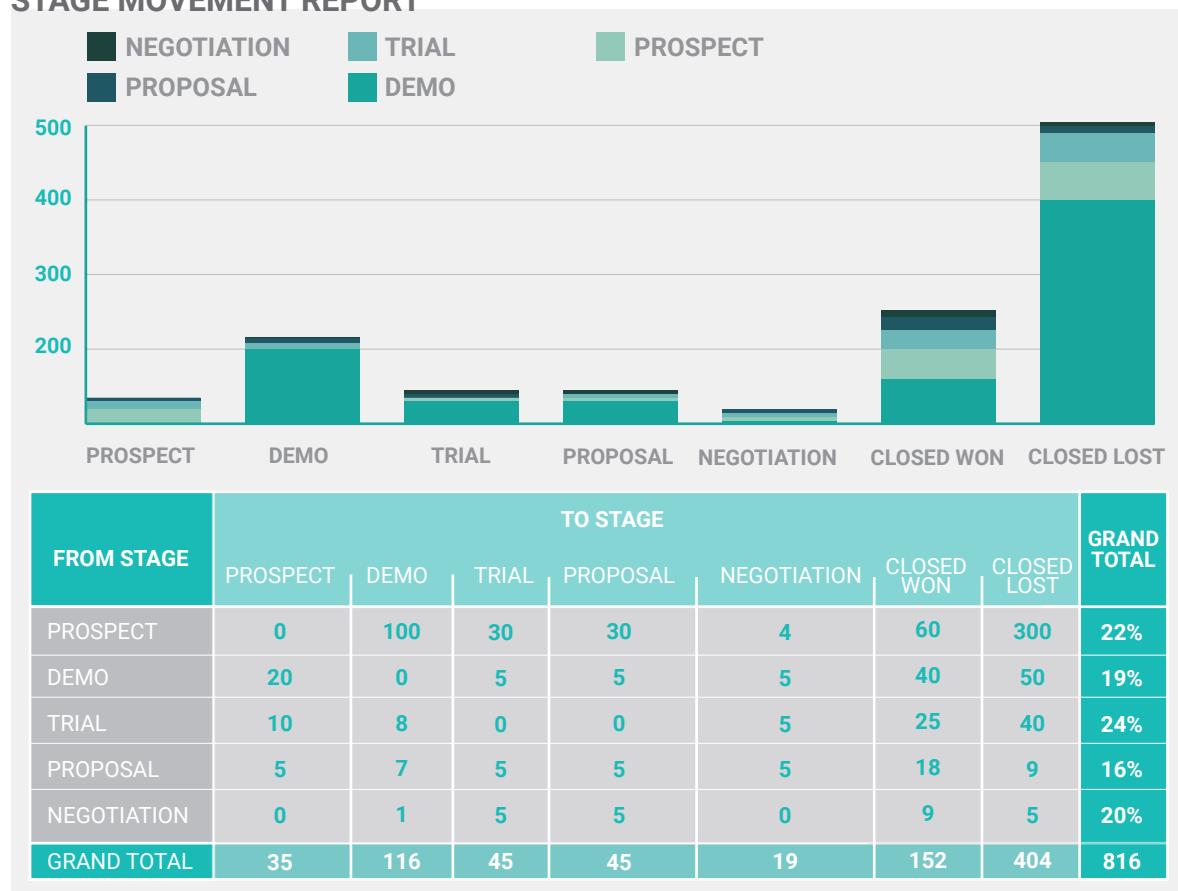## Suggested Time Period
User choice depending on sales cycle

What this chart tells you
The velocity at which deals are moving through the pipeline

THIS REPORT ANSWERS CRITICAL QUESTIONS about your pipeline like: Are deals getting stuck? What is my pipeline velocity? You can easily ascertain if deals are moving through the pipeline with this report. The reason is that, as your deals move through each stage in the sales pipeline, there should be a decrease in the quantity of deals at each stage. A lynchpin of the accuracy of this report is the accuracy with which your reps are entering data on which stage deals are in. Furthermore, you must accurately define for your organization what each stage is and what drives deals into those stages.

STAGE MOVEMENT REPORT

FROM STAGE	TO STAGE					CLOSED WON	CLOSED LOST	GRAND TOTAL
	PROSPECT	DEMO	TRIAL	PROPOSAL	NEGOTIATION			
PROSPECT	0	100	30	30	4	60	300	22%
DEMO	20	0	5	5	5	40	50	19%
TRIAL	10	8	0	0	5	25	40	24%
PROPOSAL	5	7	5	5	5	18	9	16%
NEGOTIATION	0	1	5	5	0	9	5	20%
GRAND TOTAL	35	116	45	45	19	152	404	816

Pipeline Trend by Stage

Report Type
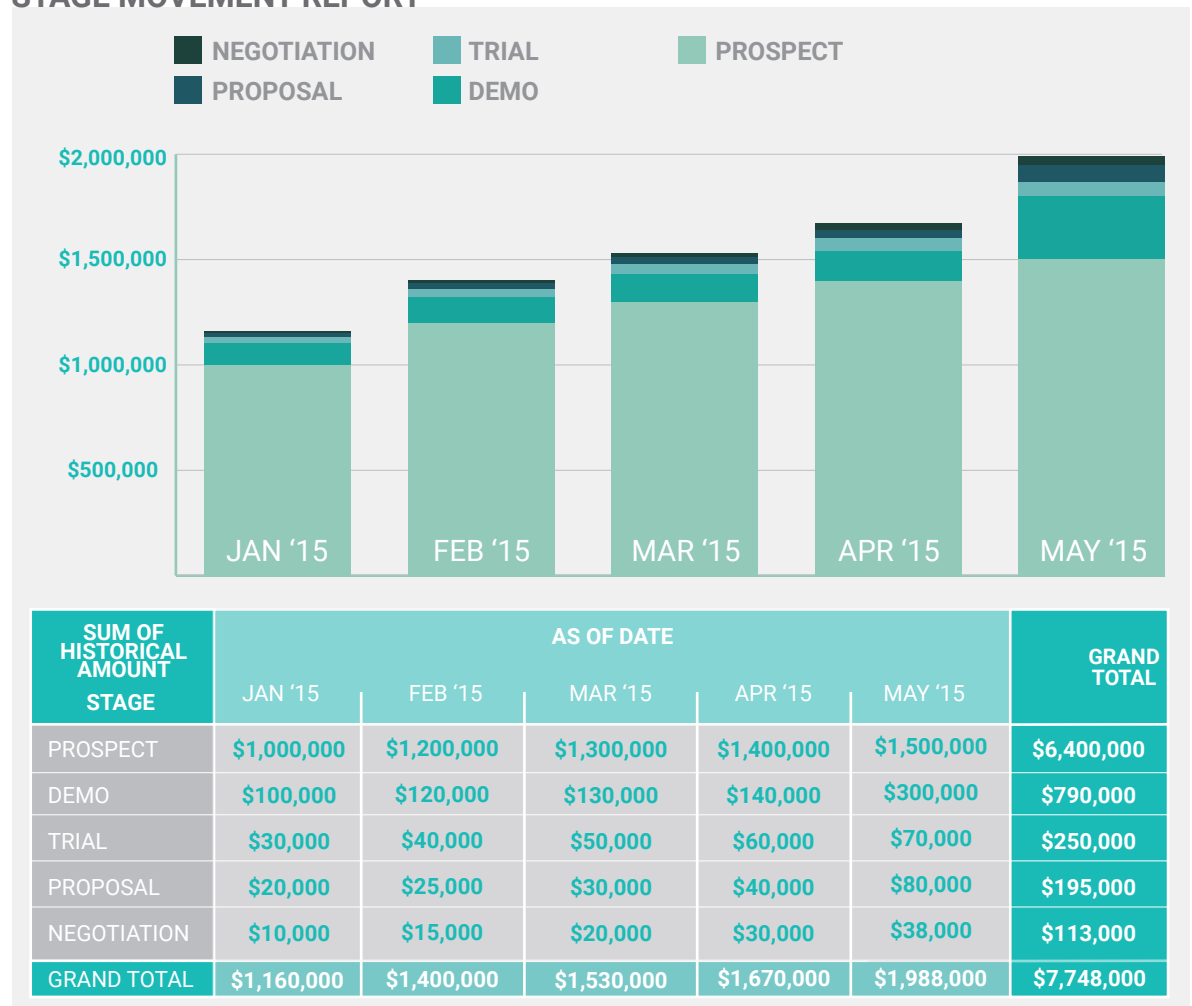Stacked bar chart driven by matrix report

Suggested Time Period
User choice depending on sales cycleCalculated monthly for the last six months

What this chart tells you
Whether your team's pipeline is growing or shrinking

WANT TO KNOW THE STATE of your pipeline for the last six months? This report is a leading indicator and one of the more valuable analytics to show you trends in your pipeline growth (or shrinkage). It answers these questions: What does your sales pipeline look like? Is the pipeline dollar volume increasing or decreasing over time? At which stage are deals in the pipeline?

STAGE MOVEMENT REPORT

SUM OF HISTORICAL AMOUNT STAGE	AS OF DATE					GRAND TOTAL
	JAN '15	FEB '15	MAR '15	APR '15	MAY '15	
PROSPECT	$1,000,000	$1,200,000	$1,300,000	$1,400,000	$1,500,000	$6,400,000
DEMO	$100,000	$120,000	$130,000	$140,000	$300,000	$790,000
TRIAL	$30,000	$40,000	$50,000	$60,000	$70,000	$250,000
PROPOSAL	$20,000	$25,000	$30,000	$40,000	$80,000	$195,000
NEGOTIATION	$10,000	$15,000	$20,000	$30,000	$38,000	$113,000
GRAND TOTAL	$1,160,000	$1,400,000	$1,530,000	$1,670,000	$1,988,000	$7,748,000

6

Top XX Open Opportunities

Report Type
Opportunity list report

Suggested Time Period
N/A

What this chart tells you
How to prioritize key accounts and opportunities

WHAT A SIMPLE WAY to prioritize key opportunities. This report helps you keep your eye on the prize (or the biggest prizes, at least). Depending on the size of your team, you can set the number of opportunities to display at ten, twenty, or whatever you prefer. Sales managers love this report as it gives them quick access to deals their teams should be concentrating on.

ACCOUNTS WITH OPEN OPPORTUNITIES	
TOP 10 ACCOUNTS	
ACCOUNT	SUM OF AMOUNT
WAYNE ENTERPRISES	$20,000
PRESTIGE WORLDWIDE	$18,000
WONKA INDUSTRIES	$17,000
STERLING COOPER DRAPER PRICE	$16,000
STARK INDUSTRIES	$15,000
THE BLUTH COMPANY	$14,000
DUNDER MIFFLIN	$12,000
LOS POLLOS HERMANOS	$11,000
GRINGOTTS	$9,000

Pipeline Opportunities by Close Date

Report Type
Stacked bar chart driven by matrix report (defined by stage movement)

Suggested Time Period
By close date over the next 5-6 months

What this chart tells you
How healthy is your pipeline in terms of deals that are expected to close

WITH THIS REPORT, you get immediate visibility into the health of your sales pipeline, allowing you to quickly assess how much business your team can expect to close in the coming months. You also get a snapshot into the volume of business resting at each stage in your pipeline.

PIPELINE OPPORTUNITIES BY CLOSE DATE AND STAGE
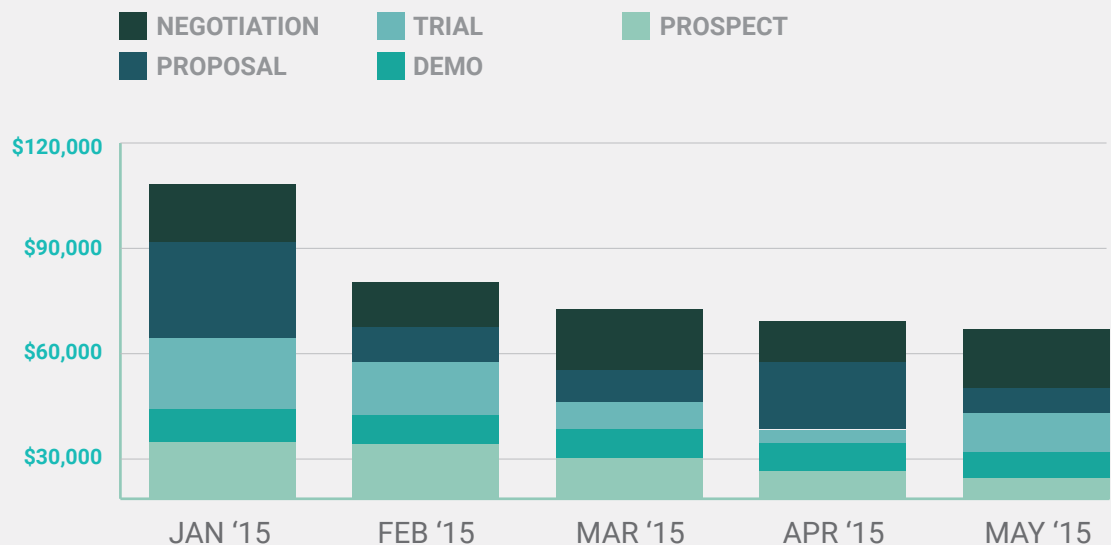
SUM OF HISTORICAL AMOUNT STAGE	AS OF DATE					GRAND TOTAL
	JAN '15	FEB '15	MAR '15	APR '15	MAY '15	
PROSPECT	$5,000	$4,000	$3,000	$2,000	$1,000	$15,000
DEMO	$10,000	$8,000	$6,000	$3,000	$1,000	$28,000
TRIAL	$20,000	$10,000	$5,000	$2,500	$500	$38,000
PROPOSAL	$30,000	$15,000	$7,500	$4,000	$2,000	$58,500
NEGOTIATION	$40,000	$20,000	$10,000	$5,000	$2,500	$77,500
GRAND TOTAL	$105,000	$57,000	$31,500	$16,500	$7,000	$217,000

Completed Activities

Report Type
Stacked bar graph (defined by sales rep)

Suggested Time Period
Last 5-6 months

What this chart tells you
Which reps are beating the streets hard

ONE OF THE MOST ACCURATE PREDICTORS of future sales success is activity level. Reps should be placing calls, sending emails, doing whatever it takes to stay in front of current prospects. This report provides a measure of the effort reps are contributing to their pipelines. With this report, you can benchmark individual rep activity against other reps. In addition, you can forecast downturns or spikes for reps based on current activity.

COMPLETED ACTIVITIES PER SALES REP AND TEAM
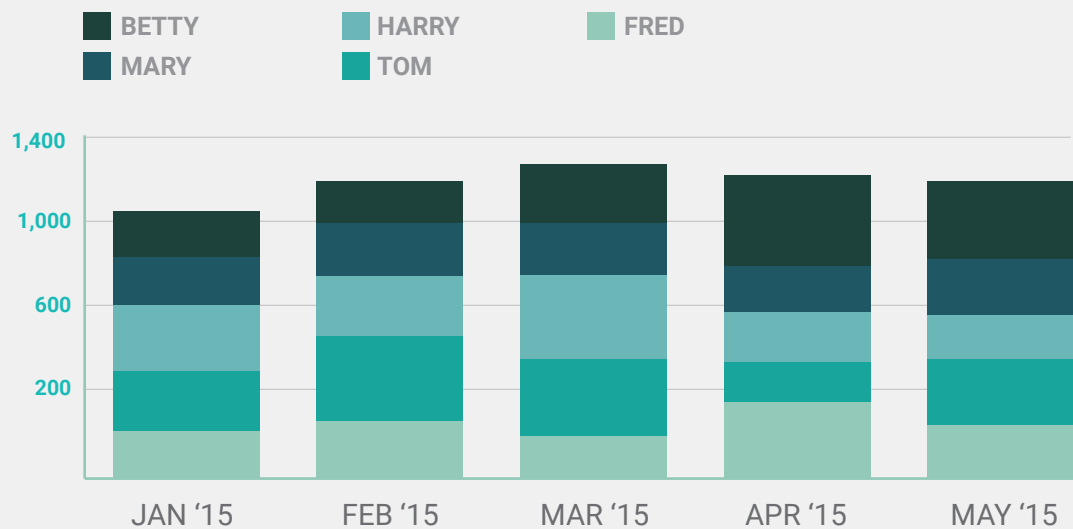
ASSIGNED	JAN '15	FEB '15	MAR '15	APR '15	MAY '15	GRAND TOTAL
FRED	100	120	90	166	120	596
TOM	200	223	243	199	201	1,066
HARRY	300	333	342	189	203	1,367
MARY	250	255	265	276	266	1,312
BETTY	180	150	225	300	274	1,129
GRAND TOTAL	1,030	1,081	1,165	1,130	1,064	5,470

Average Deal Size

Report Type
Bar graph driven by matrix report (defined by sales rep)

Suggested Time Period
Last 5-6 months

What this chart tells you
A scorecard of which sales reps are landing the larger deals

THERE ARE TWO MAIN WAYS to win in the revenue game: increase deal size and close more deals. This chart addresses the former. Find out who's landing the big fish and who's shooting themselves in the foot by offering too many discounts. It's best to have variations of this report by quarter, year-to-date, and other time periods as you deem necessary – allowing you to identify sales rep trends around average deal size. Alternatively, you can also consider using a line graph for each sales rep showing the average deal size trends over time.

AVERAGE SIZE OF CLOSED DEALS
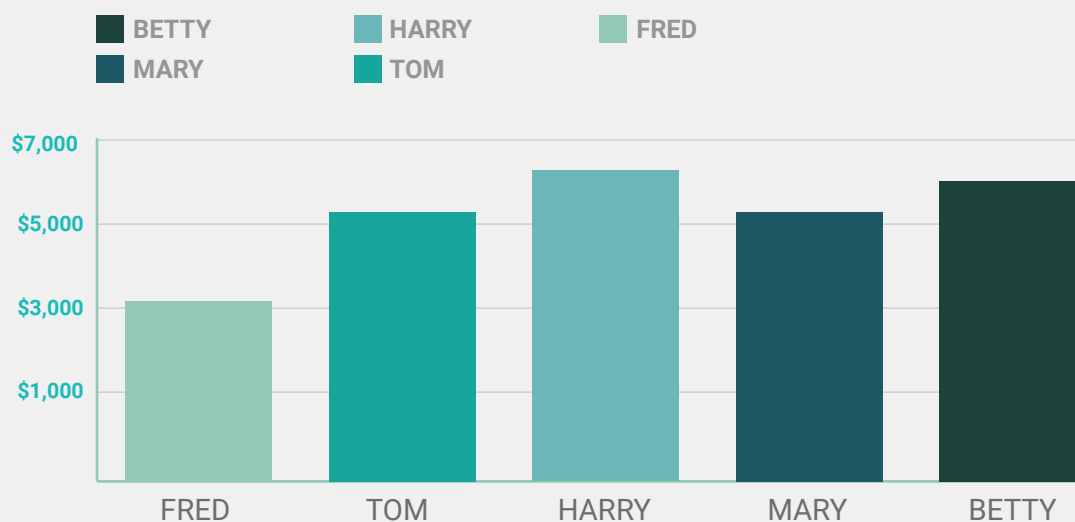
OWNER	JAN '15	FEB '15	MAR '15	APR '15	MAY '15	GRAND TOTAL
FRED	$2,000	$3,000	$2,500	$3,500	$4,500	$3,100
TOM	$5,000	$6,000	$3,000	$7,000	$5,000	$5,200
HARRY	$8,000	$7,000	$4,000	$5,000	$8,000	$6,400
MARY	$3,800	$6,000	$5,000	$6,000	$5,000	$5,160
BETTY	$5,000	$6,000	$7,000	$6,500	$5,100	$5,920
AVERAGE	$4,760	$5,600	$4,300	$5,600	$5,520	$5,156

Sales Cycle

Report Type
Stacked bar graph (defined by month)

Suggested Time Period
Last 3-6 months

What this chart tells you
Time from first conversion to close

SALES CYCLE IS SUCH A UBIQUITOUS NUMBER that any CRM should be able to illustrate with a simple bar graph. Sales cycle is heavily dependent though on the trigger your company uses to determine when the sales cycle begins. Is it the conversion into a lead by marketing (identifying a Marketing Qualified Lead)? Is it once the Sales department accepts the lead, qualifies it, and a presentation is given? You can also slice sales cycle illustrations by industry, buyer persona, and other factors to identify trends in sub-segments.

Legend:
- 1 month
- 2-4 months
- More than 5 months

Chart axis: 10%, 20%, 30%, 40%, 50%

Categories: JULY, AUGUST, SEPTEMBER