



**CRM UNIVERSITY**  
INCORPORATED

**CHAMPS**  
software

BUSINESS  
INTELLIGENCE  
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# ***THE SALES MANAGERS DASHBOARD***

***June 16, 2009***

# About CHAMPS Software

- Founded in 1976 – Pioneers of Computers Maintenance Management Systems (CMMS) to the nuclear power industry
- HQ – Crystal River, FL
- Business Intelligence Division started in 2003
- Partnered with QlikTech – fastest growing BI Vendor last 4 years running
- Our Dashboard Projects are typically implemented in 3-6 weeks
- Guarantee our clients 100% satisfaction

# eWorkshop Course Syllabus

- The Business Challenges To Be Addressed
- What is a Sales Managers Dashboard
- An Introduction To Sales Execution Management
- A Clear Focus On The Metrics That Matter
  - Influence The Desired Behavior
- Leading Edge Practices For Sales Dashboards
- Functional Examples of Dashboards

## Polling Question

# Dashboards Vs. Scorecards

- A ScoreCard is nothing more than a scoring mechanism to track and measure “Key Sales Performance Indicators”
- A Dashboard is the “Interactive & Visual Representation” of the ScoreCard
- Sales Dashboards generally require one centralized database of all necessary data

# SALES -- BUSINESS CHALLENGES



> Sales Performance and Effectiveness



> Pipeline Analysis, Forecasting & Lead Management



> Product Sales & Customer Analytics



> Integrated Enterprise Sales Data

# Sales Execution Management

- Sales organizations often struggle with unsophisticated reporting capabilities that do not enable timely visibility into all stages of the sales cycle.
- More comprehensive reporting capabilities are required to measure key sales metrics and provide analysis.
- Sales organizations need analytical tools and reports to identify opportunities to improve the sales process, optimize sales results and reduce the cost of sales.

# What is a Sales Dashboard?

Information requirements are different for each level

**Executive Management:**  
Highlights, trends, exceptions

**Sales Management:**  
Customer analytics  
and reporting

**Sales Reps:**  
Detailed Reports



# What is a Sales Dashboard?

**Provide visibility across the business**

- Monitor Metrics
  - Define and deploy key metrics (KPIs)
  - Track metrics over time to identify trends
  - Manage by exception with business rules
- Gain insight
  - Interact with robust set of analytics
- Provide visibility
  - Present consistent views of key performance indicators





# What is a Sales Dashboard

## *Monitor Performance*

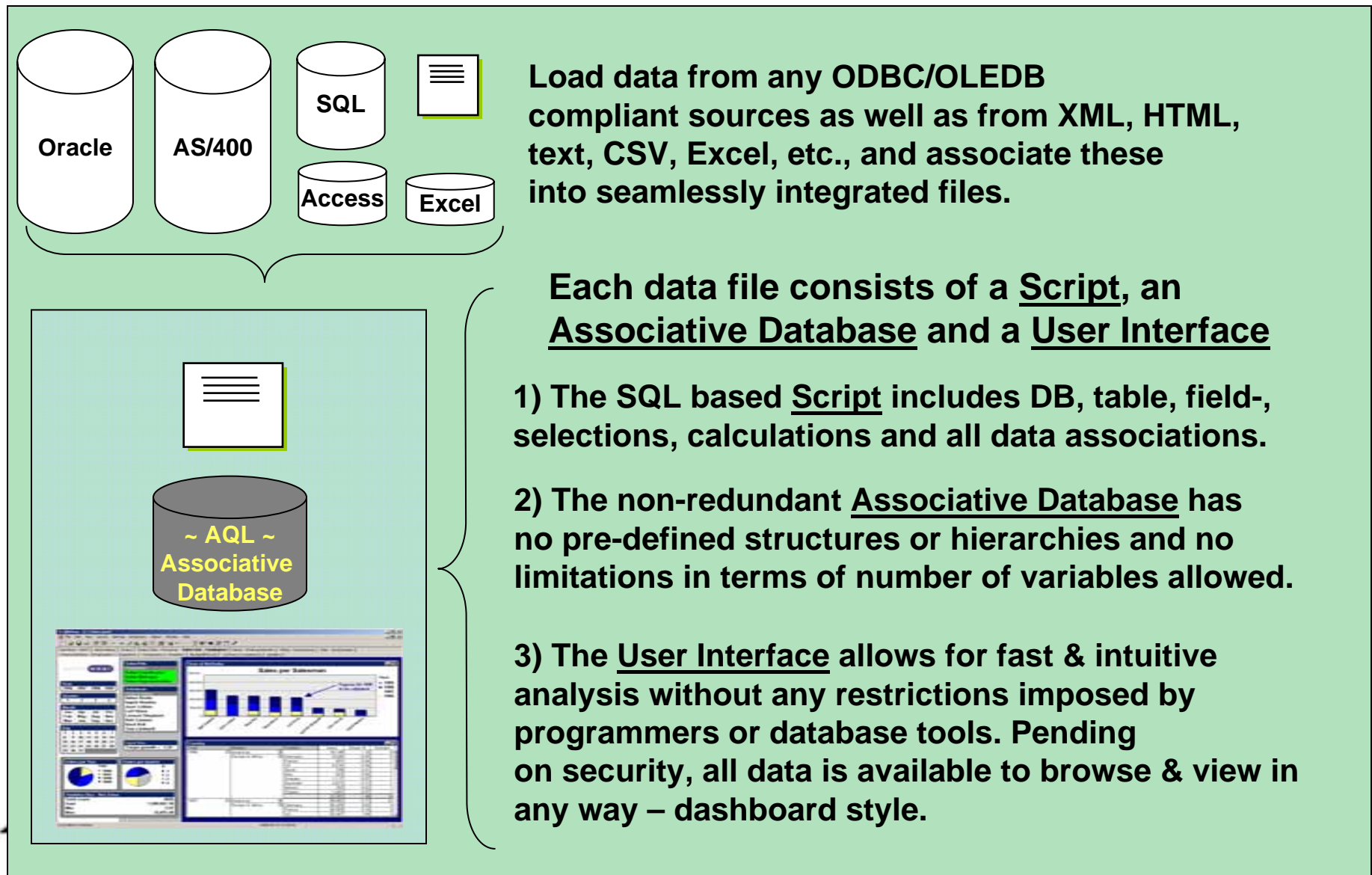
- Flexible metric management
  - Create different types of metrics
  - Customizable calendars for metric management
- Alerts and business rules
  - Set up your company's business rules
  - Alert users via e-mails and dashboards
  - Link directly into operational systems to automate actions



# Why Create a Dashboard?

- To Provide Focus, Direction and a Common Understanding throughout the organization
- To Provide Knowledge for making better decisions regarding the Sales priorities
- A proper business case develops a baseline for anticipated results against which the entire Sales Effectiveness Program can be measured
  - Tangible financial metrics & Intangible non-financial metrics

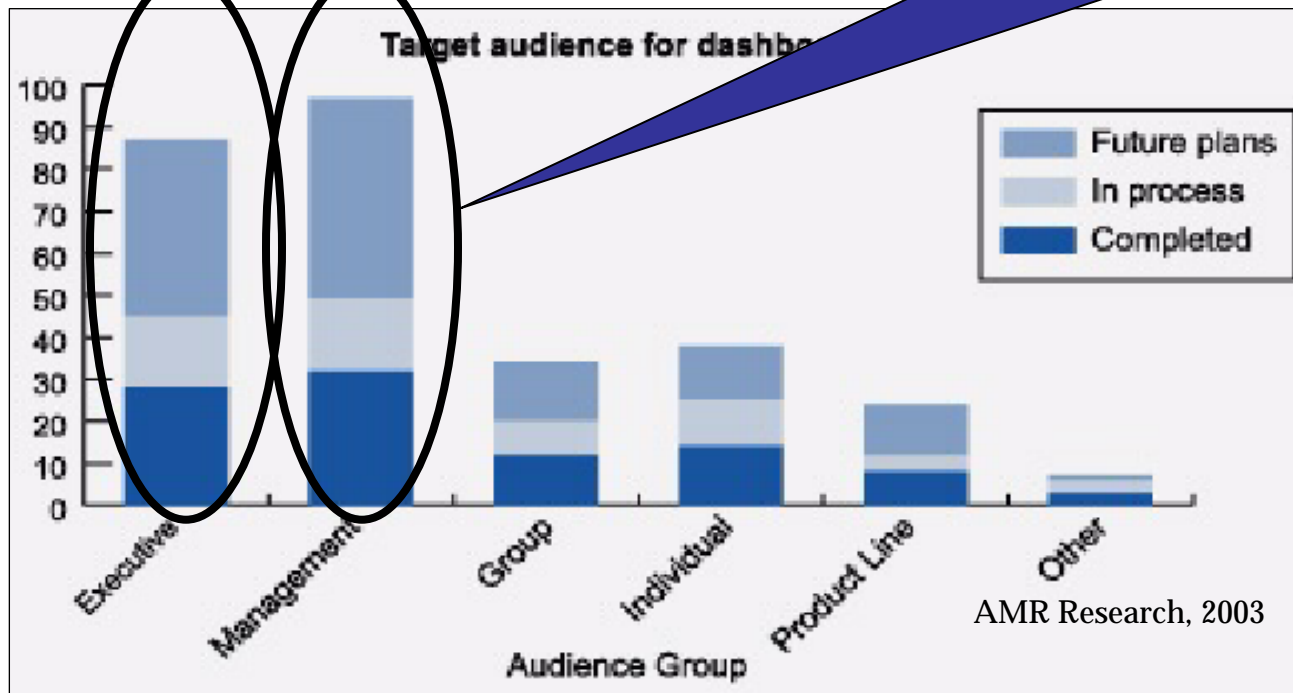
# Analytics Technology



# Trends for Dashboards Today

*Not just for executives anymore*

Jump in operational management dashboards



# Prioritize the Specific Business Challenges

1. Improve Customer Targeting



*Improve Conversion Rate,  
Increase Revenue/Account*

2. Improve Lead Tracking,  
Qualification, and Routing



*Improve Conversion Rate*

3. Off-load Job Activities



*Increase Selling/Service Time*

4. Improve Opportunity  
Management



*Improve Conversion Rate, Increase  
Deal Size Value, Shorten Sales Cycle*

5. Support Team Selling and  
Channel Integration



*Increase Average Deal Size,  
Shorten Sales Cycle*

6. Improve Marketing  
Effectiveness with Cross-  
Selling and Up-Selling



*Increase Average Deal Size*



*Improve Conversion Rate,  
Increase Retention, Shorten  
Sales Cycle*

7. Increase Responsiveness to  
Customer Inquiries



From Strategy To Revenue Acceleration



# The Metrics That Matter

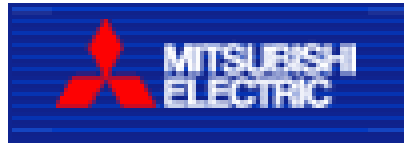
$$\left[ \begin{array}{c} \text{\#Deals in pipeline} \\ 20+ \end{array} \right] \times \left[ \begin{array}{c} \text{Win Ratio} \\ 75\% \end{array} \right] \times \left[ \begin{array}{c} \text{Size (\$) of wins} \\ \$200/\text{MRR} \end{array} \right] = \text{\$}\text{\$}\text{\$}$$

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$$\left[ \begin{array}{c} \text{Length of Sales Cycle} \\ 90-120 \text{ Days} \end{array} \right]$$

## Company

Mitsubishi Electric – USA, \$200MM division of Mitsubishi Heavy Industries



“QlikView is the answer to all of our questions.”

“QlikView has improved our sales and forecasting analysis significantly. We now have a powerful yet easy-to-use performance management solution that brings interactive planning and analysis to our employees’ desktops .”

**Allan Dziwoki**

**Director of Sales and Operations Planning**

**Mitsubishi Electric - USA**

## Industry

Manufacturer of ductless HVAC Systems

## Challenge

Replace outdated, proprietary analysis system. Improve sales analysis and forecasting. Create a reporting and analysis solution that is powerful, yet easy-to-use.

## Solution

QlikView applications to support sales & operations planning for more than 50 users

## Benefits

Analytical and reporting capabilities available across the organization, supporting faster and better decisions .

Significantly reduced costs and demands on IT staff.



*From Strategy To Revenue Acceleration*



Overview **KPIs** Maps Ranking Win/Loss Opportunities Activities Marketing Cust Service How To Setup

Compare  
Over Year

Selected



Expand Pics --->

Sales Rep

- Hogan
- Administrator
- an McNulty
- thy Hughes
- n Barret
- rek Murray
- Martinez
- orgine Ekels
- hs Stichler
- n Grant
- h Lee

Region

- a/Pac
- EA
- th America
- th America

Selected

Category	Count
Account	242
Contact	255
Portu...	21
Net	20
Campaign	4
Ad	0

Last Refreshed :  
7/18/2006  
12:45:20 PM

**End Date:**

Year	Month
2002	Jan
2003	Feb
2004	Mar
2005	Apr
2006	May
	Jun
	<b>Jul</b>
	Aug
	Sep
	Oct
	Nov
	Dec

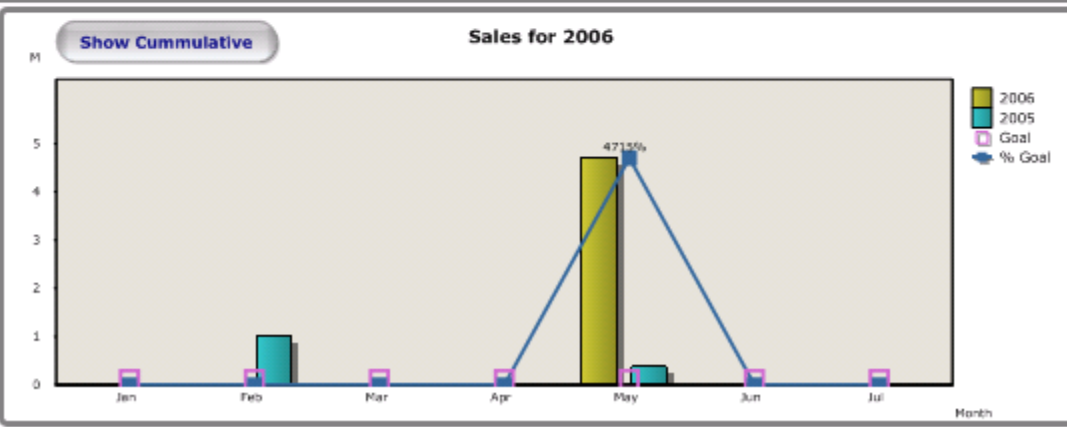
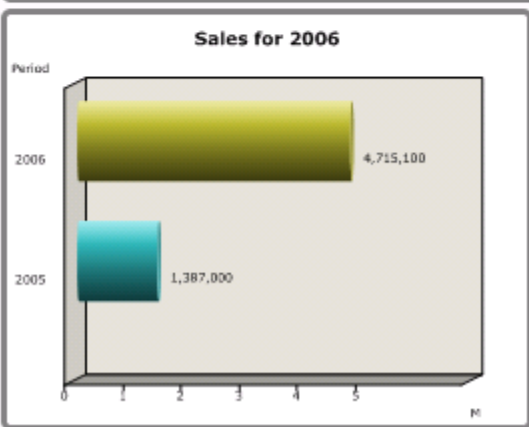
Set To Today

### Territory Summary for 2006

Item	2006	2005	All	Activity	2006	2005
Accounts	0	45	242	Calls	3	0
Customers	0	16	77	Events	0	0
Leads	0	0	0	Other	1	0
Opportuni...	0	0	0	Todos	2	0
Prospects	0	16	74	Meetings	1	1
Tickets	0	0	0	Emails	2	2

### KPI Trends for 2006

KPI	2006	2005	%	Trend
Sales	4,715,100	1,387,000	339.9%	↑
Opps	2,431,912	0	-	↑
Activities	9	3	300.0%	↑
Leads	0	0	-	→
Tickets	1	1	100.0%	→



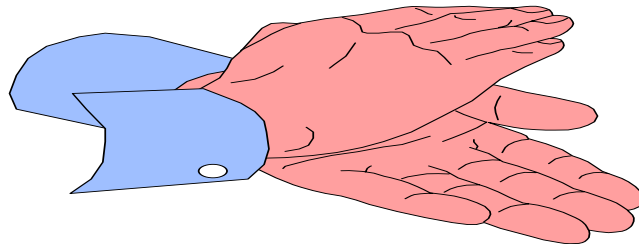


# Conclusion

- Flexible framework for managing performance
  - Easy metric creation, customizable workflows
- Interactive visual representation of analyses
  - Analytics that help understand your business
- Alerting capabilities to help manage your business
  - Business rules defined for your organization
- Corporate and personal dashboard views
  - Provide consistent views of key performance indicators while allowing for personalized dashboards

# Part-II of This Webinar Series

## How To Implement Your Own Sales Dashboard



## DEAN HERINGTON, Jr.



Dean Herington brings over 20 years of CRM Consulting and Training experience to the CRM Industry. He is an established authority in Marketing & Sales Integration with proven experience in helping client organizations leverage technology to optimize their Customer Relationship Management Processes. Mr. Herington has had a privileged career in the *CRM Industry*, one that has enabled him to participate in pioneering some of today's most advanced Marketing & Sales Process Integration Methodologies. As one of the CRM Industry's early pioneers, he approaches Marketing & Sales Integration as a competitive business "Strategy", not as a technology "Project". As an industry leading consultant, Mr. Herington works closely with client companies to understand their overall revenue growth strategies and improve sales and marketing effectiveness through the implementation of highly customized Marketing Automation Solutions.

Mr. Herington is the Founder of CRM University, the industry's first Professional Certification Program. As Chairman of the Methods & Best Practices Committee for CRMCommunity.org, his visionary leadership has influenced the advancement of the Sales & Marketing Profession by establishing the industry's only Professional Certification Programs on Sales Process Modeling and CRM Results Measurement. In this role he has delivered numerous Keynote Presentations and Seminars at CRM Conferences in throughout the USA and in 7 other countries around the world.