8 Tips for Better Sales Performance Dashboards

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Without data you're just another person with an opinion. You need clearly defined data when a colleague in a meeting throws out an anecdotal comment like "You're not calling leads fast enough". And then you ask where the colleague obtained that data, because you have different data. It just causes conflicts that you don't need. Change the conversation to forward-looking performance indicators that drive business growth.

Best-practice sales performance dashboards involve a lot more than technology. They are about clearly defined metrics and integration with your sales processes. Here are eight tips you can start using today to get the most from your sales performance dashboards.

1 Enable self-reliant dashboards

You don't need a corporate "report factory" to build, customize, and publish sales dashboards. Save time and resources by connecting directly to your sales data. Avoid expensive data integration and data warehousing. IT staff don't need to spend hours and hours a week on sales reports and dashboards. Free your IT department to focus on strategic projects that drive growth. Look for a solution where sales people can create and share their own self-reliant dashboards.

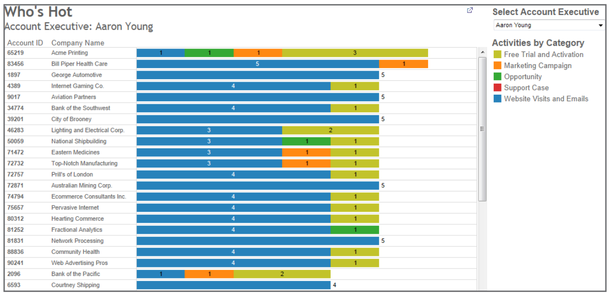

Figure 1. Who's Hot.

Create a "Who's Hot" dashboard by combining Salesforce data with campaign leads, web tracking, emails, and support cases. Like to know how to build a "Who's Hot" dashboard for your sales team?

In this "Who's Hot" dashboard, see which prospects or accounts have recently called, emailed, visited the website, started a trial, or logged a support case. This dashboard is a great way for each sales person to jump into today's schedule for whom to call.

Use analytics and self-reliant dashboards to track completion of goals at every step of the sales process. Get a holistic view of your prospects, sales pipeline, accounts, and sales performance.

2 Design a simple process with clearly defined owners

Keep it simple and have clearly defined owners. You don't need 500 steps. The sales process needs to be simple for everyone in your sales team to adopt it. Don't launch any process change without being able to measure its performance. If you have an extremely complex process, it's hard to measure the performance.

There is a place for complex "state of the company" dashboards where you can see a bunch of information all in one screen. But for sales performance management, simple can be better.

Have a single view of the truth so that individual sales people see the same version of the data that their manager sees. That way, managers hold their teams accountable, and you're not wasting time by looking at different numbers or different metrics.

3 Know your data

In *The Complete Guide to Accelerating Sales Force Performance*, Dr. Andris Zoltners and his co-authors define three threats to the measurability of sales performance: data availability, data accuracy, and data timeliness. Your sales systems may not capture all transactions, or you may not be able to attribute results to individual sales people in a team-selling environment. Sales people may be inconsistent in how they record

[1]Andris A. Zoltners, Prabhakant Sinha, and Greggor A. Zoltners, "The Complete Guide to Accelerating Sales Force Performance", American Management Association, 2001, page 285.

calls and emails. Some of your sales data may be hours, days or even weeks late, or subject to change due to processing errors. If it takes a while to measure something, you may have already misperformed for a quarter.

Salesforce and Force.com give you lots of options to bring data directly into Salesforce, but you may have leads, market sizing, sales quotas, social media, or other data to blend. Previously, OptumHealth had many different data sources and Excel spreadsheets. Now they bring it all together. They can really get a holistic view of their sales operations and address customer issues as they come up. To hear Larry Mullen in his own words, *watch the video*.

Knowing your data is particularly important with the wealth of different Salesforce.com standard and custom tables. Appreciate and support your Salesforce administrator. In Salesforce, custom objects require special treatment so that they can be covered in relationship queries. Having a field naming convention really helps when it comes to the underlying table names and application programming interface (API) names. Date fields can be tricky in Salesforce. And Salesforce allots a defined number of API calls over a rolling 24 hour period. If the client exceeds this number, the API connection is blocked.

4 Select real-time or near-real-time indicators

You don't want to get to the end of the quarter and know that you failed. You want to make sure that you and your sales team are performing every day. Show key performance indicators (KPIs) in a dashboard to give your sales people short-term vision into what's happening in real time. Drive sales people to perform better by meeting the KPIs.

Rather than looking at something that sales people have already done, align the processes with a goal in the future. For example, instead of looking at all those leads that sales people didn't call last week, track whether each sales person has built enough pipeline for this week.

Match the KPIs to each team's sales process and objectives. If the inside sales team has different metrics than field sales, don't make them use the same canned dashboard. Provide your entire sales force, channel team, and executives with customized views of data — right in a browser or tablet, secure, and updated automatically.

This should be more than just an automobile-style dashboard with colored gauges. You and your sales people need to be able to click directly on the dashboard to drill down and see the underlying details. It doesn't do you or your sales team any good to know if you're going fast or slow if you can't immediately see the underlying reason for under-performance and what you need to do to fix it.

5 Be rigorously selective about your indicators

You don't want a dozen indicators about your sales process. If you have too many indicators your sales people's focus will be diluted. Focus on a handful of the most important indicators – less is more.

Just having historical information is not an effective way of communicating with sales people. When you do a win-loss analysis or other post-mortem, find what's actionable and set a performance indicator. You need to define what to do on a weekly or daily basis. If a metric is showing red for underperformance, show clearly what to do to change it.

6 Have realistic goals, and know what your goals are

A goal can be a threshold to be above or below or a number to reach. Make sure you have these defined and portrayed in your sales team dashboard.

“ Tableau really provided a very useful tool for our sales force to look at their sales territory, see where the key brokers and distribution partners are, and really look for opportunities.”

– Larry Mullen, Director of Operational Reporting, OptumHealth

Distinguish among sales teams targeting different segments such as enterprise or small and mid-market. And enable individual members of the sales team or department to see how they rank with their peers for opportunities closed and deal size.

7 Favor outward-looking indicators

Select outward-looking metrics that affect performance. Tracking the number of sales calls may just include hang-ups, voicemails, or wrong numbers. Instead, consider tracking the number of new qualified leads per week. That gives you more insight into opportunities.

How many discovery calls has the sales person made today? How many live conversations have taken place to convert a lead to a prospect? How many opportunities has the sales person created or won today?

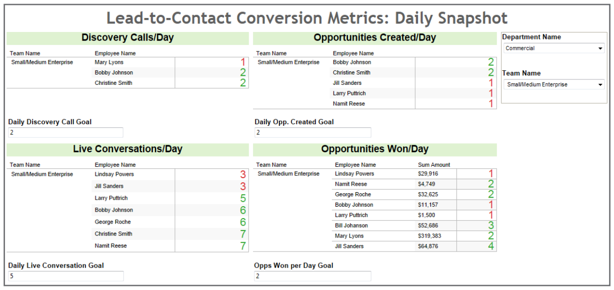

Figure 2. Lead-to-Contact Conversion Daily Snapshot.

In this sample dashboard, filter by sales department and team to see color-coded key performance indicators (KPIs) for the most important steps in the lead-to-contact conversion process. If your organization is paying $20, $50, or even a $100 or more per lead, you want to make sure sales people follow up in a timely way with every lead.

8 Align actions with each indicator

Use sales performance dashboards to drive the actions that you and your organization expect. If your pipeline quality is showing red you better go clean up your pipeline. If your time-to-call metrics are showing that sales people are taking too long to call when new leads come in, motivate your sales team or investigate what the holdup is.

There you go, eight best practices you can use today for sales performance management dashboards. Use analytics and self-reliant custom dashboards to track completion of goals at every step of the sales process, from prospecting and lead management to pipeline coverage, pipeline quality, territory analysis, and forecasting.

Have your own suggestions? Email us at *solutions@tableausoftware.com*. New to Tableau? Download a full functioning free trial at *http://www.tableausoftware.com/products/trial*.

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After being a Tableau customer for 3 years, Evan jumped at the opportunity to join the Tableau team. Evan is primarily responsible for the stewardship of sales force time, efficiency, and effectiveness. He leads sales training and enablement, strategy and planning, and sales process development. Prior to joining Tableau, Evan held sales operations leadership roles within the semiconductor manufacturing, telecommunications manufacturing and software industries at AMD, Spansion, Dell, and JDSU.

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Phil is responsible for a team of Tableau Software's Sales Operations Analysts. Prior to Tableau, he worked for Doyenz, Inc. At Doyenz, he created processes and reporting dashboards to help manage a fast paced sales organization in a growing multinational organization. Phil works in a cross departmental role at Tableau including sales leadership, finance, operations, and system administrators. His work helps ensure the scalability of solutions, data timeliness and validity, and a positive and simple user experience – all while driving increased productivity and measurability of the sales organization.