06. Sales Reporting & Analytics

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From Prospect to Sales

Click on this link for the full training material (PowerPoint)

Added Value

- A lot will be expected from the sales reps in terms of **input** into the CRM system, and without reports (and dashboards) the sales rep may find it difficult to understand the **outcome of his input**, and where he is in terms of the maintenance of the database.
- **Individual and team objectives** (like number of visits, management of the pipeline, etc.) may need to be monitored and dashboards will help the sales rep to estimate progress towards these objectives.
- On top of existing reports and dashboards, personal reports and dashboards can be created. They will help the sales rep to anticipate certain results management may see, in their own dashboards or in the Qlik analytics. Note that they are **real-time in Salesforce** (while Qlik isn't)
- The Salesforce reports and dashboards are a day-to-day tool that should encourage the sales rep's behaviour and guide him in his tasks

Other advantages:

- These dashboards are **easily cutsomizable** by anyone with the right training and access within the GBU (not dependent on "developement" by IT).

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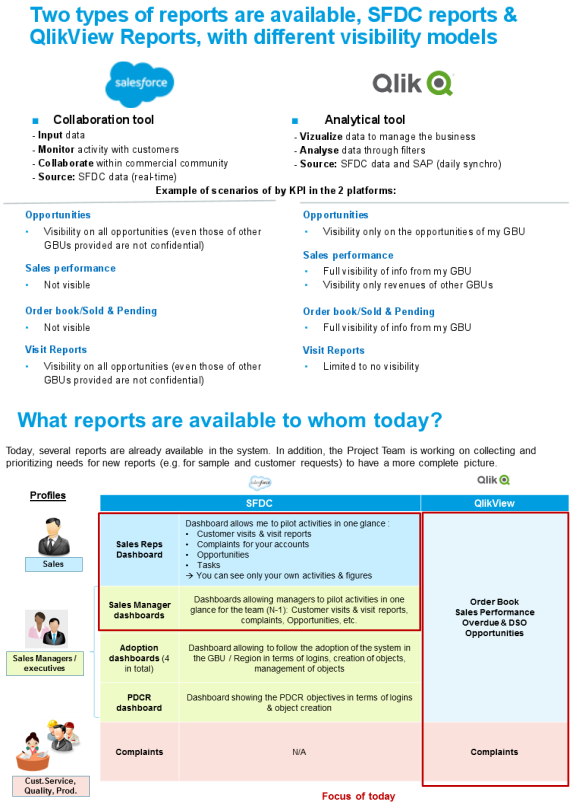
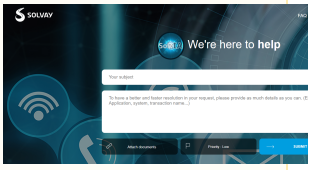
What you need to know to start...



Need Help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : https://solvia.solvay.com/



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example