



CRM: Sales Performance Dashboard

Sales Performance Dashboard- Manager's View

The Sales Performance Dashboard provides information to Managers, helping them determine the best possible sales opportunities to assist the salesperson in finding the 'best' deal. Managers should review the prior day's customer visits daily with salespeople.

Assist the salesperson:

- Set and review appointments
 - View 'In Showroom' customers
 - View appointments
 - View no-show appointments
- Review recent customer visits
- Coach, review, and inspect activities and find actionable customers

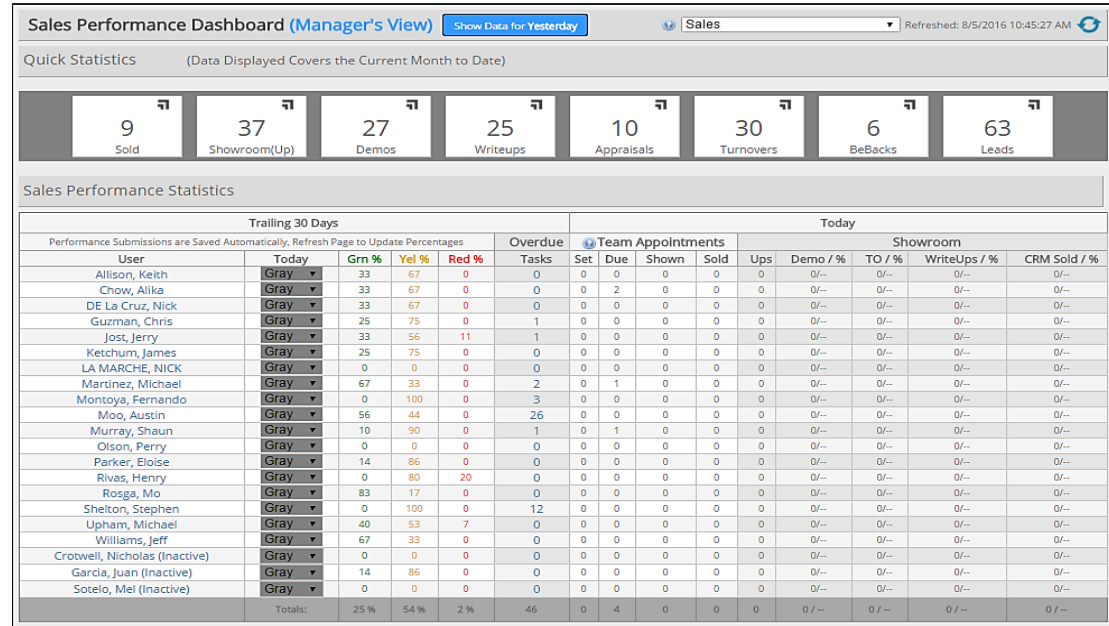


Figure 1: Sales Performance Dashboard Manager's View Example

Sales Performance Dashboard- Manager's View

Access Manager's Dashboard:

- 1 Click 'Dashboards'
- 2 Rollover 'Sales'
- 3 Select 'Sales Performance Dashboard (MGR view)'

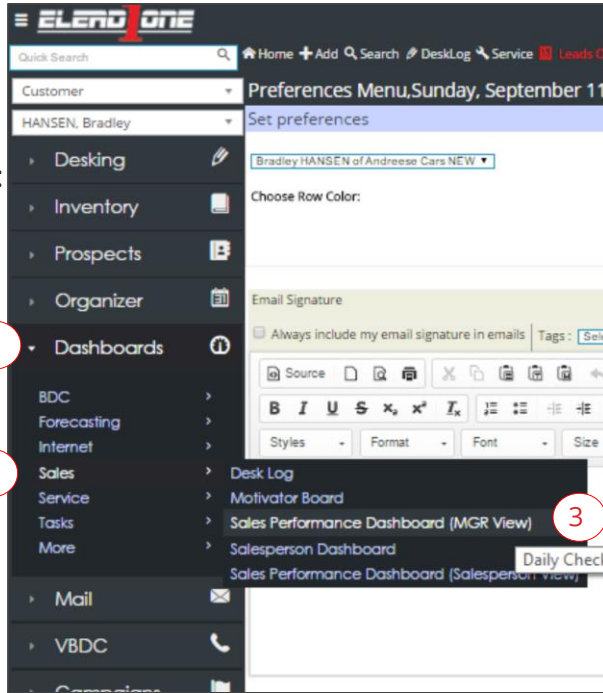


Figure 2: CRM

- 4 Select a Salesperson's name to open the dashboard details.

Sales Performance Dashboard (Manager's View)

Quick Statistics (Data Displayed Covers the Current Month)

9 Sold	37 Showroom(Up)	27 Demos
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Sales Performance Statistics

Trailing 30 Days

Performance Submissions are Saved Automatically, Refresh Page to Update Percent

User	Today	Grn %	Yel %
Allison, Keith	Gray	33	67
Chow, Alike	Gray	33	67
DE La Cruz, Nick	Gray	33	67
Guzman, Chris	Gray	25	75
Jost, Jerry	Gray	33	56
Ketchum, James	Gray	25	75
LA MARCHE, NICK	Gray	0	0
Martinez, Michael	Gray	67	33
Montoya, Fernando	Gray	0	100
Moo, Austin	Gray	56	44
Murray, Shaun	Gray	10	90
Olson, Perry	Gray	0	0
Parker, Eloise	Gray	14	86
Rivas, Henry	Gray	0	80
Rosga, Mo	Gray	83	17
Shelton, Stephen	Gray	0	100
Upham, Michael	Gray	40	53
Williams, Jeff	Gray	67	33
Crotwell, Nicholas (Inactive)	Gray	0	0
Garcia, Juan (Inactive)	Gray	14	86

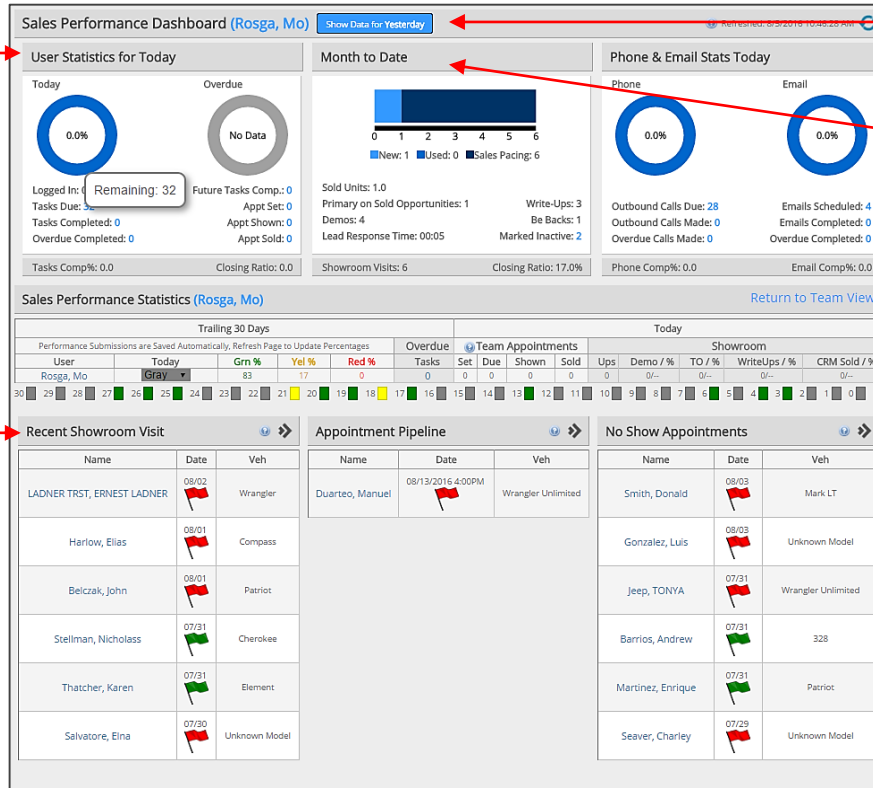
Figure 3: Sales Performance Dashboard

Review Salesperson

The Sales Performance Dashboard allows Managers to review the Salesperson details for the current or prior day's performance.

User Statistics

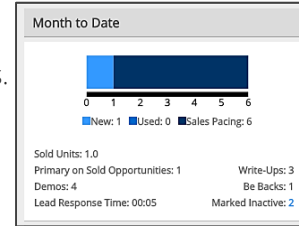
- Time logged in
- Task completed vs. task due (date)
- Appointments set
- Sold closing % (looking for 30%)



Press **Show Data for Yesterday** to view details from the previous day

Month to Date

Traffic Report: Ups vs. Solds and Closed



Manager Review Indicator

- Gray: No Manager review with the Salesperson on this date
- Green: Manager review with the Salesperson did occur on this date


Recent Showroom Visits

- Displays customers that visited but did not purchase
- Flags track Manager's activities

Figure 4: Sales Performance Dashboard – Salesperson details example

Review Salesperson Continued

The  icon opens up a larger display of the data from a particular segment.

Emails sent by the salesperson can be reviewed by selecting the  icon.























Outbound Calls 			Inbound Calls 			Emails Sent/Rec'd 		
Name	Date	Call	Name	Date	Call	Name	Date	Email 
Clothier, Alan	9/13/2016 4:16:00 PM	03:23 	Quintana, Yara	09/05/2016	02:08 	Zaina, Rami	9/13/2016 3:46:52 PM	
Gamble, Michael	9/13/2016 3:52:00 PM	03:12 	KRISHNA KUMAR, NAVANEETH	08/29/2016	03:00 	THOMAS, LEHMAN	9/13/2016 3:43:43 PM	
Paige, Mitchell	9/13/2016 3:20:41 PM	01:15 	THOMAS, LEHMAN	08/26/2016	01:18 	Paige, Mitchell	9/13/2016 3:31:37 PM	
Aguis, Jake	9/13/2016 8:31:55 AM	03:16 	THOMAS, LEHMAN	08/25/2016	01:37 	Shy, Tony	9/13/2016 9:08:02 AM	
Rock, John	9/13/2016 8:07:28 AM	00:41 	DOBSON, CHANTEL	08/16/2016	01:11 	Rock, John	9/13/2016 8:16:46 AM	
			Wilson, Lanaye	08/16/2016	04:25 	Devone, Greg	9/12/2016 6:34:28 PM	

Figure 5: Sales Performance Dashboard – Salesperson details example

Inbound/Outbound Calls

For Dealerships with 3rd party vendor inbound/outbound calls, Managers can listen to all calls made or received by the salesperson by selecting the  icon next to the call length value.

Opportunity Details Display

The flags contained on the Opportunity Details Page correspond to ones displayed on the **Sales Performance Dashboard**. The flags denote the current status of tasks, such as sent emails, notes, set appointments, and call logs to a customer.

The flag statuses are as follows:

- Gray: No Manager on the deal (Figure 5)
- Red: No Manager action taken
- Yellow: Manager viewed opportunity- no call or appointment tasks completed
- Green: Manager task is complete

The screenshot displays the 'Opportunity Details' page. The top toolbar includes icons for eBrochure, Email, Letter, Phone, Text Message, Showroom, Schedule, Sales Quote, Credit App, 5 Liner, Worksheet, Add Note, Print Info, Merge, and Delete. The main content area is split into two sections: 'CUSTOMER' and 'OPPORTUNITY'. The 'CUSTOMER' section shows the name 'AL BOGI' and ID '154171229'. It lists contact information: Home #: (626) 290-6624, Work #: (626) 290-6624, and Cell #: (626) 290-6624. It also indicates 'Preferred Email: No Preferred Email Address', 'Available for CallCenter: [checked]', and 'Last Modified: 9/14/2015 3:46:15 PM'. A gray flag icon is visible next to the customer information. The 'OPPORTUNITY' section shows 'Vehicle: Used', 'Stock #:', 'Trade:', 'Sales Teams: Reber, Scott - Primary Salesperson', 'UpType: Showroom Up', 'Source: drive by', and 'Date/Time Due: 9/15/2015 2:00:00 PM'. The 'Sales Status' is set to 'New'. Below this, there are several checkboxes for actions like 'In Showroom', 'Share Value Proposition', 'Welcome to Premier WC', 'Early Intro to Coaches', 'Selective Presentation', 'INTRO TO MGRS', 'Show Model Up and Down', 'Active Demonstration', 'Share Menu /Options / Choices', 'Demo', and 'Delivery of Vehicle and Store'. A gray flag icon is also present in the 'OPPORTUNITY' section, circled in red. At the bottom, there are tabs for 'Contacts', 'Service', 'Relationships', 'Ins/Other', 'Lifetime Value', 'Vehicles', 'Audit Trail', 'Equity', and 'Loyalty'.

Figure 6: The gray flag indicates that no manager is listed on the deal

View Opportunity Details Flags: Sales Performance Dashboard

Manager Activity Flags:

- Grey: No Manager on the deal
- Red: No Manager action taken
- Yellow: Manager viewed opportunity- no call or appointment tasks completed
- Green: Manager task is complete
 - Click-to-Call or phone call logged
 - Sent email
 - Scheduled appointment
 - Confirmed appointment
 - Added notes or comment

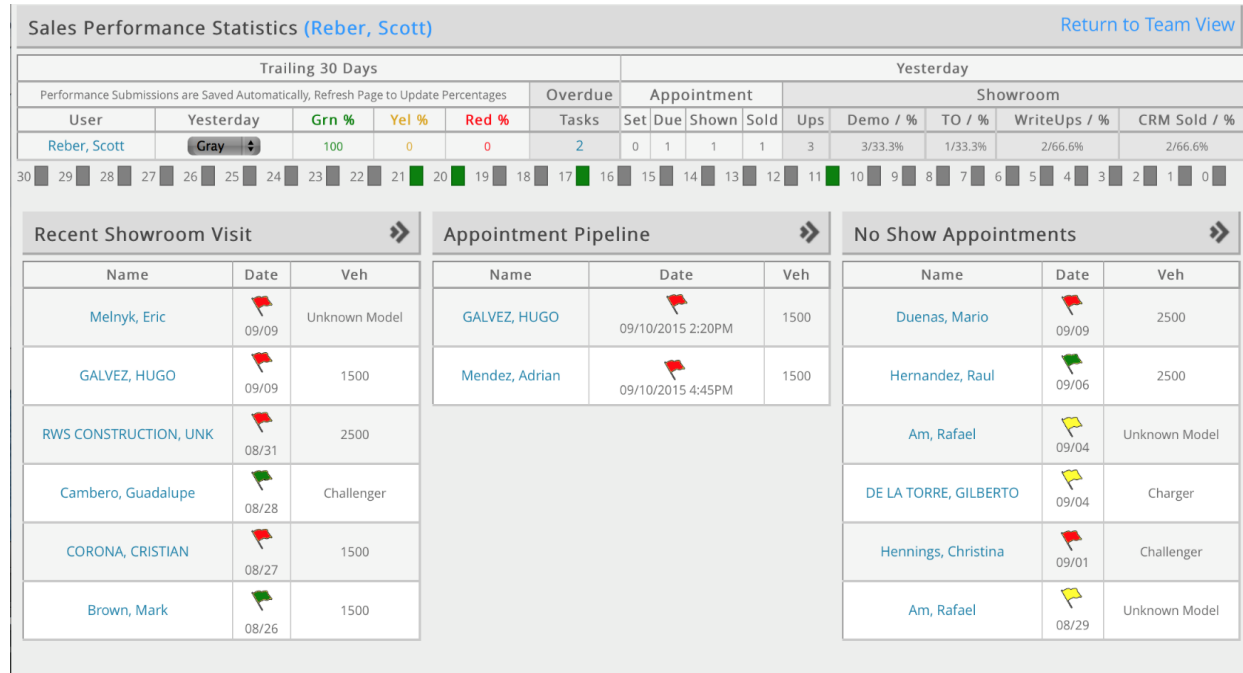


Figure 7: The flags on the Opportunity Details Page and Sales Performance Dashboard represent the same status



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