INSIGHT**SQUARED**

The Sales Ops Guide to

Inside Sales Metrics

Contents

Introduction

Call it the The Moneyball Revolution. The Age of Big Data. Sales 2.0. Whatever the name, one thing is clear: The sales landscape is evolving, and Sales Ops is on the front lines.

This evolution is most visible in the development of sales metrics. In the last few years, sales metrics have become an operational mandate in almost every sales organization, regardless of size, stage or industry.

The best Sales Ops teams have gone well beyond simply reacting to these new demands. They have taken initiative and proactively helped their sales departments thrive in the increasingly metrics-driven sales landscape.

Of course, this makes one thing abundantly clear: Sales Ops professionals must have a comprehensive understanding of sales metrics. As CEOs and Sales VPs become better versed in the right sales KPIs, it is essential that Sales Ops teams stay at least one step ahead. Not only in order to stay in the executive team's good graces, but also to give their organizations the best chance to stay ahead of the competition.

But there's a problem: An exhaustive and clear guide to Inside Sales metrics has historically been difficult to find. We know how useful this guide would be to ambitious and forward-looking Sales Ops professionals, so we decided to create it.

We talked to some of the best sales leaders, executives, and of course, Sales Ops engineers to boil down the essential Inside Sales metrics into 3 categories:

- Activity Metrics
- Pipeline Metrics
- Sales Results Metrics

The result is a soup-to-nuts tour of the most critical and useful Inside Sales metrics. Sales Ops teams can use it to ensure they are tracking the right metrics, and using them to get real, repeatable sales results.

Sales Ops is only going to grow in importance over the next few years, so it is important for professionals in the field to get an early start in understanding how the can most effectively lead their sales teams to success.

The Right Sales Activity Metrics

Summary

Sales is a function of the number of right activities. This means that if you want to measure your team's performance, you need to start by tracking their daily activities. The three metrics in this section will help you ensure that your reps are not only taking the right actions to generate deals, but also that those actions are efficiently leading to bookings.

In this section we will look at the three key sales activity metrics:

- Number of Activities
- Activity Efficiency Ratios
- Activity Results vs. Activity Goals

Number of Activities

Activity Dashboard
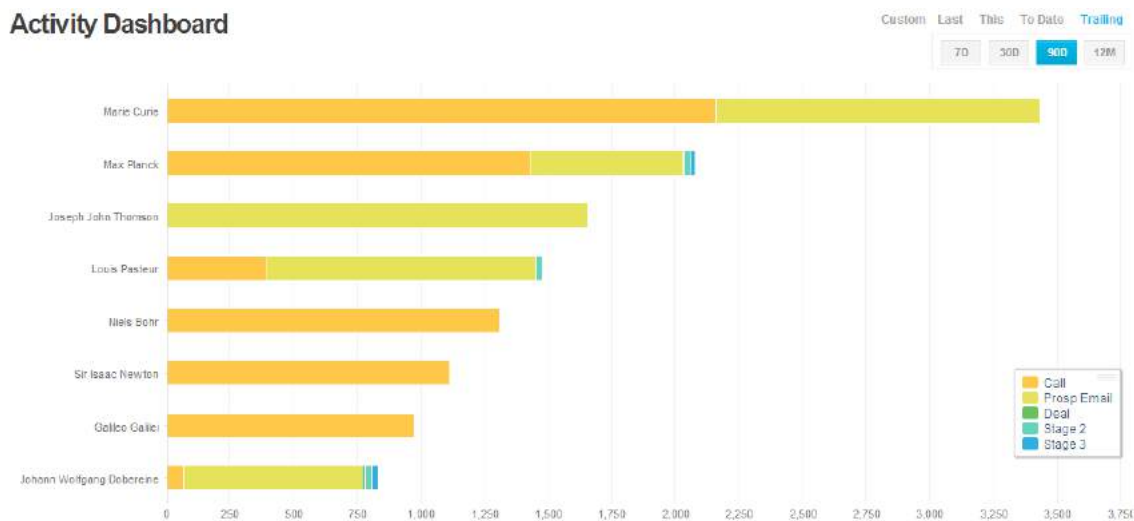
The Metric
Number of activities (e.g. dials, emails) your reps performed in a given time period.

What it tells you
Are your reps taking the necessary steps to help you hit your number? How many dials, connects and appointments did each of your reps perform in a given time period?
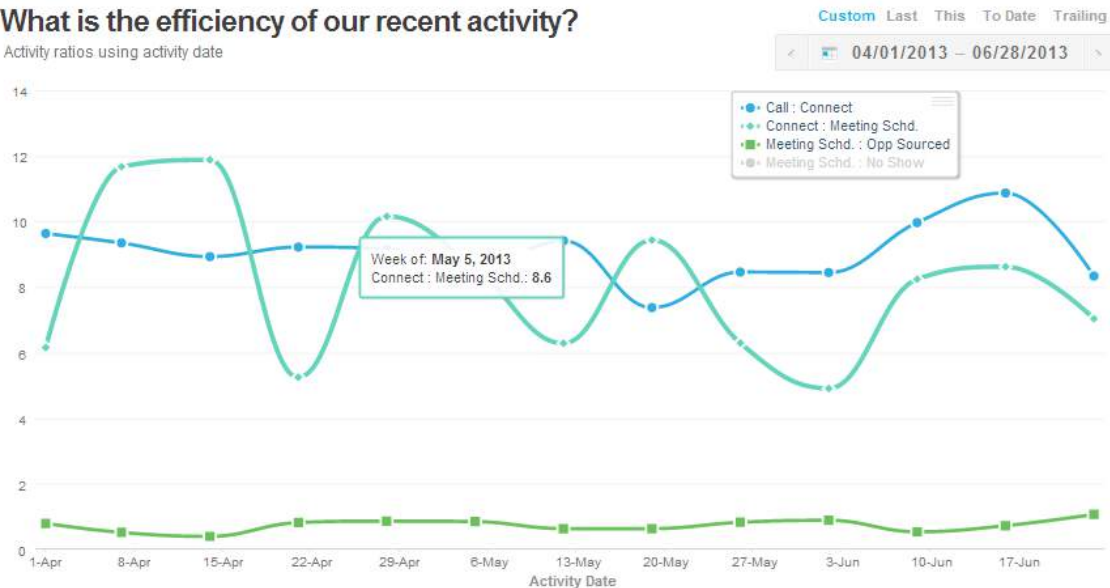
The Takeaway
If your reps are not performing enough activities, you won't hit your number. Sales is a function of the number of activities your reps performed, so it is important to carefully track this metric. Even if you don't watch your reps do their jobs every day, you can follow their activity totals to see how hard they're working and how passionate they are about hitting their goals. In the report above, for example, you can see that certain reps are performing many more sales activities than others. What can you do to encourage your underperforming reps to boost their activity levels? One way is to make this metric transparent by regularly sharing the results with your reps to encourage healthy competition. That way they can see how they're performing relative to their co-workers.

Sales Activity Efficiency Ratios

What is the efficiency of our recent activity?
Activity ratios using activity date

Custom   Last   This   To Date   Trailing
04/01/2013 — 06/28/2013

Legend:
- Call : Connect
- Connect : Meeting Schd.
- Meeting Schd. : Opp Sourced
- Meeting Schd. : No Show

Week of: May 5, 2013
Connect : Meeting Schd.: 8.6

Activity Date

The Metric
Ratios of "Calls : Connects," Connects : Meetings," Meetings Scheduled : Opportunities Sourced."

What it tells you
How effective are your reps' activities at leading to opportunities and deals? While measuring the number of activities your reps perform gives you a baseline understanding of their effort and productivity, tracking efficiency ratios is much more important because it shows you the downstream conversion rates of these activities, such as how many dials it takes your reps to source a single opportunity.

The Takeaway
Even more than activities, the efficiency of your reps determines if you will hit your number. How can you coach your reps to be more efficient at their jobs? Are they making a lot of calls but not getting enough connects? Maybe they are leaving ineffective voicemails or writing lackluster emails. Or maybe they need to call at different times or be more selective about who they call from lists. Are your reps not producing enough meetings or appointments? Only by measuring your reps' efficiency ratios can you be sure that individual reps are not only performing the right actions, but are doing so in a way that creates downstream

opportunities and deals. This way, you can identify areas of weakness and coach your reps to improve.

In the table below, for example, you can see that Steve Nash is making about 25% more calls than Shawn Marion.

| SDRs	Dials	Connects	Opps	Deals	Dial : Connect	Dial : Opp	Opp : Deal	Dial : Deal
Steve Nash	3,844	333	11	1	12:1	349:1	11:1	3,844:1
Jeff Hornacek	4,285	339	15	2	13:1	286:1	8:1	2,143:1
Shawn Marlon	2,911	251	27	4	12:1	108:1	7:1	728:1
Jared Dudley	3,973	342	20	6	12:1	199:1	3:1	662:1
Total: 4	**15,018**	**1,265**	**73**	**18**	**12:1**	**206:1**	**6:1**	**1155:1**

Based on this metric alone, you may reward Steve Nash for his high number of activities and criticize Shawn Marion for coming up short. However, a deeper dive reveals that Shawn Marion is actually *5 times more productive* at generating deals. Tracking activity efficiency ratios instead of just number of activities will let you know that Shawn Marion is actually the rep who should be rewarded, while Steve Nash should be coached to be more efficient with his activities.

Tracking efficiency ratios will also help you determine which parts of your sales process need to be improved in order for you to hit your ultimate goal (opportunities sourced, for example). By working backwards, you can determine what prevented you from hitting that ultimate goal. Did you create enough opportunities? Why not? Was it because you didn't schedule enough meetings or because you didn't convert the meetings you had scheduled? Paying close attention to your reps' efficiency ratios in all areas will help you make sure you are taking the right steps (in terms of both volume and efficiency) to hit your downstream goals.

Once you determine what is blocking you from achieving your goals, you should target those areas and coach your reps to move past them. For example, a low connect rate can be addressed by coaching your reps to leave more informative voicemails and write clearer emails. If you notice that your reps are falling short of their "meetings scheduled" goals, you should listen in on some calls and then work with your reps to help them become better at explaining your product. Finally, if your reps have a low "Meeting : Opportunity" ratio, you should focus on improving their ability to uncover BANT (budget, authority, need and timing).

Activity Results vs. Activity Goals
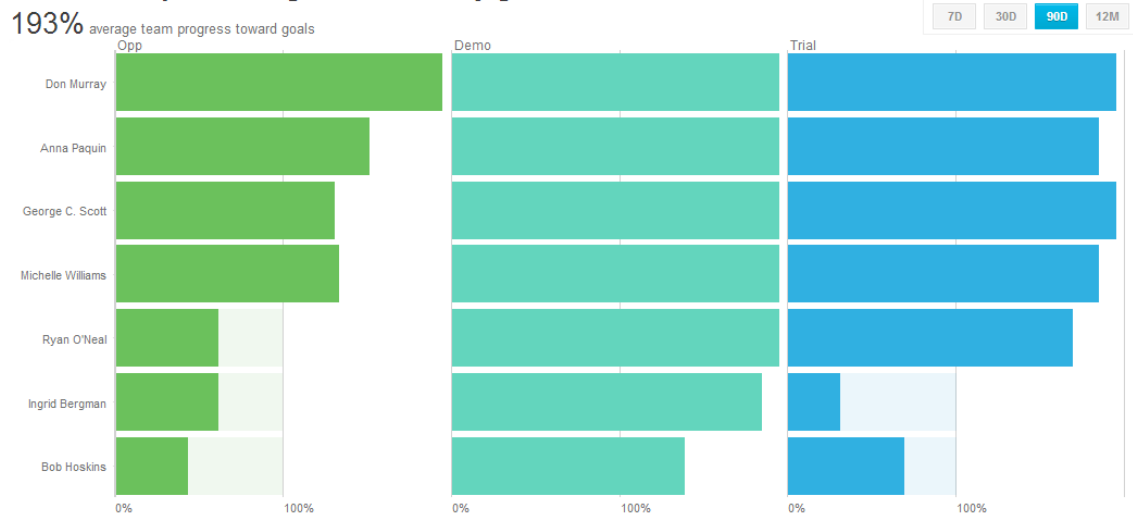
The Metric
Achievement of sales goals.

What it tells you
Are your reps meeting their goals? Your reps are not working in a vacuum – they are (or should be) performing against clearly defined goals. Measuring and displaying their results against these pre-established goals is the most reliable way to ensure that they hit your number.

The Takeaway
If you want to create a culture of accountability and competition, your reps need to know how they're stacking up against each other and the goals you set for them. Tracking this metric (and sharing it with your reps) will help you increase transparency so your reps know how they're doing. Are all of your reps hitting their goals in all areas? Is one of your reps performing well in most areas, but falling short in one specific area (like Ryan O'Neal in the report above)? Carefully tracking your reps' performances against specific goals allows you to identify performance gaps so you can coach your reps in these areas. This better line of sight into overall and specific performance will spur healthy competition among your reps.

Pipeline Metrics: Part 1

Analyzing Buyer Behavior, Prioritizing Your Selling and Identifying Your Winners

Summary

If you want to prioritize your sales team's efforts on high-probability opportunities, you need a clear picture of your pipeline.

In the first section, we looked at how effectively and efficiently your reps' activities are creating pipeline. Now it's time to convert that pipeline, which means identifying buyer behavior so you can better understand which opportunities to prioritize.

In this section we will help you make the most of your reps' time by using the following metrics:

- Pipeline Integrity
- Sales Funnel Conversions & Win Rate
- Duration or Sales Cycle by Stage
- Win Rate by Opportunity Value
- Slippage
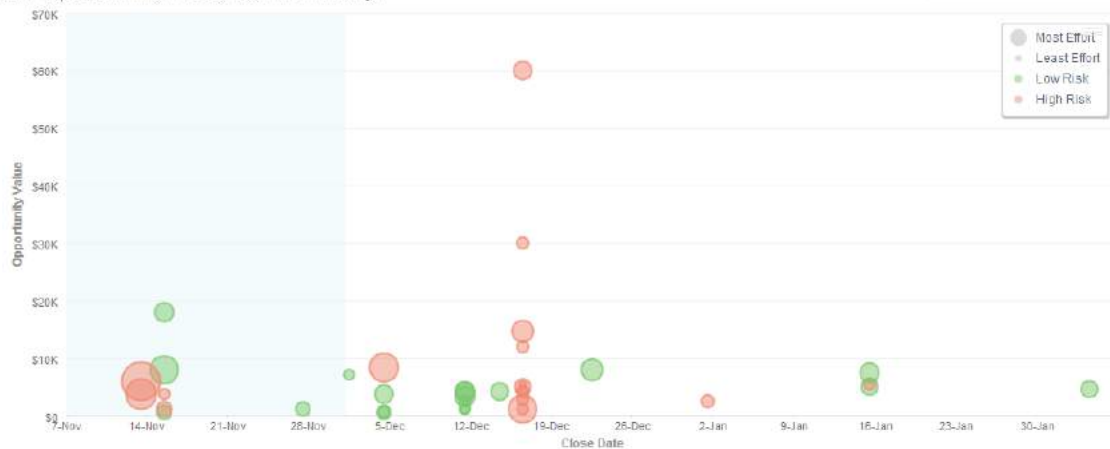- High-Probability Opportunities ("Strike Zone")

Pipeline Integrity

The Metric

Which soon-to-close opportunities do you have in your pipeline that are at risk? What factors should you consider when you calculate an opportunity's risk level? It is important to consider anything that could affect its likelihood to close, which typically means four attributes: number of close date moves, deal size, age in current stage and momentum.

What it tells you

How your reps should prioritize the opportunities in their pipeline this week. Weekly Pipeline Review Meetings have long been an essential part of managing a sales team, but it is crucial that you have a clear, up-to-the-minute view of your pipeline to ensure that you are making data-backed decisions instead of using intuition alone.

It is important to examine your pipeline regularly and ask the right questions of it. What's closing soon? Which opportunities are at risk – either because they are significantly above your average sales price, have lingered in the same stage too long or because they have not been worked on recently by your reps? Asking questions like these and having your reps answer them based on the metrics listed above will help you get the most out of your regular Pipeline Review meetings.

What are some red flags that should grab your attention in these meetings?

- An opportunity's close date has changed 5 or more times
- An opportunity has lingered in the same stage 6x longer than an average deal
- An opportunity is 3x larger than an average deal

The Takeaway: A clear picture of the soon-to-close opportunities in your pipeline is your most effective tool for optimizing your sales reps' time. Which opportunities require immediate actions – and what should those actions be – and which can be shelved for the time being? Is a particular opportunity at-risk because one of your reps has not engaged with the buyer for a few weeks? In the report shown above, the size of opportunity circles is determined by the effort level your reps have been putting in. Too small a circle means that your reps may not have been engaging with an opportunity enough to push it to Closed-Won, while a large circle may mean that they are investing too many calories in an opportunity that is unlikely to close. During each Pipeline Review Meeting, you should have your reps look at their pipelines, identify any at-risk opportunities and explain them to you.

But how, aside from effort level and close date, can you determine which opportunities to prioritize for your reps? The next three metrics will help you zero in on the best opportunities in your reps' pipelines and set your reps up for an efficient and effective week.
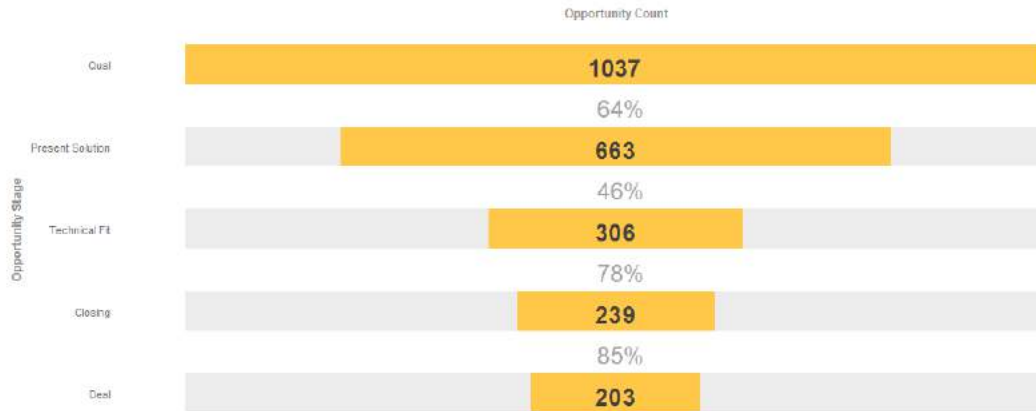
Sales Funnel Conversions and Win Rate

What are our conversion rates for closed opportunities?
20% win rate for opportunities with close dates in the previous 12 months.

Custom Last This To Date Trailing
7D 30D 90D 12M

Opportunity Count

Opportunity Stage		
Qual	1037	
	64%	
Present Solution	663	
	46%	
Technical Fit	306	
	78%	
Closing	239	
	85%	
Deal	203	

The Metric
Conversion rate for closed opportunities, both from the top and by stage. In the example above, the Win Rate is 20%.

What it tells you
How are opportunities progressing through the funnel? What percentage of opportunities are your reps converting into Won Deals? In which stages of the sales process do you have the most drop off?
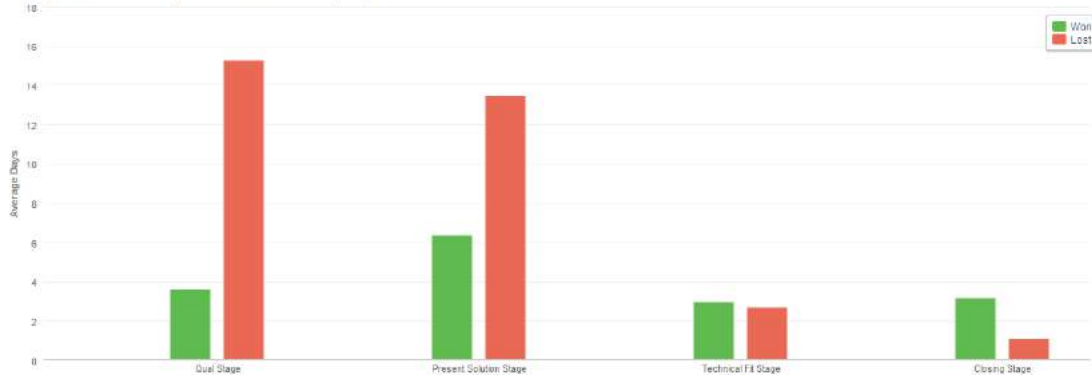
The Takeaway
If you want to optimize your reps' time and increase their Win Rate, you need to know where they have the most difficulty converting opportunities to the next stage. Analyzing your sales funnel by stage shows you exactly where you are losing deals so you can coach your reps to improve these areas and repair a leaky funnel. In the example above, for instance, the company shown is losing more than half of its opportunities during the "Present Solution" stage. Knowing this, you can coach your reps to be more effective at presenting your product to potential customers. Furthermore, studying conversion rates by stage can help you forecast more accurately by showing you how likely opportunities are to convert based on their current stage.

Duration, or Sales Cycle by Stage

The Metric

Duration, or how long your Won and Lost opportunities spend in each sales stage on average.

What it tells you

Historical data about your average sales cycle so you can better identify likely buyers and at-risk opportunities based on how long they have spent in specific stages. How does your sales cycle compare for Won and Lost Deals? How long can an opportunity spend in a certain stage before it should be considered at-risk? A clear understanding of how your Won and Lost opportunities compare by stage is essential for properly planning your reps' schedules, prioritizing their time and identifying likely losers in your pipeline.

The Takeaway

The amount of time an opportunity spends in a funnel stage has a strong correlation to its likelihood of becoming a Won Deal. Too often, your reps have "happy ears" when qualifying their opportunities. However, this dispassionate metric will help you combat your reps' emotional investment in opportunities and separate the winners from the losers. If an opportunity has been sitting in a particular stage for significantly longer than the historical average for a Won Deal, it should be flagged as at-risk. In the report above, for example, you can see that Lost Deals spend almost 5 times as long in the Qualifying Stage as Won Deals (15.9 days vs. 3.6 days). Therefore, if you have an opportunity that has been in this stage for 15 days, you should flag it and encourage your reps to perform an action and either move the opportunity to the next stage or close it altogether.
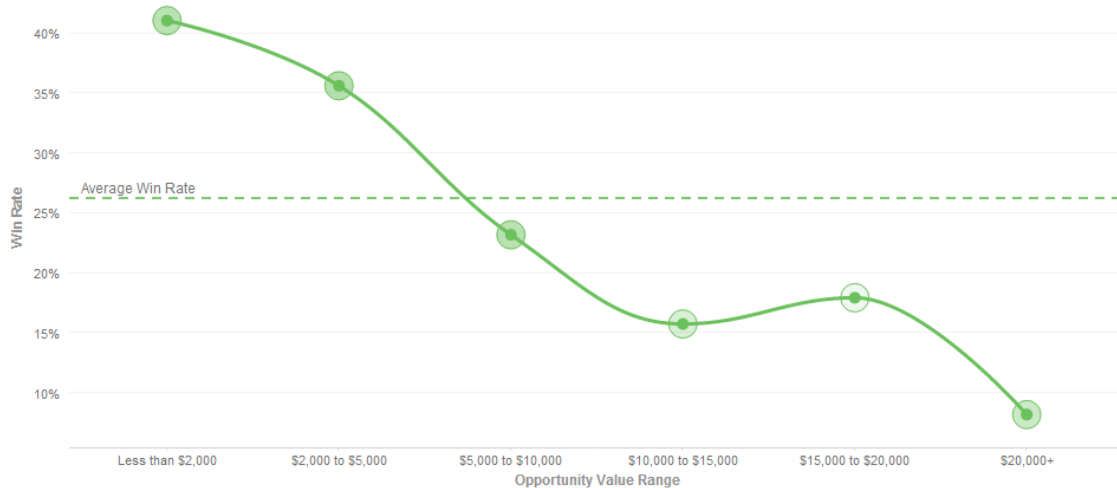
Win Rate by Opportunity Value

The Metric

The effect of deal size on Win Rate.
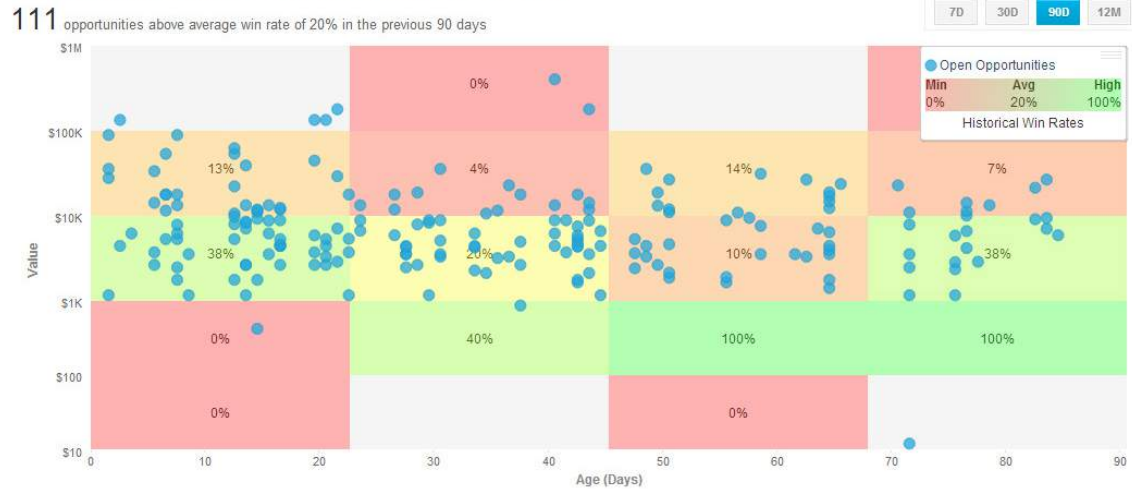
What it tells you

Do your reps have difficulty closing deals above (or below) a certain size? Measuring how deal size affects your team's Win Rate can help you prioritize your reps' time, better understand the opportunities in your pipeline and identify deal-size sweet spots for your reps.

The Takeaway

An opportunity's size tells you a great deal about how your reps should approach it. This metric will help you best allocate your reps' time by showing you what size deals they have the best shot at winning and which deals they may need to invest more time into (or whether it is worth it to invest much time at all). The report above, for example, shows a company that has very high success rates for deals under $10,000 but much lower Win Rates as deal size increases. This doesn't mean that these reps will never win a deal outside of this range, it just means that their odds of doing so are smaller and that they might have to expend more effort (or take a different sales approach) to win those deals.

Slippage of Expected Value or
Close Date of Opportunity

The Metric

How a given opportunity has changed over time (in terms of close date and value).

What it tells you

Which opportunities in your pipeline have changed close date or value during a given time period. Opportunities that have experienced frequent or considerable slippage are not as likely to convert into deals as more stable opportunities, and these changes are often telling indicators that the opportunity is not a likely buyer. Closely monitoring changes made to opportunities in your pipeline gives you a clearer picture of your near-term bookings forecast and a more detailed understanding of how your reps are handling their open opportunities.

The Takeaway

Changes to open opportunities affect your forecast and strategy, so it is important to be vigilant about the adjustments your reps make to opportunities' close dates or value. Closely monitor changes made to opportunities in your pipeline to get a clearer picture of your near-term bookings forecast and a more detailed understanding of how your reps are handling their open opportunities. You should discuss these changes with your reps. Why did a particular opportunity's close date get pushed back two weeks or have its value dropped by $20k? Is it now less likely to close at all? Analyzing opportunity changes and discussing them with your reps will give you a clear, up-to-the-minute picture of the health of your forecasted opportunities.

High-Probability Opportunities or "Strike Zone"

The Metric
Win percentage and expected deal value based on opportunity value and age.

What it tells you
Which open opportunities your reps are most likely to win. Not all opportunities have an equal chance to convert into Won Deals, and knowing which ones are most likely to be won (based on historical data about similarly sized and aged deals) helps you prioritize your reps' time, identify at-risk opportunities and focus on the right opportunities.

The Takeaway
Your reps have limited time and they can't give 100% of their opportunities 100% attention, so it is your job to use historical data and opportunity-specific information to prioritize their effort and set them up to hit their number. Analyzing each opportunity in the pipeline by how likely it is to convert into a Won Deal and how much revenue it is expected to contribute not only allows you to help your reps prioritize their time, but also gives you much clearer insight into how much revenue your team is likely to generate and whether you'll be able to hit your number. In the report above, for example, you can see that opportunities in the upper right-hand corner of the chart (older, larger opportunities) have a lower Win Rate than opportunities in the middle of the chart. Use this information to help your reps identify likely buyers and adjust their sales process for opportunities just outside their wheelhouse.

Pipeline Metrics: Part 2

Pipeline Trends, Real-Time Pipeline by Employee, Opportunity Flow and Metrics-Driven Sales Forecasting

Summary

After you've used historical data to identify likely buyers and optimize your reps' time, you should take a deeper look at your pipeline – how it has changed over time, whether it is growing in line with rising revenue targets, and exactly how much revenue you expect to generate from it.

In the following section we will look at the 4 most important metrics for evaluating your pipeline's change over time, and how these changes will affect the revenue your sales team generates:

- Pipeline by Employee
- Historical Pipeline Trend
- Pipeline Inflow/Outflow
- Metrics-Driven Sales Forecast

Pipeline by Employee (Stage)
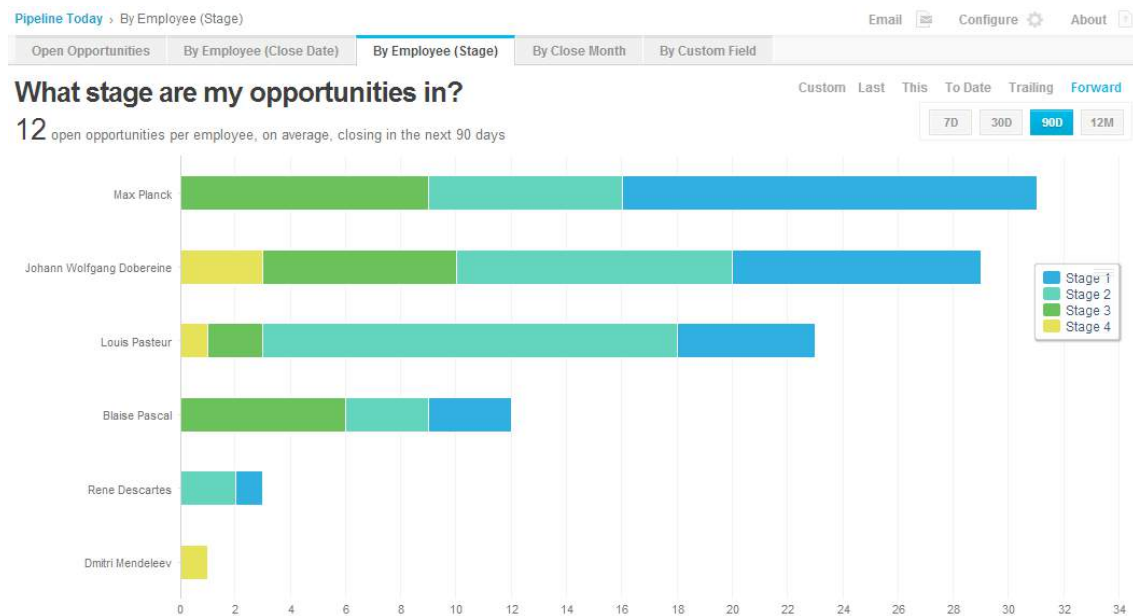
The Metric
Number of open opportunities your reps have in their pipelines by opportunity stage.

What it tells you
What your individual reps' pipelines look like. Your team's aggregate pipeline is important, but it is also essential to make sure you are splitting it up correctly among your reps. Are some of your reps focusing exclusively on late-stage opportunities? Do some of your reps not have many opportunities to work at all?

The Takeaway
If one of your reps has a pipeline full of late-stage opportunities and another rep is working on all recently added opportunities, you may want to adjust their workloads to be more balanced. In the report above, for example, you can see that Blaise Pascal has no late-stage opportunities while Johann Wolfgang Dobereine has several, and they both might benefit from a more balanced pipeline. Additionally, analyzing open opportunities by stage (on a rep-by-rep basis) provides you with a more realistic bookings forecast.
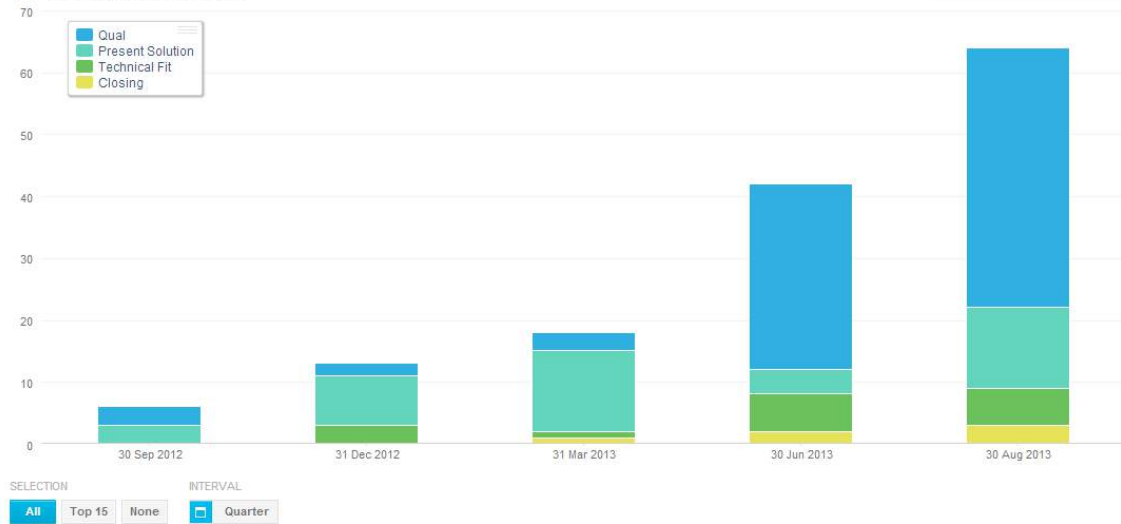
Historical Pipeline Trend

The Metric
Value of open opportunities in your pipeline over time, broken down by stage.

What it tells you
Are there more opportunities in your pipeline than there were last week? Last month? Last year? Based on your historical pipeline data, do you currently have enough opportunities in your pipeline to hit your number? Analyzing your pipeline count over time allows you to see if your pipeline is growing over time and how well your current pipeline sets you up to hit your number.
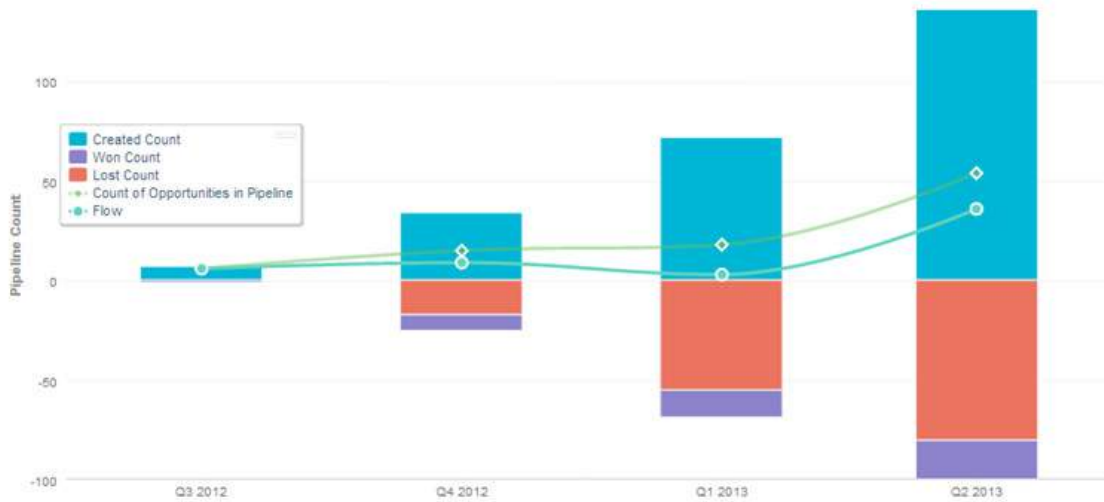
The Takeaway
To truly understand your current pipeline, you need to look at it in the context of how it has evolved over time. If your pipeline is shrinking or stagnant, then you need to address this issue immediately. Additionally, it is important to juxtapose your pipeline growth with your goal quota growth so you can see whether your pipeline is growing commensurately with your goals and if you are on pace to meet your rising goals.

Pipeline Inflow/Outflow

Why is our pipeline changing?

249 opportunities created

Legend:
- Created Count
- Won Count
- Lost Count
- Count of Opportunities in Pipeline
- Flow

(Pipeline Count on y-axis; Q3 2012, Q4 2012, Q1 2013, Q2 2013 on x-axis)

The Metric

Number of newly created opportunities in the pipeline compared to the number that have left as Won/Lost Deals, which is a leading indicator of how many deals you will close.
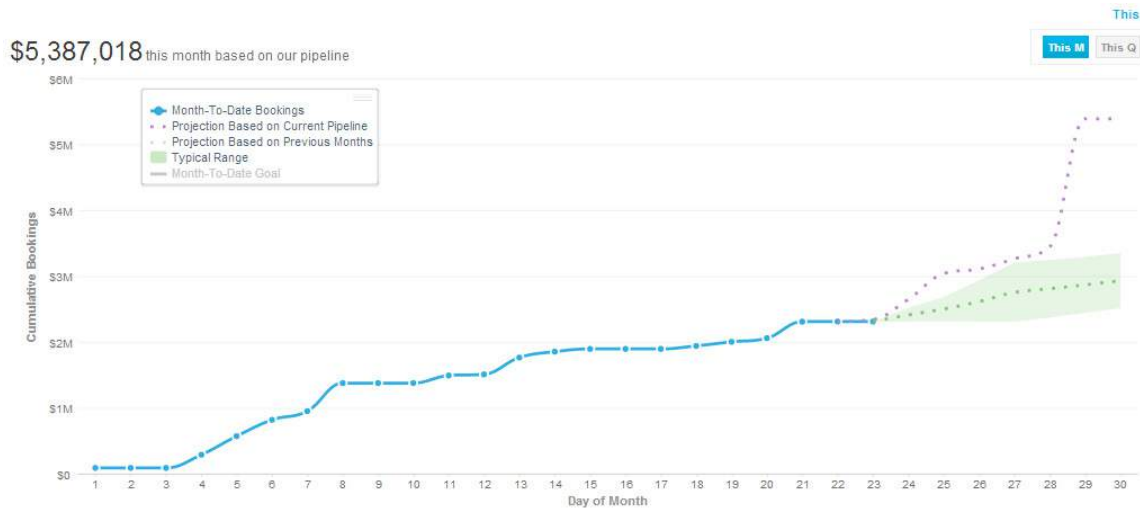
What it tells you

Analyzing your historical pipeline trend shows you if your pipeline is growing or shrinking, but studying your pipeline inflow/outflow tells you why. Are your reps closing out more opportunities than your SDRs and the marketing team are generating? Measuring your net flow of opportunities allows you to ensure that your pipeline is growing fast enough to replace the opportunities that have flowed out as Closed-Won or Lost and to stay on pace to reach your rising revenue goals.

The Takeaway

If your pipeline is stagnant – or, worse, losing net opportunities – you need to take action to generate more opportunities. Perhaps you're losing too many deals and you need to improve a leaky section of your funnel. Or maybe you need to emphasize lead generation to quickly add more opportunities to your pipeline to replace the outflow. Whatever the case, a stagnant or shrinking pipeline needs to be addressed quickly, and this can only be achieved if you are carefully tracking the net flow of opportunities in your pipeline.

Metrics-Driven Sales Forecast

The Metric

Revenue prediction based on historical conversion rates and number of opportunities currently in the pipeline.

What it tells you

Will you hit your number this month or quarter? Assigning expected revenue contributions (based on your reps' and company's historical data) for each opportunity helps you create a data-driven forecast so you have a clearer understanding of where you stand against your revenue goals.

The Takeaway

An accurate forecast is the key to staying on track with your number, and this means using historical conversion rates and opportunity-specific information to project deals. This, of course, is a complicated equation that needs to take into account the current stage of the opportunity, the personal Win Rate of the rep who owns it and your company's historical performance for similar deals. Furthermore, bookings projections vary significantly based on what data is used to make the projection, so it is important to compare several different approaches. In the report above, for example, you can see that this hypothetical company's bookings forecast based on its current pipeline (the dotted purple line) is significantly higher than the forecast made using previous months' performance (the dotted green line). No forecast will ever be 100% accurate, but it is important to study your projected forecast as carefully and from as many angles as possible.

Sales Results Metrics

Summary

You measured your reps' activities, prioritized their pipeline based on historic data and tracked how your pipeline is changing over time. At this point, it's time to see how this strategy worked out. Did your reps hit their quotas? Did they win the deals you expected them to? Did you have enough reps to tackle your pipeline? Are you, as a team, hitting your number?

In this section we will explore the metrics you should use to ensure that your sales results are in line with your expectations and trending in the right direction:

- Closed Sales vs. Goals
- Won/Lost Analysis by Close Date
- Won/Lost by Reason
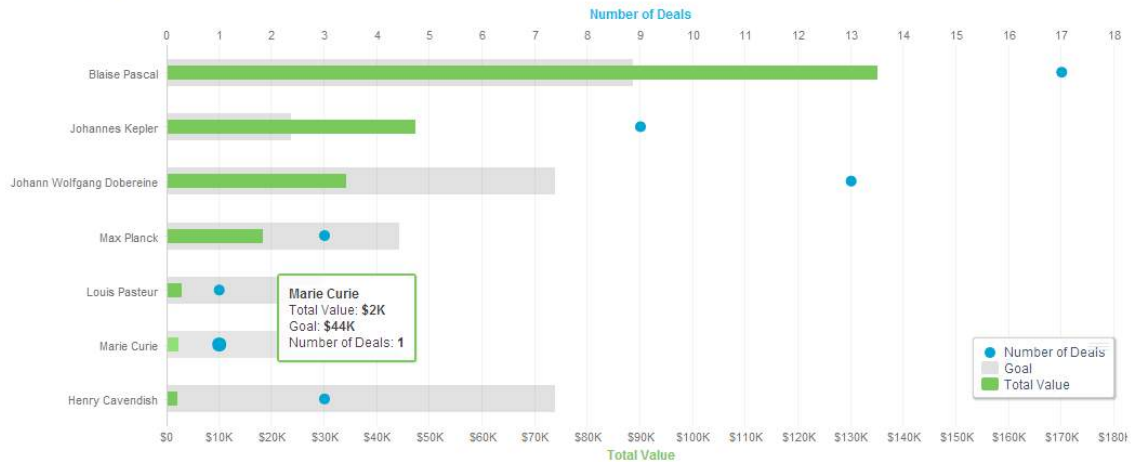- Sales Cycle
- Sales Bookings

Closed Sales vs. Goals

How much have my employees booked?
$242,218 in the previous 90 days

Marie Curie
Total Value: $2K
Goal: $44K
Number of Deals: 1

The Metric

Number and value of deals your reps have won compared to their goals.

What it tells you

Are your reps hitting their number? How many deals does a given rep need to book over the remainder of the selling period to hit his goal?

The Takeaway

It is important to analyze Sales vs. Goals by individual rep and not in aggregate so you can identify which reps are performing well and which reps are struggling against their goals. This will also help you determine the gap between booked deals and quota per rep so you can better devise coaching strategies to help struggling reps improve. It is also a good way to encourage healthy competition among your reps by publicly displaying their performance. Finally, it is important to track both the number (the blue dot in the report above) and value (green bar) of deals your reps booked so that you have a better understanding of the average size of the deals your reps are booking.
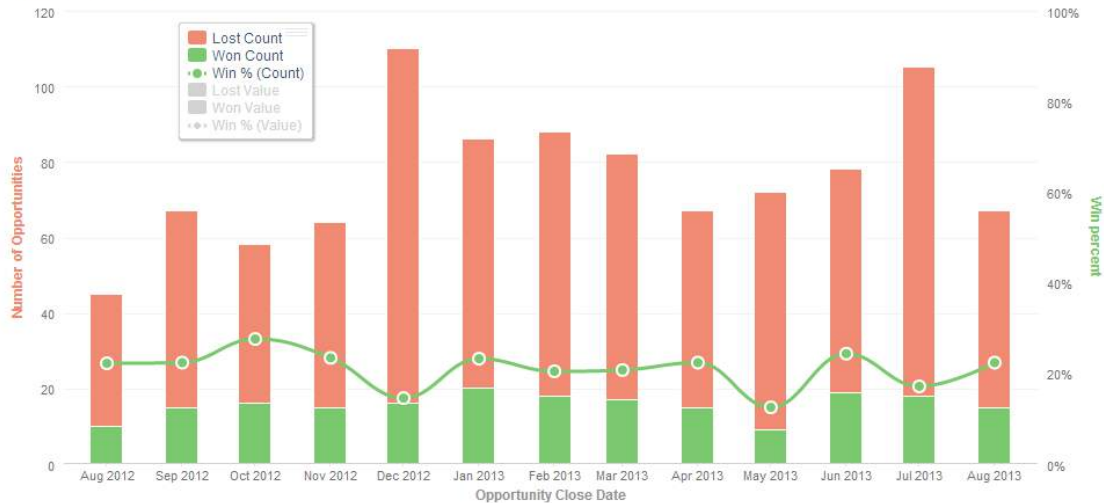
Won/Lost Analysis by Opportunity Close Date

The Metric

Win Rate of closed opportunities.

What it tells you

How well your reps performed at converting opportunities into Won Deals during a given time period. How your team's Win Rate is changing over time.

The Takeaway

Your team's Win Rate has a huge impact on your ability to hit your number, so it is essential that you track it closely – not just as a static value, but over time. Has your team's Win Rate been rising or falling? Does the number of opportunities in your pipeline affect your team's win percentage? By analyzing your team's Win Rate, you can give yourself a deeper understanding of how effectively your reps are closing deals and what is influencing their Win Rate. Finally, cohorting your won/lost analysis by close date – instead of creation date – gives you a more accurate picture of your Win Rate by excluding open opportunities, which skew your Win Rate down.
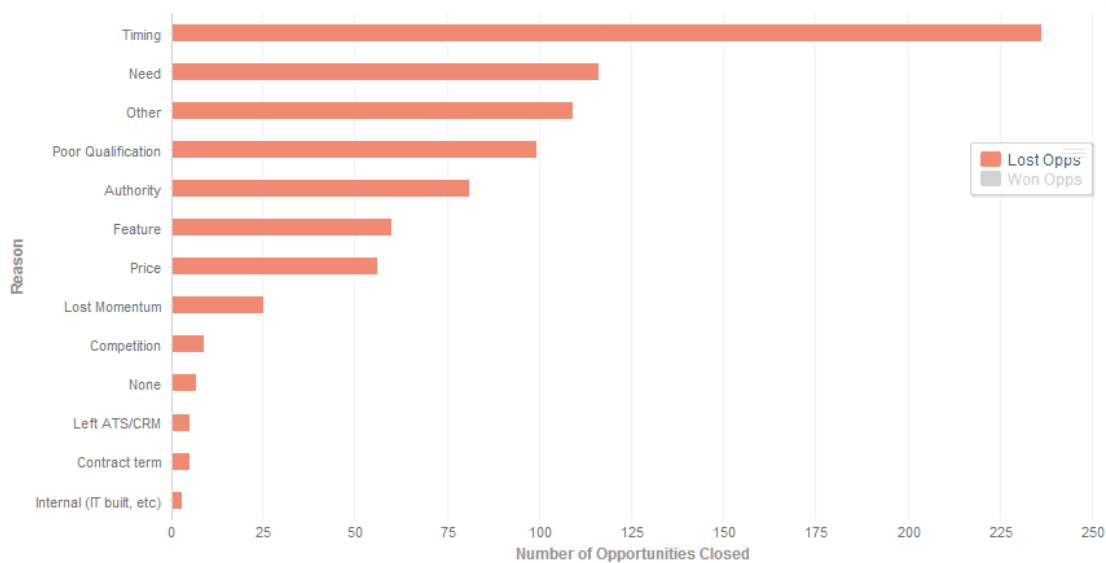
Won/Lost by Reason

Why did these opportunities close ?

236 Opportunities were lost to Timing in in the previous 12 months

The Metric

Reasons why opportunities were lost.

What it tells you

The most common reasons given by potential customers about why they decided
not to buy your product, and how many deals you lost due to each reason.

The Takeaway

You must coach your reps to understand common buyer objections and how
they can change their messaging to anticipate and overcome these objections.
Are you losing a large number of potential customers because your product is
missing an essential feature? Because many opportunities believe that now is
the right time to purchase your product? Use the information about why deals are
falling through to help your reps improve their messaging and close more deals.
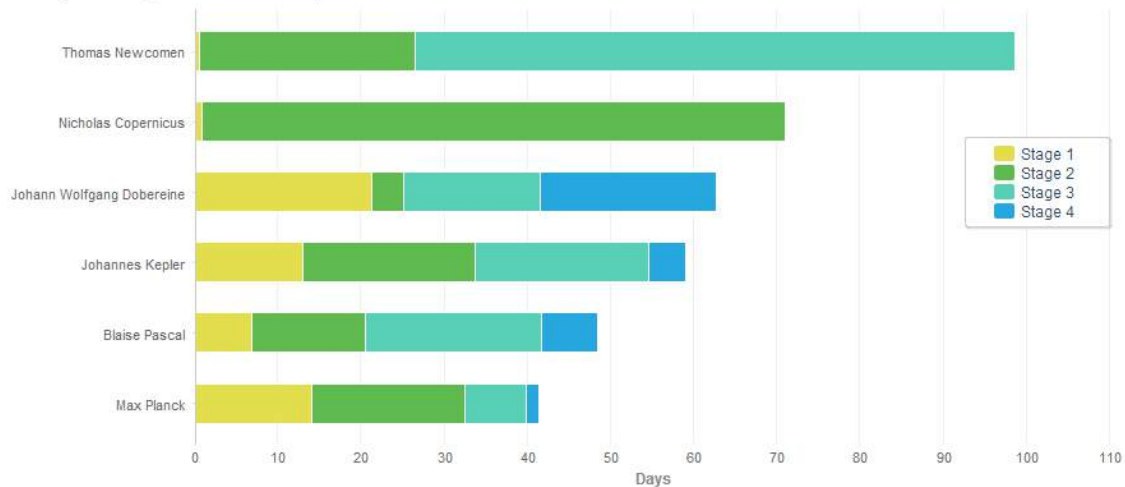
Sales Cycle

How long is the sales cycle for each employee?

Custom Last This To Date **Trailing**

7D 30D 90D **12M**

53 days on average for deals won in the previous 12 months

Legend:
- Stage 1
- Stage 2
- Stage 3
- Stage 4

Employees:
- Thomas Newcomen
- Nicholas Copernicus
- Johann Wolfgang Dobereine
- Johannes Kepler
- Blaise Pascal
- Max Planck

X-axis: Days (0 to 110)

The Metric
Average sales cycle by rep.

What it tells you
How long, on average, it takes each of your reps to move an opportunity from qualification to closing.
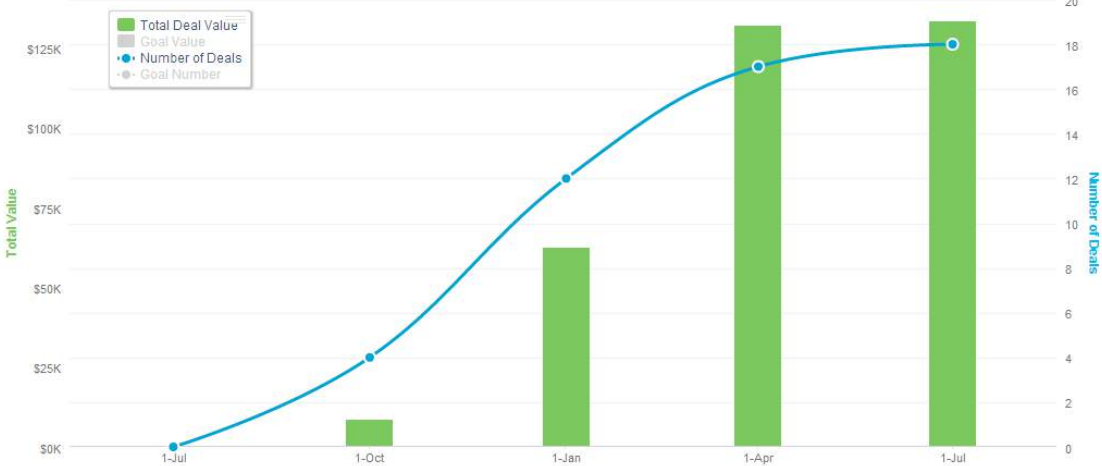
The Takeaway
How long your sales are taking can tell you a lot about your team's performance and sales process. It is important to not only look at your company's Win Rate, but to look at it broken down by individual rep. If your average sales cycle is increasing, you should examine your process to see which stages are routinely holding deals up and which of your reps are pushing deals through the fastest. Is one stage dominating the sales cycle for most of your reps? Identify these bottlenecks and coach your reps to improve their ability to push deals past them. In the report above, for example, you can see that many of these reps struggle to move opportunities past the third stage. However, some reps are doing a very good job at this. Talk to your high-performing reps about what they are doing to push deals along and incorporate this knowledge into your coaching sessions for your reps with longer sales cycles. With that said, sometimes longer sales cycles correlate to happier customers, so you should analyze churn rate by rep and identify the sales cycle that best correlates to high customer satisfaction.

Sales Bookings

How are our bookings trending over time?

$336,708 booked in the previous 12 months

Custom   Last   This   To Date   **Trailing**

7D   30D   90D   **12M**

The Metric

Number and value of deals booked during a given time period.

What it tells you

Are you booking more (and larger) deals over time? Are your reps in line with your goals for the month and quarter?

The Takeaway

Ultimately, revenue is the most important metric for your sales team, so it is critical to carefully track it over time – not only to see whether you are generating increasingly more revenue, but also to understand more nuanced aspects of your bookings, such as whether your average deal size is growing over time and whether you are on pace to hit rising revenue goals.

Review

Only by carefully measuring your sales team's performance will you be able to manage it effectively. In this eBook, we looked at the three main categories – **activity metrics**, **pipeline metrics** and **sales results** – through which you should be regularly measuring your sales team's performance and adjusting your sales process. By keeping these metrics in mind, you can be sure that you have all the information you need to make data-driven decisions about where to allocate resources, what you need to do to hit your number, and how to best coach your team for continued success.

Remember that this is an ongoing and circular process – what you learn about your sales results should influence which sales activities you emphasize and how you can better identify likely buyers. As this eBook outlined, managing your sales team is all about using the right metrics in three main categories:

- **Activity metrics** are the most fundamental way to ensure that your reps are taking the right actions to hit their quotas and close the most deals. However, it is not enough to simply track the number of dials they make or meetings they book – you must also track activity ratios so that you know that your reps are not only taking the right actions, but doing so in a way that generates opportunities and, ultimately, revenue. Finally, you should make sure that your reps are in line with the goals you have set for them.

- **Real-time pipeline metrics** help you track your pipeline over time so you can forecast bookings more accurately and identify the factors that are preventing you from hitting your number. They can also help you use historical date to better understand buyer behavior, such as how long a deal can spend in a given stage before it should be flagged as at-risk.

- Finally, **sales results metrics** help you look back and evaluate the success of your recent sales strategy. Are your reps meeting their goals? Are you converting a large enough share of your opportunities? Is your number of Won Deals trending upward? Only by analyzing the results of your reps' activities and your management decisions can you be sure you are taking the right steps to hit your number and promote sales growth.

What you learn from studying your sales results will help you go back and improve your team's performance in other categories. Are you losing a large number of deals for the same reason? Coach your reps to hone their messaging to address this issue. Are you losing more deals than you used to? Help your reps focus on the right deals by identifying likely losers.

There is no magic bullet or quick fix to improve your sales process – it takes careful analysis and a clear understanding of important factors. Tracking the metrics outlined in this book will help you create a dynamic and responsive sales process so you can improve results and hit your number.

#1 for Salesforce Analytics

About InsightSquared

InsightSquared is the #1 Salesforce Analytics product for small

and midsize businesses (SMB). Unlike legacy business intelligence platforms, InsightSquared can be deployed affordably in less than a day without any integration costs and comes preloaded with reports that real business people can use. Hundreds of companies and thousands of users around the world use InsightSquared's award-winning analytics to maximize sales performance, increase team productivity and close more deals. Based in Cambridge, Mass., InsightSquared was recently named one of the "Best Places to Work in Massachusetts" by the Boston Business Journal.
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