Sales Product Target

Report Module Guide: Sales Stage Target vs Actual

Module Location

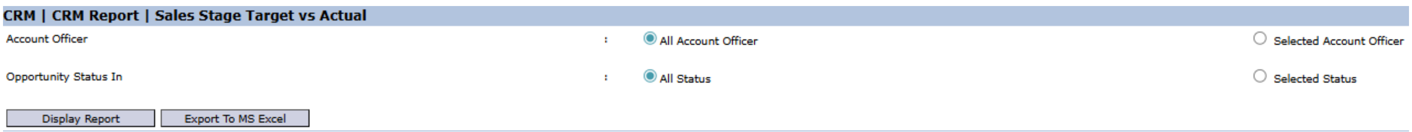
CRM > CRM Report > Sales Product Target

Module Objective

The **Sales Product Target** module is used to generate a report that compares the actual composition of a salesperson's sales pipeline with the percentage targets that have been set for them. This report is a managerial tool for evaluating whether a salesperson's pipeline is healthy and balanced, or clustered in specific stages.

1. Report Parameters

The main page of this module is a form containing various parameters to customize the report that will be generated.



Here is an explanation for each parameter:

- **Account Officer**:
    - Select **All Account Officer** to display the comparison report for all salespeople.

    - Select **Selected Account Officer** to choose one or more specific salespeople to be evaluated.

- **Opportunity Status In**:

    - Filter opportunities by their status.

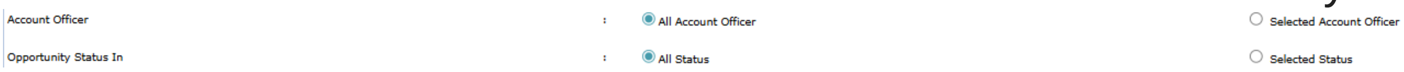
    - Select **All Status** to include all opportunities.

    - Select **Selected Status** to filter by a specific status (the most common choice is selecting the **"Open"** status to analyze the active pipeline).

2. Steps to Generate the Report

Step 1: Set Report Parameters

Select the **Account Officer** and **Opportunity Status In** that you wish to analyze.

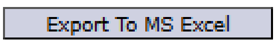


Step 2: Generate the Report

After all parameters are set, click one of the two buttons in the bottom-left section of the page:

- **Display Report**: To preview the comparison report directly on your screen.

- **Export To MS Excel**: To download the report data in an Excel file format.



3. Workflow & Integrated Business Process

This report is the culmination of several processes in the CRM modules:

1. **Target Setting**: A manager first sets the percentage targets in the **Sales Stage Target Percentage** module.

2. **Sales Activity**: The Sales team manages and updates the sales stage of each deal in the **Opportunity** module.

3. **Performance Analysis**: The manager uses this report (**Sales Stage Target vs Actual**) to compare the actual data from the Opportunity module with the targets that have been set.

Tips & Important Notes

- This report is used to answer questions like, "Is salesperson A's pipeline too heavy in the early stages and lacking in the negotiation stage according to their target?"

- To ensure this report can display a valid comparison, make sure the percentage targets have been set first in the **Sales Stage Target Percentage** module.

- This is a good **coaching tool** for Sales Managers to help their teams proactively manage their pipelines and ensure a healthy deal flow.

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