

TURNING CRM DATA INTO
INSIGHTS AND COACHABLE
METRICS

Finding Your Sales Scorecard Strategy



WHAT ARE SCORECARDS?

- **Activities**

- 100% in your control
- Dials, emails sent, social outreach

- **Results**

- The end results
- Quota, Revenue

- **Objectives**

- Early indicator of results
- set meetings, opps, connects

- **Efficiency or ratio metrics**

- Coachable metrics
- Connects>meetings, opps>Closed won, Emails sent>open

Why Scorecards?

Activities

- Calls
- Emails
- Social connections
- Referrals
- Face to Face meetings
- Webinar leads

Objectives

- Connects
- Meetings set
- Meetings held
- Opportunities
- Opportunity to closed won %
- Connects to meetings set %

Results

- Quota
- Revenue
- Retention
- Renewals
- Average order value
- Expansions or up-sells

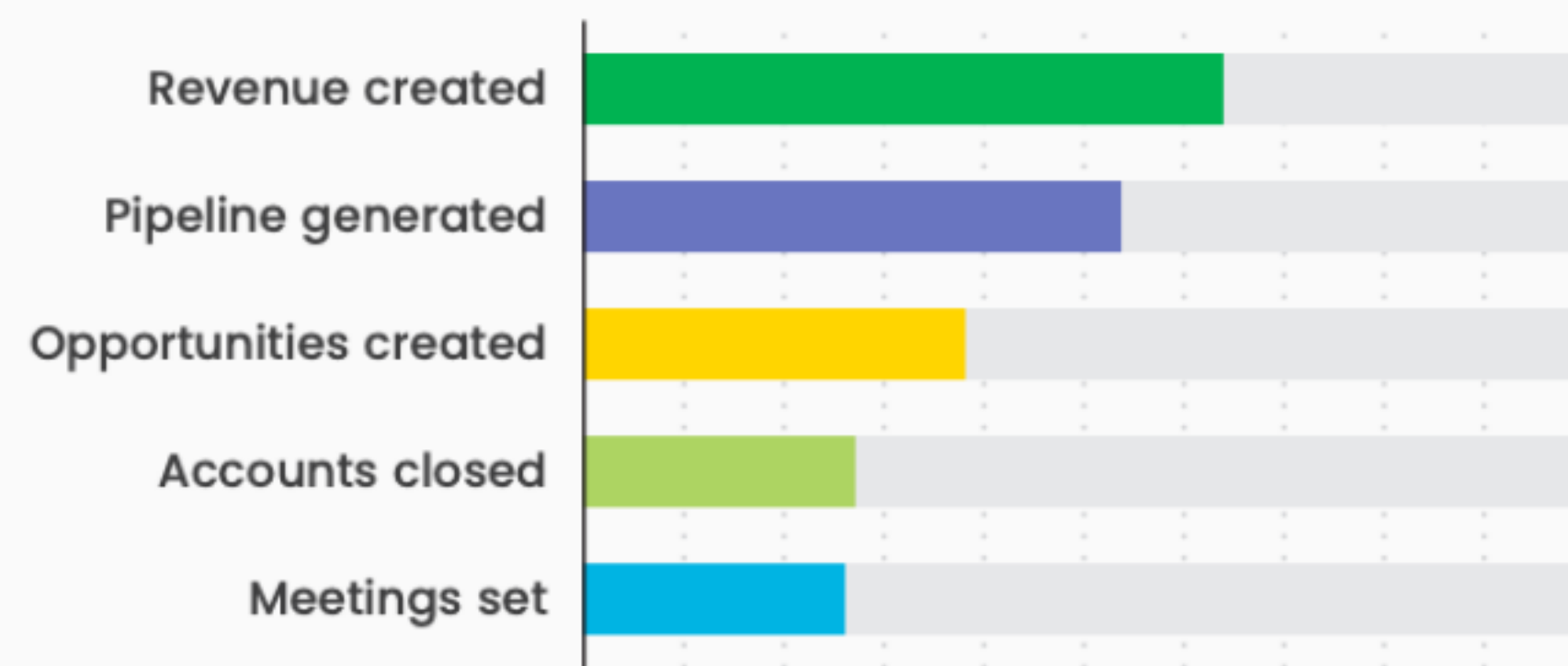
OBJECTIVE: MEETINGS HELD

71% of our polled respondents said that meetings held was a metric that mattered

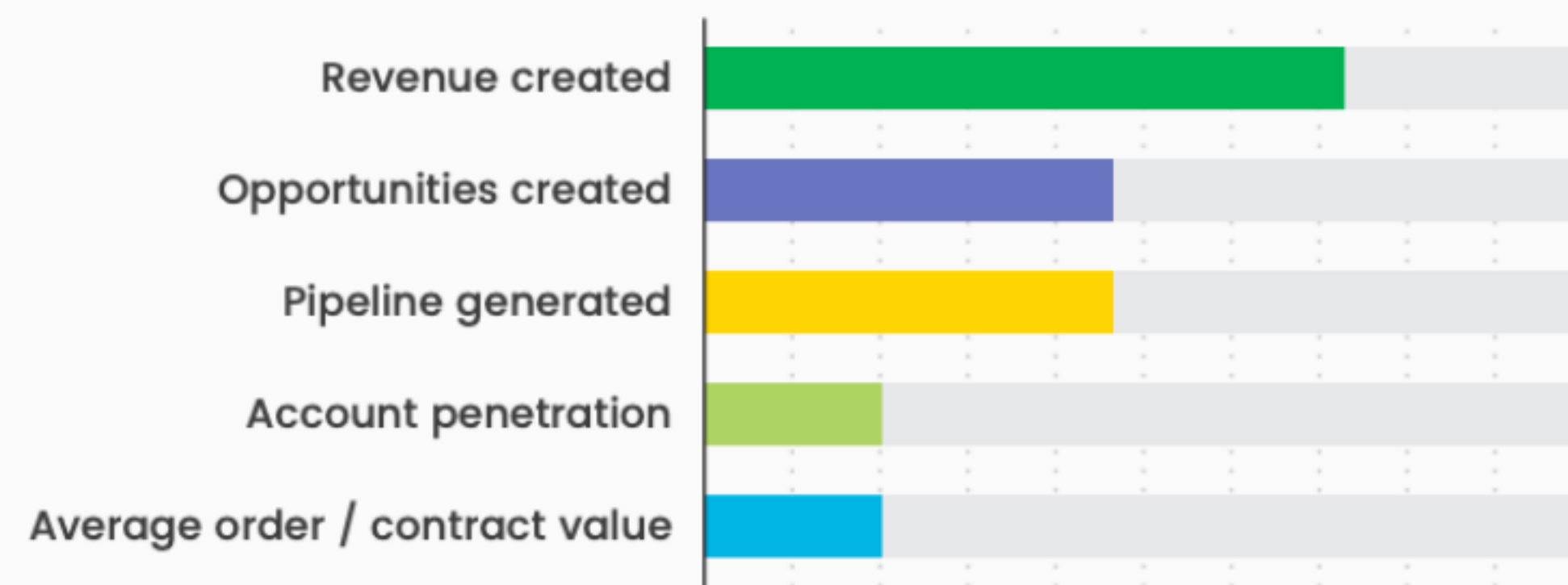


WE ARE MISSING THE EARLY INDICATORS OF SUCCESS

Top KPIs for sales leaders:



Top KPIs for sales reps:



How do coaches leverage visibility and scorecards to improve performance?

PROVIDE VISIBILITY WITH SCORECARDS AND LEADERBOARDS AND COACH TO EFFICIENCY METRICS





DETAILS

Today's
ACTIVITY SCORE

107 ?

This Month's
OBJECTIVE SCORE

17 ?

TODAY'S ACTIVITIES MONTH'S OBJECTIVES METRICS

Score Trend



Today



Calls

46 / 60

38.3

Emails/Social

Max: 100

82 / 60

68.3

Click on the metrics above for additional information



Activity Score

107





DETAILS

Today's
ACTIVITY SCORE

107

?

This Month's
OBJECTIVE SCORE

17

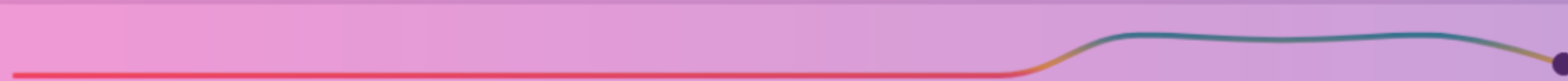
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TODAY'S ACTIVITIES

MONTH'S OBJECTIVES

METRICS

Score Trend



<

This Month

>

FSIs Completed (SFDC + Exception)

2 / 12

16.7

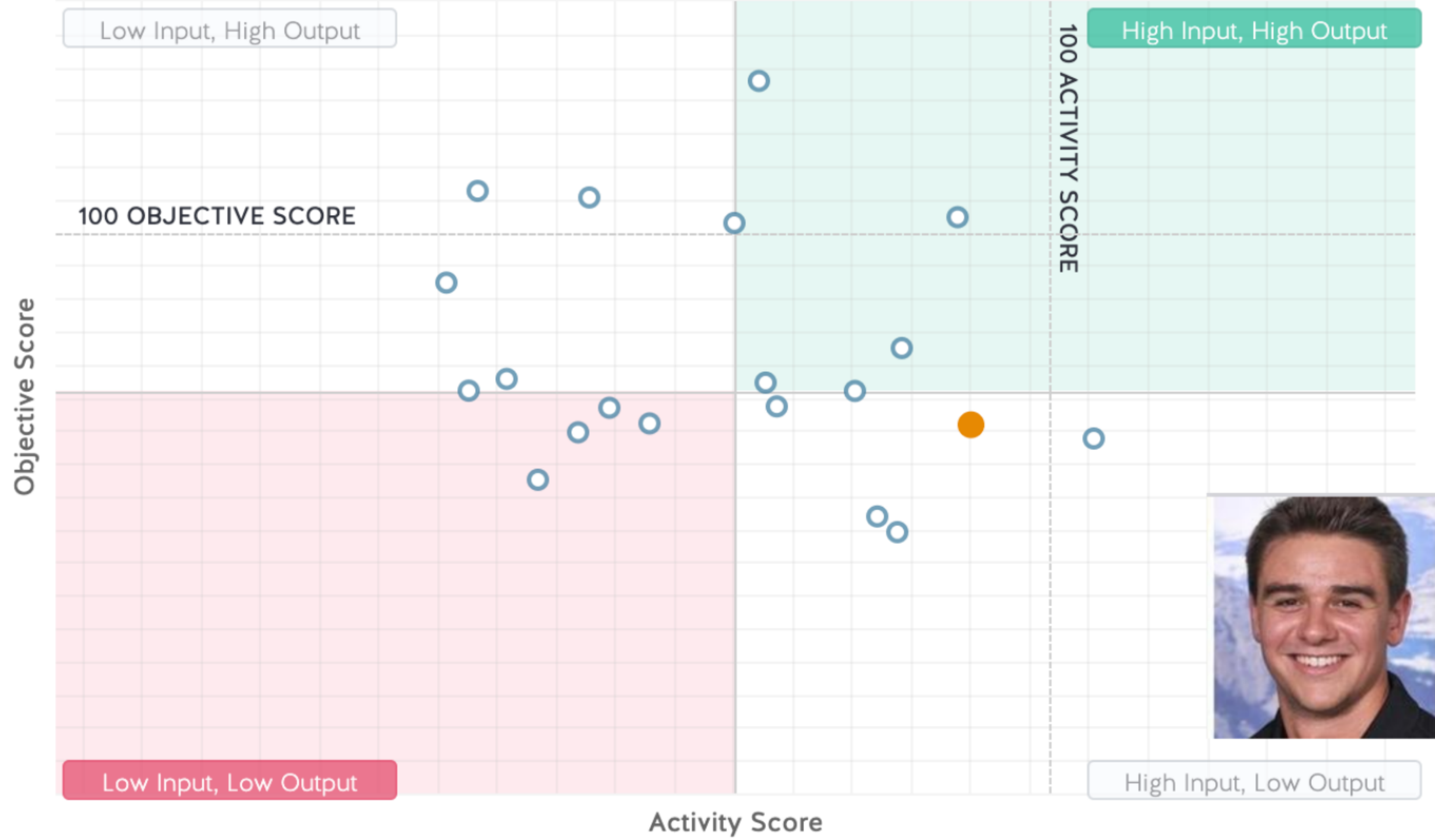
Click on the metrics above for additional information



Objective Score

17

FINDING YOUR CREATIVE NICHE | CHC 2020



SPM survey showed

32%





OF REPS SAY THAT VISIBILITY
INTO NUMBERS IS WHAT GETS
THEM MOST FIRED UP TO SELL



SCORECARDS PROVIDE INSIGHTS AND DATA FOR MULTIPLE METRICS AND MULTIPLE LEADERBOARDS

< BACK | Leaderboard

FILTERS Active Filters: METRIC: ACTIVITY SCORE TIME FRAME: THIS WEEK GROUPS: AUSTIN BRAKSICK TYPE: USER RANKING: PERCENT-TO-TARGET

| | | |
|-----------------------------|---|-----|
| 1ST Overall: 6th ▲3 |  Sean ANTHEM | 115 |
| 2ND Overall: 11th |  Beatrice ANTHEM | 93 |
| 3RD Overall: 12th ▼2 |  Joseph ANTHEM | 92 |
| 4TH Overall: 13th ▲11 |  Michael | 92 |



Xactly Closes Record-Breaking Year, Marks Strongest Performance in Company's 14-year History

Major Customer and Market Expansion, Additions to the Board of Directors and Multiple Acquisitions Bolster Sales Performance Management Suite

DON'T WE ALL WANT TO BE LIKE XACTLY?



Bound Tree



388%

INCREASE IN CALL VOLUME
WHEN BROADCASTING REAL-
TIME CALL METRICS FOR THIER
REPS



DEMANDBASE: 

31X

INCREASE IN MEETINGS SET BY
WEIGHTING DIALS HEAVILY IN
THEIR SCORECARD



Text SCORE to 33777

FOR A SCORECARD TEMPLATE
DOWNLOAD. IT IS A MANAGER
SCORECARD CONCEPT THAT
INTRODUCES ACTIVITIES AND
OBJECTIVES-STYLE METRICS FOR
MANAGERS



Scorecards Templates

Ready-to-use, plug-and-play sales scorecard
templates.

[GET STARTED →](#)