

Sales Report Overviews

Sales Rep Conversion Percentages

"I want to see the percentage of opportunities that are in one stage and move to another"

When to use:

- When trying to figure out percentage of stage moves from one specific stage to another
- When trying to analyze specific sales rep stage move percentage

Conversion Percentages (Created By)

"I want to see the percentage of opportunities that are in one stage and move to another based on who created them"

When to use:

- When trying to figure out which opportunity creators (users/system) are most effective
- When comparing auto-created opportunities to manually created

Stage to Stage Report

"I want to see the average days it takes to move an opportunity from one stage to another"

When to use:

- When looking for pipeline bottlenecks
- When looking for individual sales rep effectiveness

Opportunity Created Detail

"I want to see who is creating opportunities and/or who they are assigned to"

When to use:

- When looking for sales rep lead generation
- When looking for problems between who creates the opportunity and who works them

Call History Summary

"I want to see how many notes my sales reps are leaving"

When to use:

- When you want to see how many calls sales reps are making
- When you want to verify they are managing their Opportunities properly

Call Log Report

"I want to see the notes my sales reps are leaving"

When to use:

- When digging for specifics on sales rep interaction
- To check on the quality of the notes being left by sales reps

Sales Pipeline Summary

“I want to see all my pipeline movement within a given date interval”

When to use:

- When looking for a high level flow of the pipeline
- When looking for stage ‘sinkholes’; aka lots of people enter but not many leave

Sales Pipeline Detail

“I want to see individual pipeline movement within a given date interval”

When to use:

- When looking for specific stage-to-stage move details
- When looking for stage move trends

Opportunity Revenue Forecast

“I want to see how much money is in the pipeline and my weighted chances of closing”

When to use:

- For sales rep revenue forecasting
- For recurring revenue forecasting

Opportunity Sales Report

“I want to see how much money we actually made in orders and number of closed opportunities by rep”

When to use:

- When looking for revenue generated by sales rep
- When looking for average revenue generated

Sales Cycle Report

“I want to see how long people are staying in stages per sales rep”

When to use:

- When looking for pipeline bottlenecks
- When analyzing individual sales rep efficiency

Opportunity Pipeline Summary

“I want a global overview of my entire pipeline”

When to use:

- For a high level quick view of the entire pipeline