

Evaluate Sales Rep Effectiveness🔗

There are several Sales Reports (**CRM > Reports > Sales**) that will help you evaluate sales rep effectiveness by individual or team. You can use these reports to educate and strengthen your sales team and see who is best at identifying qualified leads.

Sale Rep Conversion Percentages

The sales rep conversion percentages report shows who is most effective at moving opportunities from stage to stage, by percentage. You can filter this report by date ranges, stages, teams, and individual users. A high move percentage indicates a sales rep is actively engaging with the prospects to keep them from stalling in the pipeline. You can also see the percentage of opportunities that are moved from new opportunity to the "won" stage to see overall close percentage.

Conversion Percentages (created by)

The conversion percentages (created by) report shows who is most effective at identifying and creating qualified opportunities. You can filter this report by date ranges, stages, teams, and individual users. This report displays the move and close percentages based on the person who created the opportunity instead of the responsible sales rep. If you use a qualifying team to filter sales leads, this report can tell you who is most effective at the qualifying process.

Stage to Stage Report

The stage to stage report shows the number of leads a sales rep has moved from one stage to the next within a specific date range. It calculates the average number of days the rep takes to move leads out of the first stage you select based on the total number of days for all of the leads in that stage divided by the total number of leads moved from the first stage into the next. You can filter this report by move date, "from" and "to" stage, as well as sales rep and /or sales team.

Sales Cycle Report

The sales cycle report shows the average number of days an opportunity remains in any given stage. This is a consolidated report that combines the total of number of days opportunities remain in a stage and divides it by the number of stage moves. It lists the sales rep, the total number of opportunities assigned to the sales rep, and the average number of days it takes the rep to move the stage. A low average generally means the sales rep is actively working with their prospects to keep them moving through the sales pipeline. A high average may mean that a sales rep has too many opportunities assigned to them and / or needs training on how to work with prospects more effectively. You can filter this report by sales rep, user group, and date range.
