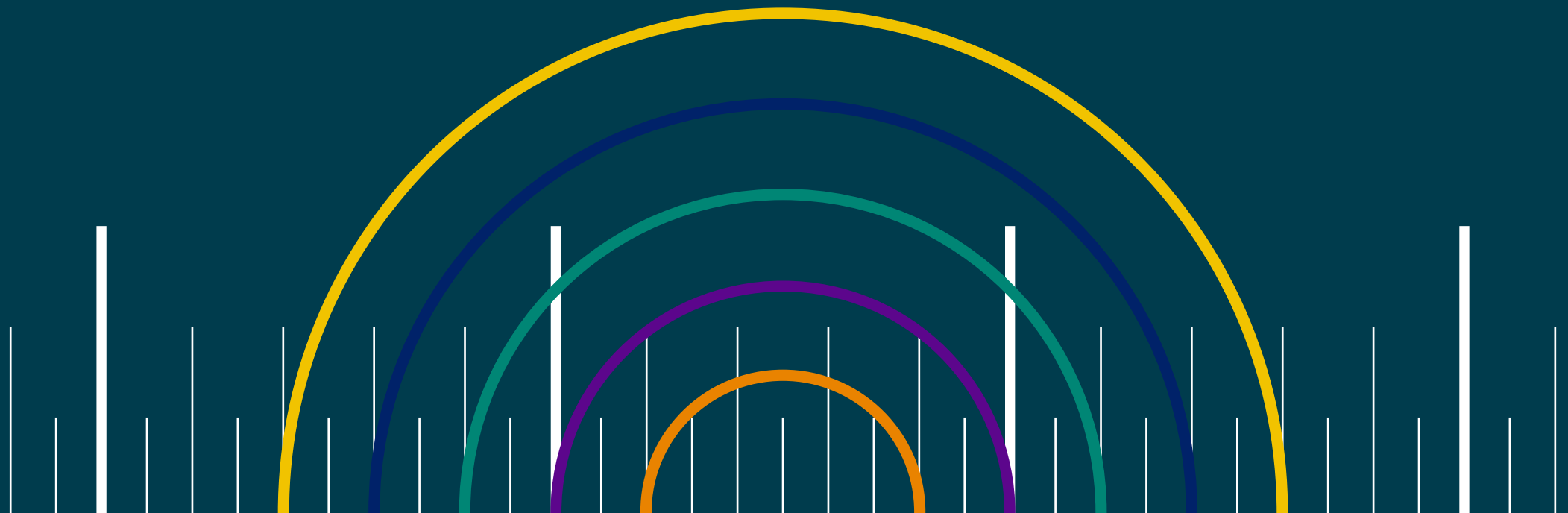# The sales metrics that matter: Six experts, six themes, one invaluable guide

salesforce

Sales leaders from the UK & Ireland reveal
the KPIs and tactics that keep them successful
in a multi-channel world

Introduction:
What's the story behind your metrics?

Modern business generates vast quantities of data that can help sales leaders improve pipelines and increase the sales team's performance.

But if we're completely honest, we're all too busy, and too under pressure to sift through, digest and interpret everything – especially when the data is changing so quickly.

You have to keep your eye on the ball. But which one?

How should you prioritise what you track? Which metrics are most important, what can they tell you about your business, and how can you best act on them?

We found the people with the answers.

Six experts, six themes, one eBook…
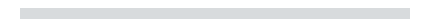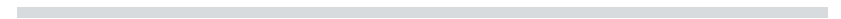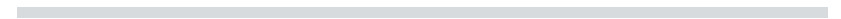## …and a wealth of insights

This eBook is about using the right metrics, in better ways, to improve sales performance quickly. It contains at-a-glance tips and insights from six UK and Ireland-based sales leaders who are using data to achieve new heights of success.

You'll see how our panel choose the metrics that matter, and how they use those figures to build pipelines, motivate reps and communicate performance to senior management.

We hope it'll inspire you to see your own metrics in a new light.

(Our panel is drawn from different industries across the UK and Ireland, but one thing they all have in common is that they're using Salesforce Sales Cloud to visualise and track key indicators. Learn more about Sales Cloud.)
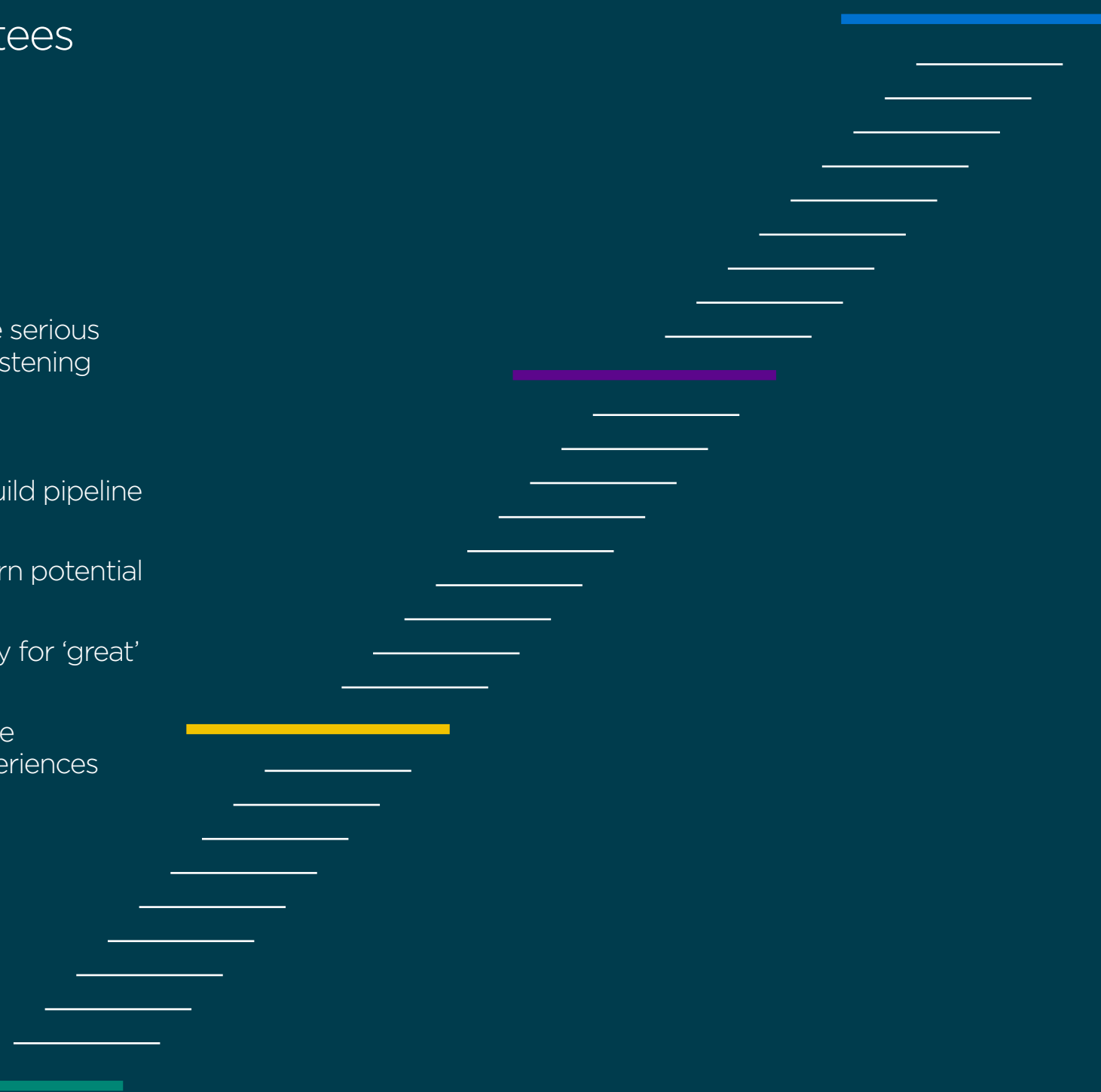
Meet the metrics devotees

The six sales leaders in our panel are serious about metrics. For them, it's about listening to the heartbeat of their business.

Above all, it's the cue for action:

• Identifying exciting new ways to build pipeline and improve close rates

• Knowing when to intervene – to turn potential problems into successes

• Seeing when there's an opportunity for 'great' to become 'outstanding'

We'd like to thank them for their time and generosity in sharing these experiences with us.

Meet the metrics devotees

Bruce Bratley
Founder and CEO, First Mile

Bruce Bratley founded First Mile in 2004 to deliver Easy Recycling services to city centre businesses. First Mile helps 12,000 city centre businesses achieve high recycling rates at low cost.

Bruce started in business aged 12, selling produce he had grown on the family farm. He completed a degree at Edinburgh University, followed by a Ph.D. in Marxism and the Environment. Bruce has worked in the environmental sector for 20 years with previous roles at Valpak, Wastelink and Envictor.

Leigh Phillipson
Sales Director, Wahanda

Leigh Phillipson is Sales Director at Wahanda, Europe's largest hair and beauty online marketplace, where customers can browse and book appointments at over 6,000 UK spas and salons.

Wahanda is growing at 200% year on year, with member spas and salons seeing an average bookings increase of 25-30%. Founded in 2012 by Lopo Champalimaud, Wahanda is backed by investors including Fidelity Growth Partners, RGIP and Lepe Partners.

Sanj Bhayro
Area Vice President, Commercial Sales, EMEA, Salesforce.com

Sanj Bhayro is the Senior Area Vice President Leader for Small & Medium Business across Europe, Middle East and Africa for Salesforce.com. In his eight years at Salesforce, he has managed across multiple regions and market segments, and is currently focused on small & medium business growth.

Sanj is committed to aligning and helping start-ups and fast growing companies achieve success. He has 15 years' experience in technology across various industries and segments in EMEA.

Meet the metrics devotees
Continued...

Nick McClellan
Sales Director, RAM Tracking

RAM Tracking offers GPS-based tracking systems for fleets and vehicles. Named by Fleet News as the 'next generation' of tracking, it is renowned for its simple and easy to use interface.

Nick joined RAM as a Business Development Manager in the company's first year of trading. After securing numerous key contracts and helping grow the sales department, he earned his status as Sales Director where he now oversees all internal and external sales teams both in the UK and Canada.

Jim Hand
Sales Director, Bryan S Ryan

Bryan S Ryan is an Irish owned and managed business, operating in Ireland since 1948. The company has gone from strength to strength and is now the largest and most technically-advanced supplier of managed print devices to Ireland's corporate and SME sectors.

Three years after joining Bryan S Ryan as an Account Manager, Jim Hand set up the National Accounts Division which he successfully ran until he was promoted to General Sales Manager in 1999. Jim became Sales Director in 2007, retaining direct responsibility for a team of dedicated Account Managers.

Paul Garner
Global Director of Sales, Dialogue.net

Established in 1994, Dialogue specialises in delivering mobile messaging and mobile billing solutions for businesses large and small, around the globe.

Paul joined Dialogue's Sydney office in 2008 with the objective to ramp up sales activity in Australia and New Zealand. After successfully achieving this goal, he then took on the responsibility of overseeing the expansion of the commercial side of the business into South East Asia.

In 2011 Paul took on the Global Head of Sales role for the Messaging division of the business, and today manages sales teams across Australia, Singapore, Philippines, South Africa and the UK.

Chapter guide

Focusing on six themes, this eBook contains six sales leaders'
real-world experience of using metrics to boost sales in
a multi-channel world.

0.1
How metrics & dashboards
give you an edge

How metrics & dashboards give you an edge

What are the main business development challenges that our panel have faced? And how have their approaches to metrics and dashboards helped them succeed?

Leigh Phillipson
Wahanda

Wahanda is growing rapidly, especially in the Sales function. We must target the right venues and get them online swiftly. Dashboards help us to highlight which venues we should be visiting and bringing into our marketplace. Dashboards and the metrics behind them can give you real-time insights into the activities of the field sales team. For instance, how many customers have they spoken to? And what were the outcomes and conversion rates? These figures allow you to customise how you manage each member of the team to maximise their productivity.

Bruce Bratley
First Mile

Many of our customers are small companies. The business development challenge is to win these in volume and track thousands of leads simultaneously. We have to carefully select the right type of customers and then nurture them into high revenue, high margin, recurring customers.

Metrics and dashboards have enabled us to track progress and summarise large data sets in a succinct and useful way. Monitoring the pipeline and the quality of customers has allowed us to grow profitably. We use metrics to ensure we look deeper and watch the margins in a sector where these are easily eroded.

Nick McClellan
RAM Tracking

Metrics and dashboards have given us enhanced control, visibility and accountability. We adopted an holistic view to monitor and measure business activities. This has started with the basics, through to ensuring we get a sound return on lead generation spend. Dashboards and metrics allow us to focus our efforts where they deliver the optimum result. They offer a shared perspective, giving our entire workforce an overview of our success, in an easy-to-interpret, visual presentation.

"Dashboards and metrics allow us to focus our efforts where they deliver the optimum result."

Nick McClellan
RAM Tracking

Jim Hand
Bryan S Ryan

We're in a highly competitive industry. Traditionally, we've always sold through getting to know the customer well but that's not easy with a rapidly-growing customer base. Retaining and developing customers is a bigger challenge than sales.

Our Salesforce solution has become a deposit of information, helping us to ensure we maintain and build relationships. With metrics and dashboards, our responsiveness to customers has increased greatly. Incoming leads are directed to the appropriate account manager and we have complete management of opportunities through every phase. By using tracking and alerts, this simple but effective procedure has helped us to convert more new business and grow our existing business.

Paul Garner
Dialogue.net

We have increased revenue and profit by implementing a robust infrastructure with the optimal performance conditions for reps. We can forecast accurately for three and six months ahead and we're intending to tie in post-sales with pre-sales so we can tweak our metrics or use further metrics. We'll benefit from dashboards that show trends over time, for example, for an operator, country, traffic and margin. Having a granular view of data provides real understanding that some of our competitors don't have. We can look at trends and share data with our clients. We can identify threats before they become serious, as metrics are flagged if they drop below certain thresholds. This will enable us to stay ahead in the marketplace.

Key Takeaway
Metrics and dashboards are essential tools for any Sales organisation looking to grow revenues, meet customers' needs and beat the competition.

0.2
Which metrics motivate
reps the most?

Which metrics motivate reps the most?

Leader board rankings, lists of shame, monthly
targets, financial rewards, gamification and
other incentives can help to motivate reps.
But which metrics work best... and which should
be avoided?

Paul Garner
Dialogue.net

We're moving to a leader board based on the
uptake of the new methodologies, different
tasks and KPIs over a month. The top scorer
against these gets a gift card. However,
you have to be very careful over anything
you make public in case some people feel
bad (while others feel good). If goals are
attainable and everyone has an equal chance
of succeeding, then it's OK to have someone
in last place.

Leigh Phillipson
Wahanda

Reps are motivated by hitting targets. But
at the start of a month or quarter, these can
have a negative impact, with reps wondering:
'how do I get there?'. Getting transfixed by
sales figures alone can actually halt progress.
In my experience, it's important to really
break it down to what the salesperson can
control day to day.

Calls, presentations, appointment setting and
crossing doors on foot will all ultimately drive
sales if done correctly and you understand
the conversion rates. If you provide an
environment where inputs and pipeline
building is tracked and acknowledged, you
will see an increase in the end sales. This will
also identify where some people in the team
may need extra support.

Bruce Bratley
First Mile

Business development people are motivated
by money. They know this will be because
the company is successful. In my view, the
metrics that work best are: total sales (not
just from new wins); profitability; and cash
collection. This last point links back to good
customer selection. We know which types
of customers are bad payers and we show
these numbers. At our company, no cash
means no bonus!

Nick McClellan
RAM Tracking

For us this has to be number of units sold,
which is displayed on our leader board
through the Hoopla gamification app. Reps
want to be at the top, so this bring out a
healthy competitive spirit throughout our
team and keeps everyone on their toes.

"Getting transfixed by sales figures alone can actually halt progress... it's important to really break it down to what the salesperson can control day to day."

Leigh Phillipson
Wahanda

Jim Hand
Bryan S Ryan

For account managers to reach targets and achieve bonuses, they need to be selling to a large number of accounts. What motivates reps is the detailed metrics we get from Salesforce that show how accounts are progressing. It's also vital information for managers. Without that focus, you're simply leaving things to chance which is not something any business can afford to do.

Leader boards can play a part but it's more than one final figure. We offer rewards for certain sales categories. The more detailed information a rep has on a client, the better equipped they are to ensure they retain that customer. This all feeds back to greater productivity, increased levels of gross profit and superior account management.

Sanj Bhayro
Salesforce.com

We use dashboards to motivate reps and influence their behaviour. The great thing about shared dashboards is that reps can see how they're doing compared to everyone else, in real time. You can have a 'hall of fame', with leader boards showing things like who has the most closed-won deals and the biggest pipe creation (or whichever metrics matter most to you and your reps). Then you can share your 'hall of shame' by highlighting reps who continually push opportunities, or who don't follow the correct steps in your sales methodology or undertake the right activity. We call this one a 'clean your room' dashboard, because it lets the Sales manager spot the reps who need to clean up their pipe. Nobody wants to be at the top of that one!

Key Takeaway
Accurate, real-time metrics can be used creatively to motivate individuals and teams. Financial and other rewards will connect with the natural, competitive DNA of reps. But people must always feel that targets are within reach – and small steps will take them in the right direction.

"We call this one a 'clean your room' dashboard, because it lets the Sales manager spot the reps who need to clean up their pipe. Nobody wants to be at the top of that one!"

Sanj Bhayro
Salesforce.com

0.3
How can Sales and Marketing
team up – and win?

How can Sales and Marketing team up – and win?

Selling has changed in the past few years, as buyers do more research online before engaging with a salesperson. Which metrics should sales leaders be tracking in this new climate? And how can Sales collaborate with Marketing to identify the most promising leads?

Bruce Bratley
First Mile

Online is important for us. We enable customers to buy and specify services through mobile. We also invest heavily in web marketing to drive growth and track which phrases people search for. We base our paid Google ads on this intelligence. Identifying popular landing pages and the route taken through the website helps us identify where we need strong web pages. The most important marketing metric (alongside the amount of leads and enquiries) is the source of incoming enquiries. Attributing enquiries to specific campaigns (down to the sales rep who delivered the message) helps us to see which campaigns bring in the greatest return, compared to their cost.

Nick McClellan
RAM Tracking

We track each prospective customer's interaction with our website, landing pages and online ads, making analysis easy. We can drill down into the detail, looking at specific keywords, easily identifying the strongest and realigning our spend to reflect this. We can track interaction with online resources such as brochures downloaded, videos watched and forms submitted. This all gives us an invaluable insight into what makes a successful conversion rate and close ratio.

Sales directors should focus on the success of lead generation tactics. Put simply, which enquiry sources are generating the most closed/won business? You can see those with the biggest return, contributing the largest opportunity value to the sales pipeline and the most successful close ratio. These can be identified in dashboards and reports, but more specific activities such as events can be added to Salesforce Campaigns.

Leigh Phillipson
Wahanda

Sales directors need to understand the market at a very local level to ensure their sales teams are selling the right products to the right people. We use metrics to ensure the team are bringing quality venues and choice of venues in areas where people are showing a demand through online searching and demographics. With this approach, you can guide your sales teams in a very effective way. Reps need to work closely with marketing colleagues and use the same data to ensure that sales activities will mirror marketing activities, so supply meets demand. Salesforce helps us to bring these projects together.
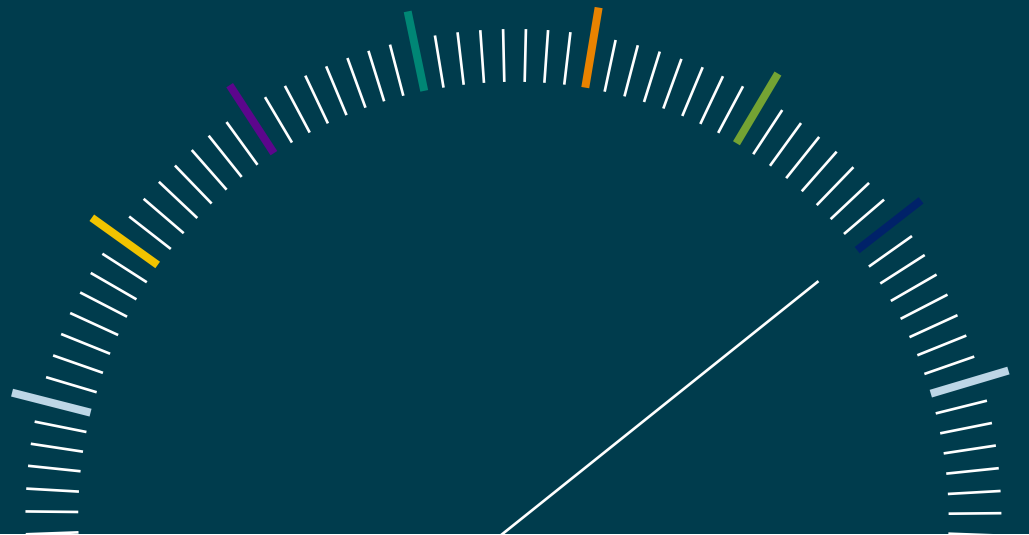
Key Takeaway
Marketing data delivers rich insights that can be used to identify pockets of demand and enable sales teams to focus on the segments and prospects that will deliver the best returns. When Sales and Marketing use the same data, they can align their activities closely to maximise conversion rates from every campaign.

"Reps need to work closely with marketing colleagues and use the same data... so supply meets demand."

Leigh Phillipson
Wahanda

0.4
What makes
a killer dashboard?

0.4

What makes a killer dashboard?

We're in an age of information overload… 24/7 across multiple devices. Amid the deluge of email, news and data, it's easy to miss what matters most. So which metrics will cut through the noise for senior management?
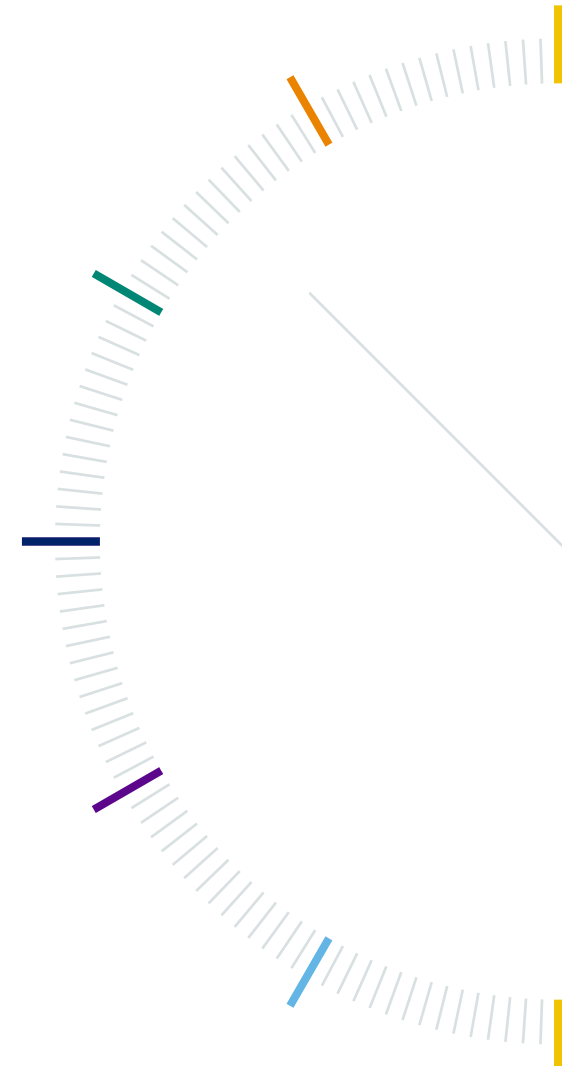
Sanj Bhayro
Salesforce.com

Creating a killer dashboard is key to tracking and using information to motivate your sales reps to new heights of performance. But before you even start thinking about metrics, make sure sales reps are keeping their information up to date. Sales metrics don't just matter to you – they drive the whole business. Get together with senior management, Marketing, customer service and HR – and decide the important KPIs that will drive the business forward. Once you're all agreed, a good CRM solution will let you share the metrics that matter to everyone. This enables transparency which improves alignment, collaboration and action.

Look at the whole funnel. A dashboard that also includes marketing metrics can provide huge insight into what your opportunities are interested in. You can track their whole journey from the top of the funnel, to see what content they've downloaded, what they've looked at on the website, and even (with a system like Salesforce) what they've been discussing on social media. That can provide lots of fantastic information for understanding their thinking and for starting conversations. But keep it simple. It's easy to get overwhelmed. Decide on a few key metrics that are important for your business, and have a system that lets you drill down into data when you need more information.

Bruce Bratley
First Mile
I would focus on customer selection, lifetime sales value (12 month cycle recurring) and margin (profitability). Don't chase headline sales but look at the bottom line (First Mile could be twice the size it is today but make 50% less profit!). Salesforce understands what a customer is really worth and tracks this carefully, but a lot of business development teams don't. If you have a recurring revenue model then analyse and report on the 12-month value of new customers and the lost ones.

Nick McClellan
RAM Tracking
I would highlight current and future revenue. I want to know we're doing well now, but I also need to know it is sustainable in the longer term. Salesforce has made these convenient to locate and analyse, as my reports and dashboards are already in existence, automatically updating so I always have an accurate view of business activities. Gone are the days of trawling through spreadsheets and working through calculations, it's all at my fingertips, anytime, wherever I am and on any device.

Key Takeaway
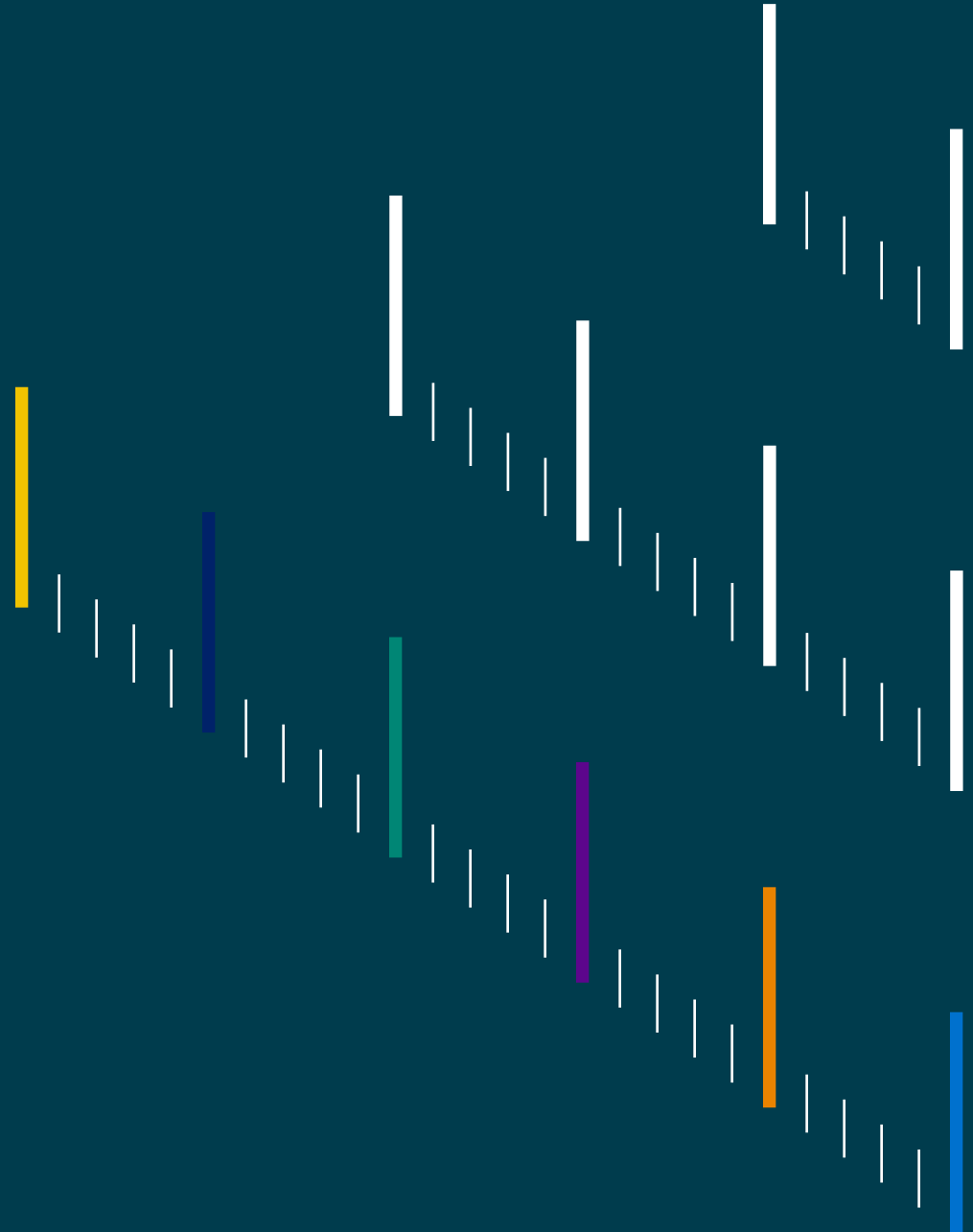Make sure reps are keeping their information up to date. Keep your dashboard simple. Focus on what matters most to you and to other key stakeholders – so results can drive actions across the business.

"Gone are the days of trawling through spreadsheets and working through calculations, it's all at my fingertips, anytime, wherever I am and on any device."

Nick McClellan
RAM Tracking

0.5
Sales-critical metrics:
The ones that got away

Sales-critical metrics: The ones that got away

With so much data available, it's easy to overlook crucial information that could make a huge difference to sales performance. What types of metrics should sales leaders measure but often don't?
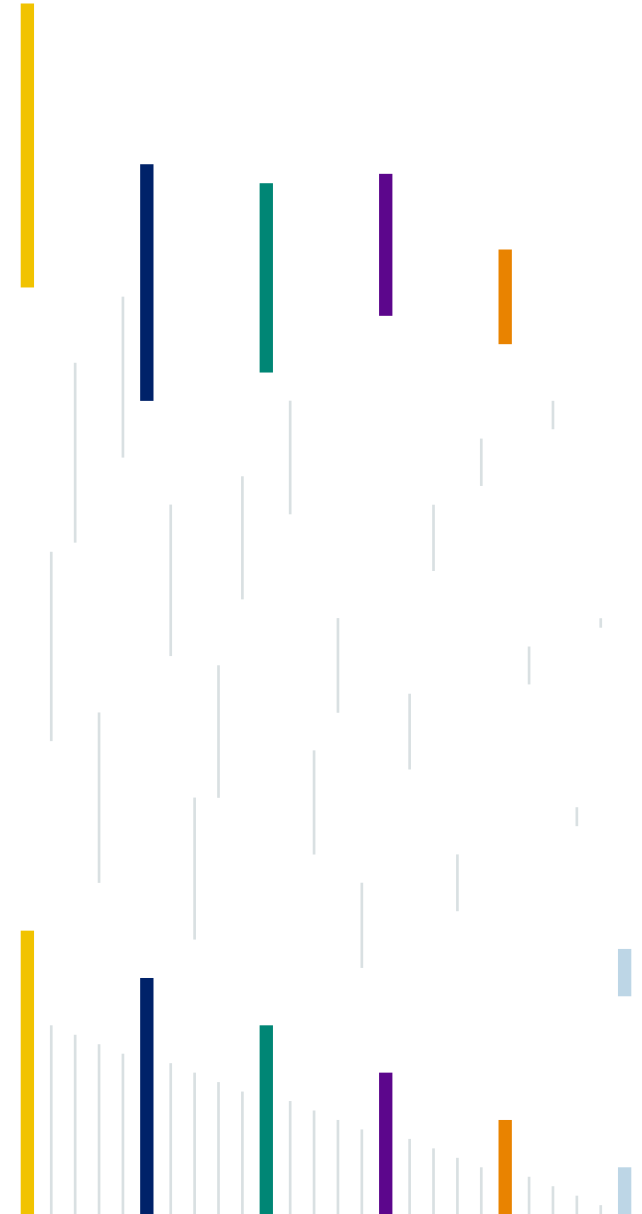
Bruce Bratley
First Mile

Business development teams should measure lost customers and understand why they are leaving and at what point. They should also measure the 12-month revenue from a customer and refer back if a customer has 'sized out'. Business development teams may think they have done heroic work but the customer might turn out to be of less value than a smaller initial win that goes on to open five more branches or hire 100 more staff. We measure and size customers as they progress through their first and subsequent 12-month cycles to check their scale and profitability. For us, location is also very important. A big customer which is 10 minutes from the next nearest customer is not as profitable as a small customer next door to existing customers.

Leigh Phillipson
Wahanda

One thing I don't often hear about being measured in a metric is training and development - and the uplift on results. Sales managers and directors have a level of responsibility to train and develop their team and this often involves significant investment. It seems to make sense that this should be tracked and its impact measured over the subsequent weeks/months. If doing field accompaniments and training days don't improve the approach of the sales team, improve outputs and make working practices more effective, it would be easy to argue that this training and development needs to be adapted and improved.

Sales-critical metrics: The ones that got away
Continued...

Sanj Bhayro
salesforce.com

Choose metrics that let you influence sales performance. Lots of sales managers just track top line figures: pipe, productivity, close rate. But if you want to actively increase your closed-won rate, you need to dig one level deeper to see what's really going on. I look at how long opportunities have been in the pipe, and how quickly they are moving. These metrics give a much more accurate picture of how much is likely to close in the current quarter. They can also highlight problem areas with the pipe and identify reps who need to do more work to close the opportunity. You can then take action to ensure opportunities get moving faster.

Nick McClellan
RAM Tracking

Pushed and stalled opportunities are often forgotten, as well as the number of days that any lead has stayed within a particular sales cycle stage. These are vitally important as they allow you to spot any knowledge gaps within your sales team and help improve them to produce better results.

Furthermore, pipeline closed stage percentage can reveal much about what needs to be fed into the pipe to achieve the desired number of closed/won business out. Many sales directors don't measure any of the above as they simply do not have a system advanced enough to do so.

Key Takeaway
Seeing what happens over time emerges as a common theme. Point-in-time data is valuable. But being able to chart the changing size of customer accounts, the outcomes of training and the speed at which opportunities are moving through the funnel provides richer insights.

"Business development teams may think they have done heroic work but the customer might turn out to be of less value than a smaller initial win..."

Bruce Bratley
First Mile

0.6
Dashboard essentials:
My top three metrics revealed

Dashboard essentials: My top three metrics revealed

Coffee in hand, you fire up your laptop (or smartphone, or tablet)... Which are the metrics you always look at first? Our panel each reveal their top three indicators.

Nick McClellan
RAM Tracking

• I focus on pipeline as this is the fuel my company requires.

• My marketing dashboard measures campaign effectiveness, ROI and lead generation so we don't waste marketing resources.

• Our business is built on the principles of customer support. Customer success is at the heart of our tracking culture.

Leigh Phillipson
Wahanda

• The activity conversion rates dashboard provides me with full insight into the top of the sales funnel as well as individual activity.

• I watch the choice of venue being provided on our website per area.

• The sales trends graph gives me insight into everything from seasonality to training.

Sanj Bhayro
Salesforce.com

• I look for the key deals pipeline coverage for the next quarter because I can influence that this quarter.

• Deal velocity tells me how much business is closing day-by-day versus last month and the month before.

• Historical trends break out key deals compared to last year in terms of count and value.

Paul Garner
Dialogue.net

- I follow the tracker trends and the margin trends.

- Pre-sales metrics are very important. Are we likely to get the right number of new business accounts signed?

- Any decline in traffic levels from a customer will also raise a flag that tells us something.

Bruce Bratley
First Mile

- I watch for leads coming in and their status.

- Re-buy rate (i.e. recurring revenues) is another key metric.

- The customer type in each stage helps us to make sure we are getting good stuff in through marketing and then converting and keeping it.

Jim Hand
Bryan S Ryan

- I like the metric between new business and existing business.

- I also like to see activity metrics.

- I need to know how many new people we've talked to. You can have a great website, SEO and marketing, but none of it is worth one cent unless you follow it up.

Key Takeaway
Successful sales leaders are passionate about their personal dashboards. The top three metrics will be unique for each business – but customer trends and their implications always demand the closest attention.

"You can have a great website, SEO and marketing, but none of it is worth one cent unless you follow it up."

Jim Hand
Bryan S Ryan

Further reading:

Like to know more about how you can use metrics and dashboards to increase your sales performance?

The nine principles of Killer Dashboards has more tips and insights for forward-looking sales leaders.

> **Download now**

Postscript:
A platform to track it all

Keep your eye on the ball with feature-rich dashboards... wherever you are

At Salesforce, everything we do is about helping you become a more successful sales organisation. Our Sales Cloud isn't just the world's best sales app for the social, mobile era, it's also got some of the clearest, most customisable and most downright addictive dashboards around.

So if you think your current metrics and dashboards aren't doing a good enough job, have a look at what Sales Cloud can do for you. It could be the start of something big.

Watch demo | Take free trial

salesforce sales cloud