

**FORCELOGIX**  
Turning the Art of Selling into Science

# Sales Force Optimizer

## Empowering the Sales Management Process

2008

*“What gets measured...gets done!”*



- Introduction to Forcelogix
- The impact of Sales Management Process Optimization
- Defining Sales Performance Indicators that impact results
- A Day in the Life with SalesForce Optimizer:
  - Tracking goals and performance versus actual results seamlessly
  - Coaching and mentoring sales individuals to increase performance
  - Trending of sales performance over time
- Next Steps



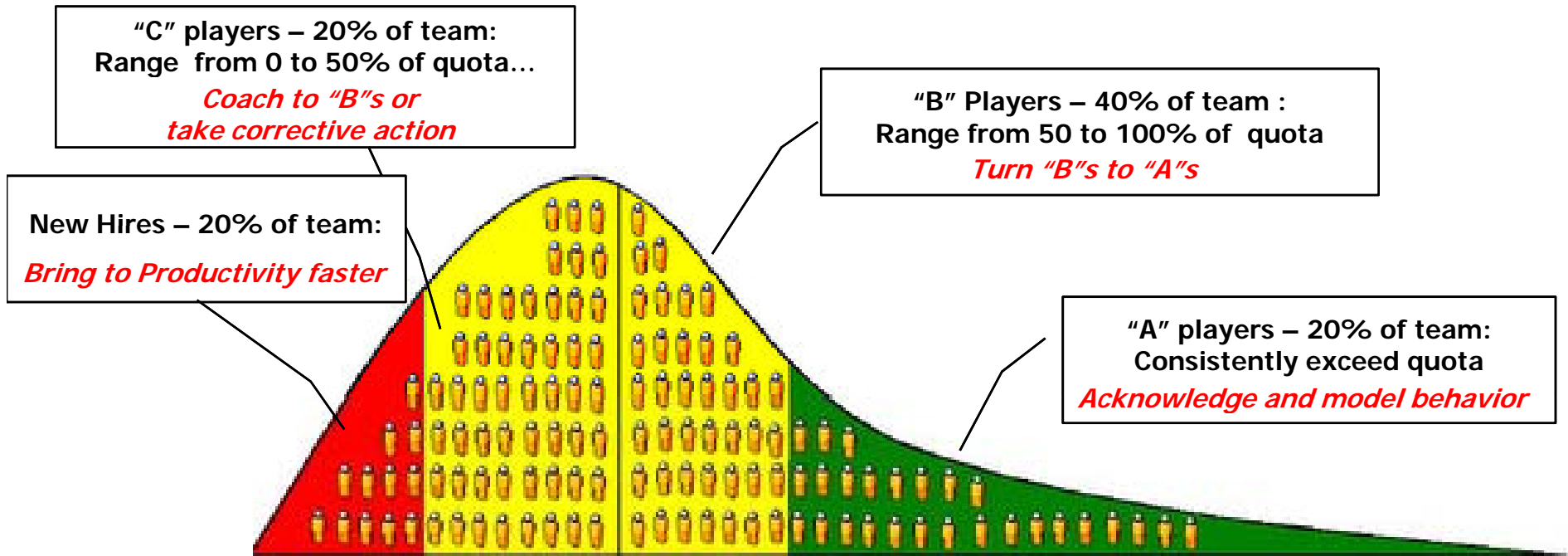
## Sales Performance Visualization And Optimization



- Founded by Senior Sales Executives *who saw...*
- Lack of applications to develop and manage sales talent so we...
- Built solutions to provide sales management with *Actionable Insight*
- Product Line: Sales Force Optimizer
- Mission: Turning the Art of Selling into Science...

# Potential for Sales Management Optimization

Goal: Maximize the yield of Each Sales Resource: Studies Show: ↑ 25% - 50%



## By Providing Actionable Insights that:

- Model the behaviors of your top performers
- Provide coaching and mentoring tools to increase performance
- Manage sales force to optimal models
- Track Performance Over Time to Identify Opportunities and Trends

# Current Barriers to Realizing Benefits



- ❑ Critical data resides in disparate silos
- ❑ Multiple, Repetitive Manual Operations with Potential for Errors
- ❑ Cannot Access Timely Information to Increase Revenues

# Challenges to effective SPM (Ventana Research)

## Our Research Finds Challenges in Adopting Performance Management in Sales

1. **Lack of Process** – No consistency in management of sales processes to achieving objectives efficiently
2. **Limited Alignment** – Objectives/Metrics and Quotas/Commissions are not explicitly tied together
3. **Scattered Information** – Little consistency in information that aligns to sales processes
4. **Limited Visibility** – Methods to better understand the situation in sales is sorely lacking
5. **Lack of Effectiveness** – Doing the right things well and coaching for improvement are emphasized

# Introducing Salesforce Optimizer



## Shows Sales Performance versus Goals:

- Provides Summary and Detail Analysis
- Shows My Rankings to drive results
- Review Performance Trends

## Access to Data to Manage:

- Stack Ranking
- Graphical Performance Views
- Sales Performance Trending
- Ad-Hoc reporting

## Define Sales Profiles:

- KPI's and Importance
- Mix and Match:
  - ✓ SVP's
  - ✓ AVP's
  - ✓ RD's
  - ✓ RM's



## Capture Field Data:

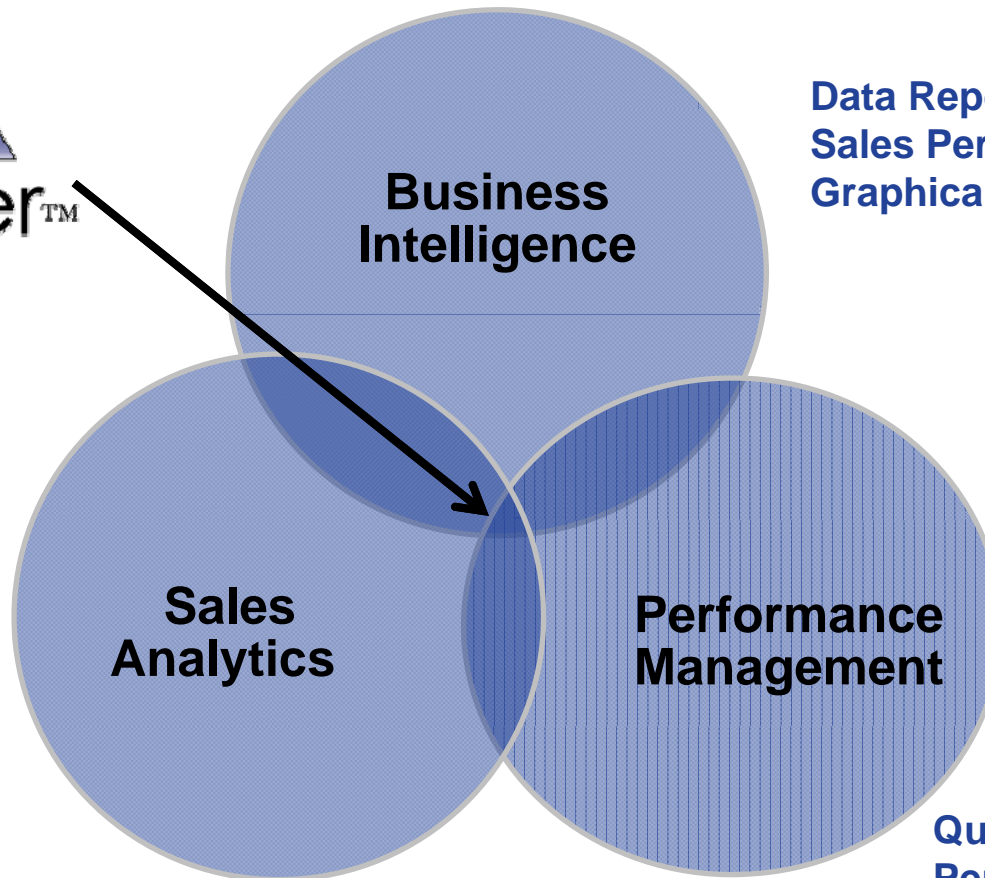
- Coaching Notes
- Manager Input
- Quarterly/Annual Reviews
- Performance Planning

## **On-Demand Delivery**

- No Hardware or Software
- Full Company Administration Capability
- A Single repository for Sales Data
- Full Integration Engine

# Result: Optimizer is 3 Solutions in One!

Sales  
Force  
Optimizer™

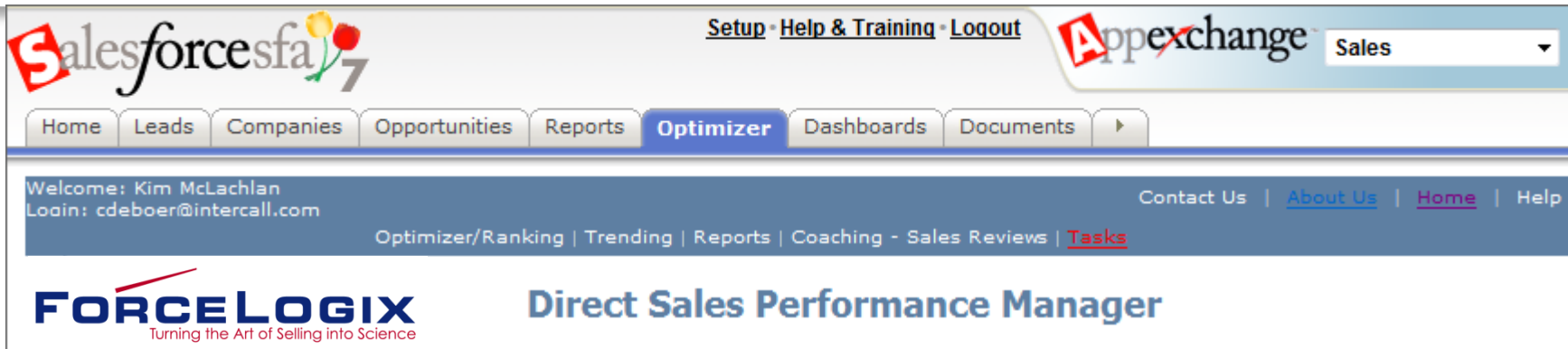


Data Repository for Sales  
Sales Performance Dashboards  
Graphical Analysis

Stack Ranking  
Sales Performance Trending  
Ad-Hoc reporting

Quick Coaching Notes  
Performance Planning  
Manager Input  
Quarterly/Annual Reviews

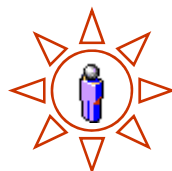
# Optimizer complements CRM Investments



**Goal of CRM:**  
Maximize Yield per Customer



- Better Manage: customers
- Increase sales: customers
- Sell More to: customer



360° View  
of Customers

**Goal of Optimizer:**  
Maximize Yield per Rep/Manager



- Better Manage: Sales People
- Increase performance: Sales People
- Manage Turnover: Sales Force



360° View  
of Sales People

# Build Sales Profiles



| Sales Activities  | Results / Financial   | Accuracy / Efficiency  |
|---|---|--|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> # outbound phone calls</li> <li><input type="checkbox"/> # conference calls</li> <li><input type="checkbox"/> # webinars/web meetings</li> <li><input type="checkbox"/> # on site meetings</li> <li><input type="checkbox"/> # partner meetings</li> <li><input type="checkbox"/> # customer visits</li> <li><input type="checkbox"/> # prospect visits</li> </ul>                  | <ul style="list-style-type: none"> <li><input type="checkbox"/> Revenue - MTD/QTD/YTD</li> <li><input type="checkbox"/> Bookings - MTD/QTD/YTD</li> <li><input type="checkbox"/> Total Forecast - MTD/QTD/YTD</li> <li><input type="checkbox"/> Total Pipeline - MTD/QTD/YTD</li> <li><input type="checkbox"/> Expense management</li> <li><input type="checkbox"/> Profitability/Margin</li> </ul>                         | <ul style="list-style-type: none"> <li><input type="checkbox"/> Close ratios</li> <li><input type="checkbox"/> Pipeline development</li> <li><input type="checkbox"/> Lead conversion</li> <li><input type="checkbox"/> Average deal size</li> <li><input type="checkbox"/> Bookings consistency</li> <li><input type="checkbox"/> Revenue consistency</li> </ul>                                      |
| Growth  | Business/Sales Skills   | Manager Input  |
| <ul style="list-style-type: none"> <li><input type="checkbox"/> # Opportunities</li> <li><input type="checkbox"/> # Opportunities by Type</li> <li><input type="checkbox"/> # Customer up-sell opportunities</li> <li><input type="checkbox"/> Year over Year Growth</li> <li><input type="checkbox"/> Product Composition/Mix</li> <li><input type="checkbox"/> Net units sold</li> <li><input type="checkbox"/> Net revenue by product</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> General business acumen</li> <li><input type="checkbox"/> Industry knowledge</li> <li><input type="checkbox"/> Product knowledge</li> <li><input type="checkbox"/> Competitive positioning</li> <li><input type="checkbox"/> Cold calling</li> <li><input type="checkbox"/> Presentation skills</li> <li><input type="checkbox"/> Closing skills</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Attitude</li> <li><input type="checkbox"/> Teamwork</li> <li><input type="checkbox"/> Motivation</li> <li><input type="checkbox"/> Time management</li> <li><input type="checkbox"/> Partnering skills</li> <li><input type="checkbox"/> Resource utilization</li> <li><input type="checkbox"/> CRM updates and consistency</li> </ul> |

**Mix and match to build profiles that will drive actions and behaviors**

## Example: Tenured Outside Sales Profile

| Sales Activities   | Results / Financial  | Accuracy / Efficiency  |
|--|--|--|
| <input type="checkbox"/> # outbound phone calls<br><input type="checkbox"/> # conference calls<br><input checked="" type="checkbox"/> # webinars/web meetings<br><input checked="" type="checkbox"/> # on site meetings<br><input type="checkbox"/> # partner meetings<br><input checked="" type="checkbox"/> # customer visits<br><input checked="" type="checkbox"/> # prospect visits       | <input checked="" type="checkbox"/> Revenue - MTD/QTD/YTD<br><input type="checkbox"/> Bookings - MTD/QTD/YTD<br><input checked="" type="checkbox"/> Total Forecast - MTD/QTD/YTD<br><input type="checkbox"/> Total Pipeline - MTD/QTD/YTD<br><input type="checkbox"/> Expense management<br><input checked="" type="checkbox"/> Profitability/Margin                   | <input checked="" type="checkbox"/> Close ratios<br><input type="checkbox"/> Pipeline development<br><input type="checkbox"/> Lead conversion<br><input checked="" type="checkbox"/> Average deal size<br><input type="checkbox"/> Bookings consistency<br><input checked="" type="checkbox"/> Revenue consistency   |
| Growth   | Business/Sales Skills  | Manager Input  |
| <input checked="" type="checkbox"/> # Opportunities<br><input type="checkbox"/> # Opportunities by Type<br><input type="checkbox"/> # Customer up-sell opportunities<br><input checked="" type="checkbox"/> Year over Year Growth<br><input checked="" type="checkbox"/> Product Composition/Mix<br><input type="checkbox"/> Net units sold<br><input type="checkbox"/> Net revenue by product | <input type="checkbox"/> General business acumen<br><input type="checkbox"/> Industry knowledge<br><input checked="" type="checkbox"/> Product knowledge<br><input checked="" type="checkbox"/> Competitive positioning<br><input type="checkbox"/> Cold calling<br><input type="checkbox"/> Presentation skills<br><input checked="" type="checkbox"/> Closing skills | <input checked="" type="checkbox"/> Attitude<br><input checked="" type="checkbox"/> Teamwork<br><input type="checkbox"/> Motivation<br><input type="checkbox"/> Time management<br><input type="checkbox"/> Partnering skills<br><input checked="" type="checkbox"/> Resource utilization<br><input checked="" type="checkbox"/> CRM updates and consistency |



Tenured Outside Sales Profile – 20 specific SPIs with Emphasis on Results

# Example: New Hire Sales Profile

| Sales Activities   | Results / Financial  | Accuracy / Efficiency  |
|--|--|--|
| <input checked="" type="checkbox"/> # outbound phone calls<br><input type="checkbox"/> # conference calls<br><input checked="" type="checkbox"/> # webinars/web meetings<br><input type="checkbox"/> # on site meetings<br><input type="checkbox"/> # partner meetings<br><input checked="" type="checkbox"/> # customer visits<br><input checked="" type="checkbox"/> # prospect visits | <input type="checkbox"/> Revenue - MTD/QTD/YTD<br><input type="checkbox"/> Bookings - MTD/QTD/YTD<br><input checked="" type="checkbox"/> Total Forecast - MTD/QTD/YTD<br><input checked="" type="checkbox"/> Total Pipeline - MTD/QTD/YTD<br><input type="checkbox"/> Expense management<br><input type="checkbox"/> Profitability/Margin  | <input type="checkbox"/> Close ratios<br><input checked="" type="checkbox"/> Pipeline development<br><input type="checkbox"/> Lead conversion<br><input type="checkbox"/> Average deal size<br><input type="checkbox"/> Bookings consistency<br><input type="checkbox"/> Revenue consistency   |
| Growth   | Business/Sales Skills  | Manager Input  |
| <input checked="" type="checkbox"/> # Opportunities<br><input type="checkbox"/> # Opportunities by Type<br><input type="checkbox"/> # Customer up-sell opportunities<br><input type="checkbox"/> Year over Year Growth<br><input type="checkbox"/> Product Composition/Mix<br><input type="checkbox"/> Net units sold<br><input type="checkbox"/> Net revenue by product                 | <input checked="" type="checkbox"/> General business acumen<br><input checked="" type="checkbox"/> Industry knowledge<br><input checked="" type="checkbox"/> Product knowledge<br><input type="checkbox"/> Competitive positioning<br><input checked="" type="checkbox"/> Cold calling<br><input checked="" type="checkbox"/> Presentation skills<br><input type="checkbox"/> Closing skills | <input checked="" type="checkbox"/> Attitude<br><input checked="" type="checkbox"/> Teamwork<br><input checked="" type="checkbox"/> Motivation<br><input checked="" type="checkbox"/> Time management<br><input type="checkbox"/> Partnering skills<br><input type="checkbox"/> Resource utilization<br><input type="checkbox"/> CRM updates and consistency |

 **New Hire Sales Profile – 17 specific SPIs with an Emphasis on Development**

# Platform for Sales Management Optimization



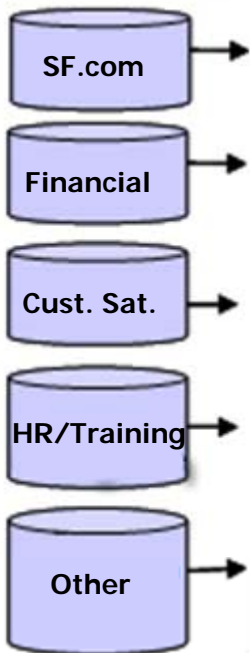
## Utilize the Optimizer Platform to Profile the Sales Management Process



**Better understand the strengths and weakness' of your sales force by empowering your sales managment**

# Intuitive Sales Performance Analysis

Stranded Data within the Enterprise



Manager and Mentor Assessments



**Dashboard: Daniel E. Kavanaugh**

Overall Performance Rating: 1 out of 6

Summary Data: 73.36%

| Category               | Rank       | SPI Weighted Score | Category Threshold | Ranking Score |
|------------------------|------------|--------------------|--------------------|---------------|
| Business Results       | 1/5        | 66.20%             | 100.00%            | 16.55%        |
| Customer               | 2/5        | 129.75%            | 100.00%            | 25.95%        |
| Operational Excellence | 1/5        | 66.20%             | 100.00%            | 0.00%         |
| Our People             | 1/5        | 100.00%            | 100.00%            | 30.00%        |
| Subjective             | 1/5        | 100.00%            | 110.00%            | 0.86%         |
| <b>Overall Ranking</b> | <b>1/5</b> |                    |                    | <b>73.36%</b> |

Review Period: FY 2007  
Date Updated: 11/01/2007 11:03 AM

**Why is it happening?**

Categories:

- Business Results: 66.20%
- Customer: 129.75%
- Our People: 100.00%
- Operational Excellence: 66.20%
- Subjective: 100.00%

| Quantitative Metrics   |        | Qualitative Metrics                     |        |
|------------------------|--------|---|--------|
| Mid Market             | 89.2%  | Planning                                | 100.0% |
| Drive Solutions        | 56.0%  | Market and Customer Knowledge           | 100.0% |
| Business Flow          | 88.2%  | Mid-Market                              | 100.0% |
| Exceed Ctr S.A.S Plan  | 100.0% | Customer Activity - Calls               | 29%    |
| Operating Margin       | 56.0%  | Customer Satisfaction                   | 78.6%  |
| Penetration by Product | 100.0% | Recognition Cross Sell Rate             | 100.0% |
| Pipeline               | 100.0% | Call Prep per Month                     | 100.0% |
| Pipeline Growth        | 100.0% | Employee Engagement                     | 100.0% |
|                        |        | Professional Development                | 100.0% |
|                        |        | Sales Cycle Time                        | 100.0% |
|                        |        | Time Spent Per Rep per Cust             | 100.0% |
|                        |        | Office observations such as work habits | 100.0% |
|                        |        | Personal goals                          | 100.0% |
|                        |        | Skills Assessment                       | 100.0% |
|                        |        | Training plans                          | 100.0% |

**Where to Focus...**

VP ↔ Regional Director ↔ District Manager ↔ Sales Person

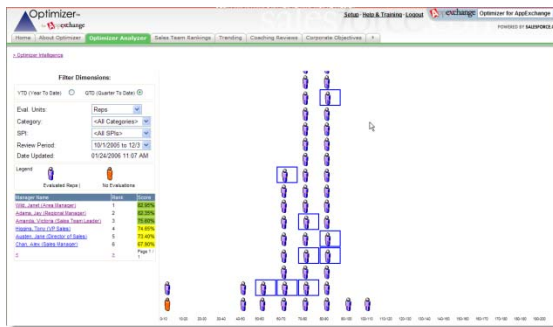
# Sales Management Functionality



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Graphical Performance Analysis



Sales Performance Dashboards

Quick Coach Notes

Subject: Presentation Technique

Date: 10/30/2006

Comments: They need to work on competitive positioning and questions. He was caught off guard at the last meeting when asked about a competitor on the west coast.

Coach: Warren Allen

Coach Type: Accepting

Suggested Action/Notes/Feedback: They need to work on competitive positioning and questions. He was caught off guard at the last meeting when asked about a competitor on the west coast.

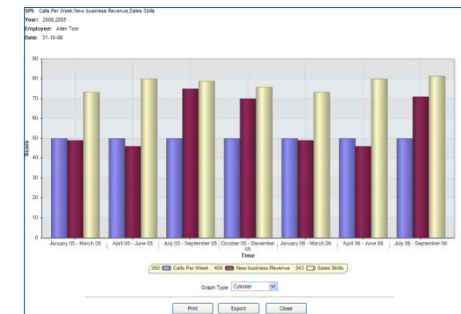
Coaching and Ride-along Notes

Optimizer - Sales Team Rankings

Relative Rankings

| S No. | Sales Team Member                      | Sales Manager             | Score   | Rank | Financial | New Biz | Product | Services | Profit |
|-------|--|---------------------------|---------|------|-----------|---------|---------|----------|--------|
| 1     | Colton, Justin (Senior Representative) | WMA, Janet (Vice Manager) | 100.23% | 1    | 1         | 1       | 1       | 1        | 2      |
| 2     | Wilson, James (Senior Representative)  | WMA, Janet (Vice Manager) | 81.42%  | 2    | 2         | 2       | 2       | 1        | 2      |
| 3     | Schnee, Michael (Sales Representative) | WMA, Janet (Vice Manager) | 80.32%  | 4    | 6         | 4       | 14      | 2        |        |
| 4     | Sargent, Ryan (Sales Representative)   | WMA, Janet (Vice Manager) | 81.74%  | 15   | 22        | 28      | 15      | 2        |        |
| 5     | Zachary, Matt (Sales Account Manager)  | WMA, Janet (Vice Manager) | 80.22%  | 21   | 25        | 26      | 27      | 2        |        |
| 6     | Valech, Craig (Relationship Manager)   | WMA, Janet (Vice Manager) | 79.37%  | 24   | 30        | 11      | 37      | 2        |        |
| 7     | Strickland, Mike (Account Manager)     | WMA, Janet (Vice Manager) | 79.92%  | 27   | 29        | 28      | 25      | 2        |        |
| 8     | Mear, Mike (Account Manager)           | WMA, Janet (Vice Manager) | 79.90%  | 28   | 26        | 24      | 29      | 2        |        |
| 9     | Smith, Rick (Senior Representative)    | WMA, Janet (Vice Manager) | 78.57%  | 29   | 10        | 21      | 15      | 2        |        |
| 10    | Taylor, Michael (Account Manager)      | WMA, Janet (Vice Manager) | 85.18%  | 45   | 45        | 47      | 42      | 2        |        |
| 11    | Shawn, Ben (Account Manager)           | WMA, Janet (Vice Manager) |         |      |           |         |         |          |        |

Stack Rank Performance Analysis



Trending and Ad-Hoc Reporting

# Graphical Team Analyzer

Welcome: Eddie Leshin  
Login: Eddie.Leshin@chrobinson.com

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Optimizer/Ranking | Trending | Reports | Coach and Review | [Tasks](#)

## FORCELOGIX Sales Team Analysis

> Main Form

**Filter Dimension**

Select Save View :  
Please Select

Run View Delete

View :  
 Graphical Analyzer  
 Rep Rankings

Display Period :  
 YTD  QTD  MTD

Review Period :  
YTD 2006

Show Reps :  
Reps

Category :  
All

SPI :  
All

**Save View**

Name: \_\_\_\_\_

Access:  
 Public  Private

Save View Cancel

**Legend**

Evaluated Non Evaluated

| Manager Name                                | Score   |
|---|---------|
| <a href="#">Chan, Alex (POD Manager)</a>    | 104.00% |
| <a href="#">Higgins, Tony (POD Manager)</a> | 102.00% |
| <a href="#">Skora, Chris (POD Manager)</a>  | 101.00% |
| <a href="#">Wild, Janet (POD Manager)</a>   | 43.00%  |

**Relative Rankings**

Direct Reports

Rating Percentage

The entire sales force is represented on a performance bell curve. Analysis can be made based on:

- Date Range
- Team or Rep View
- Categories
- Individual Indicators

# Stack Rank Analyzer

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Login: John.James@sfdemo.com

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**FORCELOGIX**

## Sales Performance Manager

[Main Form](#)

### Filter Dimension

Select Save View :

Please Select

Run View

Delete

View :

Analyze - Optimizer Intelligence

Challenge - Stack Ranking

Display Period :

YTD  QTD  MTD

Review Period :

YTD 2006

Show Reps :

All Reps

Category :

All

SPI :

All

### Save View

Name:

Access:

Public  Private

Save View

Cancel

### Ranking Relatives

A B C D E E G H I J K L M N O P Q R S T U V W X Y Z All

Show Selected Only

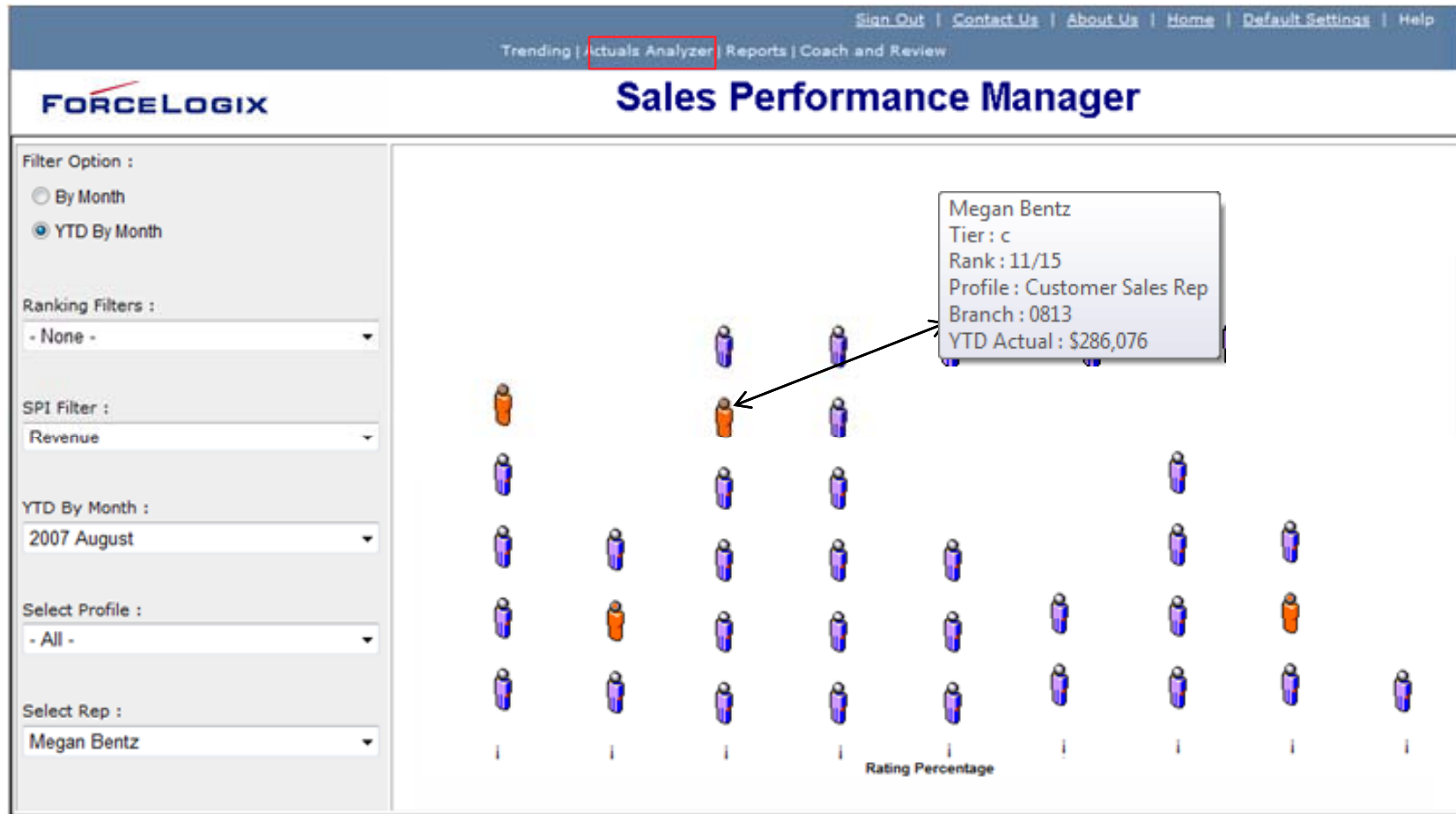
| S.No.                       | Sales Team Member                        | Sales Manager                            | CategoryScore          | Rank | Compensation | Sales Calls | Cust Load Data | Training | Manager Input |
|-----------------------------|--|--|------------------------|------|--------------|-------------|----------------|----------|---------------|
| <input type="checkbox"/> 1  | <a href="#">Hall, Wayne (CustOps)</a>    | <a href="#">Higgins, Tony (VP Sales)</a> | <a href="#">87.20%</a> | 1    | 5            | 3           | 1              | 26       | 11            |
| <input type="checkbox"/> 2  | <a href="#">Wanjuki, Donna (CustOps)</a> | <a href="#">Higgins, Tony (VP Sales)</a> | <a href="#">83.83%</a> | 3    | 4            | 5           | 5              | 21       | 20            |
| <input type="checkbox"/> 3  | <a href="#">Swann, Chris (CustOps)</a>   | <a href="#">Higgins, Tony (VP Sales)</a> | <a href="#">81.26%</a> | 7    | 13           | 8           | 8              | 31       | 4             |
| <input type="checkbox"/> 4  | <a href="#">Wanjue, Gerald (CustOps)</a> | <a href="#">Higgins, Tony (VP Sales)</a> | <a href="#">80.45%</a> | 9    | 20           | 14          | 6              | 33       | 16            |
| <input type="checkbox"/> 5  | <a href="#">Match, Telford (CustOps)</a> | <a href="#">Higgins, Tony (VP Sales)</a> | <a href="#">77.37%</a> | 13   | 8            | 10          | 13             | 32       | 3             |
| <input type="checkbox"/> 6  | <a href="#">Walter, Tim (CustOps)</a>    | <a href="#">Higgins, Tony (VP Sales)</a> | <a href="#">70.11%</a> | 15   | 16           | 15          | 15             | 17       | 6             |
| <input type="checkbox"/> 7  | <a href="#">Tom, Allen (CustOps)</a>     | <a href="#">Higgins, Tony (VP Sales)</a> | <a href="#">63.98%</a> | 17   |              |             |                |          |               |
| <input type="checkbox"/> 8  | <a href="#">Singh, Wayne (CustOps)</a>   | <a href="#">Higgins, Tony (VP Sales)</a> | <a href="#">20.98%</a> | 35   |              |             |                |          |               |
| <input type="checkbox"/> 9  | <a href="#">Schwandt, Don (CustOps)</a>  | <a href="#">Higgins, Tony (VP Sales)</a> | <a href="#">20.83%</a> | 36   |              |             |                |          |               |
| <input type="checkbox"/> 10 | <a href="#">Wild, Janet (CustOps)</a>    | <a href="#">Higgins, Tony (VP Sales)</a> | -                      | -    |              |             |                |          |               |

The entire sales force is represented on a ranking screen. Analysis can be made based on:

- Date Range
- Team or Rep View
- Categories
- Individual Indicators
- Click on name or manager to get details

[Skora, Chris \(POD Manager\)](#) 101.00%  
[Wild, Janet \(POD Manager\)](#) 43.00%

# Actuals Analyzer and Ranker



# Sales Performance Trending

## Sales Performance Manager

**Sales Force Optimizer Trending Graph**

Select graph: (Please select)

**Graph Control**

Graph Name:  Graph Type: Line

| Time Interval   | Quantity   | Filter  |
|---|--|---|
| Month <input checked="" type="radio"/> Period <input type="radio"/> | <input checked="" type="radio"/> Individual SPI <input type="radio"/> Category Total <input type="radio"/> Overall Score | All Employees <input checked="" type="radio"/> All Team <input type="radio"/> |
| Year  | Criteria Name  | Name   Job Title  |
| <input type="checkbox"/> 2007                                       | <input type="checkbox"/> Bonus Tracking  | <input type="checkbox"/> Allen Elverson   Sales Representative                |
| <input type="checkbox"/> 2006                                       | <input type="checkbox"/> Calls Per Week  | <input type="checkbox"/> Allen Tom   Sales Representative                     |
| <input type="checkbox"/> 2005                                       | <input type="checkbox"/> Contact Frequency   | <input type="checkbox"/> Andreas Scheckton   Sales Representative             |
|   | <input type="checkbox"/> Customer meetings   | <input type="checkbox"/> Andrew Winter   Sales Representative                 |
|   | <input type="checkbox"/> Customer Survey   | <input type="checkbox"/> Bill Boyd   Sales Representative                     |
|   | <input type="checkbox"/> Lead Tracking   | <input type="checkbox"/> Burton Ton   Sales Representative                    |
|   | <input type="checkbox"/> New business Revenue  | <input type="checkbox"/> Chris Swann   Sales Representative                   |
|   | <input type="checkbox"/> New Product Revenue   | <input type="checkbox"/> Cristy Sweetland   Sales Representative              |

Preview Delete Save Cancel

- (Please select)
- (Please select)
  - 2005 and 2006 - Team Performance Score Comparison
  - 2005 and 2006 End of Year Analysis - By Sales Team
  - 2006 - Team Performance - Financial Scores
  - All New Business and Developed Opps by Month
  - Pipeline vs Business-Product Revenue - Allen Tom
  - Training Class of January 2005 Performance

Trending Report configuration can be saved and recalled as needed.

- Line
- Line
  - Cylinder
  - Spline
  - AreaLine
  - Bar
  - Marker
  - Areaspline

Users can decide the type of graph.



# Sales Performance Reporting



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Optimizer/Ranking | Trending | **Reports** | Mentor - Sales Reviews | **Tasks**

**FORCELOGIX**  
Turning the Art of Selling into Science  
> Main Form > Trending > Report Manager

## Sales Performance Manager

User Defined Fields

Select Report  
Trending-Base Data

Parameters:  
Employee: Elverson, Allen | SPI: New business Revenue | Year: 2005 | Please choose Graph: Line

Report Options:  
Zoom: 100% | Excel

**Generate Report**

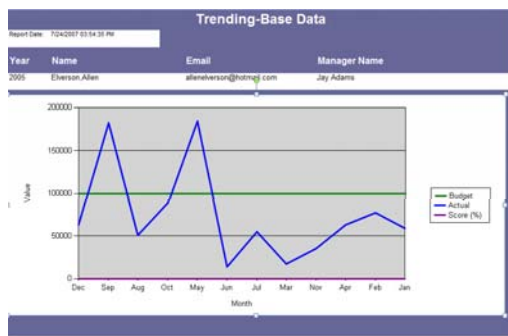
- New business Revenue
- Bonus Tracking
- Calls Per Week
- Contact Frequency
- Customer meetings
- Customer Survey
- Lead Tracking
- New business Revenue**
- New Product Revenue
- Peer interaction
- Quick Coaching Notes
- Sales Skills
- Services Revenue
- Split tracking
- Teamwork
- Tech Support Tracking
- Test Calculated SPI
- Total Developed Opps YTD
- Training Completion
- Travel & Expenses /Total Margin

## Trending-Base Data

Report Date: 7/24/2007 3:48:20 PM

| Year | Name          | Email                |
|------|---------------|----------------------|
| 2005 | Allen, Warren | warren.a@hotmail.com |

- Excel
- HTML
- Acrobat (PDF) file
- Excel**
- TIFF file
- MHTML
- CSV (comma delimited)
- XML file with report data



# Sales Performance Improvement Tools

**Quick Coach Notes**

Update    Cancel

**Quick Coach Notes Details:**

To: Adlemson, Jerry

Subject: Presentation Technique

Date: 5/3/2006

**Coaching Comments:**

Comments: Jerry needs to work on competitor questions. He was caught off guard when asked about a competitor...

Add to Current Review:

Update an SPI:

Reps Response: Accepting

**Suggested Action / Reps Feedback**

Comments: I plan on making some calls w/ eastern region to get a better competitive positioning and dif...

Return to Main Page

**Performance Improvement Plan**

Employee: Jerry Adlemson

Plan: Period 4 of 2005 from 10/1/2005 to 12/31/2005

Complete, signoff and archive plan

Update changes without archiving

Preview Performance Improvement Plan for this Sales Team Member (Remember to save changes first)

Type: Initial Written Warning

Status: DSM/DVP Draft Review

Review Period: 10/1/2005 to 12/31/2005

Date: 4/16/2006

Previous Counseling Date: 4/14/2006

Previous Counseling: Initial Written Warning

Previous Counseling Comments: Previous Counseling Comments

Performance Standard: Performance Standard

Performance Discrepancy: Performance Discrepancy

Expected Performance Standard: Expected Performance Standard

Time Frame: Time Frame

Consequences: Failure to comply with this document may result in further termination. Likewise, regression or failure to comply performance, after this time frame, may result in further termination \*Corrective action voids eligibility for interim this document is confidential and should not be discus...

Sales Team Member Comments:

Footer Notes: \*\*\*By signing, I acknowledge that I have received a coaching standard. I have also received coaching and/or couns (s), and have been made aware of the services of the (308-4936). Any comments or disagreements that I n...

**Sales Team Member Review Form**

Report Type: Sales Team Member/Sales Manager Review

Sales Team Member: Sales Team Member: Jerry Adlemson (Account Manager)

Prepared By: John James (VP Sales)

Employee Start Date:

Score for this Period: 58.24%

Review Type: Quarterly

Period Start Date: Apr 01, 2005

Period End Date: Jun 30, 2005

| Categories            | Weight | SPI / Attribute                 | Value  | Target | Total for SPI (%) | Total for Category (%) |
|-----------------------|--------|---------------------------------|--------|--------|-------------------|------------------------|
| Subjective            | 20     | Peer interaction                | 85.00% | 100    | 85.00%            | 81.33%                 |
|                       |        | Sales Skills                    | 81.67% | 100    | 81.67%            |                        |
|                       |        | Teamwork                        | 78.33% | 100    | 78.33%            |                        |
|                       |        | Training Completion             | 81.67% | 100    | 81.67%            |                        |
| Financial             | 55     | New business Revenue            | 62.00% | 100    | 62.00%            | 51.69%                 |
|                       |        | New Product Revenue             | 51.00% | 100    | 51.00%            |                        |
|                       |        | Services Revenue                | 0%     | 100    | 0%                |                        |
|                       |        | Travel & Expenses /Total Margin | 0%     | 100    | 0%                |                        |
| Customer Satisfaction | 5      | Contact Frequency               | 80.00% | 100    | 80.00%            | 79.40%                 |
|                       |        | Customer Survey                 | 80.00% | 100    | 80.00%            |                        |
|                       |        | Tech Support Tracking           | 78.00% | 100    | 78.00%            |                        |
| CRM                   | 15     | Calls Per Week                  | 50.00% | 50     | 100.00%           | 52.14%                 |
|                       |        | Customer meetings               | 63.00% | 100    | 63.00%            |                        |
|                       |        | Lead Tracking                   | 55.42% | 100    | 55.42%            |                        |
|                       |        | Total Developed Opps YTD        | 29.17% | 100    | 29.17%            |                        |
| Compensation          | 5      | Bonus Tracking                  | 47.20% | 100    | 47.20%            | 35.00%                 |
|                       |        | Split tracking                  | 22.80% | 100    | 22.80%            |                        |

Quick Coach

Performance Improvement Planning

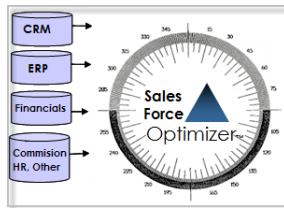
Quarterly/Annual Reviews

# Up and Running in 45 – 60 Days



## 1. Create Unique Instance with Sales Profiles

- Upload Users and configure Instance
- Mix and Match Sales Performance Indicators
- Weight each based on Relative Importance



## 2. Integrate Data

- Bring in Actual results
- Integrate with multiple systems



## 3. Analyze

- “Fact-based” analysis of Strengths and Weaknesses
- Individual Sales Performance Dashboards
- Team Analysis and Stack Ranking
- Ad-hoc and Trend Reporting



## 4. Optimize

- Quick Coach
- Performance Plans and Reviews
- Enhanced Sales Coaching Option

# 3<sup>rd</sup> Party Validation of Forcelogix



***“Ventana Research sees sales performance management as one of the most critical management initiatives and processes of this decade.”***



***“ForceLogix has created strong dashboard functionality married with performance review capabilities for sales”***



***“Forcelogix offers a simplified approach to improving sales performance which reduces IT and technology competencies required”***



***“Salesforce.com partners with Forcelogix, which offers sales optimization applications that allow the ability to understand, optimize and align sales reps and teams to goals and objectives.”***



***“Forcelogix dashboards give sales managers information with which to grow each sales rep, inspiring better future performance.”***

## ■ Drive Greater Revenue through Actionable Insights

- Combine lagging and leading edge indicators to provide greater visibility
- Move “B”s to “A”s and “C”s to “B”s, or take corrective action sooner
- Early Warning System – shift behaviors and influence results before end of term

## ■ Improve Organizational Effectiveness

- Exploit best management practices throughout organization
- Align sales activities with corporate objectives via common goals and measures
- Single repository of sales performance data – less time hunting / more managing

## ■ Lower Costs

- Improve allocation of Sales Operations spend
- Leverage SaaS delivery for faster deployments and turnaround of enhancements
- Streamline employee training and review processes

- Email Forcelogix at [info@forcelogix.com](mailto:info@forcelogix.com)
- Call Us at 847-281-9307
- We can provide:
  - Custom Demonstration
  - Sales Management Analysis
  - Optimizer Impact Analysis