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Knowing Your Numbers- CRM Contact KPI's

The screenshot shows a CRM Sales Dashboard for user Leroy Pedigo. The dashboard includes several key performance indicator (KPI) cards:

- Deal Forecast:** Shows "Not a deal in sight. Choose a different user, time period, or create your first deal now." with a "Create a deal" button.
- Productivity:** Displays four metrics: CALLS PLACED (1), EMAILS SENT (0), MEETINGS SCHEDULED (1), and TASKS COMPLETED (0).
- Pipeline:** Shows a progression of stages: ASSIGNED (8 - 300%), CONTACTED (1), DEALS CREATED (1), and DEALS WON (0).
- Email Reports:** Includes a note: "Email and template reports can now be found within templates."

A yellow callout bubble points to a "Settings" icon in the top right corner of the dashboard, with the text: "Press here to Change lengths and timeframes of reports."

On the sales dashboard is an easy snap shot of where you are. There are also other tools on this to dashboard where you are able to follow your progress on day to day, week to week, month to month, and year to year timeframe.



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The screenshot shows a CRM interface with a top navigation bar containing 'Sales', 'Dashboard', 'Contacts', 'Companies', 'Deals', 'Tasks', 'Sidekick', and 'Settings'. A search bar and user profile are on the right. The main content area is titled 'Sales Dashboard' and includes a user profile for 'Leroy Pedigo (lk.pedigo@...)'. A date selector shows 'This month'. A 'Deal Forecast' section contains a message: 'Not a deal in sight. Choose a different user, time period, or create your first deal now.' with a 'Create a deal' button. A 'Productivity' section displays four metrics: 'CALLS PLACED' (1), 'EMAILS SENT' (0), 'MEETINGS' (0), and 'TASKS COMPLETED' (0). A 'Pipeline' section shows a flow: 'ASSIGNED' (8 - 300%) -> 'CONTACTED' (1) -> 'DEALS CREATED' (1) -> 'DEALS WON' (0). An 'Email Reports' section has a message: 'Email and template reports can now be found within templates.' A right-hand sidebar shows an 'ACTIVITY' feed with several entries. A yellow callout bubble points to a dropdown menu that is open, showing options: 'Last month', 'Next month', 'This quarter', 'Last quarter', 'This year' (highlighted), and 'Last year'. A smaller 'This year' label is also visible near the activity feed.

Once you click there a drop down menu will appear and here you can choose the time frame you want and click it and the totals for that time period will appear.

Sales Dashboard

Leroy Pedigo (lk.pedigo@...) This year

Deal Forecast

Set quota

Not a deal in sight. Choose a different user, time period, or create your first deal now.

Create a deal

Productivity

CALLS PLACED	EMAILS SENT	MEETINGS SCHEDULED	TASKS COMPLETED
1	0	1	0

Pipeline

ASSIGNED	CONTACTED	DEALS CREATED	DEALS WON
10	1	1	0

Email Reports

Email and template reports can now be found within templates.

RECENT ACTIVITY

- You created a meeting: Wants all candidates prep. 10/12/2015 at 6:02 PM UTC-07:00. View
- You created a task: CV hulu. 10/12/2015 at 5:56 PM UTC-07:00. View
- You made a call: cv for hulu. 10/12/2015 at 5:56 PM UTC-07:00. View
- You created a note: has a controller position open. 10/12/2015 at 5:55 PM UTC-07:00. View
- You created a task: Call COX on Thursday 10/15/15 to discuss open position. 10/10/2015 at 3:50 PM UTC-07:00. View

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Then your totals for that period will appear under the **Assigned** section under **Pipeline** area.