

The CEO's Guide to

Sales and Marketing Dashboards and KPIs



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Meet the Authors

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Zorian is a sales and marketing veteran who is a recognized authority on metrics-driven sales and marketing management in the software industry. Prior to InsightSquared, Zorian was on the management teams of several global software companies including Acronis, Veeam and AppAssure (which was sold to Dell), ranging from \$8 Million to over \$100 Million in annual sales, each of which he helped grow by over 100% year over year. He was also CEO at StarWind Software, a software company with customers in over 100 countries where he grew worldwide sales by 100% and North American sales by 145%+ by using the best practices of metrics-driven inside sales management, demand generation and sales prospecting.



Zorian has a degree in Finance and with minors in Applied Mathematics and in Computer Science from Lehigh University and earned his MBA from Harvard Business School.



Kim Lindquist

Kim can be found at the crossroads of marketing analytics and writing. With a passion for data-driven decisions, Kim strives to turn numbers into stories that help businesses understand their data-landscape. Since graduating from Boston College, where she earned degrees in English and Communication, Kim has enjoyed working in the lively start-up scene in and around the Boston area.

Foreword

According to a survey of Inc 500 CEOs, the average Chief Executive rises before the sun each morning (6:15 a.m.), spends at least two hours responding to email, three hours speaking with employees, and two hours working after dinner. 22% reported having no downtime whatsoever. *Sound familiar?*

If you spend much of your time switching contexts and reacting to data, you can consider yourself an elite member of one of the busiest clubs on the planet. So, when it comes to analyzing daily updates from various VPs and managers, you need the full story in an accurate and digestible format.

In most organizations sales and marketing struggle most to provide CEOs a comprehensive “story” based on mutual data. Although their different interpretations are often unintentional, having gaps in the story of sales and marketing’s efforts is extremely risky to the health of your business. In many organizations, it is not a lack of data transparency that blurs these lines, but a lack of consistency in reporting. As a CEO, you need to hold your teams to repeatable reporting standards: doing so will provide more accurate data and solidify sales and marketing alignment within your organization.

How do you ensure that both teams tell their story from the same data? Create standardized on-demand dashboards that all stakeholders can access and easily interpret. Though developing a list of these dashboards can be daunting, you risk analyzing the wrong metrics (or two sets of the wrong metrics!) if you continue to listen to conflicting stories.

In order to get the “big picture” view from Sales and Marketing, CEOs need to create or have access to the following 8 Sales and Marketing KPI Dashboards.

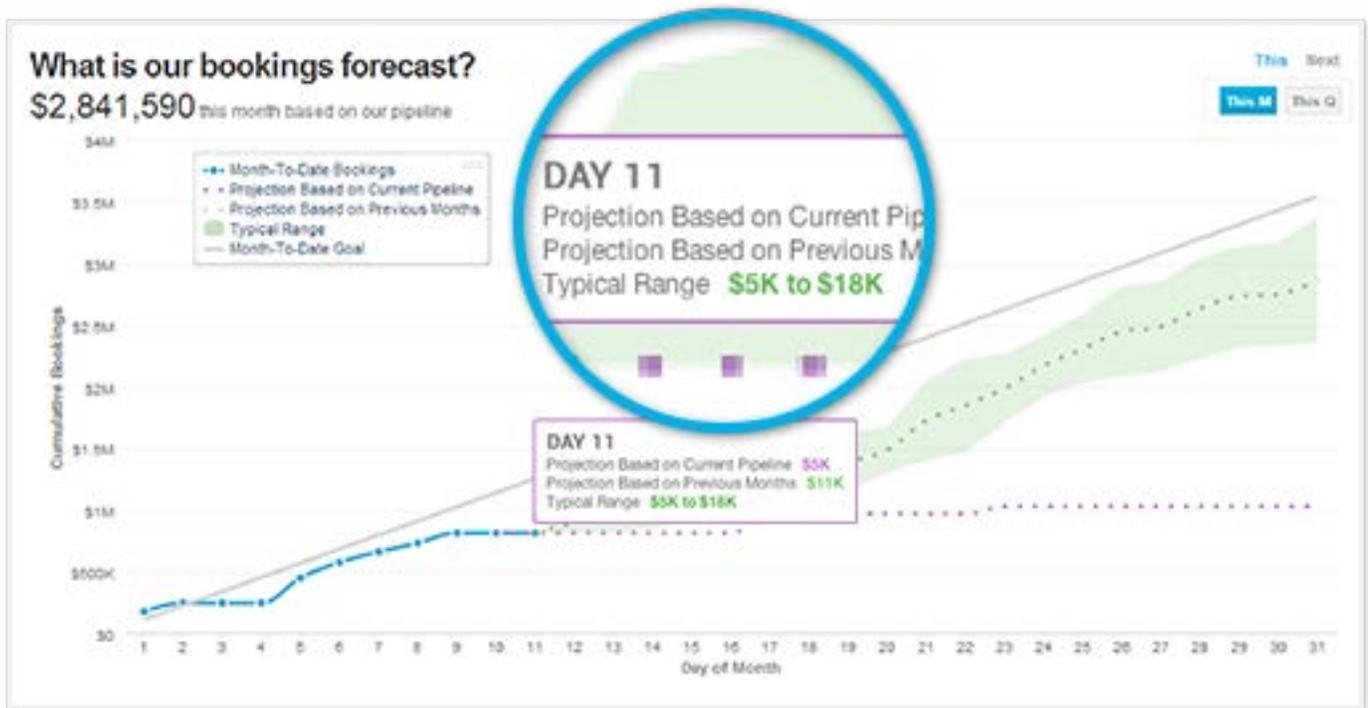
Chapter // 1

Sales Dashboards

Metrics-Driven Sales Forecast

Why?

You need to know your forecasted revenue to properly run your business, plan for growth, and mitigate risk. You also need to compare your projected forecast against your historic performance to assess how realistic the current bookings forecast is.



Take Action

Keep your sales leaders and sales reps honest by comparing their expected bookings to historic performance. Are your reps being too optimistic about their open opportunities based on “gut” feelings? Urge your sales leaders to assess an opportunity’s likelihood to close by several factors including opportunity age, stage, size, their rep’s historic win rate, and opportunity velocity. This allows your forecast to be accurate and a trustworthy tool to help you run your business.

Pipeline Trends

Why?

Know the total value of your open opportunities and be able to compare how your pipeline value is trending over time. Historical pipeline data will show you how much pipeline your Sales VP needs to hit his quota.



Take Action

With this dashboard you have the tools to have an objective conversation with your Sales VP about how the pipeline is trending over time. If you are not trending upwards, you need to ask your VP of Sales to present a plan of action to remedy this. At this point, you can also bring your VP of Marketing into the conversation to ask for assistance. What quick campaigns can they launch to help fill a stagnant pipeline?

Pipeline Creation with Net Flow of Opportunities

Why?

Know whether your pipeline is growing or shrinking and if there are enough new opportunities to replace the outflow (both Won and Lost deals). Talk to your Sales VP about his strategy for pipeline creation as well as the net flow of opportunities quarter over quarter.



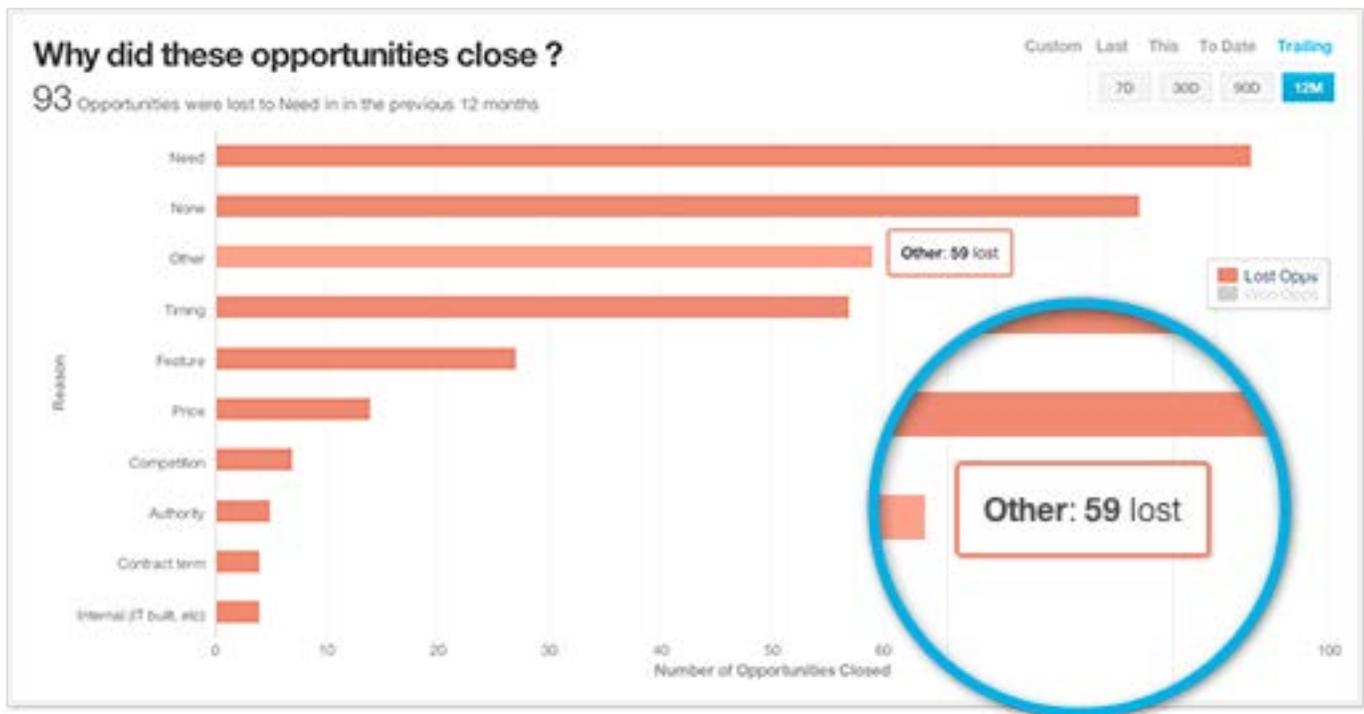
Take Action

If your team is not showing growth in the pipeline, you need to discuss a plan to fix it. Your Sales VP and Marketing VP should both be on the hook for this dashboard. Do you have enough reps on the prospecting team? Is Marketing contributing enough to your pipeline? Discuss the number of open opportunities; are there enough quota-carrying closing reps to handle those open opportunities? Finally, know whether you are adding enough new opportunities to replace those that are leaving the pipeline.

Why Are We Losing Sales?

Why?

If you do not learn from your mistakes, you are destined to repeat them. Analyzing opportunities that your team could not convert gives you tremendous insight into what is not working when it comes to your sales process, and helps you identify non-buyer profiles. Look at every aspect of these closed-lost opportunities – for both external factors like timing, as well as internal factors like poor qualification.



Take Action

Analysis is the first step to understanding how to overcome Closed-Lost opportunities. Ask your sales leaders to routinely explore lost opportunities to spot trends by reason, company size, industry, cost and any other significant external factors. Sales leaders will then be able to identify “red flag” opportunities and coach reps to address known issues early, or allocate less time to them. Additionally, push sales leaders about the internal factors that could be losing deals. Is there some inherent snag in your sales process where you lose opportunities? Have your development reps been improperly qualifying opportunities?

Chapter // 2

Marketing Dashboards

Lead Trajectory

Why?

You need to know how many Leads and Marketing Qualified Leads your marketing team has collected so far this reporting period and how they are tracking towards their goal. Knowing how well marketing is performing in lead generation gives you an idea of what you can expect your pipeline and sales cycles to look like as well.



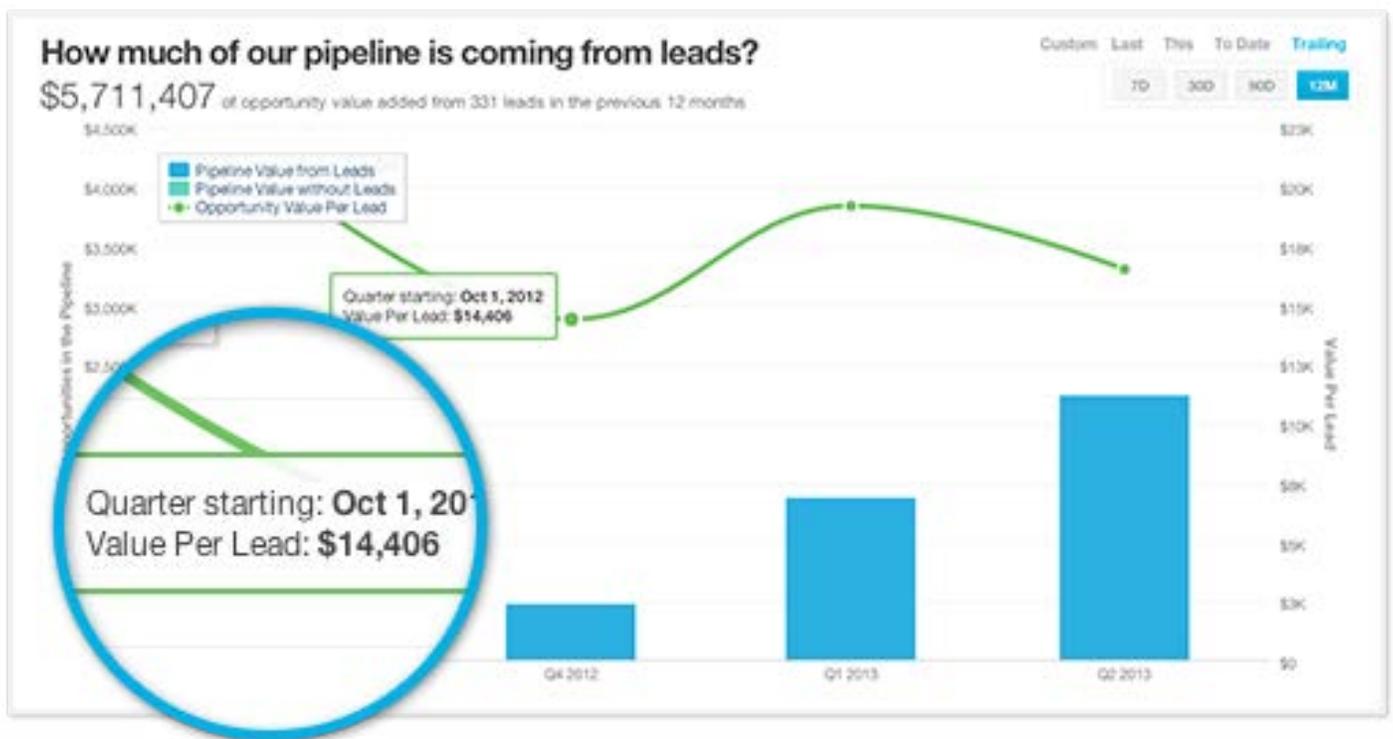
Take Action

If marketing is under-delivering on their lead goals this month or quarter, you need to identify this early in the reporting period. Talk to your VP of Marketing about the campaigns they have run (why did they fall short?) and what they can do to remedy this immediately. Are there any high yield, low effort campaigns she can launch? Can she make lead capture forms more efficient? Without ample top of the funnel output, your future pipeline and sales cycles are at serious risk.

Marketing's Impact on Sales Pipeline

Why?

You need to understand how much pipeline is directly generated by Marketing. Effective marketing is ultimately not about leads and not even about MQLs but about generating Pipeline and actual Deals. According to Marketo's "Benchmark on Revenue Performance" survey report, Marketing generates 52% of the pipeline at high-performance companies and 38% on average. This dashboard demonstrates "Marketing Generated Pipeline" trend over time and will hold your VP of Marketing as accountable to the pipeline as Sales.



Take Action

If Marketing is not contributing enough to the pipeline, you need immediately address this with your Marketing VP. Is her team executing the right campaigns that convert into Opportunities and Deals at the highest rates? Are they targeting the right buyer personas? Make sure you know how your VP of Marketing is planning to contribute at least 25% of all opportunities in the next quarter.

What Campaigns are Effective in Generating Sales?

Why?

Marketing needs to contribute all the way through the pipeline, not just merely in terms of leads generated. Know how many Opportunities and won Deals your team is contributing, and which marketing activities are translating all the way downstream to deals.



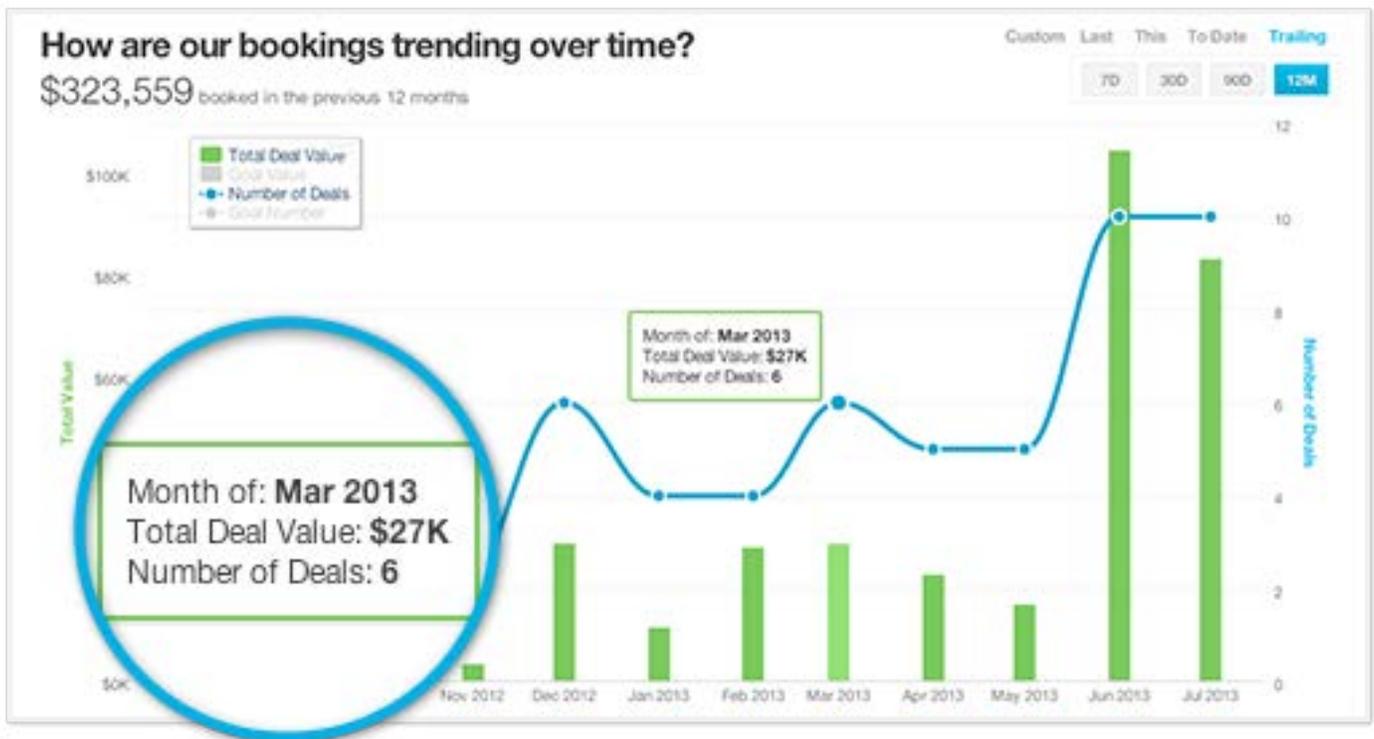
Take Action

If you identify marketing campaigns that are not converting well to Deals, you should bring these to your VP of Marketing to understand how she plans to turn them around. Is she paying attention to how effective her team's efforts have been? Without Marketing taking ownership of their campaigns from lead to cash and knowing where to spend the most "calories", your company will not hit its aggressive revenue growth goals.

Marketing Generated Deals and Sales

Why?

Similar to marketing sourced pipeline, you need to ensure that marketing is contributing to your overall revenue, in the form of marketing generated bookings. You should also work with your VP of Marketing to define clear contribution goals. Know how much of your bookings are sourced from marketing and whether they make a significant impact to your revenue generation each reporting period.



Take Action

Marketing is generating plenty of leads, and contributing to the pipeline, but they are falling short in bookings. Measure whether they are trending upwards over time, and work with your VP of Marketing and Sales to understand the disconnect. Should marketing provide more messaging in the middle of the funnel, and support sales with more case studies? Does your sales team have the right talk track developed for the leads that your marketing team is providing? Both teams have nurtured these opportunities to the end of the funnel: make sure that sales and marketing troubleshoot together to get them over the finish line!

Review

Essentials On Your **Sales Dashboard**

- Know Your Forecast Bookings
- Understand Your Pipeline Trends
- Understand the Net Flow of Your Pipeline
- Be Able to Explore Closed-Lost Opportunities

Essentials On Your **Marketing Dashboard**

- Understand Your Lead Trajectory
- See How Much of Your Pipeline is Generated from Marketing
- Know Which Campaigns Generate the Most Sales
- Know How Much Marketing Contributes to Bookings

#1 for Salesforce Analytics

About InsightSquared

InsightSquared is the #1 Salesforce Analytics product for small and midsize businesses (SMB). Unlike legacy business intelligence platforms, InsightSquared can be deployed affordably in less than a day without any integration costs and comes preloaded with reports that real business people can use. Hundreds of companies and thousands of users around the world use InsightSquared's award-winning analytics to maximize sales performance, increase team productivity and close more deals. Based in Cambridge, Mass., InsightSquared was recently named one of the "Best Places to Work in Massachusetts" by the Boston Business Journal. [For more information, visit \[www.insightsquared.com\]\(http://www.insightsquared.com\).](#)



12 Must Ask Questions for Data-Driven Sales Managers

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