



# Manage your Sales

Sales Tracker© Sales Management System

Simple

Universal

Accurate

Insightful



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In all of our consulting project experience in internationally, we have been able to distil a sales managers system needs down to 2 key concepts:

## Visibility Predictability

Sales is the lifeblood of any organisation and sales managers need to be in a position where they can **manage current performance effectively**, while at the same time have a **clear and accurate understanding of the deal flow forecast**, summarised in what deals, with which customers, at what value will be confirmed in a certain timeframe into the future. In fact the latter becomes a prime input for financial planning moving forward.

Sales Tracker was designed by Carpedia's systems partner, **TwoGlobalEyes a business systems developer based in Toronto, Canada**. TwoGlobalEyes takes the view that management control systems and management operating systems **can be delivered cost-effectively** in Excel. **Almost every company in the world uses Excel**, and to get an Excel system up and running in any organisation is a simple task. Everyone understands, can use and can collaborate with an Excel system.

## Managing Performance

- Sales Tracker allows you to copy and paste your entire customer base into the Sales Tracker data base, and manage:

**Segments, lead sources, products, sales reps, meetings, meeting outcomes, next steps, proposals & Sales**

- Sales Tracker allows you to **focus on the sales process**;

All customer activities, new Opportunities, qualified opportunities, proposals, sales go's and no go's

## Sales Tracker provides a variety of activity reports

- Sales by region
- Sales by Product
- Sales by Sales Rep
- Sales by Source
- Sales Conversion rates by Sales rep, by product
- Top 5 sales reps report
- Top 20 sales transactions

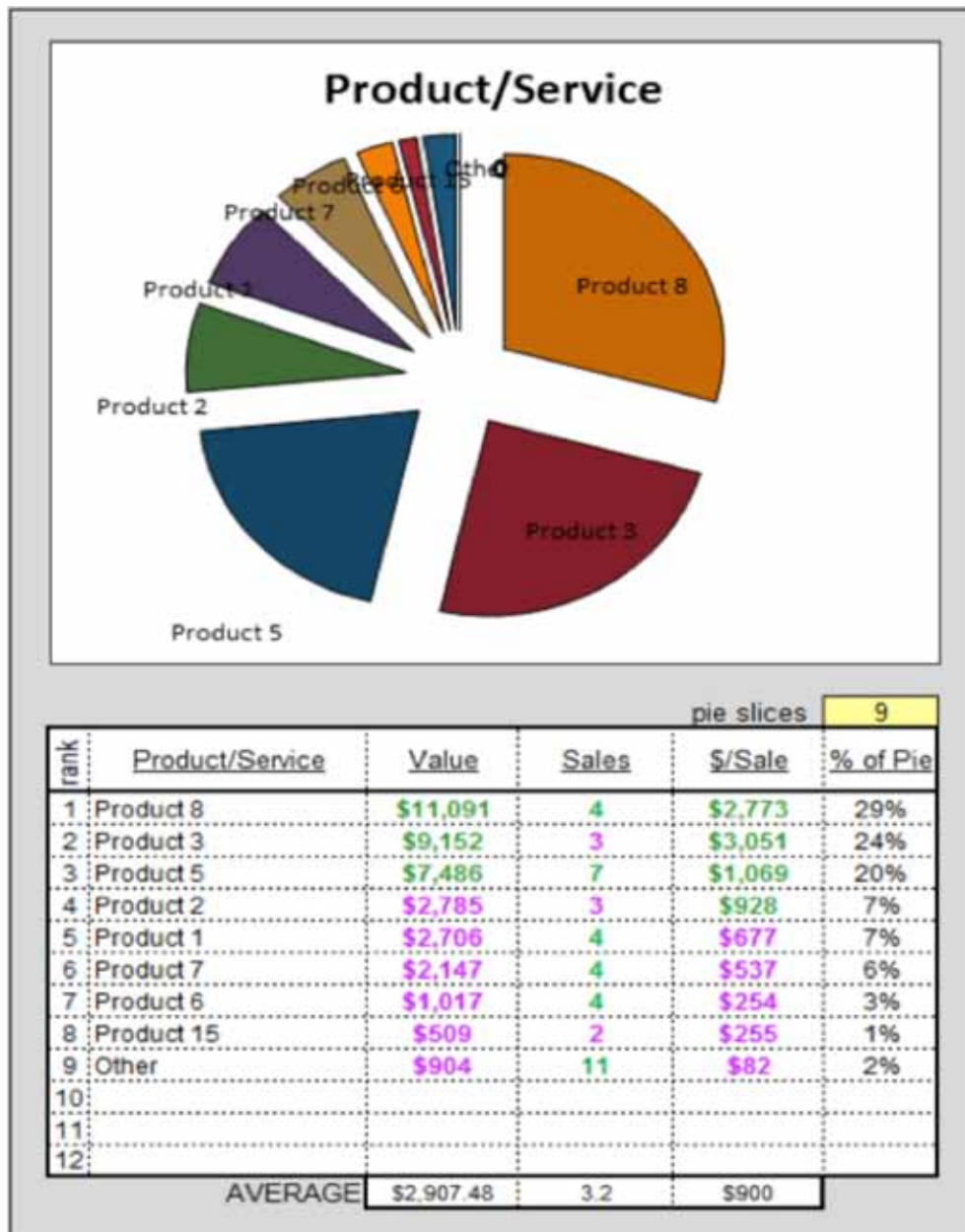


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## Insight into Sales by Product



Sales Performance Report by Product – Pie Chart

- Gain visibility into which products or solutions are selling well
- Top 5 product sales
- Sales value by product
- Sales volume by product

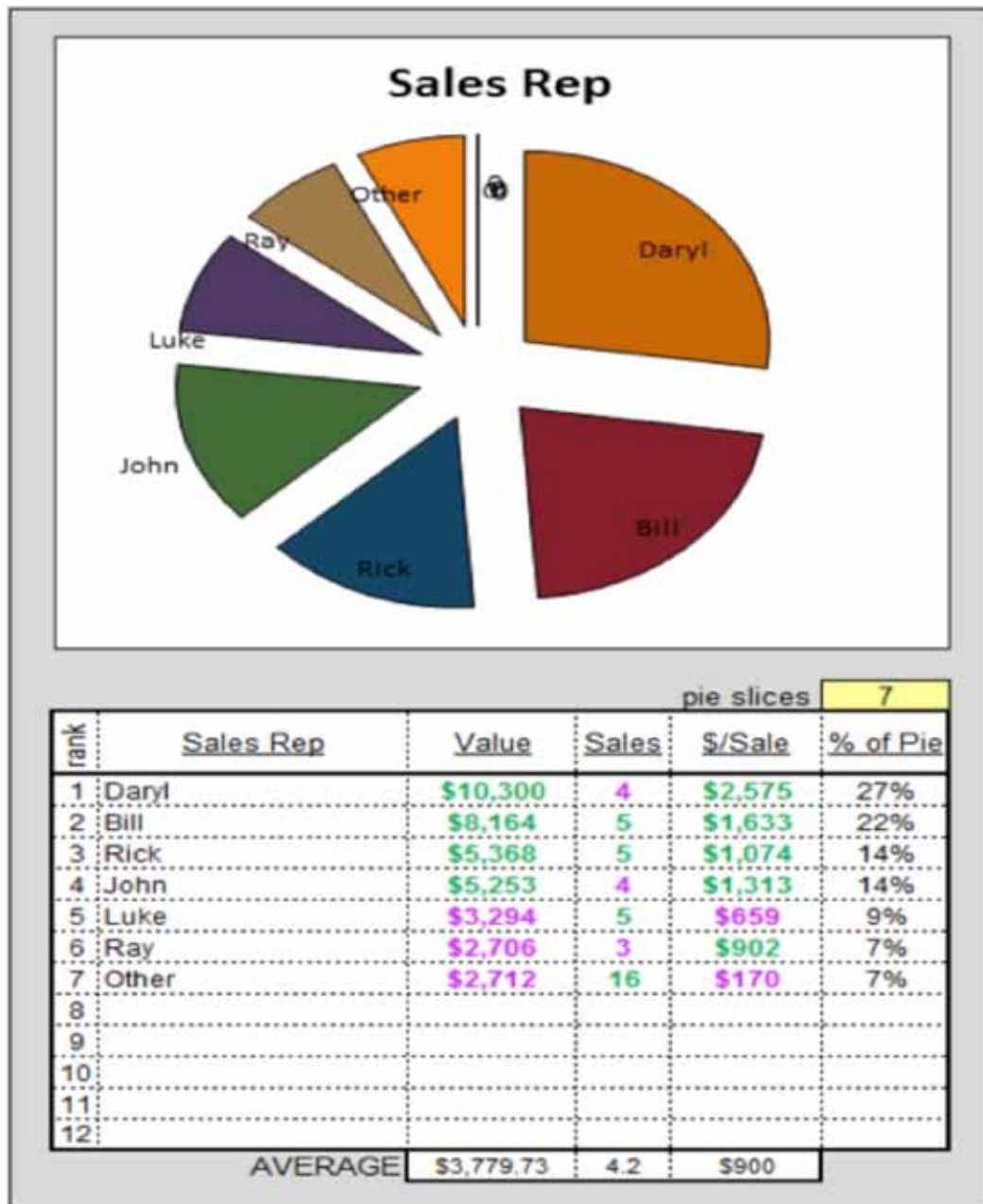


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## Visibility of Sales Rep. Performance



Sales Performance Report by Sales Rep. – Pie Chart

- Gain visibility into which sales reps are performing
- Top 5 sales reps
- Sales value by sales rep.
- Sales volume by sales rep.

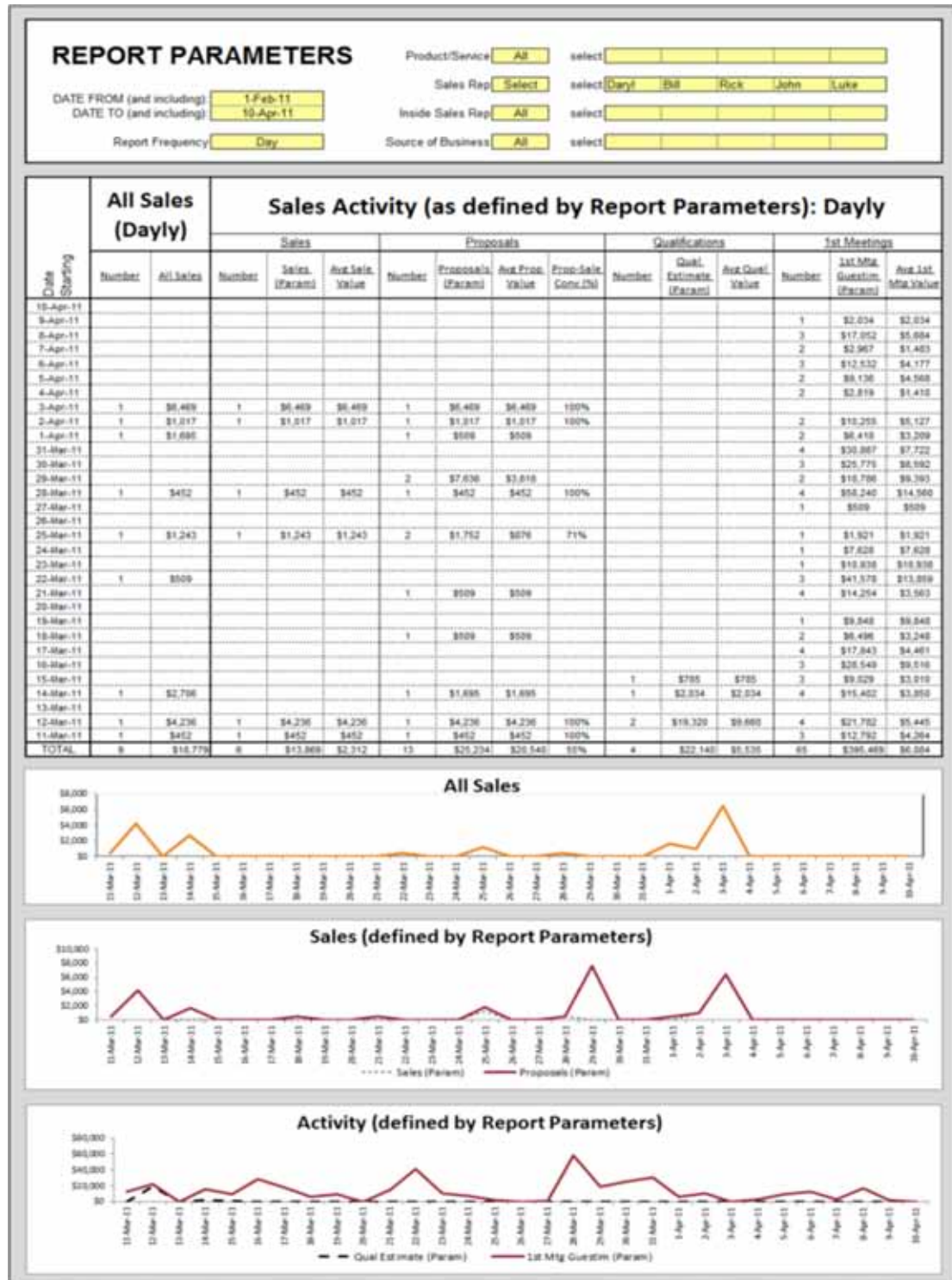


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## Daily Sales Activity Report



## Sales and Sales Activities Report

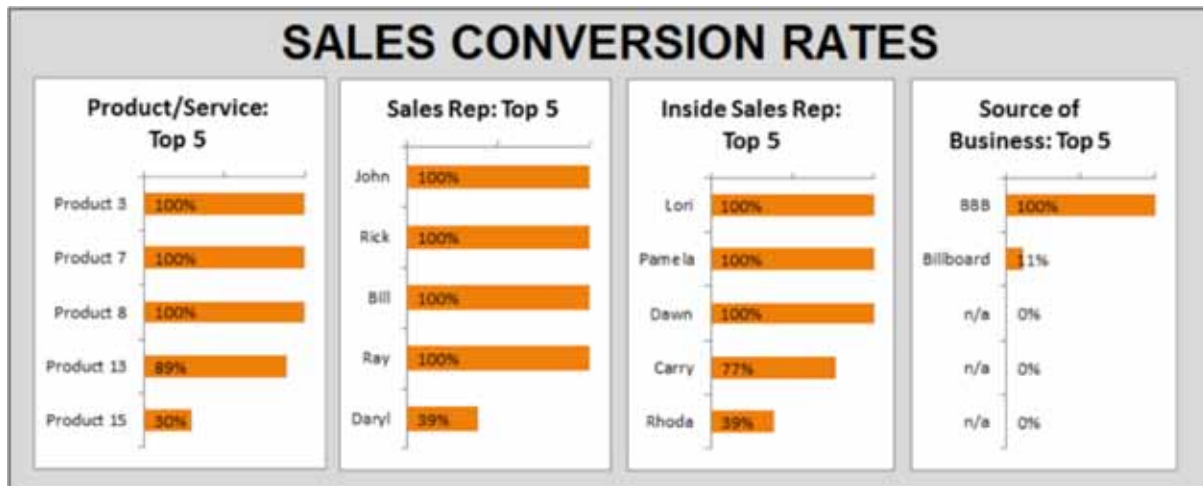


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## Insight into Sales Conversion Ratio's



Sales Conversion Ratio's Report

- Track sales conversion ratio's by product
- Track sales conversion ratio's by sales rep
- Track "source of sales" conversion ratio's

## Managing the Sales Forecast 'The Sales Funnel'

While **managing performance** tells you how you are doing (**VISIBILITY**) Sales Tracker also has the critically important Sales Funnel module incorporated, that focuses on deal flow. (**PREDICTABILITY**)

In terms of planning, Sales Trackers functionality is build around around some of the forecasting and account management concepts popularised by the Miller Heiman "Funnel" System. Sales Tracker has the ability to summarise deal flow as follows:

CONTINUED -> PG7



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## Above the Funnel Report

Summarizes all the opportunities identified where meetings have been scheduled, however not yet held. Here, a potential value can assigned to a customer, based on the potential size of the client.

## In the Funnel Report

Summarizes all the opportunities where the meetings have been held, and a confirmed opportunity to sell to the customer has been identified. The opportunity has in other words been qualified, and a value can be assigned to the opportunity as well as a potential sales close date.

## In the Funnel –Proposals

Summarizes all the opportunities where we have submitted a proposal. The value of these opportunities is firm value opportunities that can be converted into sales.

## In the Funnel - Sales

Summarizes all the committed sales in the form of firm and confirmed orders, as well as a sale date, when the sale will be invoiced. This stage also has the capability to identify the No-Go's, i.e. sales that has not taken place.

| IN THE FUNNEL: QUALIFICATION STAGE |                               |             |                 |                                  |                       |                 |           |                  |
|------------------------------------|-------------------------------|-------------|-----------------|----------------------------------|-----------------------|-----------------|-----------|------------------|
| FROM (and including):              |                               | 1-Mar-11    |                 |                                  |                       |                 |           |                  |
| TO (and including):                |                               | 30-Apr-11   |                 |                                  |                       |                 |           |                  |
| Client ID:                         |                               | All         |                 | select                           |                       |                 |           |                  |
| Sales Rep:                         |                               | Select      |                 | select Luke Daryl Rick Todd Bill |                       |                 |           |                  |
| Inside Sales Rep:                  |                               | All         |                 | select                           |                       |                 |           |                  |
| Opportunity:                       |                               | All         |                 | select                           |                       |                 |           |                  |
| Meeting Date                       | Opportunity ID                | Opportunity | Estimated Price | Estimated Timeline               | Estimated Probability | Estimated Value | Sales Rep | Inside Sales Rep |
| 1-Mar-11                           | Pee, 618 (Dunville) #01       | Product 1   | \$15,142.38     | 31-Mar-11                        | 60%                   | \$9,085.20      | Todd      | Donna            |
| 1-Mar-11                           | Rebecca, 1190 (Calville) #01  | Product 11  | \$2,350.00      | 31-Mar-11                        | 75%                   | \$1,695.00      | Rick      | Patricia         |
| 1-Mar-11                           | Harley, 563 (Milton) #01      | Product 12  | \$2,350.00      | 31-Mar-11                        | 95%                   | \$2,238.25      | Luke      | Christine        |
| 1-Mar-11                           | East 14th, 109 (Hamilton) #01 | Product 13  | \$8,475.00      | 31-Mar-11                        | 30%                   | \$2,542.50      | Daryl     | Rhonda           |
| 2-Mar-11                           | Royal, 1291 (Burlington) #02  | Product 7   | \$10,468.45     | 1-Apr-11                         | 30%                   | \$3,140.84      | Todd      | Donna            |
| 7-Mar-11                           | Watkins, 581 (Hamilton) #02   | Product 4   | \$5,268.40      | 8-Apr-11                         | 80%                   | \$4,220.72      | Bill      | Cathy            |
| 8-Mar-11                           | Vinson, 78 (Dundas) #01       | Product 8   | \$5,051.00      | 8-Apr-11                         | 40%                   | \$2,020.40      | Daryl     | Rhonda           |
| 12-Mar-11                          | East 14th, 109 (Hamilton) #02 | Product 9   | \$10,000.45     | 11-Apr-11                        | 33%                   | \$3,329.55      | Rick      | Patricia         |
| 12-Mar-11                          | Olivia, 75 (Ancaster) #01     | Product 9   | \$5,240.00      | 11-Apr-11                        | 25%                   | \$1,310.00      | Luke      | Christine        |
| 14-Mar-11                          | Colman, 90 (Greenby) #01      | Product 4   | \$2,834.00      | 13-Apr-11                        | 80%                   | \$1,220.40      | Bill      | Cathy            |
| 11                                 |                               |             |                 |                                  |                       |                 |           |                  |
| 12                                 |                               |             |                 |                                  |                       |                 |           |                  |
| 13                                 |                               |             |                 |                                  |                       |                 |           |                  |
| 14                                 |                               |             |                 |                                  |                       |                 |           |                  |
| 15                                 |                               |             |                 |                                  |                       |                 |           |                  |
| 16                                 |                               |             |                 |                                  |                       |                 |           |                  |
| 17                                 |                               |             |                 |                                  |                       |                 |           |                  |
| 18                                 |                               |             |                 |                                  |                       |                 |           |                  |
| 19                                 |                               |             |                 |                                  |                       |                 |           |                  |
| 20                                 |                               |             |                 |                                  |                       |                 |           |                  |
| 21                                 |                               |             |                 |                                  |                       |                 |           |                  |
| 22                                 |                               |             |                 |                                  |                       |                 |           |                  |
| 23                                 |                               |             |                 |                                  |                       |                 |           |                  |
| 24                                 |                               |             |                 |                                  |                       |                 |           |                  |
| 25                                 |                               |             |                 |                                  |                       |                 |           |                  |

Sales Report "In the Funnel" Sales Forecast Report



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Sales Tracker is a brilliant system in terms of its ***simplicity, universal applicability, and its accuracy***. Sales managers now have ***detail sales performance information*** available that helps them improve sales productivity, as well as having a first rate ***planning tool*** available that helps them communicate an accurate ***sales forecast and funnel visibility*** into the rest of the organisation.

Get your Sales Tracker System by simply  
downloading the system from Carpedia's  
web site at **[www.carpedia.co.za](http://www.carpedia.co.za)**



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