



Success Tracker

Success Tracker is a tool to help track and improve your sales activities and results. With the help of Success Tracker, you will be able to identify areas for you and your team to improve to reach your revenue goals.

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- Slide 3
 - Dashboard View
 - This is where your team will enter their weekly sales activity
 - All activity will be reported on your personalized Dashboard (Weekly, Monthly, Rolling 30 Days, Rolling 60 Days and Rolling 90 Days)
 - This page can be customized
 - You will receive a weekly email with your team's weekly sales activity
- Slides 4 thru 6
 - Individual Sales Activity Reports
 - These reports are imbedded into the presentation. Please click on the individual reports to view all sales activity information

Dashboard

This is where your team will input their weekly sales activity. Based upon their individual Success Formulas, the information they input will be calculated and automatically entered into the individual reports (as seen on the following pages).

Weekly Data Input

Enter Weekly Sales Activity Data

Details		
Name <input type="text"/>	Actual Dials <input type="text"/>	Actual Presentations <input type="text"/>
Period <i>(none)</i>	Actual Contacts <input type="text"/>	Actual Closed <input type="text"/>
* Reporting Date <input type="text"/> Reporting Date entered must be the FRIDAY of the weekly activity being reported (Monday-Friday)	Actual Appointments <input type="text"/>	Actual Invested \$ \$ <input type="text"/>
Goals vs. Variance		

Weekly Sales Activity Report

Name	Goal Dials	Actual Dials	Goal Contacts	Actual Contacts	Goal Appointments	Actual Appointments	Goal Presentations	Actual Presentations	Goal Closed	Actual Closed
Salesperson 1	8	16	6	3	4	4	3	2	2	1
Salesperson 2	73	32	26	14	9	4	3	4	2	0
Salesperson 3	8	5	8	4	6	1	4	6	3	2
Salesperson 4	22	15	16	6	7	4	3	6	1	2
Salesperson 5	106	40	37	28	13	8	8	6	6	2
Salesperson 6	25	33	19	9	9	4	7	3	4	3
Salesperson 7	39	39	39	21	19	12	10	9	5	4
Salesperson 8	21	45	17	20	5	15	4	4	3	3
Salesperson 9	368	140	92	30	23	15	6	13	4	5
Salesperson 10	51	55	13	16	6	7	4	6	2	1
Salesperson 11	13	63	6	6	3	7	2	3	1	2
Salesperson 12	19	59	8	9	4	8	2	3	2	1
Salesperson 13	11	60	11	7	7	2	3	2	2	1
Salesperson 14	11	12	6	3	4	9	4	3	2	0
	775	614	304	176	119	100	63	70	39	27

Monthly Sales Activity Report

Name	Month	Week	Goal Dials	Actual Dials	Dial Variance	Goal Contacts	Actual Contacts	Contacts Variance	Goal Appointments	Actual Appointments	Appointments Variance
1 (14 entries)											
Salesperson 1	05 - May	1	8	17	213%	6	6	100%	4	4	100%
Salesperson 2	05 - May	1	73	36	49%	26	18	69%	9	7	78%
Salesperson 3	05 - May	1	8	3	38%	8	3	38%	6	0	0%
Salesperson 4	05 - May	1	22	31	141%	16	8	50%	7	6	86%
Salesperson 5	05 - May	1	106	36	34%	37	25	68%	13	11	85%
Salesperson 6	05 - May	1	25	45	180%	19	15	79%	9	5	56%
Salesperson 7	05 - May	1	39	40	103%	39	22	56%	19	9	47%
Salesperson 8	05 - May	1	21	40	190%	17	25	147%	5	12	240%
Salesperson 9	05 - May	1	368	80	22%	92	400	435%	23	15	65%
Salesperson 10	05 - May	1	51	40	78%	13	16	123%	6	10	167%
Salesperson 11	05 - May	1	13	65	500%	6	5	83%	3	4	133%
Salesperson 12	05 - May	1	19	50	263%	8	7	88%	4	6	150%
Salesperson 13	05 - May	1	11	40	364%	11	4	36%	7	12	171%
Salesperson 14	05 - May	1	11	10	91%	6	3	50%	4	7	175%
			775	533		304	557		119	108	

Rolling 30 Days Sales Activity Report

Name	Month	Week	Dial Variance	Contacts Variance	Appointments Variance	Presentation Variance	Closed Variance	Revenue Variance
1 (14 entries)								
Salesperson 1	05 - May	1	213%	100%	100%	67%	50%	117%
Salesperson 2	05 - May	1	49%	69%	78%	233%	50%	51%
Salesperson 3	05 - May	1	38%	38%	0%	75%	67%	104%
Salesperson 4	05 - May	1	141%	50%	86%	200%	600%	104%
Salesperson 5	05 - May	1	34%	68%	85%	100%	50%	62%
Salesperson 6	05 - May	1	180%	79%	56%	43%	75%	269%
Salesperson 7	05 - May	1	103%	56%	47%	80%	80%	67%
Salesperson 8	05 - May	1	190%	147%	240%	100%	67%	8%
Salesperson 9	05 - May	1	22%	435%	65%	217%	50%	19%
Salesperson 10	05 - May	1	78%	123%	167%	175%	100%	173%
Salesperson 11	05 - May	1	500%	83%	133%	100%	100%	156%
Salesperson 12	05 - May	1	263%	88%	150%	150%	50%	58%
Salesperson 13	05 - May	1	364%	36%	171%	67%	50%	84%
Salesperson 14	05 - May	1	91%	50%	175%	75%	100%	432%

Rolling 60 Days Sales Activity Report

Name	Month	Week	Dial Variance	Contacts Variance	Appointments Variance	Presentation Variance	Closed Variance	Revenue Variance
04 - April > 1 (14 entries)								
Salesperson 1	04 - April	1	63%	108%	133%	400%	150%	104%
Salesperson 2	04 - April	1	100%	75%	33%	300%	67%	71%
Salesperson 3	04 - April	1	118%	44%	100%	167%	300%	100%
Salesperson 4	04 - April	1	38%	46%	92%	113%	83%	68%
Salesperson 5	04 - April	1	392%	237%	133%	43%	75%	105%
Salesperson 6	04 - April	1	103%	77%	74%	130%	200%	76%
Salesperson 7	04 - April	1	167%	129%	200%	125%	67%	883%
Salesperson 8	04 - April	1	14%	33%	52%	200%	125%	190%
Salesperson 9	04 - April	1	90%	69%	133%	150%	250%	100%
Salesperson 10	04 - April	1	592%	300%	267%	200%	300%	178%
Salesperson 11	04 - April	1	379%	75%	175%	150%	100%	33%
Salesperson 12	04 - April	1	455%	91%	114%	167%	200%	125%
Salesperson 13	04 - April	1	191%	50%	150%	50%	0%	0%
04 - April > 2 (16 entries)								

Rolling 90 Days Sales Activity Report

Name	Month	Week	Dial Variance	Contacts Variance	Appointments Variance	Presentation Variance	Closed Variance	Revenue Variance
03 - March > 1 (10 entries)								
Salesperson 1	03 - March	1	96%	85%	167%	150%	200%	167%
Salesperson 2	03 - March	1	30%	54%	108%	100%	83%	643%
Salesperson 3	03 - March	1	125%	100%	50%	67%	100%	46%
Salesperson 4	03 - March	1	145%	56%	86%	0%	0%	0%
Salesperson 5	03 - March	1	326%	113%	225%	200%	100%	216%
Salesperson 6	03 - March	1	462%	167%	233%	150%	100%	146%
Salesperson 7	03 - March	1	100%	63%	33%	150%	100%	77%
Salesperson 8	03 - March	1	164%	67%	150%	75%	100%	67%
Salesperson 9	03 - March	1	167%	118%	300%	200%	167%	127%
Salesperson 10	03 - March	1	88%	108%	122%	367%	100%	149%

12 Month Sales Activity Report

Name	Month	Week	Goal Dials	Actual Dials	Dial Variance	Goal Contacts	Actual Contacts	Contacts Variance	Goal Appointments	Actual Appointments	Appointments Variance	
01 - January > 2 (15 entries)												
Saleperson 1	01 - January	2	368	60	16%	92	20	22%	23	16	70%	
Saleperson 2	01 - January	2	106	38	36%	37	13	35%	13	6	46%	
Saleperson 3	01 - January	2	73	45	62%	26	14	54%	9	14	156%	
Saleperson 4	01 - January	2	51	33	65%	13		0%	6	7	117%	
Saleperson 5	01 - January	2	39	30	77%	39	13	33%	19	7	37%	
Saleperson 6	01 - January	2	11	10	91%	6	2	33%	4	6	150%	
Saleperson 7	01 - January	2	25	25	100%	19	10	53%	9	8	89%	
Saleperson 8	01 - January	2	8	10	125%	6	3	50%	4	1	25%	
Saleperson 9	01 - January	2	8	18	225%	8	10	125%	3	5	167%	
Saleperson 10	01 - January	2	21	60	286%	17	20	118%	5	15	300%	
Saleperson 11	01 - January	2	22	75	341%	16	10	63%	7	5	71%	
Saleperson 12	01 - January	2	19	75	395%	8	16	200%	4	10	250%	
Saleperson 13	01 - January	2	11	50	455%	11	9	82%	7	10	143%	
Saleperson 14	01 - January	2	21	100	476%	17	25	147%	5	13	260%	
Saleperson 15	01 - January	2	13	100	769%	6	15	250%	3	5	167%	
			796									
01 - January > 3 (14 entries)												
Saleperson 1	01 - January	3	368	35	10%	92	25	27%	23	13	57%	