

GETTING STARTED

REPORTING

For Sales Representatives: Reports summarize and pinpoint exactly how many deals you have at each point in the sales process. Reports can also package the key information surrounding individual opportunities into digestible, and more importantly, readable snippets which are easily accessible before visits, allowing you to fully prepare before customer face-to-face meetings.

For Sales Directors: Reports are extremely important as they provide visibility in terms of your team's performance. Reports are the primary tool with which you can track sales revenue, opportunity status, pipeline health and any number of metrics chosen when making a sales report. Reports can help you locate blockages in the sales funnel, identifying areas for potential improvement in field sales performance.

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