

Sales Report

Execution

03

Project time

1 day

Level

Intermediate

Audience



Sales Leader
& MD

Benefit

Template

Sales Report (an essential part of Sales Excellence)

Each business should have a well-designed **monthly sales report**.

Target audience: **Business and Sector**

(Group may request adhoc e.g. as part of business review).

The report should contain the following.

1. Segmentation reporting

Performance of priority market/customer segments

2. Sales KPIs

Outcome focused KPIs which indicate future sales

Minimum KPIs for all businesses	Quote conversion lume metrics e.g. orders Average deal size Fulfilment from stock On time delivery in full (OTIF)
Optional KPIs for longer cycle businesses	Pipeline coverage Backlog Sales cycle length Share of wallet (may only be known for some customers)
Optional KPIs for shorter cycle, fast transacting businesses	New enquiries Quotation speed Channel sales e.g. e-commerce, inside sales Customer churn

(To ensure correct interpretation include definitions/basis of calculations e.g. conversion).

3. Growth initiatives

Growth initiative progress