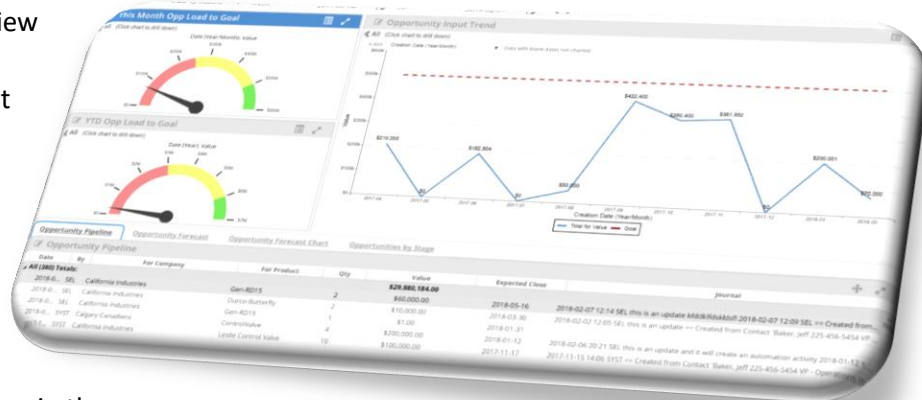


Dashboards are Key to Providing a Dynamic 360 View

Actionable, Process-Oriented dashboards provide visibility to critical information needed to manage all stages of the sales process from lead to after sale follow up. Dashboards let you see every step of the sales process even how you are performing on a daily, weekly, monthly, and annual basis. When done properly, they make it easy to view and analyze data in multiple ways including by product, rep, geography, business unit, etc.

Customers are continually interacting with various touch points within the organization and dashboards bring these touch points together. Your team can now see not only leads and opportunities, but also the emails, phone calls and meetings associated with those customers. They can view whether those have converted to a quote and then a sale, and then view any applicable shipping and invoice data.

A dynamic 360-degree view of the customer is a way to understand your client relationship at a deeper level. Dashboard allows you to capture the rich data history that had simply walked out the door when you experienced sales turnover in the past. Now your new salesperson can simply take over an account with all the information packaged and ready to roll.



See how dynamic dashboards helped a Midwest industrial distribution client gain a 360 view into their sales process. <http://www.salesprocess360.com/wp-content/uploads/2023/03/SP360-Case-Study-Allied-Automation-Final.pdf>

SalesProcess360 is a consulting organization helping clients decide which CRM is best for them and how to achieve greater ROI from their existing CRM regardless of phase or platform. To learn more on how SP360 can help please visit www.SalesProcess360.com.