



# The Salesforce Inside Sales KPI Report

*Sales accountability, visibility, and actionable intelligence - three critical tenets of the modern, dynamic sales org. As Harvard Business Review and Forbes attest, maximizing visibility and feedback are crucial for organizational success. The inherent question so many sales leaders ask is, "What should I be measuring and how do I measure it?". Our team utilized our proprietary data set and world changing customers to provide you a place to start.*

“Sales leaders today have the ability to access more data than ever before”

## How 101 Ambition clients evaluate their teams via Salesforce KPIs.

Sales leaders today have the ability to access more data than ever before about their teams, which our research shows has become a two-headed monster for many managers:

**Problem A.** On one hand, limitless data has transformed sales leaders into analysts, with reams of data to comb through for trends or KPI nightmares to address. On average, *managers spend 10-12 hours per week* analyzing Salesforce reports and dashboards.

**Problem B.** On the other hand, limitless data poses a new challenge to today's sales leaders - find sales process insights, make correct adjustments to corresponding sales goals and KPIs, get affected members of your sales force to adjust accordingly.

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## The Salesforce Inside Sales KPI Report: Background

Ambition’s sales platform offers an immediate Solution for Problem A and proven vehicle for solving Problem B. Every day, sales leaders from around the world and across industries come to Ambition looking to increase the effectiveness and performance of their sales organization.

When sales organizations invest in Ambition, they are embracing more than beautiful sales leaderboards and powerful competition tools. they are adopting a philosophy we call Agile Sales Management. to create KPI visibility, align goals and keep reps accountable to them via real-time, intelligent data insights and automation.

# The Salesforce Inside Sales KPI Report: Overview

Today, we're launching our first Salesforce Inside Sales KPI Report, with the goal being to provide an annual point of inspiration as well as guidebook that inside sales leaders can reference to both build better KPIs and better sales organizations. To provide the following data, we polled a significant number of dynamic Inside Sales orgs currently utilizing Ambition with Salesforce. Our team distilled nuanced sales behavior tracking using Salesforce metrics to provide a generalized view, applicable to any high performing inside sales team.

All of the companies we talked to sold business-to-business, and had a dedicated inside sales process run by cradle-to-grave account executives, dedicated business development personnel, or segmented Sales Development and Demand Generation teams.

The KPI analysis shows how sales orgs *track sales performance on a rep-by-rep* basis via Salesforce + Ambition. The report is segmented in half, with top-of-funnel KPIs focused on activity; bottom-of-funnel KPIs focused on objectives.



**Average KPIs: 14.5**



**Average Users: 48.75**



**Range of Roles Tracked**

Minimum: 1. Maximum: 7.



**Metrics**

58% of companies track Sales Efficiency Metrics.

## 2017 Salesforce KPI Report: Top Of Funnel

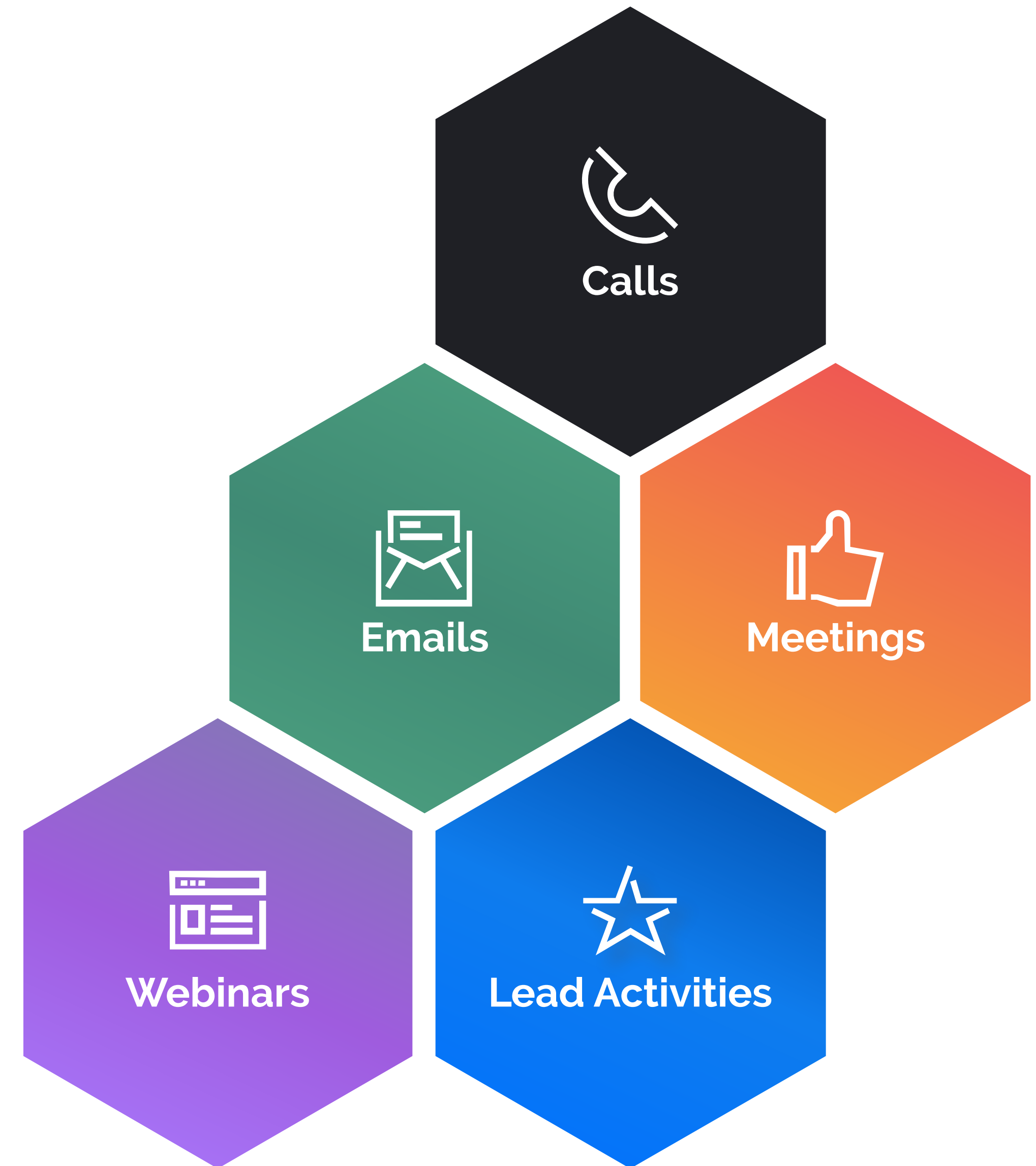
Most popular Sales KPIs for measuring top-of-the-funnel sales performance: ***Calls, Emails, Meetings Scheduled, Webinars & Lead Activity.***

### ***Top Sales Activity KPI: Call Activity***

All of the Ambition clients polled tracked call activity on a daily or weekly level. Notably, a variety of approaches were applied to track the calls - ranging from manual Task creation in Salesforce, to automated call tracking from tools like Velocify, Outreach, PowerDialer, and others

### ***Top Sales Objective KPI: Meetings Completed***

Meetings Completed was measured by 71% of our polled companies. Notably, we saw a vast array of strategies being used to define and apply the KPI to the broader picture of overall sales performance.



“By measuring conversation conversion to intended outcomes - leaders can clearly focus attention on improving rep skills.”

**The best: Create 3 Sales KPIs** (Meetings Scheduled, Meetings Completed, Opportunities Created) to provide contextual insight into their sales process. Namely, are you setting quality meetings? Are your prospects showing up? If so, are they converting to opportunities? Are your reps updating Salesforce properly throughout the process?

All of the sales organizations executing these subtle moves gave this strategy a ringing endorsement. The consensus achievement: the elimination of critical blind spots in their sales process analytics and personnel evaluation.

**Top Sales Effectiveness KPI: Call Connects / Conversations**

For sales leaders, these are a powerful set of metrics for understanding quality of the prospect pipeline being built as well as the skill level of your reps moving leads through the funnel.

We were surprised and thrilled to see that 75% of the companies we polled went beyond the simple call activity, but also measured and set targets for Call Connects or Conversations. This type of metric is really useful because it helps leaders distill Effectiveness in the process - whether that is calculated by tracking ultimate Call Disposition (we saw many) or the next step in the funnel, such as a Scheduled Meeting.

58% of the companies tracked Scheduled Meetings. However, only 25% had an Effectiveness metric to account for the number of Conversations that converted to Scheduled Meetings. This is a major leverage point for many sales organizations. By measuring conversation conversion to intended outcomes - leaders can clearly focus attention on improving rep skills.

A similar Effectiveness metric that worked both on the activity / skill side was Leads Converted and Leads Converted to Opportunities. Not all of the companies we evaluated utilized Salesforce leads, but we loved discovering 60% did track Leads that were converted to Opps.

## 2017 Salesforce KPI Report: Bottom of Funnel

The further our clients went down their sales funnel, the more nuanced their Salesforce KPI tracking. The most common Sales Objective was Closed Won Opportunities, which 75% of our polled sales organizations were tracking. Method of tracking, however, was less uniform. Many sales organizations injected a diverse range of Custom Objects as filters across different organizations and sales roles.

One proven way to encourage small wins as well as create additional recognition for sales culture is by building depth in the type of Opportunities tracked. Whether with Opportunity / Stages (which can cultivate pipeline development) or Opportunities featuring specific Product types or codes - our analysis found sales orgs driving Opp creation by measuring a number of different states.

Total Opps Created was also utilized in 70% of our customers to track Average Opportunity Value (in dollars). These metrics were typically also deployed as team or group target settings.

## Most Popular Mid-End Funnel Metrics:



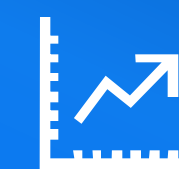
**Closed Won  
Opportunities.**



**Closed Won Dollars.**



**Pipeline Dollars  
Generated.**



**Opportunities  
Created.**

## Top Sales Effectiveness KPI: Close Rate

Across the companies polled, 50% of sales organizations kept individual targets on both the quantity of Opps Closed Won as well as the aggregated dollars of Opps Closed Won. Similarly, 42% of companies utilized Efficiency metrics by keeping track of Total Opportunities Created and combining that metric against the Closed Won metric to create a Close Ratio KPI for each rep.

### Salesforce KPI Takeaways: Bottom of the Funnel

A simple, but critical pipeline development metric we saw for ISRs was aggregated Pipeline Dollars Created (between X-Y Opportunity stage). Only 30% of the teams we studied tracked the total pipeline dollars versus rep targets over a given period.

This is a metric we really liked because it provides a simple predictor of success, and can be leveraged with Close Rate (more on that below). With both Pipeline Dollars Created and Close Rate percentage, reps could use effortless math for a predictive yardstick on quota attainment at any time.

Finally, a fantastic wrinkle from a sales coaching and management perspective we saw - which we advocate - is benchmarking Opps Committed and building an Efficiency metric with Opps Closed Won. All told, 17% of our sales teams included that Committed-to-Won ratio with clear objective targets, setting a clear expectation level for forecasting.



*Sales reps who have well-identified professional goals are almost 4 times happier, which translates into productivity.*

Trish Bertuzzi in HubSpot.







## Appendix of Salesforce KPI Analysis

If you enjoyed this report, we encourage you to visit our [Ambition-Salesforce Knowledge Center](#) and check out these brand-new resources:

- [The Sales KPI Index](#)
- [The Salesforce KPI Framework](#)
- [How Peek Increased Salesforce Activity by 142%](#)
- [How VorsightBP Increased Quality Sales Conversations by 300%](#)

Modern sales leaders use Ambition to enhance [sales performance insights](#) and run supercharged sales reports, scorecards, contests, and TVs via drag-and-drop interface. Ambition has helped improve Salesforce KPI visibility for companies like [Wayfair](#), [FiveStars](#) and [Filemaker](#).