Pipeliner

US Telecom

Johnsons Innovative

BCA Systems Ltd.   CRT Communications

...... Ltd.

Gama Electronics   Instant Pharma

....lutions Ltd.

Isdera   Bavaria Bank

...... Consulting

Weighted Target
$ 2,300,590
58 %

Pipeliner CRM Arithmetica Guide

Sales Target Tracking

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Pipeliner

Sales Target Tracking

Learn how to set up Sales Target with Pipeliner Sales CRM Application.
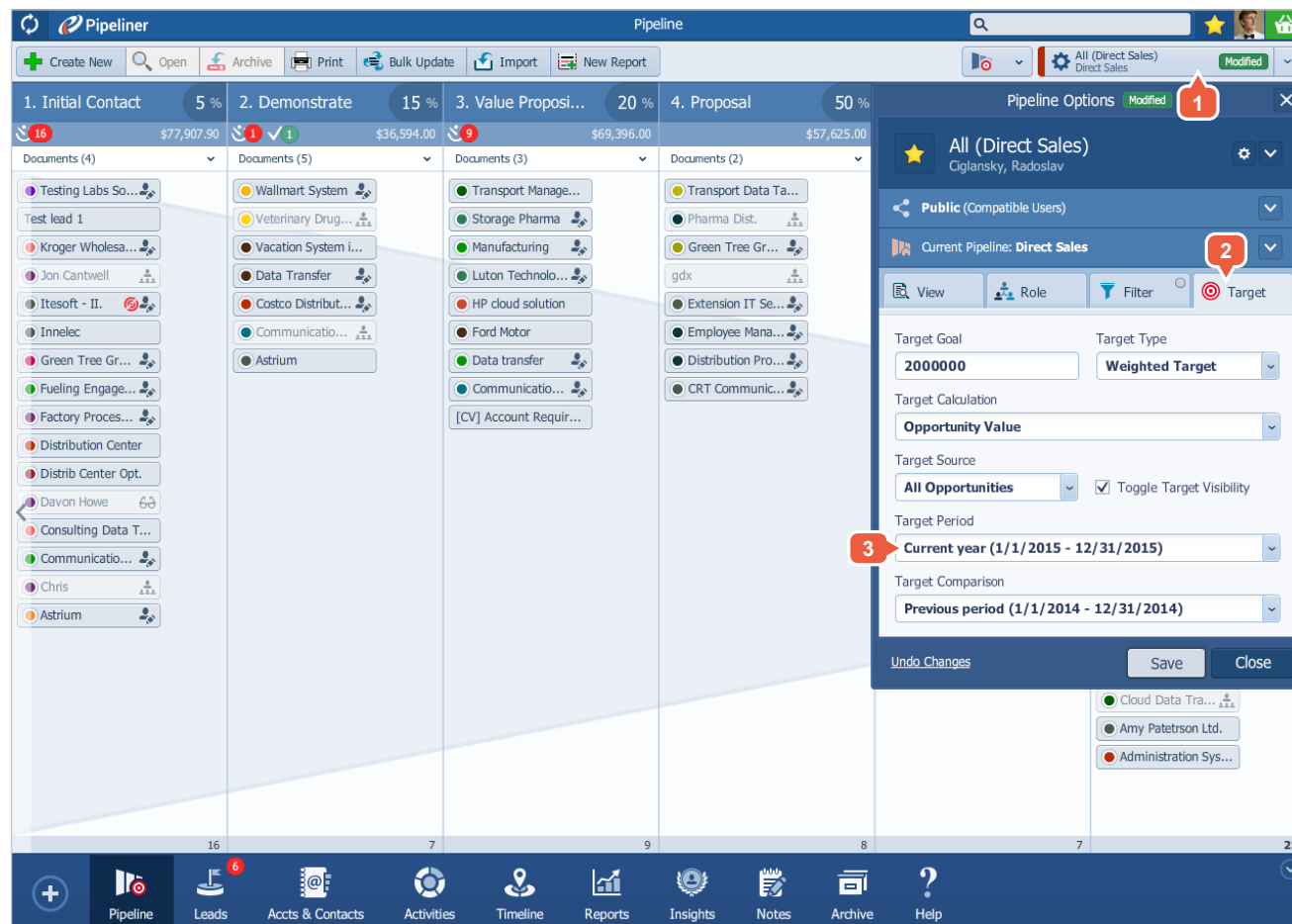
CONTENT

1. Setting up Sales Dynamic Target

1.1. How do I define Target Period

Pipeliner enables you swiftly monitor your sales effort in real-time based on pre-defined sales goals within the specific target period. Dynamic Sales Targets help keep you and your team focused on achieving your sales goals.
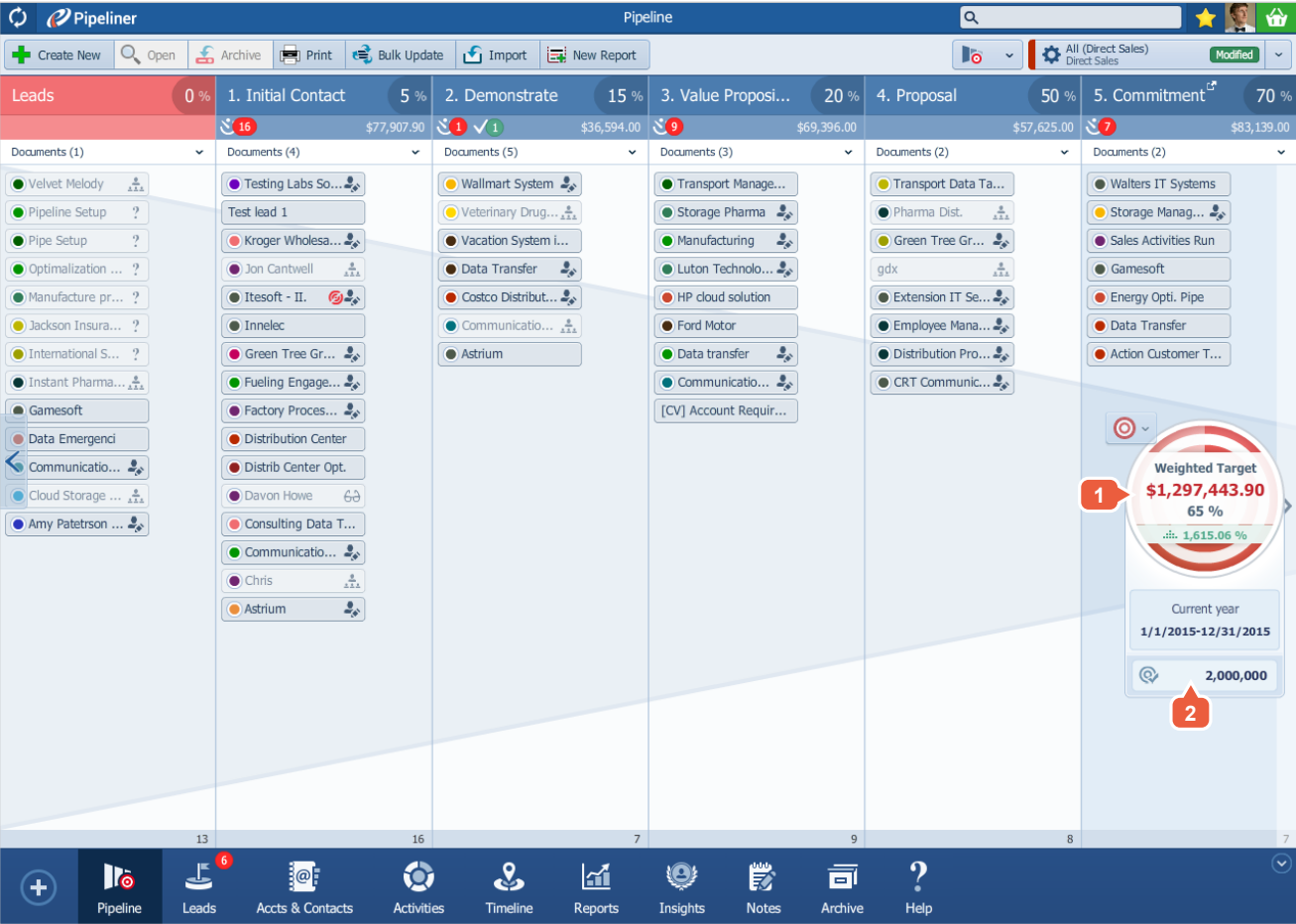

DESCRIPTION

1 To configure your target period, click on the OPTIONS icon in the upper-right corner of Pipeliner application. Pipeliner will open all options you can use to define view of your opportunities in sales pipeline.

2 Click on the TARGET. Within the target settings, you can select from many pre-defined target periods up to your own custom period range.

3 Click on the drop-down menu of DYNAMIC TARGET PERIOD and select one. Pipeliner automatically adjusts your target on your sales pipeline according to your settings.

1.2. How do I set my Goal

Pipeliner helps you to stay focus on achieving your sales goals. By setting up your goal for a specific time period you can immediately act on your sales pipeline health.
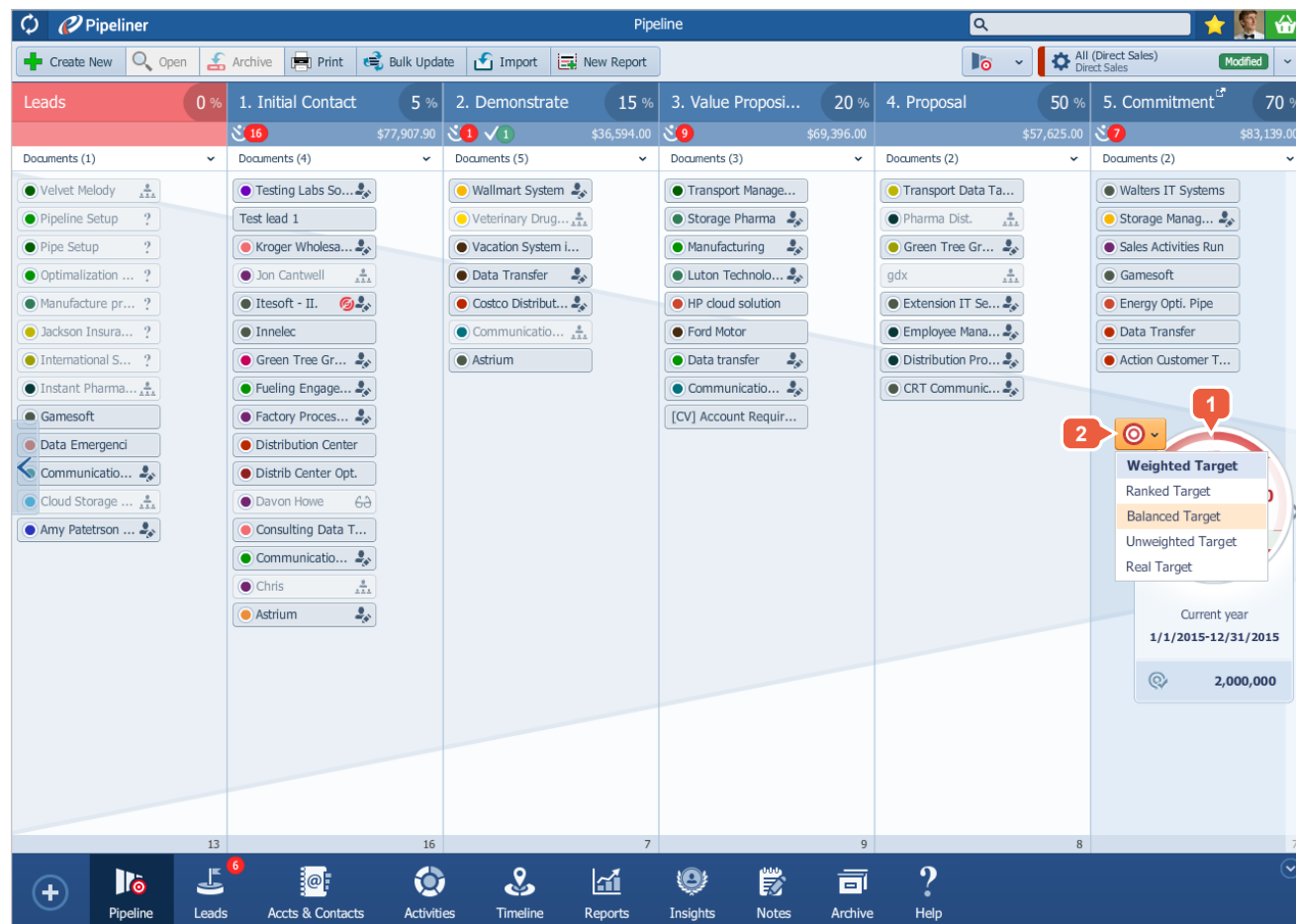

DESCRIPTION

1 To set your target goal, click on the TARGET located in the middle of your sales pipeline in the right part of Pipeliner application screen. Pipeliner will open dynamic target with its period and goal.

2 Click into the pre-defined field named GOAL and enter the value you would like to achieve for specific target period. Pipeliner automatically calculates the impact of opportunities' values in your sales pipeline to your goal.

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1.3. How do I change Dynamic Target Type

Pipeliner enables you to track different aspects of your sales pipeline value using four different dynamic target views. Pipeliner by default shows weighted dynamic target that calculates the pipeline value according to opportunities values and their position in sales step and its related probability of closure.
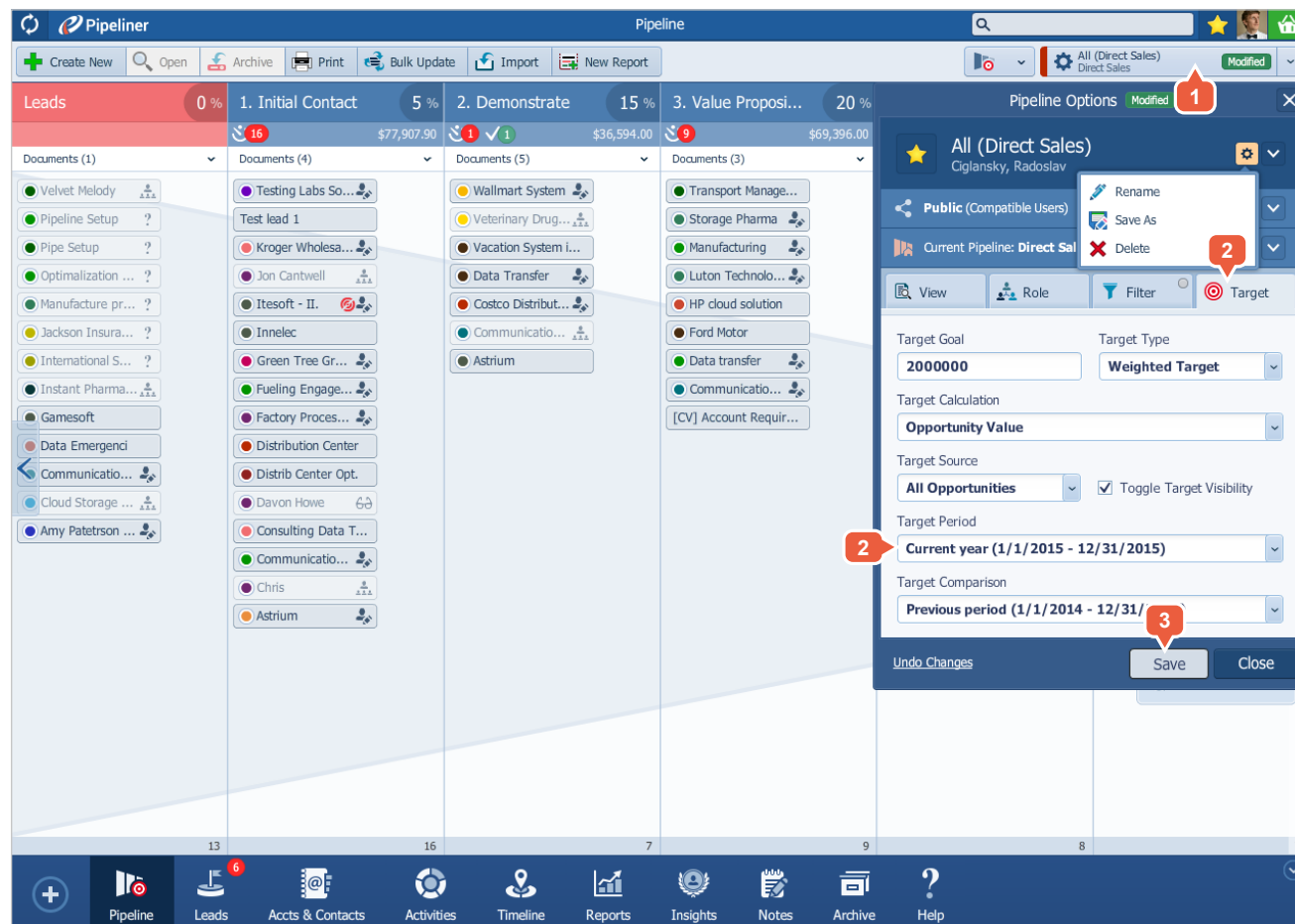

DESCRIPTION

1 To change dynamic target move your cursor on the TARGET located in the middle of your sales pipeline in the right part of Pipeliner application screen. Pipeliner automatically shows the blue icon on the top-left size of the target.

2 Move your cursor over the blue CHANGE TARGET VIEW icon and click on it. Pipeliner automatically re-calculates the target values based on the target type as follows:

› **Weighted target –** sum of the opportunities values according to their sales step position (its percentage of probability) and target period date definition.

› **Un-weighted target –** sum of the opportunities values according to the target date period definition.

› **Real target –** sum of the closed won opportunities values.

› **Balanced target –** sum of the opportunities values according to their rankings and their sales step position.

1.4. How do I compare two Targets

Pipeliner pre-defined role based profiles, with custom filter and view settings, allow you to, quickly and selectively produce the information you need, when you need it and with speed.

DESCRIPTION

1 To save your dynamic target under one profile, click on the OPTIONS icon in the upper-right corner of Pipeliner application. Pipeliner will open all options you can use to define view of your opportunities in sales pipeline.

2 Configure your dynamic target under DYNAMIC TARGET VIEW. Pipeliner enables you to overwrite your currently selected profile or create new according to your current options settings.

3 Select comparison period in the Target Comparison drop-down list. Pipeliner will automatically compare your current Target with the previous period.

TIP: Mouse-over the Target to see more details about your current and previous performance.

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