Sales Performance Template
Instructions

You take the performance of your team and every salesperson personally. You want the team and each individual to reach full potential - improving each month and reaching or exceeding quotas.

And while you realize consistency in messaging and process is key to consistency of results, in the busy day-to-day of supporting your team, it's easy to lose sight of the details. Enter your new Sales Performance Template.

With it, you'll be able to answer:

How your team and each rep is performing in terms of:
- Revenue in pipeline
- Productivity
- Competitive win rate
- New MRR
- Performance
- Messaging Adoption

You'll also see how messaging adoption impacts:
- Competitive win rate
- Performance to goal

How to use this template

This template is designed as a starting point to help you track the success of your sales reps and your team overall. You may need more rows, fewer rows, different charts or pivot tables, so feel free to make it your own.

We've tried to make it simple to modify as needed.

First, make a copy of the template here.

To get the most out of this template, simply enter your information into the "Rep Data" sheet and then analyze the results.

Sales Performance Template .ıl **Rep Data**

Adding Data in the "Rep Data" Sheet

This is where you'll add in your data and review data at the level of each rep and for your entire team.

Name and Manager
Enter the name of each sales rep and their manager. Please note that if you add more names/rows than are currently in the sheet, you'll need to adjust your formulas in the highlighted cells to make sure data from those rows are included. The "Rep Progress" pivot table data ranges will also need to be updated.

MRR, Revenue in Pipeline
Enter each rep's current $MRR and revenue in the pipeline.

Calls, Emails, Demos, # Opps worked on
Enter these productivity metrics.

%Won, %Lost to Competitors, % Won against Competitors, Competitive Win Rate
These are all formulas, no need to add anything. You'll want to review these fields when all your data is filled in to see how each rep is performing.

Target/Goal NEW MRR, Achieved NEW MRR
Enter the goal and actual MRR achieved.

Performance
No need to enter anything. This is a simple formula showing how much progress each person made to their goal MRR.

Used Battlecards/Messaging %
Enter the percentage of calls on which the sales rep used the correct messaging and/or referenced Battlecards. You can ask reps to self report or you can review sales calls for keywords used.

Comments
Enter anything that might explain their performance - good or bad.

Action Needed
Is action needed to help improve performance or to recognize a job well done?

#Won, #Lost to competitors, #Won against competitors
Enter these numbers. You may not always know for sure if a competitor was involved, so your #Won number won't always be the sum of the other two.

The numbers in the "total" and "avg" rows show you how your entire team is performing and what the average performance is across the team. Pay special attention to your particular KPIs, but also:

- % Won
- Competitive Win Rate
- Performance
- Used Battlecards/Messaging%

"Track your Progress" Sheet

This sheet compiles KPIs by month to show progress over time and in relation to other metrics. The numbers are imported from the "Rep Data" sheet.

Average Competitive Win Rate, Average Performance and Average Messaging Adoption

This chart shows clearly the correlation between messaging adoption and competitive win rates, as well as overall performance.

Revenue in Pipeline vs. Month

Just a simple chart showing progress.

"Rep Progress" Sheet

This sheet contains a series of pivot tables based on the "Rep Data" sheet. You can see, from month to month, how each rep is progressing, as well as seeing how your entire team is progressing. We've included %Won and Used Battlecards/Messaging % here, but you can change or add values as needed.

Kompyte makes it easy to improve sales performance, win rates, and messaging adoption.

Share Battlecards and up-to-the-minute competitive insights and messaging with your team. Integrate with your favorite CRM and sales tools and your team can access current information and messaging anytime.

We'd love to show you how it can work for you.

Get a demo here.