



Performance Against Plan mini-app:

See instantly how your team is performing

The problem

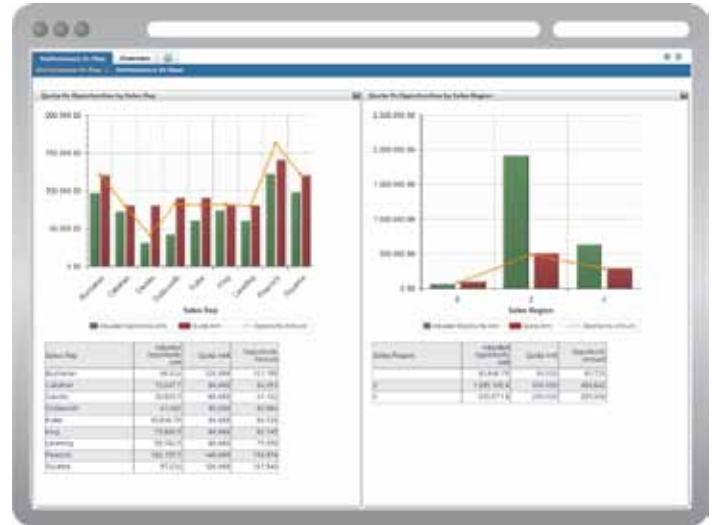
Comparing your sales team’s performance against plan is a top priority for most sales executives—but it’s rarely as easy as it seems. You need different spreadsheets for different regions, reps and managers—and different files for the actual plan/goal data. What’s more, you rarely have the ability to drill down and view the data at a micro level.

The answer

Advantenon integrates your pipeline data with your sales plan data so you can compare them easily side by side in a dynamic, easy-to-read report. You can drill down to virtually any level of detail you need—from company to region to manager to individual sales rep. And you can summarize and filter the data however you want. Comparing regions or even individual reps side by side is a snap. Plus, when you integrate additional data sources, such as your customer service database, you instantly gain additional intelligence and insight, such as gross profit on all deals or the number of maintenance contracts in the pipeline.

Mini-app Highlights

- Combine pipeline data with sales plan data in one easy-to-use file
- Drill down to any level of detail you need, from territory to manager to rep
- Get accurate, detailed information and meaningful analysis with drill-down ability
- See actionable, real-time data to make better-informed decisions
- See colorful, easy-to-read charts and graphs
- Access data on any platform, even mobile devices
- Use geographic views of your sales team to quickly determine sales success



View the current pipeline against quota by sales rep or region.



View current pipeline amount vs. quota by month/quarter, by sales rep or by sales process stage.



advantenon

MINI-APPS FOR NIMBLE BI

Learn more online at www.advantenon.com

Reports & dashboards included

- Performance against plan (dollars and gross profit)
- Number of maintenance plans proposed (or any other product/service variable)
- Color-coded geographic map of performance against plan
- Trigger report emailed to sales managers whenever sales rep falls behind plan

Data sources we can connect to

- Invoice data from accounting system
- Pipeline info from CRM system
- User-created spreadsheets
- Call center management systems
- Customer service management systems
- Project management data
- Text file extracts from other systems
- Databases from other systems (SQL Server, Oracle, etc.)

Price

\$7,450

This price includes the mini-app, all reports and dashboards, and integration to your custom data sources.



View and interact with the same data on your mobile device.