

SAMPLES TELL A STORY

Call Activity

Frank Bretton is a senior manager with the fictional Great Outdoors Sporting Goods Company. He is responsible for a team of four Sales Managers. Each manager supervises the sales output of 3-4 sales representatives.

Frank uses a customized dashboard that was created with IBM Cognos. The data is updated nightly. Frank uses his dashboard to see how his team is performing based on several key metrics and charts. He can also download the dashboard to his iPad and use the dashboard wherever he goes.

Frank's dashboard was designed to support two primary use cases. Sometimes Frank focuses on the details for the team of a single manager, and explores their team's details. Other times, Frank compares the managers with each other.

At the top of the dashboard is a picture of each of Frank's managers. He can click on each one to see the details for their teams. He can see that Alex Rodriguez is currently ranked 3 out of 4, largely because his team is underperforming on Total Calls. As he clicks on each manager's icon, he sees that Julie has the lowest rank. Frank decides to find out why.

Julie's *Average Win %* of 93 is in line with everyone else. The same is true for her *Average Access to Power*, the metric for individuals on her contact list that have the authority to buy.

Still on the *YTD* tab, Frank scrolls down and examines Julie's year-to-date call numbers for her whole team. He can see that Julie has only three team members, and the other managers all have four. This definitely accounts for part of her low ranking. He clicks the button to isolate Karly Millers and sees that she made no calls in April. Frank remembers that she was on sick leave for most of that month.

Frank clicks the *Monthly* tab. He can clearly see that Karly's *Win %* for June of 46% is half the value of her team members. To see how she has been doing, he clicks on her name and the table below is filtered to her four orders. Frank clicks the checkboxes below the table to show the *City* and *Customer Type* columns.

Frank would like to verify if Karly's *Win %* is consistently lower than her peers each month. He clicks on the Iterator at the bottom of the page to see the data for May (much worse at 26%), April (no data due to the sick leave), March (not bad at 54%), February (dismal at 15%), and finally January (again 26%).

Frank decides to ask Julie Olsen at their next one-on-one meeting to see if Karly's numbers have been trending up since her sick leave. If not, they will need to determine if additional training or support is required to get Karly to perform at the same level as her peers.

As a final check, Frank clicks on the *Managers* tab. He scrolls down to view a sorted list of Calls across all Sales Representatives in his organization. Again he sees that Karly is at the bottom.

To recap, Frank is empowered to view the key metrics for his four managers, and dig deeper into YTD and monthly details. He can also see a quick summarized list of all of his managers and sales representatives at the same time.