Zone&Co

ZoneReporting

Top 10 CRM Reports for your NetSuite, Salesforce and HubSpot Data

Top 10 Sales Reports for your NetSuite, Salesforce and HubSpot CRM Data

Abstract:

This paper includes 10 must-have reports for your CRM data that will give you actionable insights for your sales and marketing teams and beyond.

✅ About ZoneReporting:

ZoneReporting presents a pre-built reporting solution that's seamlessly integrated into Microsoft Power BI, purpose-built to elevate your CRM experience. Supported CRMs include NetSuite, Salesforce, and HubSpot.

Our robust pre-built solution encompasses a dedicated connector, an intelligently crafted tabular data model, an array of key metrics and KPIs, and a collection of highly valuable reports. Our mission is to expedite your journey towards establishing a powerful Business Intelligence (BI) reporting framework. Instead of investing months or even years, we empower you to launch your BI platform in mere weeks, saving you valuable time and resources.

ZoneReporting is your catalyst for unlocking the full potential of your CRM data, allowing you to make data-driven decisions with ease. Ready to explore our solution in action? **Request a personalized demo** and discover how we can transform your CRM reporting. Your path to streamlined, efficient reporting begins here.

✅ Summary:

In this comprehensive white paper, we delve into a vital aspect of your business intelligence: CRM reporting. We will unveil the primary objectives of each report presented, articulate their indispensable value in enhancing your business, and provide actual examples of our reports. This document is your ultimate guide to unlocking the full potential of CRM reporting, tailored to your data within NetSuite CRM, Salesforce, or HubSpot. Explore the top 10 CRM reports that can transform the way you harness your customer data and drive unprecedented growth. Here are the reports covered:

1. Opportunity Snapshot & Latest Opportunities Created and Closed
2. Opportunities by Product
3. Pipeline Cohort Snapshot
4. Stage Probability Analysis
5. Cohort Probability Analysis
6. Sales Rep Goal Performance
7. Account Activity
8. Leads Creation and Conversion Analysis
9. Forecast Accuracy
10. Opportunities Won vs Lost vs Pending

Report 1:
Opportunity Snapshot & Latest Opportunities Created and Closed

Report 1:
Opportunity Snapshot & Latest Opportunities Created and Closed
(Continued)

✓ Objective:

The objective of a sales report that shows a snapshot of all your company's open opportunities is to provide a clear and up-to-date overview of the sales pipeline and the potential revenue your company can generate from these opportunities.

A sales report showing a snapshot of open opportunities is a valuable tool for managing and optimizing the sales process, ensuring the company is on track to meet its revenue goals, and making data-driven decisions to improve sales performance.

✓ Report Value:

1. **Pipeline Visibility:** It offers a visual representation of all ongoing sales opportunities, allowing sales managers to see the quantity and quality of deals in progress.

2. **Performance Tracking:** It enables the tracking of sales team performance by showing how many opportunities are at each stage of the sales process. This can help identify bottlenecks and areas where additional support or resources may be needed.

3. **Revenue Forecasting:** By including the potential revenue associated with each open opportunity, the report can be used to forecast future sales revenue. This is essential for budgeting and financial planning.

4. **Priority Setting:** Sales reports can help prioritize efforts by highlighting high-value opportunities that are close to closing or those that require immediate attention.

5. **Resource Allocation:** It aids in allocating resources effectively. For instance, if there are many opportunities in the early stages of the sales process, it may indicate a need for more lead generation or prospecting efforts.

6. **Strategy Evaluation:** Sales reports can be used to evaluate the effectiveness of sales strategies and tactics. For example, if certain types of opportunities consistently fail to progress, it may indicate a need to refine the sales approach.

Report 2:
Opportunities by Product

✅ Objective:

The objective of a sales report that shows a snapshot of all your company's open opportunities by-product is to provide a detailed overview of the sales pipeline with a focus on how different products are performing in terms of pending or potential sales. Additionally, it helps optimize sales efforts, product management, and resource allocation to maximize revenue and market share for each product category.

Report 2:
Opportunities by Product (Continued)

✓ Report Value:

1. **Product-Specific Pipeline Visibility:** It offers a clear visual representation of all open sales opportunities, categorized by the specific products associated with those opportunities. This helps sales managers and teams to see which products are driving the most opportunities and revenue potential.

2. **Product Performance Assessment:** It allows for an in-depth assessment of how well each product is faring in the sales pipeline. By examining the number and value of open opportunities for each product, companies can gauge product-specific demand and effectiveness.

3. **Resource Allocation:** The report can assist in allocating sales and marketing resources more effectively. If certain products have a significantly higher number of open opportunities, it may suggest a need to assign more salespeople or marketing efforts to those products.

4. **Sales Strategy Refinement:** By analyzing product-specific open opportunities, companies can refine their sales strategies. For example, if one product consistently has a longer sales cycle or more stalled opportunities, it may indicate a need for changes in the sales approach for that product.

5. **Revenue Forecasting by Product:** It aids in forecasting revenue specifically by product. This is valuable for product-specific financial planning and resource allocation.

6. **Product Prioritization:** Companies can use this report to prioritize products based on the number and value of open opportunities, directing attention to those with the most immediate potential for generating revenue.

7. **Communication and Collaboration:** The report can be shared with product managers, sales teams, and executives to facilitate collaboration and align sales efforts with product strategies.

8. **Decision Making:** It provides data-driven insights for decision-making, such as product development prioritization, pricing adjustments, and inventory management decisions.

9. **Market Trends Analysis:** By examining open opportunities by product, companies can gain insights into which products are currently in demand and may identify emerging market trends or customer preferences.

Report 3:
Pipeline Cohort Snapshot
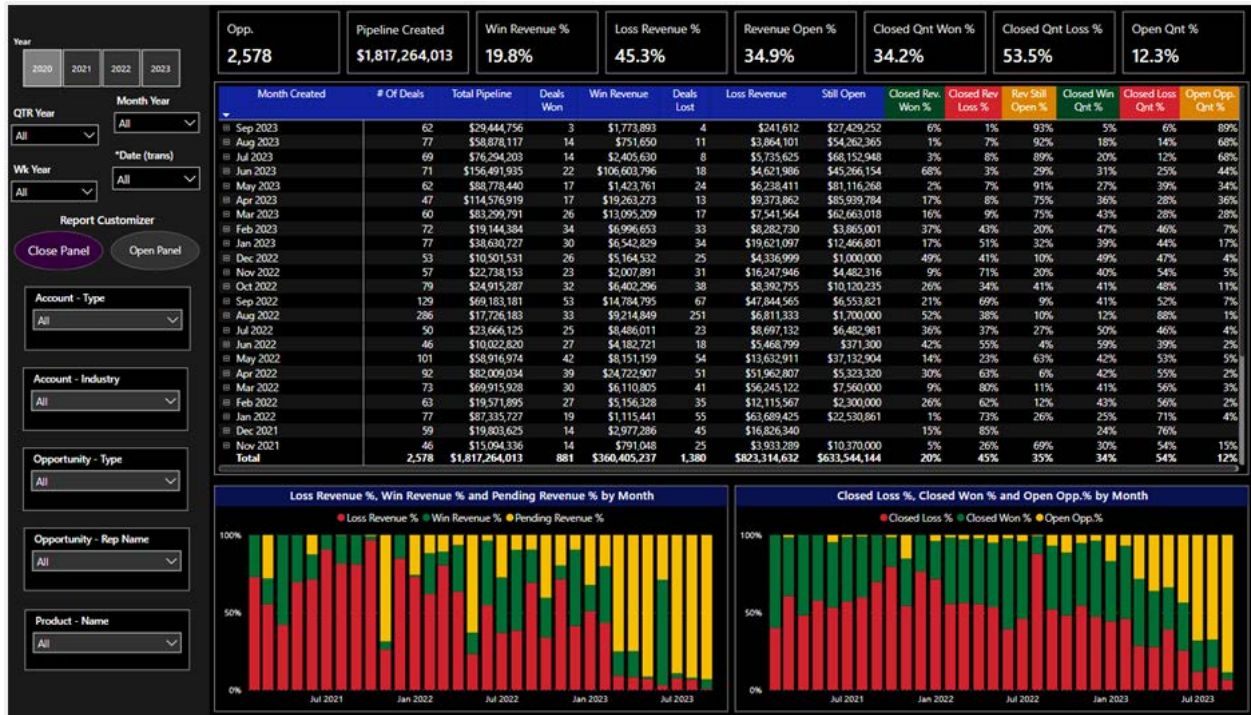
✅ Objective:

A pipeline monthly cohort report aims to provide a detailed and structured analysis of how prospects and leads progress through different stages of the sales pipeline on a cohort basis. The objective of such a report is to offer valuable insights into the efficiency and effectiveness of the sales process, as well as to identify trends and areas for improvement as the business initiatives change through each cohort. The cohort category can certainly be changed as needed to best serve your business needs.

Report 3:
Pipeline Cohort Snapshot (Continued)

✓ Report Value:

1. **Pipeline Efficiency Measurement:** The report allows businesses to measure how efficiently leads are moving through the sales pipeline. It helps track metrics such as conversion rates, velocity, and time to close, providing insights into the overall health of the sales process by cohort.

2. **Sales Forecasting:** By examining the progress of cohorts of leads and prospects month by month, companies can make more accurate sales forecasts and predictions. This is essential for revenue planning and resource allocation since activities change each cohort.

3. **Identifying Bottlenecks:** The report helps identify bottlenecks or slow-moving stages in the sales process. When certain cohorts consistently take longer to progress, it can indicate areas where improvements or additional support may be needed.

4. **Lead Source Analysis:** It provides insights into the performance of leads from different sources (e.g., marketing campaigns, referrals, cold calls) as the investment in each changes by cohort. By tracking the conversion rates of different cohorts by source, businesses can determine which lead generation strategies are most effective.

5. **Cohort Segmentation:** The report allows for the segmentation of cohorts based on various criteria, such as lead quality, geographic region, or industry. This segmentation helps businesses tailor their sales strategies for different groups of prospects.

6. **Trend Analysis:** Over time, the report can reveal trends in how leads progress through the pipeline. This information is crucial for adapting sales strategies, pricing, or product offerings to align with changing customer behaviors and preferences.

7. **Communication and Accountability:** Sharing the report with sales teams and stakeholders helps create accountability and encourages communication within the organization. Sales teams can use the report to understand their performance and make necessary adjustments.

8. **Continuous Improvement:** The report serves as a tool for continuous improvement. By identifying areas of weakness or inefficiency, businesses can implement changes in their sales process to enhance overall performance.

Report 4:
Stage Probability Analysis

✓ Objective:

The objective of a report that shows the probability of your open sales opportunities closing by stage is to provide a data-driven assessment of the likelihood that sales opportunities at various stages of the sales process will successfully close. This data-driven approach report can improve the accuracy of sales forecasts, enhance the efficiency of sales processes and lead to better overall sales performance.

Report 4:
Stage Probability Analysis (Continued)

✔ Report Value:

1. **Data-Driven Decision Making:** A probability-based report provides valuable data for making informed decisions regarding sales strategies, resource allocation, and goal setting.

2. **Forecast Accuracy:** By calculating the probability of closure at different stages, the report improves the accuracy of sales revenue forecasting, aiding in budgeting and financial planning.

3. **Efficiency:** It helps in increasing the efficiency of the sales process by focusing efforts on opportunities more likely to close, thereby reducing wasted time and resources.

4. **Sales Coaching and Training:** Sales managers can use this report to identify areas where sales reps may need coaching or training to improve their performance.

5. **Pipeline Prioritization:** The report helps in prioritizing opportunities by stage based on their likelihood of closure, enabling teams to focus on those with the highest potential.

6. **Risk Management:** It highlights potential risks in the sales pipeline by identifying opportunities with low closure probabilities, enabling proactive risk mitigation.

7. **Improved Sales Performance:** By understanding the probabilities of closure at different stages, sales teams can work more effectively, which can lead to improved overall sales performance.

8. **Alignment with Business Goals:** The report ensures that sales activities are aligned with the organization's strategic goals, helping to achieve revenue targets.

9. **Scenario Planning:** Organizations can use the probability data to run "what-if" scenarios to assess the impact of changing various factors in the sales process.

Report 5:
Cohort Probability Analysis
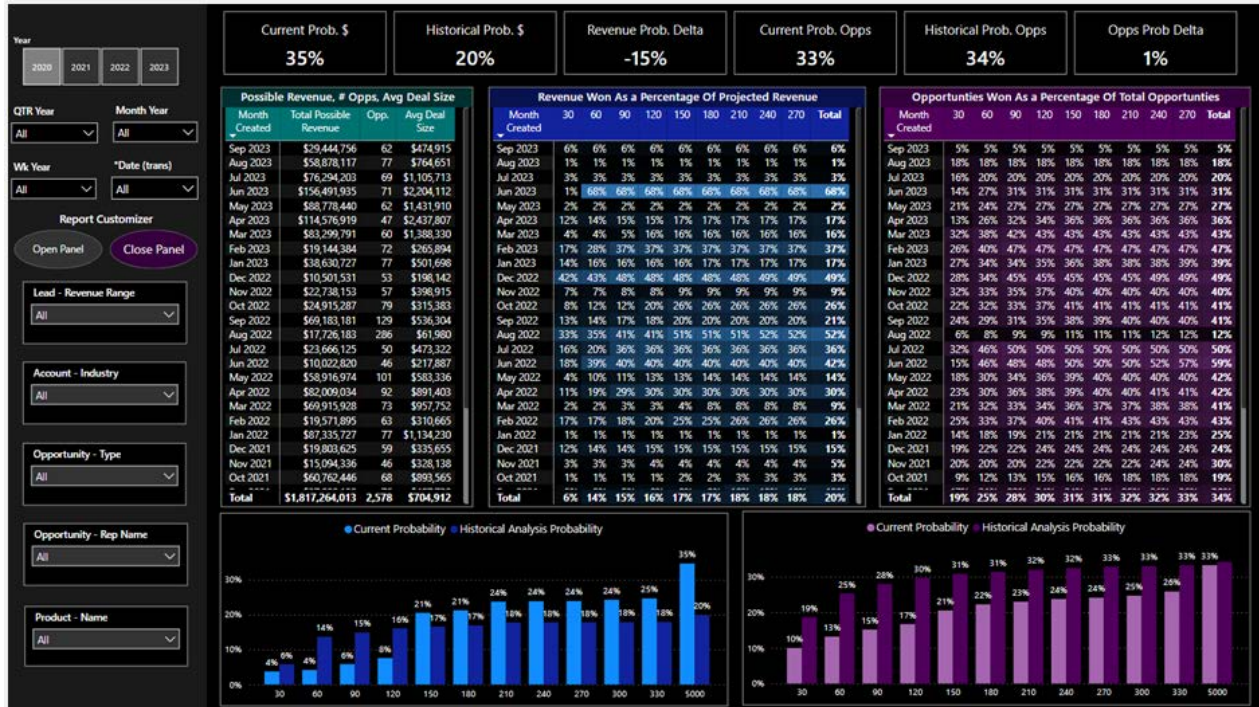
✅ Objective:

When you look at the same data by cohort in a report that shows the probability of open sales opportunities closing, the primary objective remains focused on assessing the likelihood of successful closures, but the perspective and insights gained can change. When you look at the same data by cohort, the objective of the report shifts towards providing insights that are specific to different groups of opportunities. This approach allows for more targeted and customized strategies, resource allocation, and decision-making, ultimately leading to more effective sales and marketing efforts and improved sales performance for each cohort.

Report 5:

Cohort Probability Analysis (Continued)

✅ Report Value:

1. **Segmented Insights:** Looking at data by cohort provides more granular insights, allowing businesses to understand the unique characteristics and behaviors of different groups of opportunities.

2. **Customized Strategies:** The report allows for the customization of sales and marketing strategies based on the specific needs and behaviors of different cohorts, leading to more effective approaches.

3. **Optimized Resource Allocation:** It helps optimize resource allocation by directing resources to cohorts with higher closure probabilities and revenue potential.

4. **Efficient Lead Generation:** Companies can fine-tune lead generation efforts to attract prospects from cohorts that are more likely to convert, leading to higher conversion rates.

5. **Improved Decision-Making:** Data by cohort supports more informed decision-making by considering the unique attributes and challenges of each group. This can lead to more successful strategies and tactics.

6. **Scenario Planning:** Cohort analysis enables organizations to run "what-if" scenarios for different groups, helping to assess the impact of changes in strategy or targeting for specific cohorts.

Report 6:
Sales Rep Goal Performance

✅ Objective:

The objective of a sales rep goal performance report is to provide an assessment of how well individual sales representatives are meeting their assigned goals and targets. A sales rep goal performance report is a valuable tool for sales management. Its primary objective is to evaluate and monitor the performance of individual sales representatives in relation to their sales goals, leading to data-driven decision-making, performance improvement, and motivation within the sales team. Providing this level of visibility to the reps creates a culture of accountability.

Report 6:
Sales Rep Goal Performance (Continued)

✔ Report Value:

1. **Performance Evaluation:** The primary objective is to evaluate the performance of sales reps in relation to their sales goals and targets. It provides a clear picture of how well each representative is doing in terms of achieving their assigned objectives.

2. **Goal Monitoring:** The report helps in monitoring progress towards sales goals on an ongoing basis. This ensures that sales reps are on track to meet their targets, and it enables timely intervention if goals are not being met.

3. **Data-Driven Decision Making:** It offers data that sales managers and executives can use to make informed decisions regarding sales strategies, resource allocation, and coaching or training needs for individual sales reps.

4. **Motivation and Accountability:** By sharing goal performance data with sales reps, it helps create a sense of accountability and motivation. Sales reps can see how well they are doing relative to their targets, which can drive improved performance.

5. **Identification of High Performers and Areas for Improvement:** The report identifies top-performing sales reps who consistently meet or exceed their goals, as well as those who may need support or development. This information can guide recognition and coaching efforts.

6. **Sales Team Incentives:** Sales rep goal performance data can be used to determine bonuses or incentives for high-achieving individuals and teams, further motivating the sales force.

7. **Sales Strategy Adjustments:** If a significant number of sales reps consistently fall short of their goals, it may indicate the need for adjustments in sales strategies, target markets, or product offerings.

8. **Sales Territory Management:** The report can inform decisions about territory management by identifying which reps are effectively managing their assigned regions or customer segments.

9. **Resource Allocation:** It aids in allocating resources efficiently, ensuring that sales teams with a higher likelihood of reaching their goals receive the necessary support and resources.

10. **Continuous Improvement:** Sales rep goal performance reports contribute to a culture of continuous improvement. They highlight areas where performance can be enhanced and where

Report 7:
Account Activity

✅ Objective:

The objective of a sales account activity report is to provide a comprehensive and detailed overview of the interactions, engagements, and activities related to specific customer accounts. This type of report is primarily focused on tracking and analyzing the interactions between sales representatives or account managers and their assigned accounts.

A sales account activity report is a valuable tool for assessing and managing customer relationships and sales activities. Its objective is to provide a data-driven view of account management, sales progress, and customer interactions, ultimately contributing to improved customer satisfaction, revenue generation, and long-term business success.

Report 7:

Account Activity (Continued)

✓ Report Value:

1. **Account Management Assessment:** The report aims to assess how effectively sales reps or account managers are managing their assigned accounts. It provides insights into the level of engagement and activity with each customer.

2. **Customer Relationship Monitoring:** It helps in monitoring the quality and depth of customer relationships by tracking communication, meetings, and interactions. This is crucial for maintaining strong, long-term customer relationships.

3. **Progress Tracking:** The report tracks the progress of various sales activities and initiatives within each account, such as sales calls, follow-up emails, product demonstrations, and negotiations.

4. **Opportunity Progression:** It provides information on the status and progression of sales opportunities within each account, including stages in the sales funnel and the likelihood of closing.

5. **Sales Funnel Analysis:** The report aids in analyzing the movement of accounts through the sales funnel, highlighting bottlenecks, stalled opportunities, or areas where accounts are advancing smoothly.

6. **Account Prioritization:** It helps in prioritizing accounts based on their level of activity, potential revenue, and strategic importance. This informs decisions about resource allocation and account management strategies.

7. **Communication and Collaboration:** The report encourages communication and collaboration within the sales team and across departments. It enables team members to stay informed about the activities and status of accounts.

8. **Customer Insights:** By tracking account activity, the report can offer valuable insights into customer preferences, needs, and feedback. This data can be used to tailor sales and marketing strategies.

9. **Performance Evaluation:** Sales managers can use the report to evaluate the performance of individual sales reps or account managers, identifying high-performing team members and areas where additional training or support is needed.

Report 7:
Account Activity (Continued)

✓ Report Value:

10. **Strategic Decision-Making:** The data from the report supports strategic decision-making regarding sales and account management. It can inform decisions about resource allocation, account-specific strategies, and customer segmentation.

11. **Customer Satisfaction and Retention:** By tracking account activity, organizations can identify signs of customer satisfaction or dissatisfaction and take proactive measures to enhance customer retention and loyalty.

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Report 8:
Leads Creation and Conversion Analysis
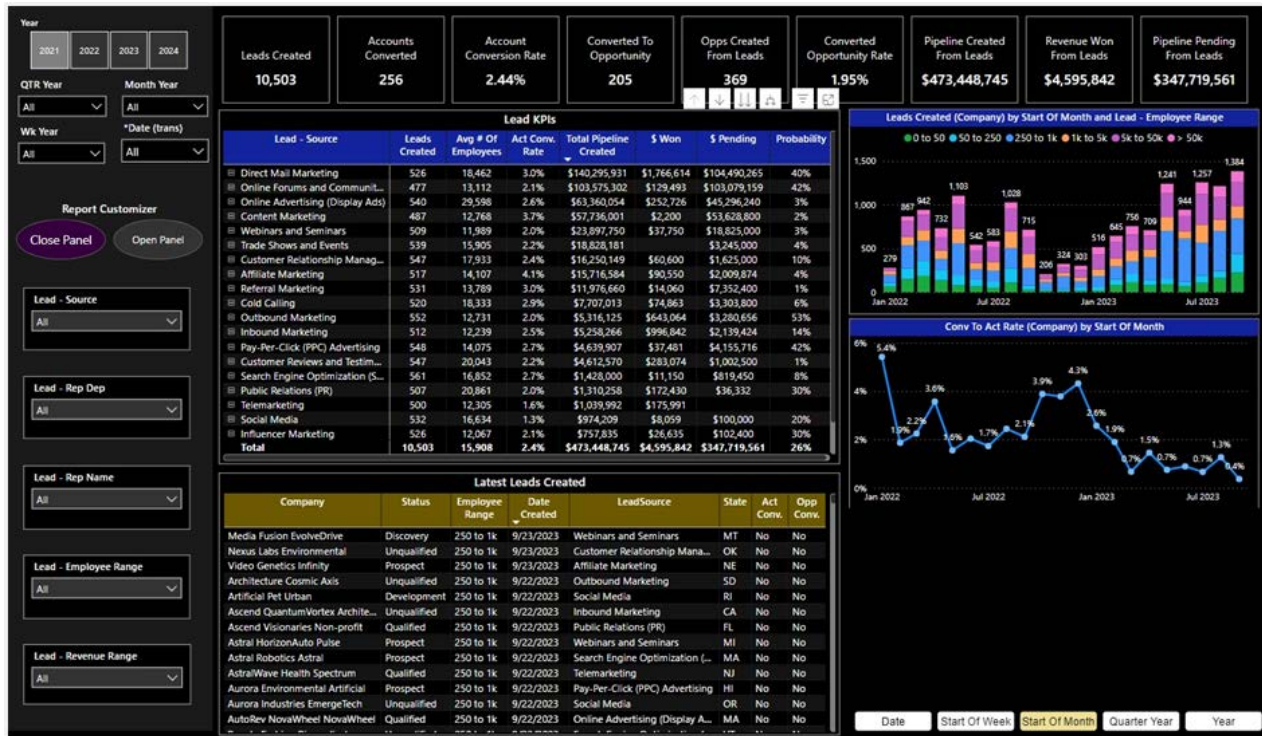
✔ Objective:

A report showing lead creation and conversion analysis is a critical tool for assessing the effectiveness of lead generation and conversion processes. Its objective is to provide insights into the performance of marketing and sales efforts, guide decision-making, and facilitate continuous improvement in lead management and customer acquisition strategies.

Report 8:
Leads Creation and Conversion Analysis (Continued)

✔ Report Value:

1. **Lead Generation Assessment:** The report aims to evaluate the effectiveness of lead generation strategies, channels, and sources. It helps businesses understand which methods are most successful in attracting potential customers.

2. **Conversion Analysis:** It provides insights into the conversion rates at different stages of the sales funnel, indicating where leads are progressing smoothly and where they may be stalling or dropping off.

3. **Marketing Performance Evaluation:** The report allows for the assessment of marketing campaigns and initiatives by tracking how leads generated through various marketing efforts progress toward becoming customers.

4. **Sales Funnel Optimization:** The report helps identify areas within the sales funnel where improvements are needed. This may involve refining messaging, sales tactics, or lead nurturing processes.

5. **Lead Quality Assessment:** It aids in evaluating the quality of leads generated through different sources. By analyzing conversion rates and the lifetime value of customers from different lead sources, businesses can focus on the most promising leads.

6. **ROI Analysis:** Businesses can determine the return on investment (ROI) for their marketing and lead generation activities by analyzing the costs associated with acquiring and converting leads.

7. **Lead Nurturing Evaluation:** The report assesses the effectiveness of lead nurturing activities, such as email campaigns, content marketing, and follow-up strategies, in moving leads through the sales funnel.

8. **Resource Allocation:** Organizations can allocate their resources more effectively based on the lead creation and conversion analysis. This includes budget allocation for marketing, lead generation, and sales efforts.

9. **Identifying Bottlenecks:** The report helps identify bottlenecks or challenges in the lead conversion process, enabling organizations to take corrective actions and optimize their conversion rates.

Report 8:
## Leads Creation and Conversion Analysis (Continued)

✓ Report Value:

10. **Customer Segmentation:** By analyzing lead sources and conversion rates, businesses can identify customer segments that are more likely to convert and adjust their targeting and marketing strategies accordingly.

11. **Data-Driven Decision Making:** It provides data for data-driven decision-making, enabling organizations to make informed choices about marketing and sales strategies, lead generation tactics, and resource allocation.

12. **Strategic Adjustments:** Based on the analysis, organizations can make strategic adjustments to their sales and marketing plans, optimizing lead creation and conversion for increased revenue and growth.

Report 9:

Forecast Accuracy

✅ Objective:

Arguably, one of the most important sales reports, yet hardest to create and maintain – this report can typically only exist in an automated platform. The objective of a report showing your sales forecast accuracy is to assess and analyze the precision and reliability of your sales forecasts in comparison to actual sales results. A report showing sales forecast accuracy aims to evaluate the reliability of sales predictions, providing data and insights that support decision-making, resource allocation, and the improvement of forecasting processes. It is a valuable tool for ensuring that business plans and operations are based on realistic sales expectations.

✅ Report Value:

1. **Evaluation of Forecast Accuracy:** The primary objective is to evaluate how accurate your sales forecasts have been in predicting actual sales results. This assessment helps in understanding the quality of your forecasting process.

2. **Data-Driven Decision-Making:** The report provides data and insights that enable data-driven decision-making for future sales and business planning.

3. **Improvement of Forecasting Process:** By analyzing forecast accuracy, organizations can identify areas where forecasting processes need improvement. This can involve refining data sources, methodologies, and models.

4. **Budgeting and Financial Planning:** Reliable sales forecasts are essential for budgeting, financial planning, and setting revenue targets. The report helps in ensuring that these financial plans are based on realistic expectations.

5. **Operational Efficiency:** Accurate forecasts contribute to operational efficiency by reducing excess inventory, optimizing production schedules, and streamlining supply chain management.

6. **Sales and Marketing Strategy Adjustments:** Organizations can make strategic adjustments to sales and marketing strategies based on forecast accuracy. For instance, if forecasts consistently overestimate sales, there may be a need for revised pricing or marketing tactics.

7. **Scenario Planning:** The report can be used for scenario planning, allowing organizations to assess the potential impact of various market conditions on sales outcomes.

✅ Report Value:

8. **Risk Management:** Accurate forecasts are essential for identifying and mitigating business risks, such as inventory surplus or production shortfalls.

9. **Performance Evaluation:** Sales managers and teams can be evaluated based on forecast accuracy. This may be used to identify high-performing individuals and areas where additional training or support is needed.

Report 10:
Opportunities Won vs Lost vs Pending
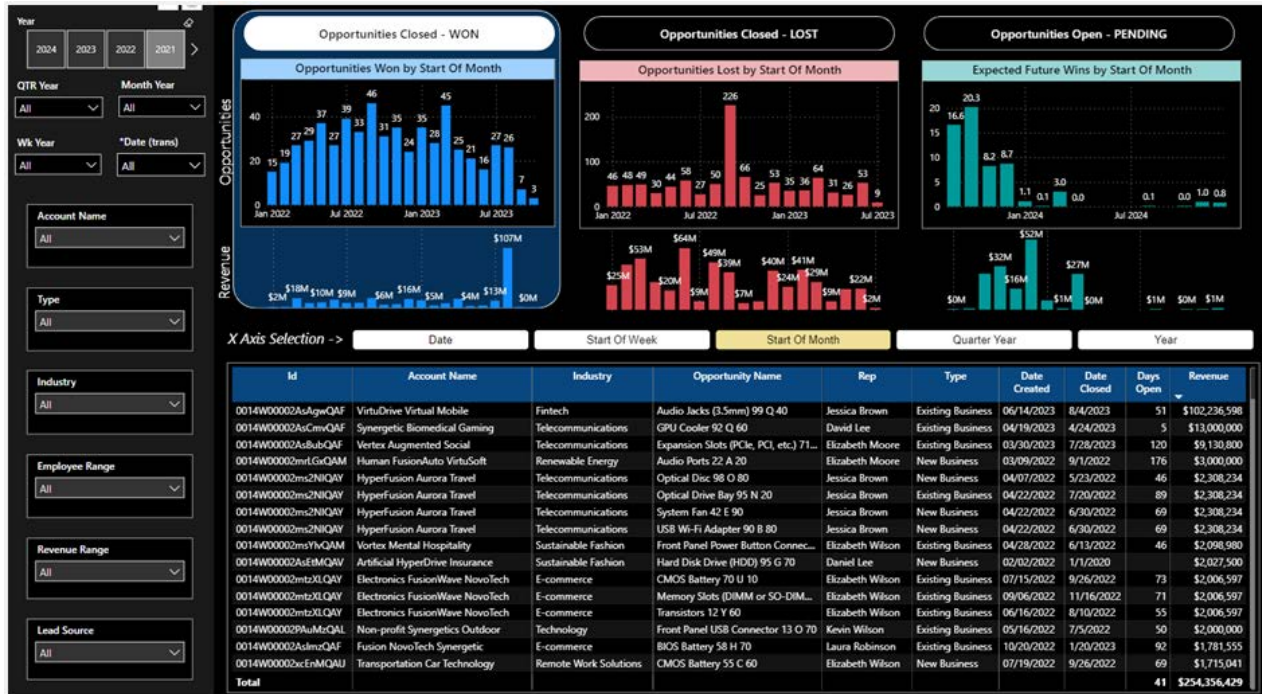
✅ Objective:

The objective of a report showing your sales opportunities won vs lost vs pending is to provide a clear and comprehensive overview of the outcomes of your sales efforts. This report is a valuable tool for evaluating sales performance, revenue analysis, and strategic decision-making. It provides insights into the efficiency of the sales funnel, helps in resource allocation, and serves as a basis for improving sales strategies and outcomes.

Report 10:
Opportunities Won vs Lost vs Pending (Continued)

✓ Report Value:

1. **Performance Evaluation:** The primary objective is to evaluate the performance of your sales team by analyzing the distribution of opportunities among those won, lost, and pending. This helps in understanding the effectiveness of your sales strategies and the capabilities of your team.

2. **Revenue Analysis:** The report enables you to assess the revenue generated from won opportunities, the revenue that was lost, and the potential revenue pending in the sales pipeline. It is essential for revenue analysis and forecasting.

3. **Conversion Rate Assessment:** By comparing the number of opportunities won to the total number of opportunities, the report provides insights into the conversion rates at different stages of the sales process. This can highlight areas of improvement in the sales funnel.

4. **Sales Funnel Analysis:** It aids in analyzing the efficiency of your sales funnel by showing where opportunities tend to get stuck or drop out. Identifying bottlenecks or areas where opportunities are pending can inform sales process improvements.

5. **Resource Allocation:** The report helps in allocating resources more effectively by showing which opportunities are pending and the potential value associated with them. It guides decisions on where to focus additional sales efforts.

6. **Strategic Decision-Making:** By examining the outcomes of opportunities, the report provides data for making strategic decisions. It helps you adjust sales strategies and allocate resources based on the status of pending opportunities.

7. **Customer Insights:** The report may reveal insights into customer behavior, preferences, and buying patterns based on the outcomes of different opportunities. This information can be used to tailor sales and marketing strategies.

> ⏩ Are you ready to maximize your sales outcomes? Our sales reporting experts are ready to dive deep into your reporting needs. **Request your personalized demo of ZoneReporting for your CRM today.**

Appendix:
Pre-Requisite Best Practices

While every company's sales processes are different, there are key overlapping metrics and reports that all sales departments should focus on to maximize their sales performance. The ability to report timely, accurately and consistently on these metrics/reports is what can set one company's sales performance apart from their competitors. When implementing or optimizing your business intelligence (BI) reporting tool, the following list of key criteria are a prerequisite to successful metrics/reports:

1. **Automated Reporting & Updates via a BI reporting platform** – As businesses operate at a fast pace, real-time and frequently updated reports and metrics are highly valued by executives. With automatic updates that occur at least daily, leadership can proactively manage the business by reviewing performance as necessary, without having to wait for weekly and/or monthly reporting. By aggregating and shaping data into an interconnected tabular data model (something all our pre-built solutions come with), the process of manual data processing is eliminated, saving time and resources, and creating a fully furnished platform to work from.

2. **No Excel** – Excel places bottlenecks on your ability to scale. Relying solely on a series of large spreadsheets to obtain key metrics and reports is not the recommended approach for successful sales organizations. Research indicates that 88 percent of spreadsheets contain errors, which increases the risk of inaccurate reports being presented to stakeholders. Additionally, it allows for subjectivity to be brought into your reporting vs data-driven objectivity. Also, managing these large spreadsheets typically falls on one individual, creating a risk for the company in case they leave. Therefore, a BI reporting tool is a necessary pre-requisite.

3. **Key Metrics / Analysis** – It's been our experience, that CRMs are incapable of sufficiently generating the key metrics/reports needed by leading sales organizations. This makes it challenging for organizations to maximize their sales potential and performance. To address this issue, BI reporting tools are needed to provide a deeper level of data analysis that can handle transaction-level detail, data from multiple data sources, and sophisticated formulas across your valuable data. By utilizing BI tools, executives can gain the necessary insights to make informed decisions and drive business success.

4. **Scalable Platform for your Other Data Sources** – While we may only be talking about sales reporting today via your one CRM, the reality is that you have other key data sources. The best practice recommendation is to put in place a reporting platform that can scale with your reporting needs. Leveraging a BI platform such as Microsoft Power BI allows us to first improve your sales reporting then add in your other key data sources when you're ready so that we can see your business not just by one department, but across all departments and data sources.

Key CRM Metrics used by ZoneReporting

Opportunity Create Date vs Close Date : When using a measure with "CD" (close date) on the end of it, the date axis will lead to Close Date on CLOSED deals and expected closed date on OPEN deals. No "CD" = create date.

Average Days Open : Days between when an opportunity was created to when it was closed on CLOSED deals. On open deals, it is the difference between when a deal was CREATED vs the date of the last refresh.

Average Days Open (Projected) : Days between when an opportunity was created to when it it is expected to close on OPEN deals.

Projected Revenue or Total Pipeline Revenue : Total potential revenue on a deal. Not factoring in probability or any other factor of potential of deal closing or falling through.

Expected Projected Revenue : Projected Revenue on OPEN deals.

Opportunity Probability : Probability of an opportunity closing.

Weighted Revenue : Projected Revenue multiplied by Opportunity Probability.

Weighted Probability : Sum of Weighted Revenue divided by Sum of Projected Revenue.

Win Revenue : Total Projected Revenue on CLOSED deals WON.

Actuals + Pipeline Expected Revenue OR Full Forecast : Total Win Revenue + Weighted Revenue on OPEN Opportunities by Close Date

Loss Revenue : Total Projected Revenue on CLOSED deals LOST.

Average Deal Size : Total Projected Revenue divided by Total Opportunities.

Win Rate % : Total Opportunities WON divided by Total Opportunities CLOSED.

Win Revenue % : Total Revenue WON divided by Total Projected Revenue.

Close Rate % : Total Opportunities WON divided by Total Opportunities CREATED.

Win / Loss Ratio : Total Opportunities WON divided by Total Opportunities LOST.

Expected Wins : Total OPEN Opportunities multiplied by Probability.

Leads Created (Company) : Number Of Leads Created. Company = 1 Lead Created.

Conversion to Account Rate : Number Of Leads Converted To Accounts divided by Number Of Total Leads Created

Conversion to Opportunity Rate : Number Of Leads Converted To Opportunities divided by Number Of Total Leads Created

CRM Days From Parameter : Bracket of "days from" specified event. I.E 90 = 90 days from specified event. 5000 = fully vested.

Closed Won Revenue % By Day Bracket : Percentage of Revenue WON by days from CREATE Date divided by Total Projected Revenue. The numerator is a cumulative measure.

Closed Won Opps % By Day Bracket : Percentage of Opportunities WON by days from CREATE Date divided by Total Opportunities. The numerator is a cumulative measure.

ALL Closed Won Revenue % By Day Bracket : Percentage of Revenue WON by days from CREATE Date divided by Total Projected Revenue CLOSED. The numerator is a cumulative measure.

ALL Closed Won Opps % By Day Bracket : Percentage of Opportunities WON by days from CREATE Date divided by Total Opportunities CLOSED. The numerator is a cumulative measure.

Current Opps Revenue Prob By Day Bracket : Current Weighted Probability of all OPEN Opportunities based on current Average Days Open (Pending).

Stage Analysis - Avg Stage Duration : Average # of days a deal stays within a specific stage in the sales cycle.

Stage Analysis - Total Projected Revenue : Total Projected Revenue that has passed through a certain stage.

Stage Analysis - Total Win Revenue : Total Projected Revenue that has passed through a certain stage and has led to a WON Opportunity (Win Revenue).

Stage Analysis - Win % Of Total Projected By Day : Stage Analysis - Total Win Revenue divided by Stage Analysis - Total Projected Revenue by days from when the Opportunity first hit the stage selected.

Weekly / Monthly / Quarterly / Annual Outlook : The current date range of the date of report OR date of snapshot forecast selected. I.E Selecting 7/27/2023 AND Quarterly Outlook will yield a date range from 7/1/2023 to 9/30/2023.

Opportunity History Snapshot - Win + Pipeline : Historical Full Forecast based on selected snapshot date.

Opportunity History Snapshot XDays - Win + Pipeline : Historical Full Forecast based on X days ago selected snapshot date.

Snap vs XDays Full Forecast : Difference between snapshot selected full forecast vs XDays Ago Snapshot Full Forecast. What has changed between two snapshot dates?