



## People Insight & Coaching

### Turning Sales Managers into Elite Sales Coaches

#### PEOPLE INSIGHT

Presenting an in-depth view into the performance of your team through an intuitive and engaging new dashboard.

People Insight allows for a closer look into the performance data of the sales team, giving managers more intel into the high-value behaviours and activities performed by their team.

The enhanced module offers new filters and lenses that allow for a much more comprehensive picture of each specific team member - across multiple roles and time periods.

#### WHAT'S NEW?

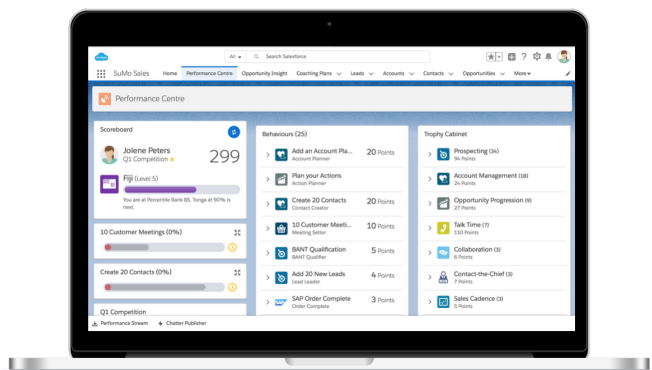
**Behaviour Charts** - Behaviour data is now displayed by value and broken down by type, providing an indication of the proportion of desirable and undesirable behaviours being exhibited by each rep.

**Performance Indicators** - Indicators provide key information around the performance of users, including the percentage attainment of available behaviours, the distribution of completed behaviours by value, as well as trend data over a rolling period.

**Activity Cadence** - Plotting the number, occurrence and value of completed behaviours through customisable periods of time to provide key insight into the cadence of behaviour completion throughout Competitions and Experience Groups.

**Behaviour Performance** - A tool to enable managers to easily identify which behaviours are taking place, which activities are not happening and what KPIs need to be focused on and prioritised.

**Comparisons** - Side-by-side comparisons help assess how well an individual user is performing in relation to their peers and high performers.



## COACHING

Arm sales managers with the tools necessary to guide their team through the sales journey.

Quickly build personalised coaching plans to help meet business objectives against personal targets and opportunity specific goals.

Coaching plans can be created to track objectives as part of an annual review or to achieve a specific goal such as improving the sales pipeline.

Using the information that is surfaced through People Insight, objectives can be defined for the purposes of targeting key activities that are designed to improve the performance of individuals.

## WHAT'S NEW?

**Behaviour Objectives** - These objectives monitor the progress towards targets set on individual behaviours.

As behaviours are completed, these contribute towards the overall Coaching Plan.

**Ad Hoc Objectives** - Built to track those all-important sales activities that cannot be recorded or translated within Salesforce.

Ad Hoc Objectives allows you to create checklists that include important targets like On-Boarding, Training or Corporate Social Responsibility.

**Summary Component** - Instantly establish progress towards set objectives through the summary component.

View details around actual vs target, percentage attainment and overall percentage completion of each coaching plan - including current, previously completed or forthcoming plans.

**salesforce**

All delivered as a 100% secure & native app on top of Salesforce

**HERE'S WHY BEING  
BUILT NATIVELY ON  
SALESFORCE IS SO  
IMPORTANT.**

- ✓ **Secure.** No data ever leaves your system
- ✓ **Rapid Roll Out.** Fast implementation time
- ✓ **Easy to Use.** Natural extension of Salesforce makes SuMo intuitive to use
- ✓ **Simple to Configure.** Point & click configuration
- ✓ **Best Practices Built-In.** Library of over 250 pre-built behaviours

**TRUSTED TO ACCELERATE SALES PERFORMANCE  
BY OVER 250 CUSTOMERS.**

