The Salesforce Inside Sales KPI Report

Introduction

“What should I be measuring — and how do I measure it?”

It’s the eternal, universal question that every sales leader has asked at some point in their careers. And for many professionals, it’s a question they struggle with every day, no matter how seasoned or successful they may be.

So if you’re in that boat: you’re not alone. And even if you have a good grasp on what you think you should be measuring: it’s only natural to wonder how the “other guys” are doing it.

Wonder no more: we put together this Salesforce Inside Sales KPI Report based on research we conducted across 101 Ambition clients — both mid-market and enterprise, across industries like transportation, finance, SaaS and more.

Of course, as you know, there’s no definitive, one-size-fits-all answer to the KPI question. But there are definite themes and trends that every sales leader can learn from.

So: dig in! And of course, if you have more KPI questions — or you want to know how you can increase visibility into KPIs across you sales floor — let’s talk.

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Section 1.

The Data Dilemma

More data, more problems? It doesn't have to be that way.

Sales leaders today have the ability to access more data than ever before about their teams. Our research shows has become a two-headed monster for many managers:

Problem A: Data sifting is a time suck. Limitless data has transformed sales leaders into analysts, with reams of data to comb through for trends or KPI nightmares to address. On average, managers spend 10-12 hours per week analyzing Salesforce reports and dashboards.

Problem B: You need insights. On the other hand, limitless data poses a new challenge to today's sales leaders — because data simply isn't enough. You need to draw meaningful insights from that data. Oh, and also, those insights need to be actionable.

That means after hours and hours of work running just getting the right data and reports, you still have to analyze it, and then draw meaningful insights out of it, and then adjust your strategy so that you can turn those insights into action that will impact corresponding sales goals and KPIs.

No sweat, right?

Fortunately, there are some simple ways to turn data into insights into action. If you're not doing these things, then it doesn't matter which KPIs you're measuring — you're not going to see any real impact from all the data you have at your disposal.

So before you dig into the KPI report, run through this checklist:

- **Do you have a solid sales coaching infrastructure?** Sales coaching is where the rubber meets the road. Smart sales managers think of their coaching programs as their opportunity to turn insights into action; in other words, they use data as a jumping-off point to drive positive performance change. Of course, it's hard to be a great sales coach if you're spending hours and hours every week running reports, then trying to translate that raw data into something meaningful about your individual reps and your team as whole (not to mention the other admin work that you're already tasked with). Which brings us to our next point.
- **Do you have the right tools in place?** Repeat after us: CRM is not enough. Sure, that's your data — but where are your insights coming from? Sales managers should not have to perform advanced calculus to draw insights from the data they have. Our mantra: automate what you can. As a manager, time is a hot commodity, so tools (like Ambition) that can automate — and visualize! — valuable sales insights that you can't otherwise access are typically worth exploring.
- **Is there visibility on your sales floor?** As Harvard Business Review and Forbes attest, maximizing visibility and feedback are crucial for organizational success. Don't hide performance insights from your team: share the wealth! Transparency is so important on your sales floor — from building trust to creating alignment to (ultimately) driving behavior change.

  So: give your reps the same access to their KPI data and insights that you have. This gives reps the chance to reflect, take initiative and proactively come up with solutions, which is a huge confidence builder.

  Again, it's where the right tools come into play. Use your TVs and leaderboards to visualize and broadcast performance insights, so everyone on your team knows exactly where they stand and how they're progressing against their goals. Not only does this set the stage for real-time coaching, but it also brings a new level of accountability and motivation to your sales floor.

Now: on to the report!

Section 2

Survey Overview

The KPI analysis shows how sales orgs track sales performance on a rep-by-rep basis via Salesforce + Ambition.

The report is segmented into two parts:

1. Top-of-funnel KPIs focused on activity

2. Bottom-of-funnel KPIs focused on objectives.

To provide the following data, we polled more than 100 dynamic Inside Sales orgs currently utilizing Ambition with Salesforce. Our team distilled nuanced sales behavior tracking using Salesforce metrics to provide a generalized view, applicable to any high-performing inside sales team.

Every company we included in our research operates in the B2B space. They also each have a dedicated inside sales process run by cradle-to-grave account executives, dedicated business development personnel, or segmented Sales Development and Demand Generation teams.

Survey Snapshot:

Average KPIs:
14.5

Average users:
48.75

Range of Roles Tracked:
minimum: 1
maximum: 7

Metrics:
58%
of companies track Sales Efficiency Metrics

Chapter 3

Top Of Funnel

Most Popular Top-of-Funnel Sales KPIs:

Calls

Emails

Meetings

Webinars

Lead Activities

Top Sales Activity KPI: Call Activity

All of the Ambition clients polled tracked call activity on a daily or weekly level. Notably, a variety of approaches were applied to track the calls — ranging from manual task creation in Salesforce, to automated call tracking from tools like Velocify, Outreach, PowerDialer, and others.

Top Sales Objective KPI: Meetings Completed

Meetings Completed was measured by 71% of our polled companies. Notably, we saw a vast array of strategies being used to define and apply the KPI to the broader picture of overall sales performance.

Again, there's no one-size-fits-all approach, every sales org has a different go-to-market process and milestones in the customer journey.. But the best sales teams — and some of the top orgs we polled — use a series of "linear" Objective KPIs to tell a story.

For example:

Meetings Scheduled

Meetings Completed

Opportunities Created

Managers who went this route are able to get contextual insight into their sales process. That is, they know the answers to all of these critical questions:

- **Are my reps setting quality meetings?**
- **Are their prospects showing up?**
- **If so, are they converting to opportunities?**
- **Are my reps updating Salesforce properly throughout the process?**

As a result, these teams are able to eliminate critical blind spots in their sales process analytics and personnel evaluation.

Top Sales Effectiveness KPI: Call Connects / Conversations

For sales leaders, "Effectiveness KPIs" or "efficiency metrics" are a powerful set of metrics that help sales managers understand the quality of the prospect pipeline being built as well as the skill level of your reps moving leads through the funnel. They're putting in the hustle — but are they achieving the desired results?

We were pleasantly surprised to see that 75% of the companies we polled went beyond standard-issue KPIs like Call Activity. They're also measuring and setting targets for Call Connects or Conversations.

Almost 60% of the companies tracked Scheduled Meetings. However, only 25% had an Effectiveness KPI to account for the number of Conversations that converted to Scheduled Meetings. This is a major leverage point for many sales organizations: it gives leaders insight into skill gaps or areas of weakness that can become great coaching opportunities.

A similar Effectiveness KPI that worked both on the activity / skill side was Leads Converted and Leads Converted to Opportunities. Not all of the companies we evaluated utilized Salesforce leads, but we loved discovering 60% did track Leads that were converted to Opps.

Section 4

Bottom of Funnel

Most Popular Mid-End Funnel Sales KPIs:

- Closed Won Opportunities
- Closed Won Dollars
- Opportunities Created
- Opportunities Stage (X or above)
- Pipeline Dollars Generated
- Active Pipeline Above Stage (X)
- Revenue

The further our clients went down their sales funnel, the more nuanced their Salesforce KPI tracking became.

The most common Sales Objective was Closed Won Opportunities, which 75% of our polled sales organizations were tracking. The method of tracking, however, was less uniform. Many sales organizations injected a diverse range of Custom Objects as filters across different organizations and sales roles.

One proven way to encourage small wins as well as create additional recognition for sales culture is by building depth in the type of Opportunities tracked. Whether with Opportunity / Stages (which can cultivate pipeline development) or Opportunities featuring specific Product types or codes - our analysis found sales orgs driving Opp creation by measuring a number of different states.

Another hot KPI: Total Opps Created was also utilized in 70% of our customers to track Average Opportunity Value (in dollars). These metrics were typically also deployed as team or group target settings.

Top Sales Effectiveness KPI: Close Rate

Across the companies polled, 50% of sales organizations kept individual targets on both the quantity of Opps Closed Won as well as the aggregated dollars of Opps Closed Won. Similarly, 42% of companies utilized Efficiency metrics by keeping track of Total Opportunities Created and combining that metric against the Closed Won metric to create a Close Ratio KPI for each rep.

Additional Bottom-of-Funnel Takeaways

A simple but critical pipeline development metric we saw for ISRs was aggregated Pipeline Dollars Created (between X-Y Opportunity stage). Only 30% of the teams we studied tracked the total pipeline dollars versus rep targets over a given period.

This is a metric we really like because it provides a simple predictor of success, and can be leveraged together with Close Rate. Using both Pipeline Dollars Created and Close Rate percentages, reps could do easy math to get an accurate predication of quota attainment at any given moment.

Finally, a fantastic learning from a sales coaching and management perspective: benchmarking Opps Committed and building an Efficiency Metric using Opps Closed Won. All told, 17% of our sales teams included that Committed-to-Won ratio with explicit objective targets, setting a clear expectation level for forecasting.

Conclusion

Where the Rubber Meets the Road

Identifying the right KPIs for your team is critical — but it's just one piece of the puzzle.

The next step is ensuring that you've got the ability to track the KPIs that matter most to your team. Then, it's all about creating real-time visibility into those KPIs. Not just for you, but across your entire team.

Once you've got that foundation in place, you're in a perfect position to recognize wins the moment they happen, step in and coach if your team veers off course, and identify skill gaps, so you can develop your reps into all-star sellers you want them to be.

Get out of spreadsheets and into Ambition! Learn how the leading sales coaching and gamification software makes identifying, tracking and driving KPIs a breeze — no spreadsheets required. Schedule a demo today!