

Gain more insight into sales with three types of CRM reports



ZOHO CRM

While you are busy calculating and assigning the sales target for your team, it is always helpful to go back and analyze what brought more deals to a closure. As you ponder over it, you may come across a lot of questions.



What is the average time taken for leads to complete the sales cycle?

In a month, how many leads are being converted to customers?

Who are the Star Performers in your sales team?

What are the regions that generate more business?

It is possible that you are not quite sure of the answers to these questions that you ask yourself on a regular basis... Accurate numbers are required. So what do you do now? Of course! You pull a variety of reports with the required filters to get the information that you need. But do these reports provide insights to effectively manage your sales process and sales team!

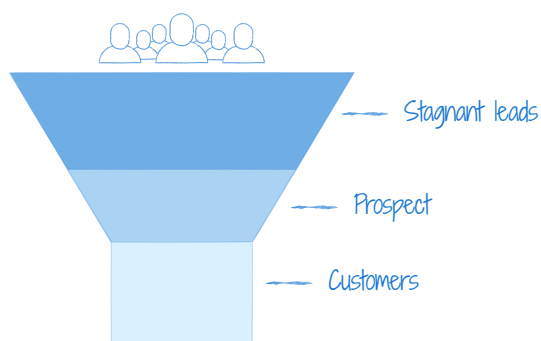
Zoho CRM's Reports will help you out at this point...

We can distinguish three main categories of reports in Zoho CRM that will provide value to your business. They can help you identify the metrics that drive more sales so that you can spend your time and effort in the right place.

Time Based Reports

Hundreds and thousands of leads do not guarantee increased sales. The secret of successfully converting qualified leads into sales lies in lead nurturing. And lead nurturing is effective only with a thorough understanding of the lead nurture process.

Do you have stagnant leads in your sales pipeline?



How do you identify such leads and the extra time and effort taken for a successful conversion? Well, with the right report, you can.

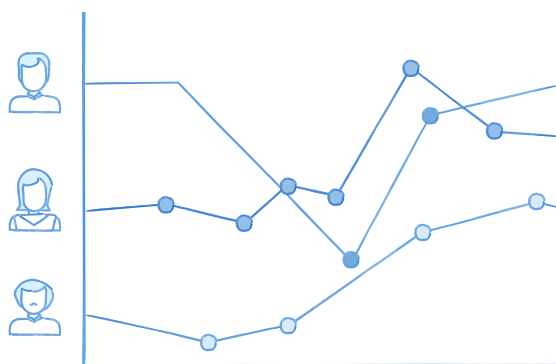
Time is money – goes an old saying and it's hard to argue! Every minute, hour, day and year counts when you face the customer or a prospect. In the process of converting a lead to opportunity, timing is everything so how much is your time worth!

Reports in Zoho CRM can help you with the proper analysis of the lead nurturing cycle. Take a look at some of these reports to calculate your valuable time and its effectiveness.

- Sales Cycle Duration across Lead Sources/Potential Type
- Overall Sales Duration across Lead Sources/Potential Type
- Lead Conversion across Industries/Owners

People Based Reports

Measuring the performance of your sales rep is crucial for your business. The sales metric used to measure the performance and effectiveness of sales rep vary. But knowing the right sales metric and getting the relevant information will help in identifying the strengths and weaknesses in your sales process – which sales rep is doing a great job and who needs to do better and requires a little coaching. Reports that give an insight on the target achieved by an



individual and the activities performed to achieve the target, is important while calculating the monthly sales target. You may try these performance-based reports in Zoho CRM that serves to measure the progress

of individuals in your team. More importantly, to check the overall quality of the service you provide to the customers:

- Sales Person's Performance Report
- Sales Cycle Duration across Owner
- Lead Conversion Count across Owners

Revenue Based Reports

How much revenue is your business making? How much does each region or line of product contribute to the overall profit? Your sales may be great in one region but not in the other!

Knowing everything about the monthly revenue, the lead source that gives you more business, percentage of target achieved, etc. is important. Figuring out who



your most profitable customers are can be difficult unless you have a detailed report of everything a customer buys and their purchase life cycle.

Measuring your organization's revenue and growth need not be very difficult with the right report in Zoho CRM.

- Sales by Lead Source
- Pipeline by Probability/Stage
- This Month Sales



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Zoho CRM Resources

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