



Sales Review

What Should A Business Sales Review Contain

- A Sales performance review involves discussing productivity, performance, goals, and career development in a business.
- These monthly, quarterly, or annual meetings between the sales manager, his/her team, and individual sales representatives help the team stay on the right track.
- This also helps in real-time course correction, if found necessary, of sales procedures, team productivity, and individual growth.



Business Overview

Revenue split by Country

Analysis reports of sales revenue for each country. This will provide insights into where to focus more and where your sales team is performing excellently.

Quarter Track Record

Record of sales and related figures in every quarter. Which quarter is in profit and which is in loss? This will help in reading the annual trends.

Our Team

Talk about your team members. Show the faces of your unsung heroes. Appreciate the champions and leaders of your team.

Product Offering

What do all products and services your company offer?
Any new edition or subtraction in the list?

Financial Highlights

Put a spotlight on the financial figures of the sales team. The overall increase in revenue, the highest amount of single sales, new financial records, etc.

Highlights

Highlights of what all happened in the previous sales year. Major events, achievements, sales partnerships, etc.



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Sales Performance

Sales Budget Vs Actuals

Compare the allocated budget with the actual expense. If it exceeds, find where you are spending extra and cut some costs.



Sales Performance Dashboard

A sales performance dashboard is one single stop to review your complete sales process and the team. Don't miss it to include it in every sales review.



Quarterly Sales Review

A review of each quarter should be included to circle out the factors affecting that quarter's sales and overall year.



Sales By Region

Read the regional sales data to understand where the audience is willing to spend more and where your organization/sales team is not able to meet the demands.



Sales KPI Performance Matrix

Discuss the sales KPI metrics of the previous year, their effectiveness, and the stats of each matrix. Based on the available sales data, finalize metrics for the current year.



Sales Revenue By Product

Compare the revenue of each product that your team sells. Understand which product is selling more/less and why.



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Sales Performance Dashboard



Revenue

\$ 1,061 M

Previous \$906 M
% Change +14.61 %

Trend ▲

New Customers

10,719

Previous 11,918
% Change -11.21 %

Trend ▼

Gross Profit

\$ 192.13 M

Previous \$183.61 M
% Change +4.43 %

Trend ▲

Customer Satisfaction

93.13%

Previous 79.82
% Change +14.29

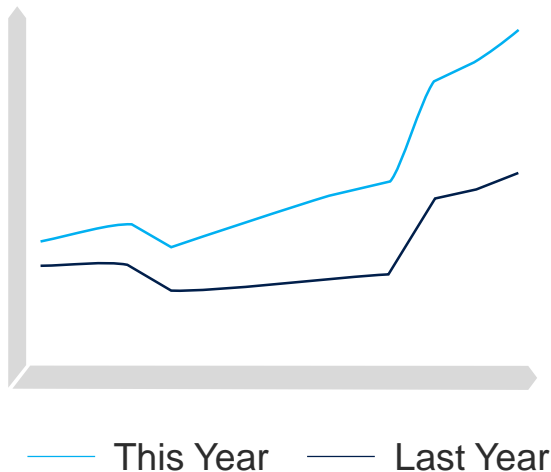
Trend ▲

A sales dashboard is a graphical depiction of your sales information. It is helpful in capturing and analyzing real-time sales data.

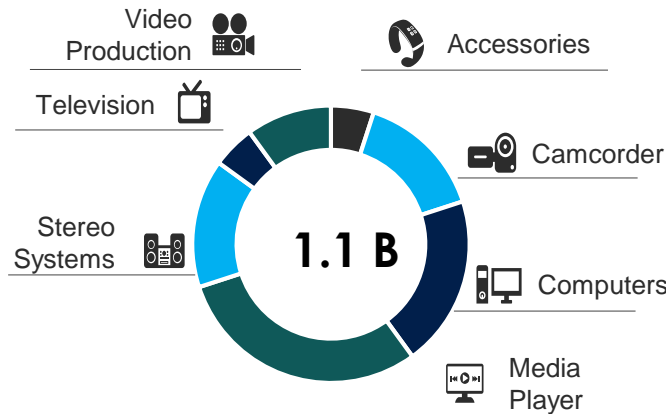
By applying various filters, sales managers can get almost every required information and insights about the sales team/process.

Quota achievement, conversion/win rate, average deal size, revenue, and sales funnel leakage are all common indicators that are tracked.

Sales Comparison



Sales By Product Category



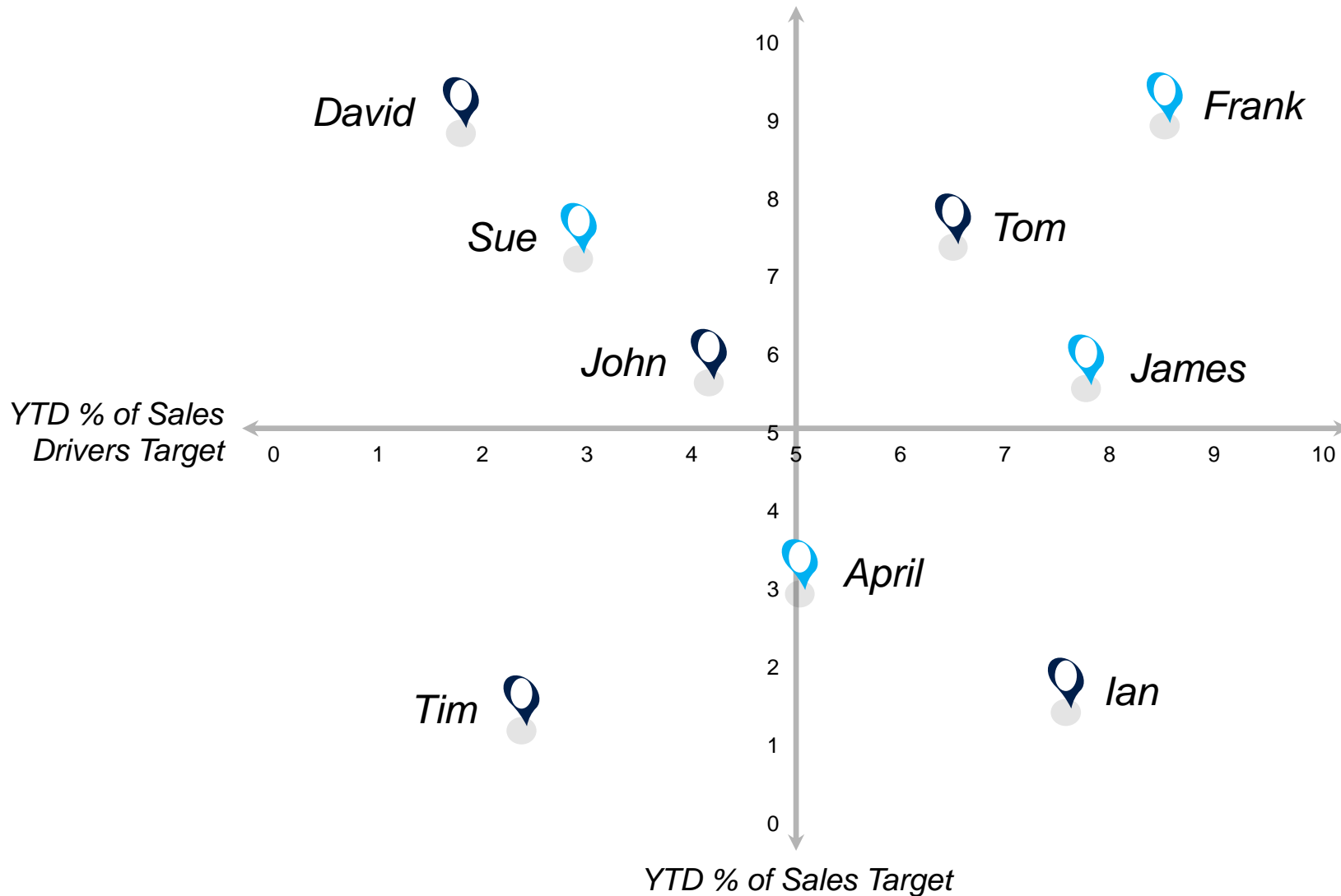
Rankings

| Top 5 Stores | | Top 5 Brands | | Top 5 Products |
|--------------|-----------|--------------|----------------|----------------|
| Store Name | Customers | Revenue (\$) | Manager | |
| London | 2,041 | 865,106 ▲ | Gordon Gecko | |
| Rome | 1,474 | 622,416 ▲ | Alexi Star | |
| Madrid | 1,462 | 638,817 ▲ | Sporty Bell | |
| New York | 1,416 | 614,479 ▼ | Cameron Slater | |
| Paris | 703 | 318,035 ▲ | Porter Brown | |

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Sales Rep Performance Scorecard

Sales Rep Scorecard Q2 2012



A sales rep performance scorecard is a tool that you can use to track and compare the performance of your individual sales rep.

This will help you find your top performers/bottom quartiles and plan strategies to improve the process or the team's performance.

Project Updates

Sales/ Channel KPI Tracker

This is similar to a sales dashboard. It is used to track live sales data and processes.



Sales Process Map

Include information about the steps involved in the sales process, like lead generation, and deal closing.



Project Updates

Complete details about the project acquired, lost, the project on which the team is working, and those are in the pipeline, along with the cost of each project.



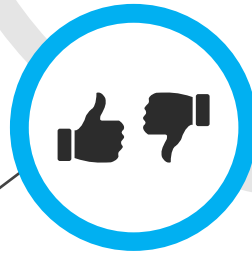
Sales Funnel Results

Present the statistics about the segments in the sales funnel. This will help you trace the bottlenecks in the funnel



Win-Loss Review

What do your customers think about your organization/sales process? What are the improvement opportunities?



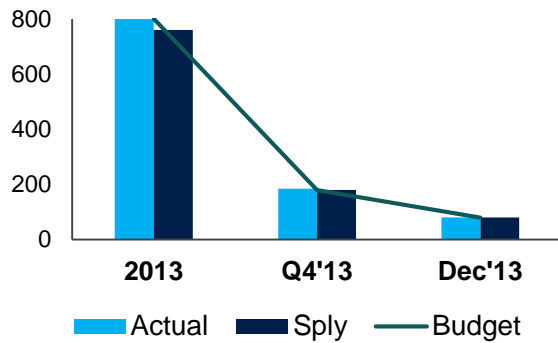
Top Clients

Mention the top customers, vendors, creditors, and debtors. How much profit/loss does your sales process get from these top contributors?

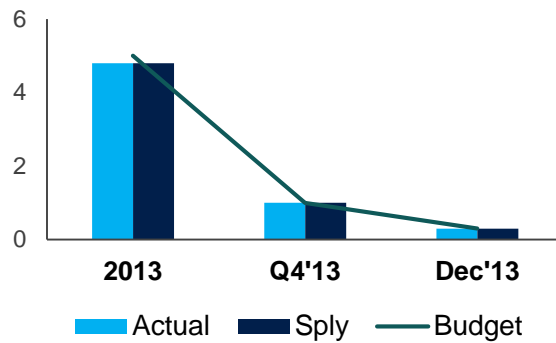


Sales KPI Performance - Summary

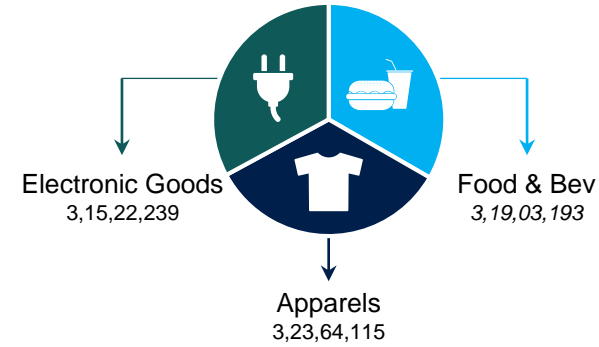
Revenue Comparison



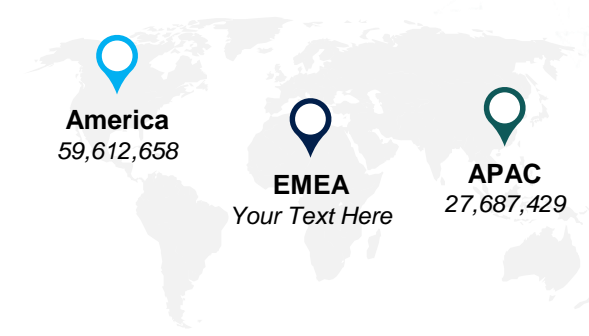
Quantity Comparison



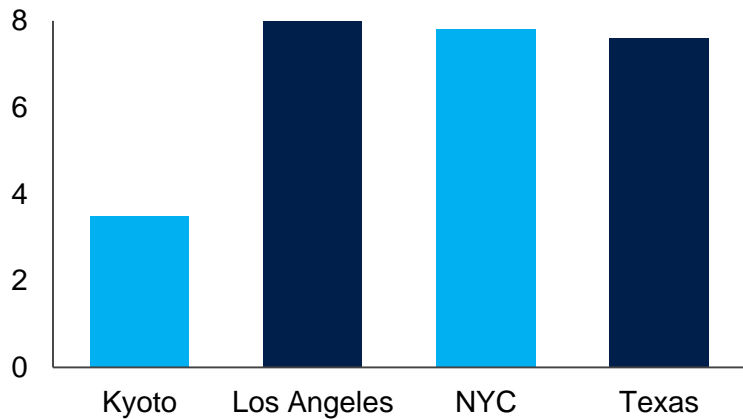
Product Sales Mix



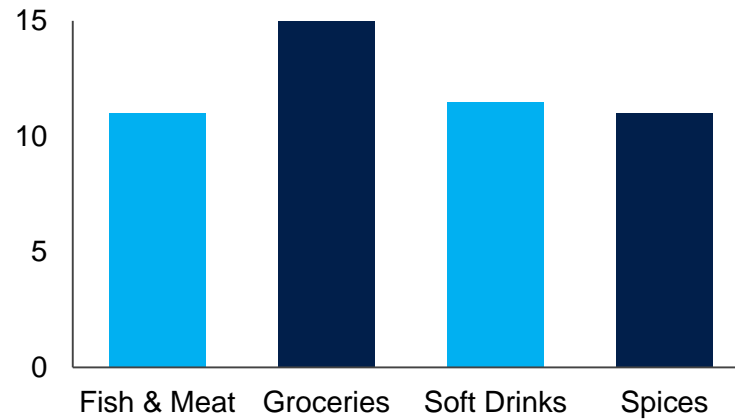
Regional Sales Mix



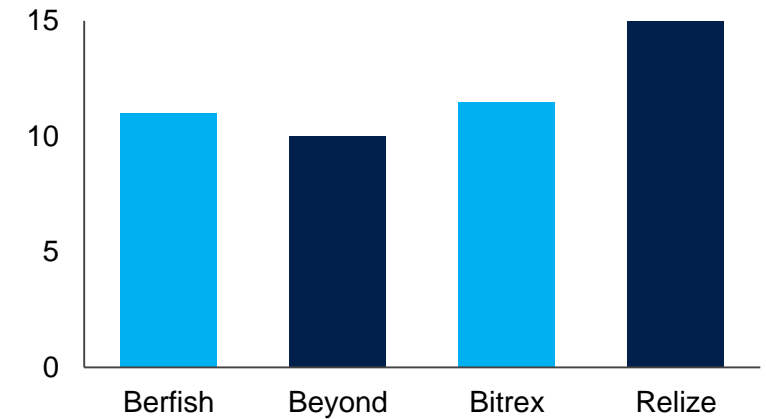
Top 4 Markets











Top 4 Products



Top 4 Sales Channel



Sales Process Map

| |  Activities |  Process Owner |  Sales Activity Lead |  Sales Activity Support |
|--|--|---|---|--|
|  Lead Generation | <ul style="list-style-type: none"> › Client Mapping › Research › Meeting › Pro-active selling | Sales Team | Sales Team | Executive Team & Operations |
|  Solution | <ul style="list-style-type: none"> › Scope Q&A › Solution Approach › Pricing › Program Timetable › Proposal | Sales Team | Operations & Finance | Sales Team |
|  Deal Closing | <ul style="list-style-type: none"> › Final Presentations › Site Visits › Inside Channel Feedback › Contract Negotiations › Program Planning | Sales Team | Executive Team | Sales Team |
|  Program Launch | <ul style="list-style-type: none"> › Provide Contracted Services | Operations | Operations & Recruitment | Finance |

Competitive Analysis

Competitors Market Positioning

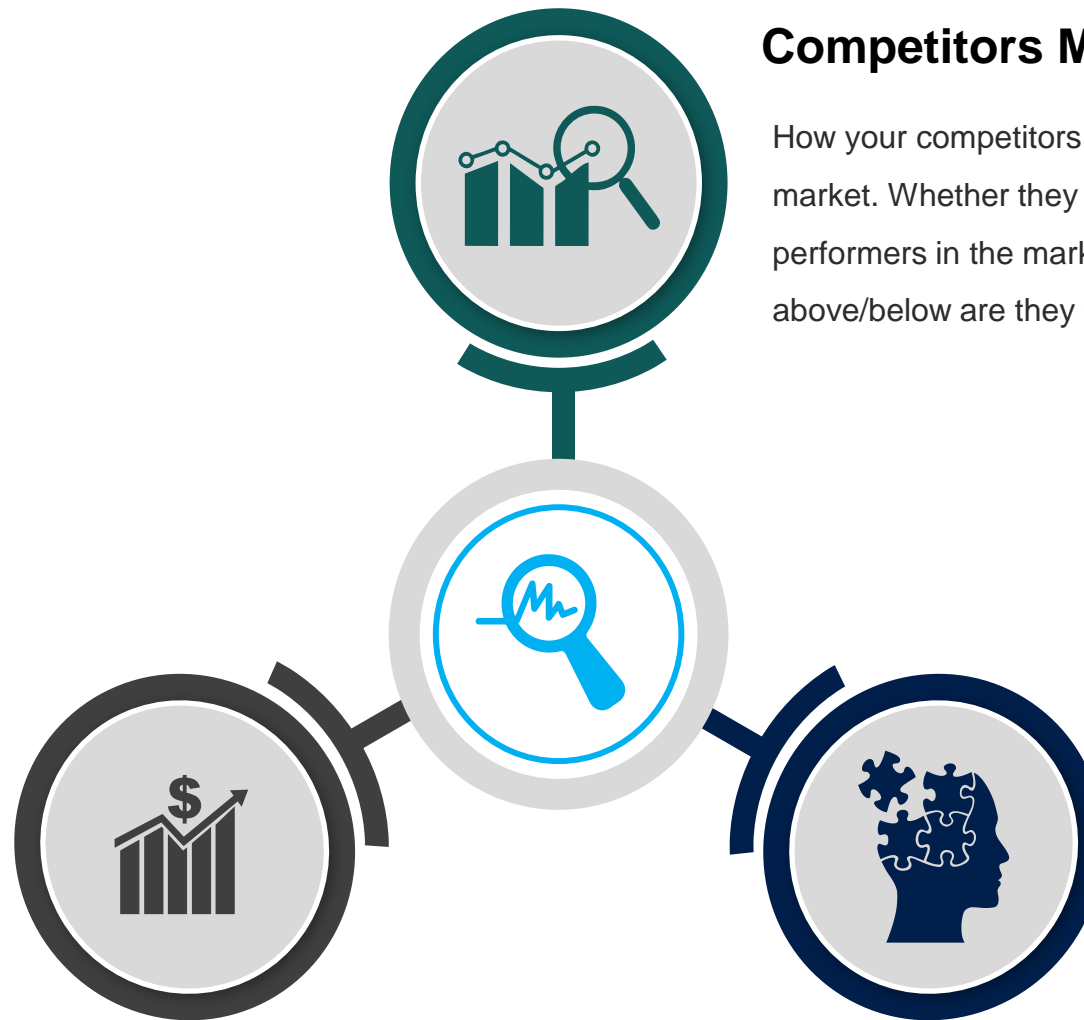
How your competitors are positioned in the market. Whether they are among the top performers in the market or at the bottom. How above/below are they from your position?

Competitors Sales Performance

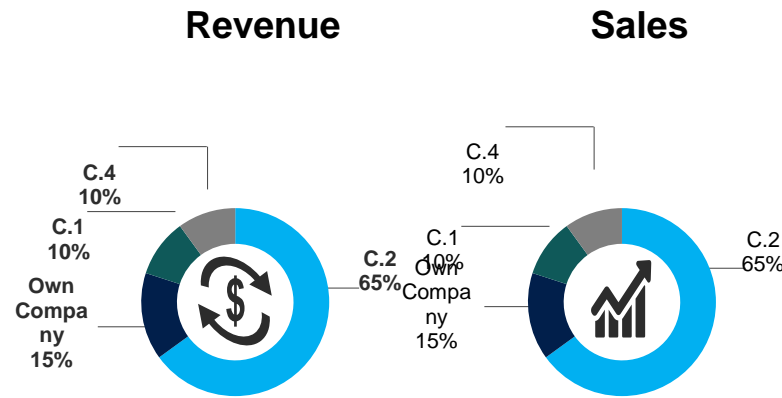
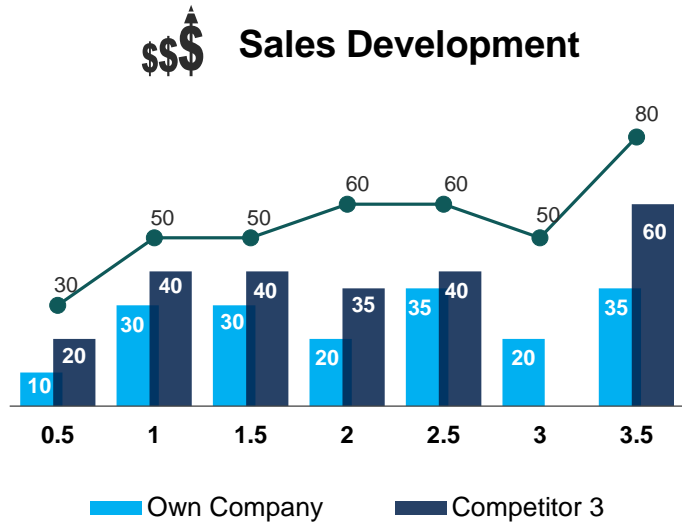
Look into your competitor's sales performance data to check which markets/products they are dominating and which markets are opportunities for you

Competitor Analysis

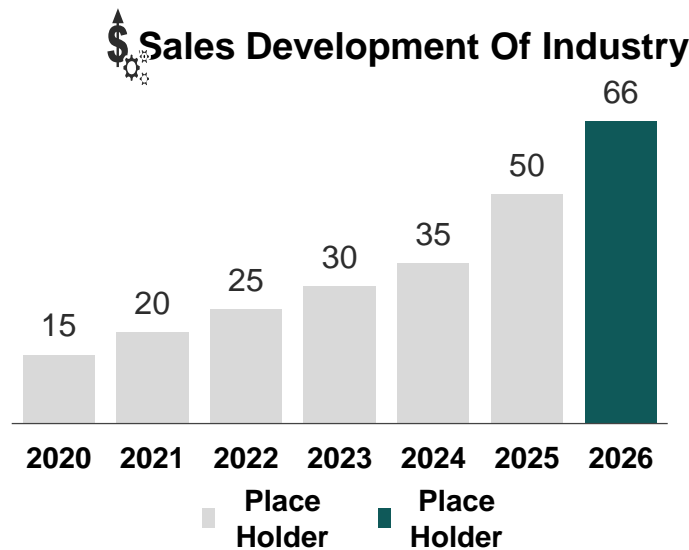
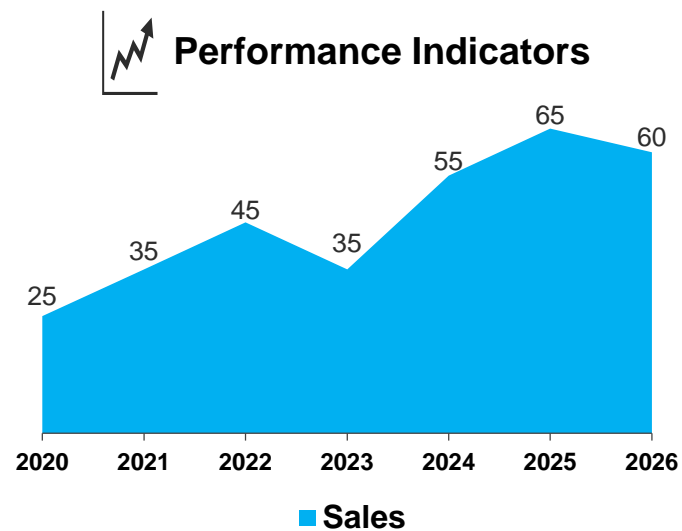
Analyze the competitors' strengths, weaknesses, advantages/disadvantages, strategies, and experiments. Discuss what you can do better.



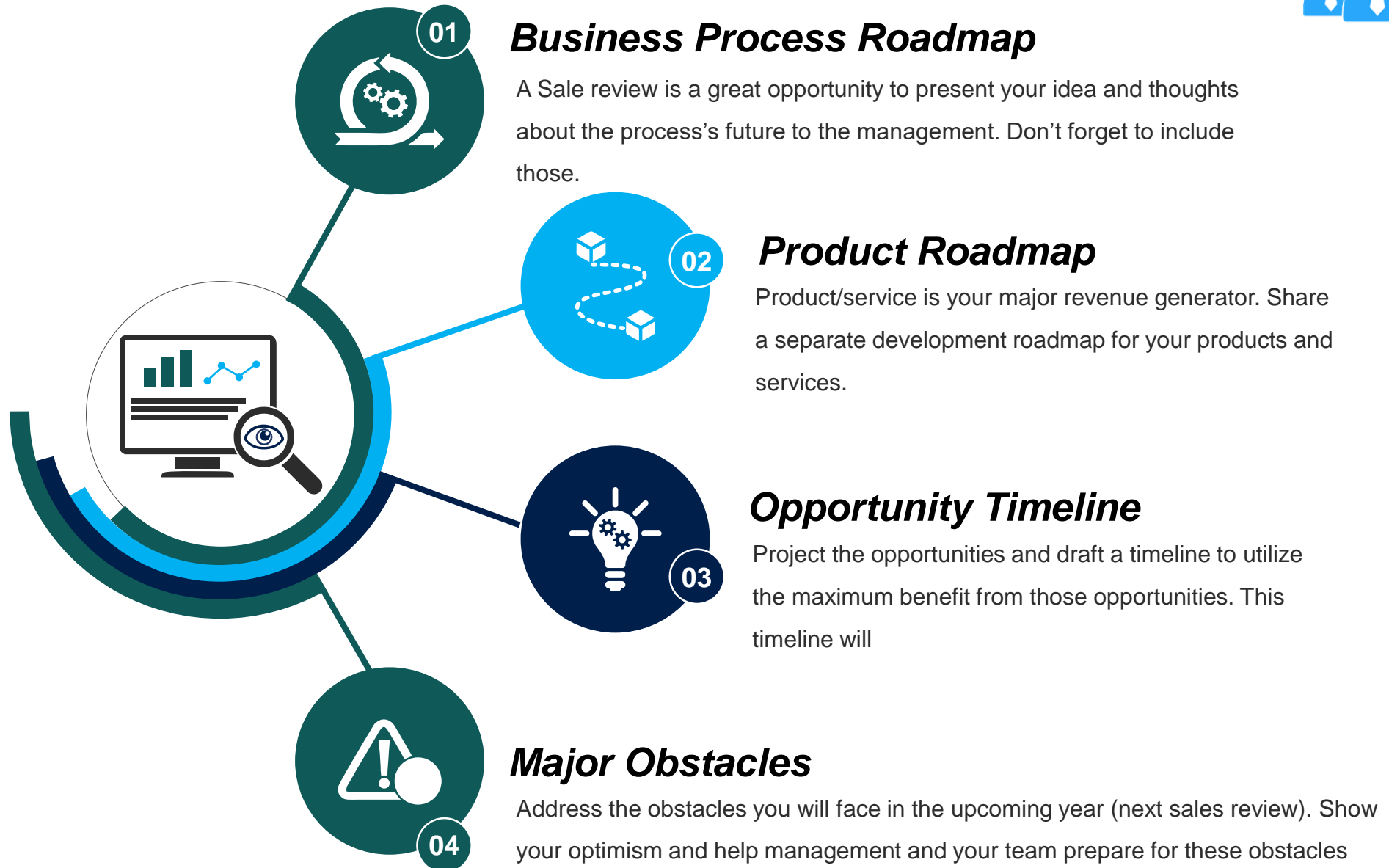
Competitor Analysis



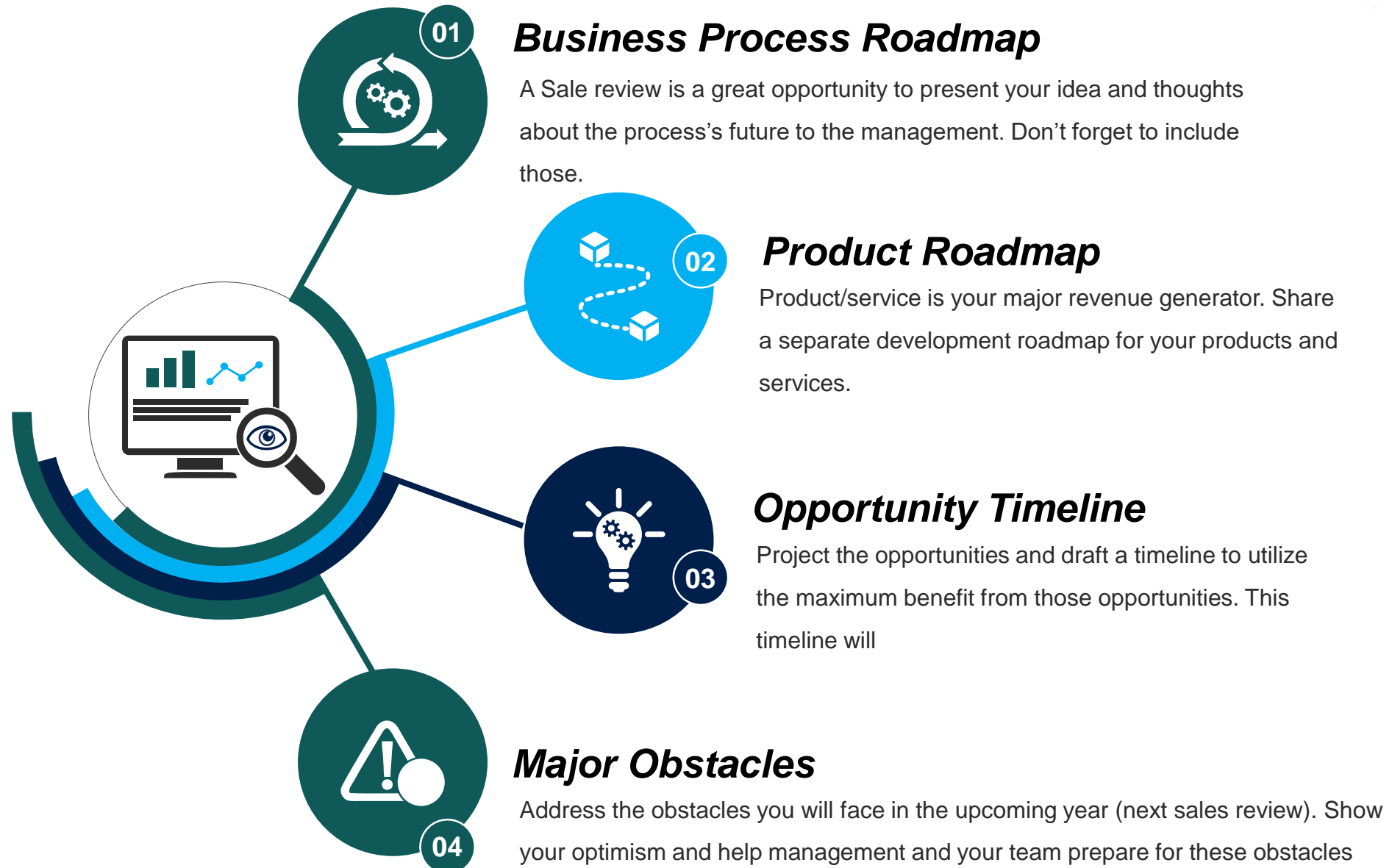
This is an ideal competitor analysis matrix you can use to analyze and compare your competitors' sales performance and data. It includes a comparison of sales development, revenue/sales comparison, performance indicators, and sales development of the industry.



You can customize the competitive analysis matrix for the elements you want to compare and analyze.



Future Perspective



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FAQs on Sale Review



1. What is a Sales Funnel?

It is an illustration of all current sales activities and interactions between a prospect and a company. It is a hypothesis that describes the path that a customer takes to make a purchase. Using a sales funnel can help you better understand how potential customers think and behave at points during the buying process. These insights help you invest in the best marketing initiatives and distribution methods, develop the most effective messaging for each stage, and convert more prospects into paying clients.

2. What are some of the tips to improve your performance reviews?

Sales performance reviews are crucial because they give sales managers a chance to advise, applaud, and motivate sales representatives—all crucial actions when trying to increase your business's sales figures.

Here are some tips to improve your sales performance reviews:

1. To evaluate each member of your team, use a consistent set of standards. To evaluate the entire team in a fair and efficient manner, use a professional performance review template.

FAQs on Sale Review



2. Examine both the results and the sales processes. Don't just concentrate on the numerical aspect of sales. Recognize the importance of results-based evaluation in delivering a distinctive customer sales experience. Therefore, pinpoint the issues with your sales processes and resolve them.

3. Sales performance reviews should be actionable.

Take a tour of our expert-curated actionable sales review to gain deeper insight. Try your best to provide them with realistic goals that complement the company and your strategies. Take into account the unique career aspirations of each representative.

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