

Motivate what matters.



THE SALES KPI REPORT

levelleven.com

CSO Insights released its first-ever sales management study.

The main takeaway?

Quota attainment has decreased since 2012, and the missing ingredient is **sales manager enablement**. The research points to a very specific area that sales managers need to be enabled around: "... managing the right activities and coaching the related behaviors (leading indicators) that lead to the desired results (lagging indicators)."

But which leading indicators should sales managers focus on? Calls? Building new pipeline? Meeting with decision makers?

LevelEleven's research team embarked on its KPI research to find out. And now, after analyzing 3,000+ key performance indicators (**KPIs**) being used by 800+ sales teams, we are eager to let you know what we uncovered.

What you'll find in this report:

1. AUDIENCE PROFILE

2. "HOW SHOULD I USE THIS DATA?"

3. MOST COMMON KPIs BY SELLING ROLE

Inside Sales • Field Sales • Account Management • Hybrid Sales

4. INTERESTING KPIs

5. MOST COMMON KPIs BY INDUSTRY, INCLUDING:

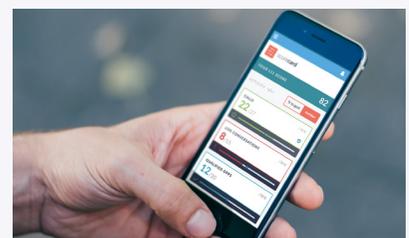
- Consulting
- Entertainment & Hospitality
- Finance & Insurance
- Healthcare
- Manufacturing
- Media & Publishing
- Retail
- Technology
- Telecommunications

6. MOST COMMON TIME FRAMES FOR SETTING KPI GOALS, INCLUDING:

Daily • Weekly • Monthly • Quarterly

About LevelEleven

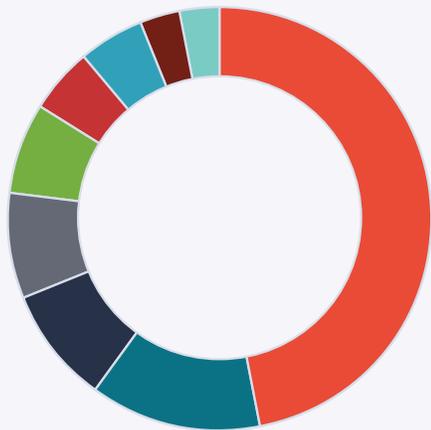
LevelEleven is a sales activity management system that reinforces the fundamental behaviors that lead to closing business. LevelEleven's suite of software and services allow sales executives to take high-level initiatives and break them down into controllable day-to-day activities for their salespeople. The system creates world-class frontline sales managers who coach with consistency and use actionable data to drive results. With this guided selling approach, modern sales organizations maximize their ROI through increased sales productivity and CRM adoption.



[learn more here](#)

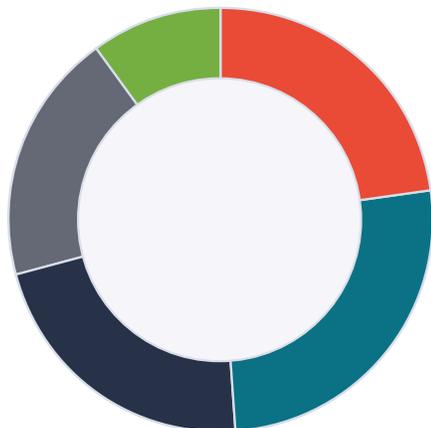
Audience Profile

In performing this study, LevelEleven analyzed 3,000+ KPIs, being used by 800+ sales teams. Here's a summary profile of the companies and sales teams included in this report:



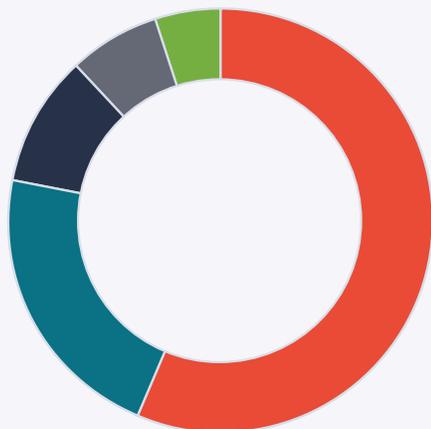
INDUSTRIES

- Technology - 47%
- Finance & Insurance - 13%
- Manufacturing - 9%
- Media & Publishing - 8%
- Telecommunications - 7%
- Retail - 5%
- Entertainment & Hospitality - 5%
- Consulting - 3%
- Healthcare - 3%



COMPANY SIZE

- 1 to 50 - 23%
- 51 to 250 - 26%
- 251 to 1000 - 22%
- 1001 to 5000 - 19%
- 5001+ - 10%



SELLING ROLES

- Inside Sales - 57%
- Sales Development - 22%
- Hybrid - 10%
- Field Sales - 7%
- Account Management - 5%

SELLING ROLES BY INDUSTRY					
Industry	Account Management	Field Sales	Hybrid	Inside Sales	SDR
Consulting	4%	10%	11%	49%	26%
Entertainment & Hospitality	3%	0%	0%	97%	0%
Finance & Insurance	0%	4%	11%	72%	12%
Healthcare	6%	2%	2%	79%	11%
Manufacturing	8%	10%	34%	46%	2%
Media & Publishing	1%	11%	30%	55%	4%
Retail	2%	0%	0%	78%	21%
Technology	6%	6%	7%	49%	32%
Telecommunications	8%	15%	1%	62%	14%

Today more than ever, selling titles differ from organization to organization; for the sake of clarity, following are general definitions for the roles included in this report:

INSIDE SALES - *The inside sales role refers to quota-carrying salespeople who work from home or an office. They prospect leads, host meetings and conduct demos over the phone and web. They may travel from time to time, but typically only for larger sales opportunities. Many of these salespeople work sales opportunities that have been identified by a sales development team.*

FIELD SALES - *The field sales role refers to quota-carrying salespeople who work in the field. They do also work in offices, but are typically out in front of customers. They commonly have larger, more complex deals, with less frequency.*

HYBRID SALES - *The hybrid sales role refers to salespeople whose responsibilities combine both inside and field sales functions. They work both in an office and, as needed, out in the field.*

SALES DEVELOPMENT - *The sales development role refers to non-quota-carrying salespeople whose job is to set up qualified sales opportunities for the inside, field or hybrid sales team. Generally, they work inside. They make a high volume of calls and emails and need to understand the ideal customer profile - including how to pursue those prospects.*

ACCOUNT MANAGEMENT - The account management role refers to team members who help existing customers to obtain maximum value out of the solution or product being sold. They are closest to the customer and are therefore able to uncover new sales opportunities. They are also sometimes referred to as “customer success” teams.¹

The companies studied use LevelEleven to manage their sales teams, which means that each takes a modern approach to building metrics-driven sales organizations.



To learn more about this modern approach, **Activity-Based Selling**, see this eBook.

get the ebook

“How Should I Use This Data?”

The KPIs that you employ to track and motivate your team’s performance must be unique to your selling roles, industry and customer journey. That being said, it’s normal not to be completely sure on where to start.

Today’s sales technology enables companies to measure anything, which commonly leads to trying to measure everything. Oftentimes, this results in “analysis paralysis.” While it’s true that sales is a process, much of which is driven by controllable activities, it can be difficult to know what really matters. What should you focus on? Calls? Meetings? Building pipeline? Which of those matter, and how often should each happen to help you hit your number? Not figuring this out means that your sales team, and frontline managers, will get lost in the day-to-day noise.

¹ LevelEleven’s previous KPI research refers to “account management” as “customer success.” The language was adjusted based on the seemingly more prominent use of “account management” to describe this role.

The data shared in this report is simply meant to offer guidance on where other modern selling teams have found success in meeting the challenge described.

In addition to running tests with the KPIs that follow, LevelEleven recommends reverse-engineering your sales goals to determine the KPIs that will best lead your team to your revenue goals. **Research** shows that this modern selling approach can create consistent sales success. For assistance in this process, join this **[free, on-demand workshop](#)**; after 45 interactive minutes, you will have a revenue-generating KPI plan, specific to your selling environment.

In the meantime, as you read this report, take time to review KPIs used by industries and selling functions outside of your own; this will equip you with a well-rounded view as you approach your own team's performance objectives.

Note: The information and data that follows were as accurate as reasonably possible at the time of preparation.

Most Common KPIs by Selling Role

As would be expected, the most commonly used KPIs differ by selling role (inside sales, field sales, hybrid sales and account management).

Perhaps most notable in current trends is the fact that in LevelEleven's previous Sales KPI Reports, Progressing Opportunities did not exist. Leading the KPI lists in its place was Opportunity Creation. This suggests a need for higher emphasis on opportunity quality.

Before diving into KPIs by selling role, please note: One common best practice used by the selling teams studied includes motivating leading indicators (the activities sales teams can control, like Calls or Meetings) and monitoring lagging indicators (like Wins). (More on leading vs. lagging indicators **[here.](#)**)

Following are the top KPIs by selling role, in order of popularity:

INSIDE SALES	
KPI	% of Sales Teams Using this KPI
Wins	22%
Progressing Opportunities	16%
Calls	15%
Meetings	14%
Activities ²	11%
Creating Opportunities	11%
Demos	4%
Quotes & Proposals	3%
Emails	2%
Meetings Scheduled	1%

A note on LevelEleven’s research: In the previous report, a “Sales” category existed, which combined inside, field and hybrid sales roles. Going forward, the research team chose to delve even deeper into roles, in hopes that it would further benefit readers. That’s why you will see inside, field and hybrid roles broken out.

² Activities refers to a compilation of tasks that salespeople complete that don’t fit into the main categories. This only includes items that are logged as Tasks or Events in Salesforce.com. The Interesting KPI’s section includes some notable examples.

FIELD SALES	
KPI	% of Sales Teams Using this KPI
Meetings	33%
Wins	21%
Creating Opportunities	15%
Progressing Opportunities	11%
Quotes & Proposals	7%
Activities	5%
Calls	4%
Demos	4%
Emails	1%

KPI ROI: Comcast Business Services' National Field Sales Senior Director, Elton Hart, increased his team's focus around KPIs and saw **8% more sales opportunities** as a result.

(Note: Comcast Business Services relied on LevelEleven's sales activity management system to achieve these results.)

HYBRID SALES

KPI	% of Sales Teams Using this KPI
Wins	24%
Creating Opportunities	21%
Meetings	16%
Progressing Opportunities	13%
Activities	11%
Calls	7%
Quotes & Proposals	4%
Demos	3%
Emails	1%

ACCOUNT MANAGEMENT

KPI	% of Sales Teams Using this KPI
Activities	20%
Progressing Opportunities	16%
Wins	14%
Meetings	13%
Calls	12%
Cases	10%
Creating Opportunities	5%
Emails	3%
Quotes & Proposals	3%
Meeting Scheduled	2%
Demos	1%

SALES DEVELOPMENT	
KPI	% of Sales Teams Using this KPI
Meetings	24%
Calls	22%
Creating Opportunities	15%
Activities	10%
Progressing Opportunities	10%
Wins	9%
Demos	2%
Emails	4%
Meeting Scheduled	4%

KPIs by Industry

As mentioned, the selling teams studied fell into a diverse range of industries. The research that follows covers the most prominent of those industries, including:

- Technology
- Telecommunications
- Media & Publishing
- Finance & Insurance
- Consulting
- Entertainment & Hospitality
- Manufacturing
- Healthcare
- Retail

Across these industries, **Wins**, **Meetings** and **Calls** land in the top three most often, with **Progressing Opportunities** and **Creating Opportunities** both tied for the fourth spot.

TECHNOLOGY	
KPI	% of Sales Teams Using this KPI
Meetings	19%
Wins	18%
Calls	16%
Creating Opportunities	14%
Progressing Opportunities	12%
Activities	9%
Demos	5%
Emails	3%
Quotes & Proposals	2%
Cases	1%
Meeting Scheduled	1%

INDUSTRY EXPERT - TECHNOLOGY

“There’s just so much noise in the seller’s head all the time. And I don’t mean physical noise, but mental noise. Putting [KPIs] in front of them just allows them to consistently look at what those important high-value activities are.”



Janet Jansen,
 Director of High Velocity Sales, Paycor

TELECOMMUNICATIONS	
KPI	% of Sales Teams Using this KPI
Wins	22%
Progressing Opportunities	17%
Meetings	16%
Activities	13%
Creating Opportunities	13%

Calls	10%
Quotes & Proposals	5%
Cases	1%
Demos	1%
Emails	1%
Meeting Scheduled	1%

INDUSTRY EXPERT - TELECOMMUNICATIONS

"We looked [at the data] and said, a phone call that lasts over four minutes almost uniformly – through regression analysis – leads to a demo appointment scheduled. It's a pre-indicator, but the correlation was so high that it became a meaningful KPI."



Michael Cox,
Vice President of Fleetmatics

MEDIA & PUBLISHING	
KPI	% of Sales Teams Using this KPI
Wins	23%
Meetings	22%
Activities	12%
Creating Opportunities	11%
Emails	10%
Progressing Opportunities	8%
Calls	7%
Quotes & Proposals	5%
Demos	1%

FINANCE & INSURANCE

KPI	% of Sales Teams Using this KPI
Activities	28%
Calls	19%
Wins	19%
Meetings	14%
Progressing Opportunities	8%
Creating Opportunities	6%
Demos	4%
Meeting Scheduled	1%
Quotes & Proposals	1%

CONSULTING

KPI	% of Sales Teams Using this KPI
Wins	20%
Meetings	18%
Progressing Opportunities	16%
Calls	14%
Creating Opportunities	11%
Activities	9%
Demos	4%
Meeting Scheduled	4%
Quotes & Proposals	4%

INDUSTRY EXPERT - CONSULTING

"Adding sales metrics is healthy and should make sense to the reps that are using and tracking them. If they understand how the metrics help shape their behaviors and activities, they are more likely to embrace them."



Phil Brabbs,
Managing Director, Torrent Consulting

ENTERTAINMENT & HOSPITALITY

KPI	% of Sales Teams Using this KPI
Wins	37%
Meetings	25%
Creating Opportunities	9%
Meeting Scheduled	9%
Calls	8%
Activities	6%
Progressing Opportunities	6%

MANUFACTURING

KPI	% of Sales Teams Using this KPI
Creating Opportunities	23%
Wins	19%
Meetings	17%
Progressing Opportunities	16%
Calls	10%
Activities	9%
Quotes & Proposals	2%
Cases	1%
Emails	1%
Quotes & Proposals	1%

HEALTHCARE

KPI	% of Sales Teams Using this KPI
Progressing Opportunities	44%
Calls	17%
Meetings	9%
Activities	8%
Wins	8%
Creating Opportunities	4%
Demos	4%
Emails	4%
Meeting Scheduled	2%
Quotes & Proposals	1%

KPI ROI: CVS Caremark Corporation is one leading selling team in the healthcare industry who relies on Activities KPIs. When CVS' inside sales team accelerated focus around a Salesforce adoption KPI, they **increased completed fields in Salesforce by 8x**.

(Note: CVS relied on LevelEleven's sales activity management system to achieve these results.)

RETAIL

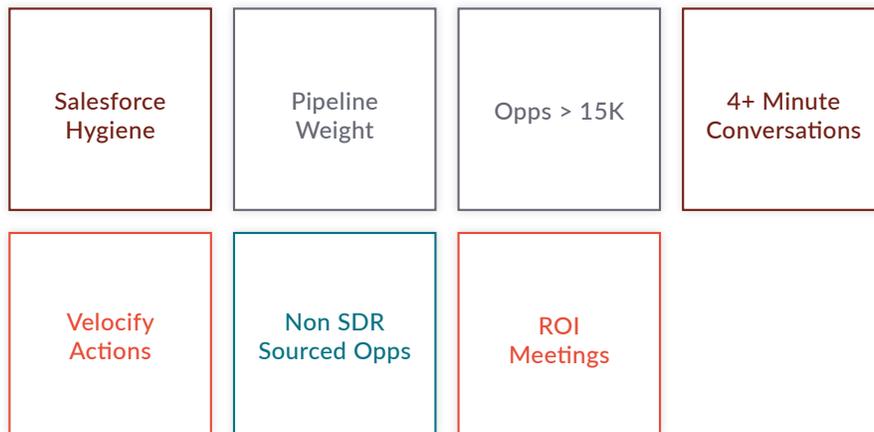
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Interesting KPIs

The “Interesting” KPI category (which, as a reminder, falls into Activities in our KPI research) is simply meant to share the breadth of unique KPIs in use. The KPIs listed in this category were hand-selected by LevelEleven’s research team for mention.

In terms of selling roles, Account Management leads in interesting KPI use, with Activities leading their KPI list in popularity. Account Management is the only role where Activities is in the top three – let alone the number one spot.

Of the industries studied, Technology had the most unique set of KPIs, with 50+% more unique KPIs than other industries. Here are some of those interesting KPIs:



Although technology has more unique interesting KPIs than the others studied, these activities are only used 9% of the time, falling behind to:

KPI	% of Sales Teams Using this KPI
Meetings	19%
Wins	18%
Calls	16%
Creating Opportunities	14%
Progressing Opportunities	12%

And although Finance & Insurance has less interesting KPIs, it uses those more often, with 28% of financial and insurance companies relying on those Activity KPIs.

Following are the top 15 most mentionable interesting KPIs from industries outside of Technology (in no particular order):



Most Common Time Frames for Setting KPI Goals

Although the sales leaders involved in this study may monitor their common KPIs using multiple time frames (i.e., looking at Wins monthly and quarterly), the research below refers to the most commonly used time frames for creating goals around each KPI.

It is important to note that the managers mentioned all have real-time access to their sales performance data (through **LevelEleven**), so there is a wide range of real-time monitoring as managers work toward their larger goals. The value in this is that the sales leaders are able to course-correct sales performance in the moment, to stay on pace to their daily, weekly, monthly and quarterly goals.

OVERALL				
Metric Category	Daily	Weekly	Monthly	Quarterly
Calls	31%	51%	18%	0%
Activities	47%	18%	29%	6%
Meetings	20%	40%	37%	3%
Progressing Opps	18%	14%	68%	0%
Wins	9%	4%	56%	31%
Cases	75%	0%	25%	0%
Creating Opps	6%	47%	35%	12%
Emails	17%	33%	50%	0%
Quotes & Proposals	0%	0%	33%	67%
Demos	0%	63%	38%	0%
Meeting Scheduled	0%	100%	0%	0%
Grand Total	21%	30%	39%	10%

Monthly is the most common goal time frame overall. 

Tip: Tracking pacing toward KPI goals maximizes focus. When Jackson National Life Distributors did this, they saw **30% greater overall sales activity** and **41% more sales calls to a specific target**.

“What ended up being the biggest ‘aha’ for our team is pacing functionality. It’s been unbelievable. We’ve seen a massive spike in activity and focus, and so far it seems to be sustained.”



Doug Mantelli,
Senior Vice President of National Sales Development,
Jackson National Life Distributors

To learn more, view this [4-minute video](#).

Note: Jackson used LevelEleven’s [sales activity management system](#) to track pacing to goals.

Thank you for reading.

Keep an eye on LevelEleven’s [sales KPI content](#) for additional guidance as you move forward in your metrics-driven approach. And in the meantime, make sure to take advantage of the following special offer:

Special Offer for Readers of this Study

The Modern Sales Management System

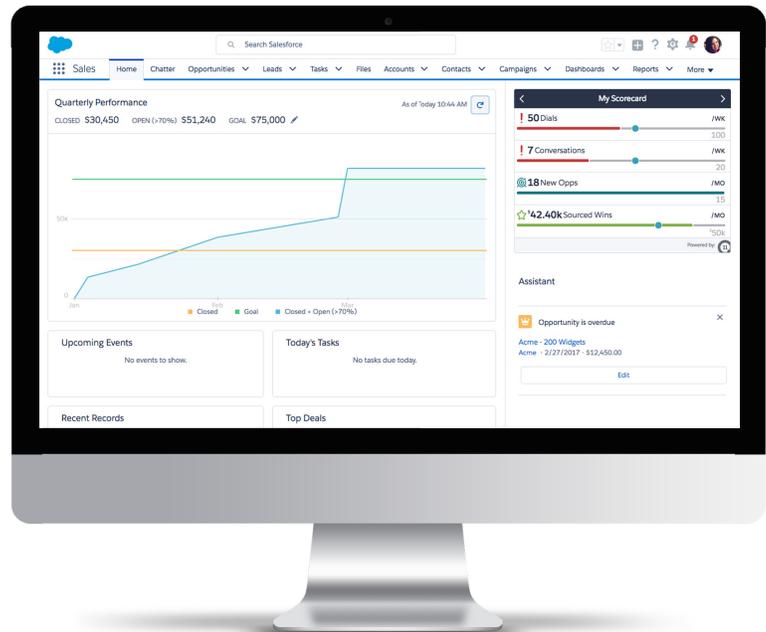
appexchange

 Lightning Ready

 Native App

 Salesforce Mobile

Vp's of Sales use LevelEleven as their sales management system to drive the fundamental activities that lead to closing business. LevelEleven **increases revenue, enables world-class sales managers and increases Salesforce adoption** through...



Personalized Scorecards:

Keep key sales data for salespeople and managers front and center

Live TV Broadcast:

Add energy and excitement with a live feed of your sales metrics and big wins

Coaching Module:

Enable data-driven sales managers who coach with consistency

HUNDREDS OF HAPPY CUSTOMERS


Hewlett Packard Enterprise





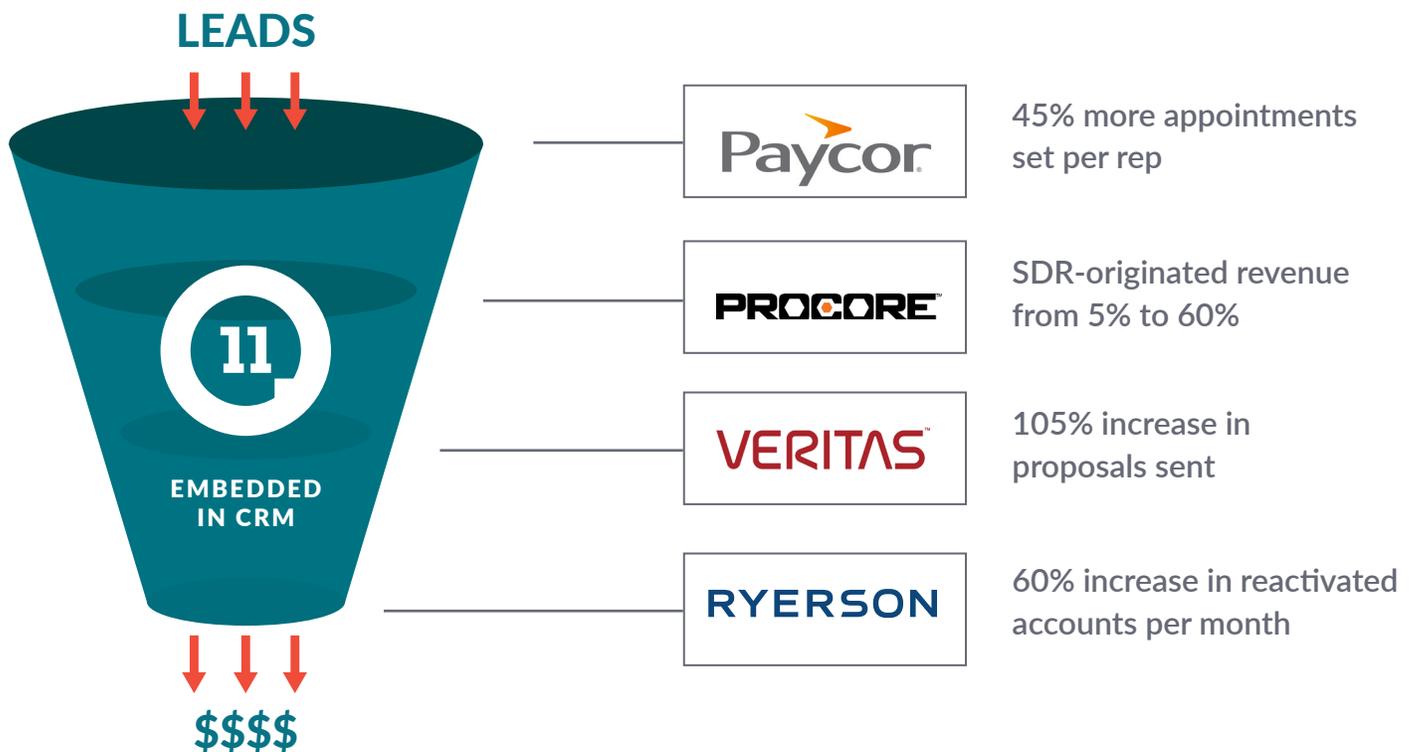


LEARN MORE AT:

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Ready to Step Up Your Sales KPI Strategy?

With LevelEleven....



"In a very short period of time, we have seen a significant increase in the key KPI we measure each week. It's exciting to see the entire team focus on what matters most now, limiting distractions while driving higher levels of success."

BILL PETERSON,
Regional Vice President, Staples

"I used to look at my dashboard 10 times a day. Now, I just go to my LevelEleven homepage and flip through Scorecard. As a sales leader, it is amazing to me how now I rely on that quick little snapshot of key metrics."

JANET JANSEN,
Director of High-Velocity Sales, Paycor