

SALES REPORT

A sales report is an analytical tool that provides insights into the performance of various sales activities within a company. Armed with powerful visualizations, sales teams use these reports to find trends and patterns to improve their service and ensure sales growth.

They give a snapshot of the company's exercise at a specific moment in time to assess the situation and determine the best decision to make and the type of action to undertake. These reports help in finding potential new market opportunities where they could improve the results by using modern sales reporting software.

They can be of various forms: a daily sales report format will track sales KPIs that are relevant on a daily basis: the number of phone calls or meetings set up by a rep, or the number of leads created. Typically, weekly sales reports templates can monitor the number of deals closed by the team or the revenue generated. A monthly sales report format will provide a bigger picture of the activity of each sales rep or the team as a whole. Putting it all together on sales dashboards will enable you to automate your data and focus on human-centric tasks, without the need for time-consuming manual calculations and repetitive exports.

There are also different variations of reports that will focus on different aspects: the sales performance in general, detailing the revenue generated, the sales volume evolution, measuring it against the sales target pre-set, the customer lifetime value, etc. There are also reports focusing on the sales representative themselves and their sales cycle performance, from lead generation to closing a deal. To know what are the various types of sales reports, we will focus on fundamental ones, starting with monthly.

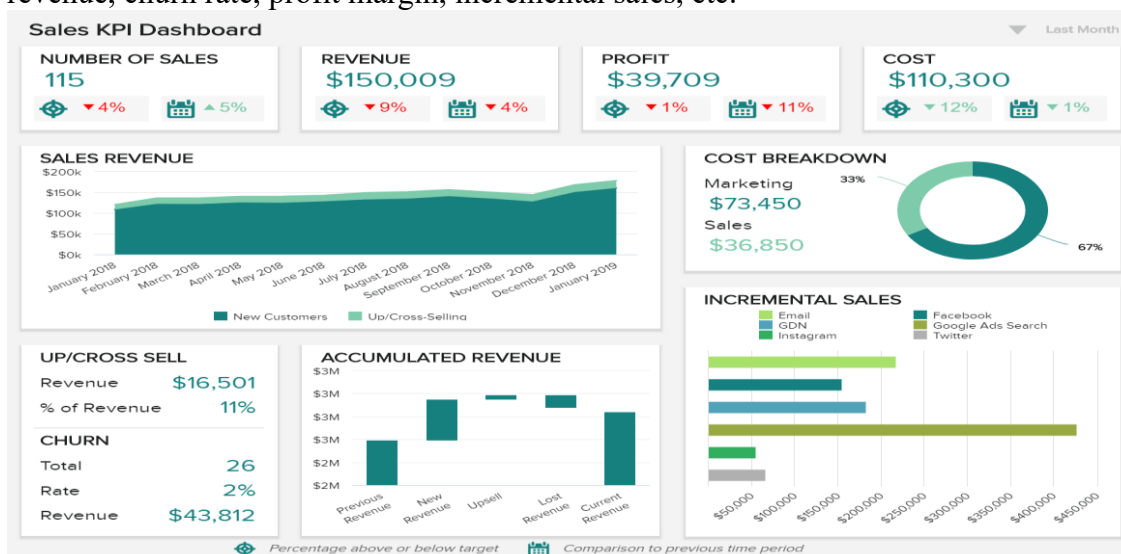
1. Monthly Sales Reports

A monthly sales report is used to monitor, evaluate, analyse, and determine sales trends on a monthly basis. It includes more long-term measurement of KPIs such as sales cycle length, conversion report, monthly performance report, among many others.

To dig a bit deeper, we will also briefly introduce some monthly sales reports examples that can be of help. A month will provide a broader feeling of how your sales reps are performing in the long run, even though, as we mentioned earlier, it can be too long for you to implement correction to avoid missing out on opportunities before it is too late.

1) Sales KPI report

We will start with a sales report example focused on high-level metrics intended to make c-level executives' lives much easier. Reporting on these levels should include main metrics such as revenue, churn rate, profit margin, incremental sales, etc.



These metrics (as we can see also in the example above) are of utmost importance to track on a monthly basis since they can change the course of a company's sales strategy. Sales VPs, managers,

and executives can monitor the most important operational and strategic data to increase the quality and performance of designated sales targets. By utilizing professional KPI software, this monthly sales report template can be generated within minutes.

In the example above, we can see how to maintain revenue reporting and management under control with the help of interactive charts that consolidate data from your connected database and bring you powerful visualizations that tell an immediate data story. You can break down your costs, monitor your incremental sales, and compare your results with the last month while keeping your data up-to-date.

2) Sales opportunity report

A sales report template for sales executives should incorporate management, development, monitoring, and analysis of opportunities. Those are the most prominent leads within the funnel that need special attention and care. With the help of professional BI reporting tools, opportunities are available in a single, central location, and automatic data updates will enable you to look at the data in real-time, without manual optimization of numerous spreadsheets and static reports. Let's see this through a visual example below:



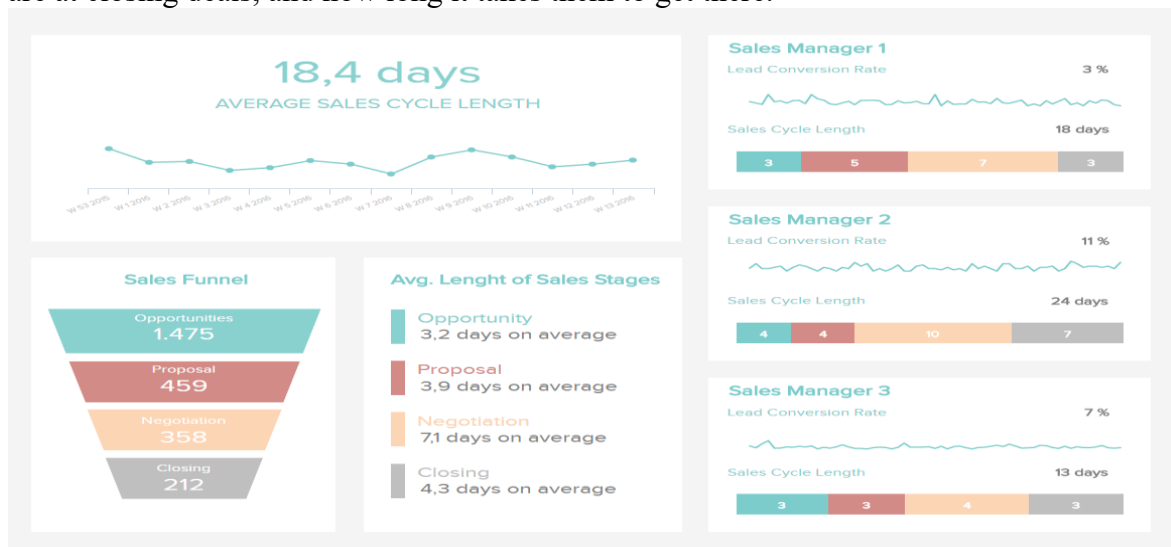
A sales performance report sample above is focused on opportunities and details on various metrics. It starts with a glance overview of current opportunities, current purchase value, average purchase value, and the win ratio compared to last month. This will immediately tell you if your developments are positive or need additional adjustments to improve results. Below you can find details on the churn reasons, and we can see that the highest number of lost opportunities state they've chosen a competitor. You can use these findings to examine what competitors offer and if you can adjust your sales strategies accordingly and try to offer something more valuable for your most promising leads.

The right part expounds on the purchase value alongside the opportunities so you can track your development through the month and see what happened during certain spikes to recreate positive scenarios and learn from negative ones.

At the bottom, the details will let you know when the first contact was made, by which sales rep, what kind of package is listed, comments, and other specifics of each opportunity. That way, you will clearly see additional information without the need to manually search through e-mails, spreadsheets, or perform any manual and time-consuming task. By adopting business intelligence software, key reports for sales managers will be centralized and accessible from any time, and anywhere. Moreover, you will be able to share and interact with each part of this dashboard that will save you countless hours and, ultimately, increase your productivity levels.

3) Sales cycle length report

This monthly sales report sample is covering the totality of your reps' sales funnel, from the opportunity to a closed deal. It will outline the performance of each rep and point out how good they are at closing deals, and how long it takes them to get there.

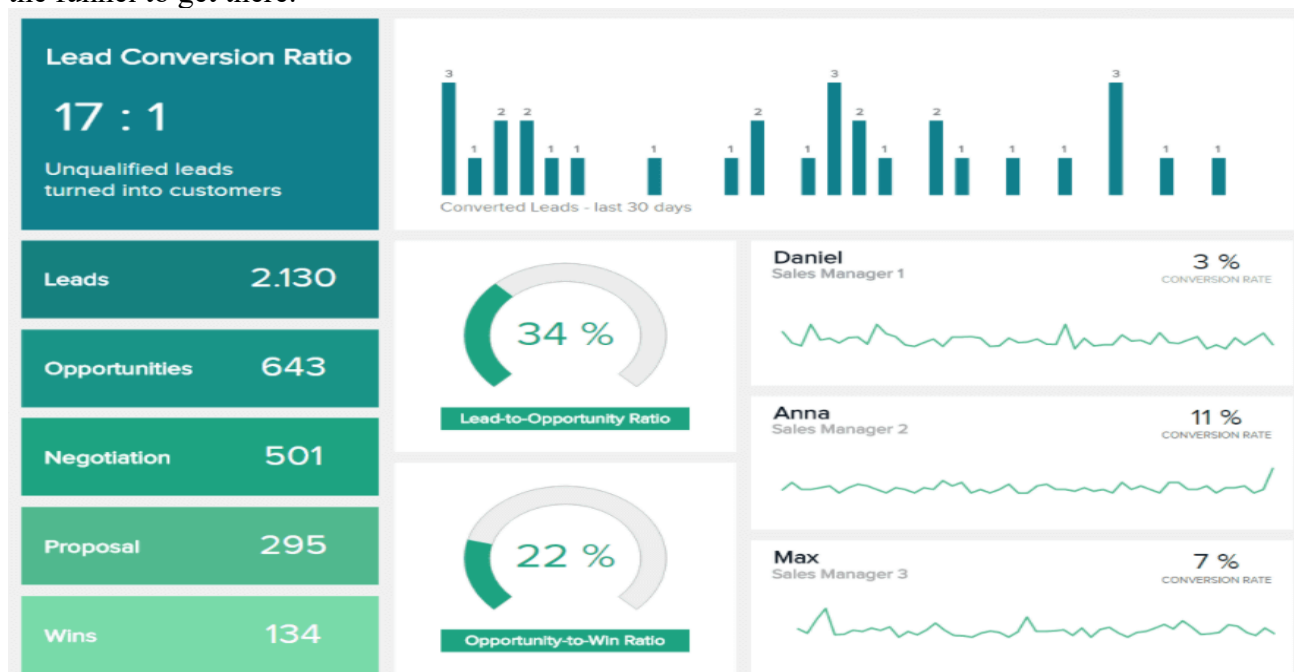


Visualizing these metrics will help you in determining the strengths and weaknesses of each individual, providing you with the information you need to respond accordingly.

In our sales data analysis example, you can see that the average cycle length is 18 days while the details are shown below and on the right in this dashboard. A [data report](#) such as this one will ensure you gain a complete overview of your cycle while monitoring the conversion rate and cycle length of each sales manager on your team. The goal is to shorten the sales cycle as much as possible but it also depends on the industry. In B2B, the cycle length is usually much longer than B2C, as mentioned. The less time it takes you from identifying an opportunity to closing a deal, the more effective and profitable your processes will be.

4) Sales conversion report

Here's a monthly sales report template that is complementary to the previous one: you are able to see how effective your reps are at converting the leads into sealed deals, after hitting every step of the funnel to get there.



By analyzing each stage of this funnel, you have the opportunity to identify where an issue may occur and address it, so as to increase your sales conversions.

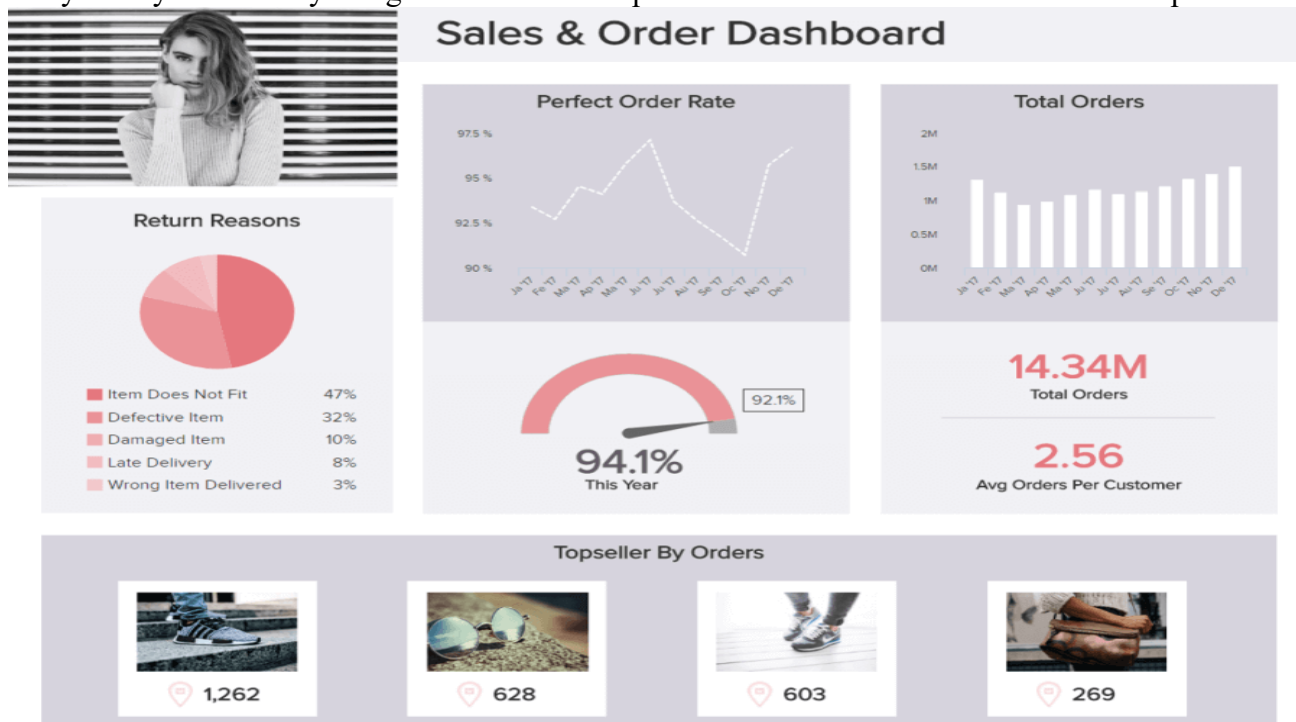
In our sales summary report sample created with a powerful [dashboard maker](#), you can see the number of leads, opportunities, negotiations, proposals, and wins in a simple, yet straightforward way. The monthly development is depicted on top where you can see how many converted leads you gained in the last 30 days. When you see certain spikes, you can examine what happened on that day to see if you can apply the same tactics for your next sessions.

You can also see 2 gauge charts that visualize the lead-to-opportunity and opportunity-to-win ratio. If you notice a significant increase in your wins, you can safely assume your sales reps bring profits to your company. On the other hand, if you see that the opportunity-to-win ratio is stagnating or decreasing, you can examine what kind of problems your reps have at the later stages of sales.

5) Sales & order report

Another monthly report template that can be helpful for online retailers. With so many orders to handle, it can be sometimes difficult to keep track of everything that is sent out – but mostly returned. Increasing sales volumes is what every retailer aims at, but managing to keep the return process in the loop will help you greatly on many levels.

In this [retail dashboard](#) below, first, you can see in which quantity your items are returned and secondly analyze why. This is key to figure out where the problem lies and troubleshoot it as fast as possible.



If the item doesn't fit, as we see in our example as the main return reason, it would make sense to communicate the sizes more effectively. Maybe they're not visible enough within your online store or they don't correspond to the standard US or EU sizes.

That way, you can easily increase your customers' satisfaction, and we all know that a satisfied customer is coming back: s/he can also recommend your products and services to their friends and family. And that's pretty much what you want to achieve.

6) Outbound calls report

Telephone [cold calling](#) is still one of the most important techniques used in sales. That's why we have chosen to present this report which displays a number of key areas in your outbound processes and potential results.

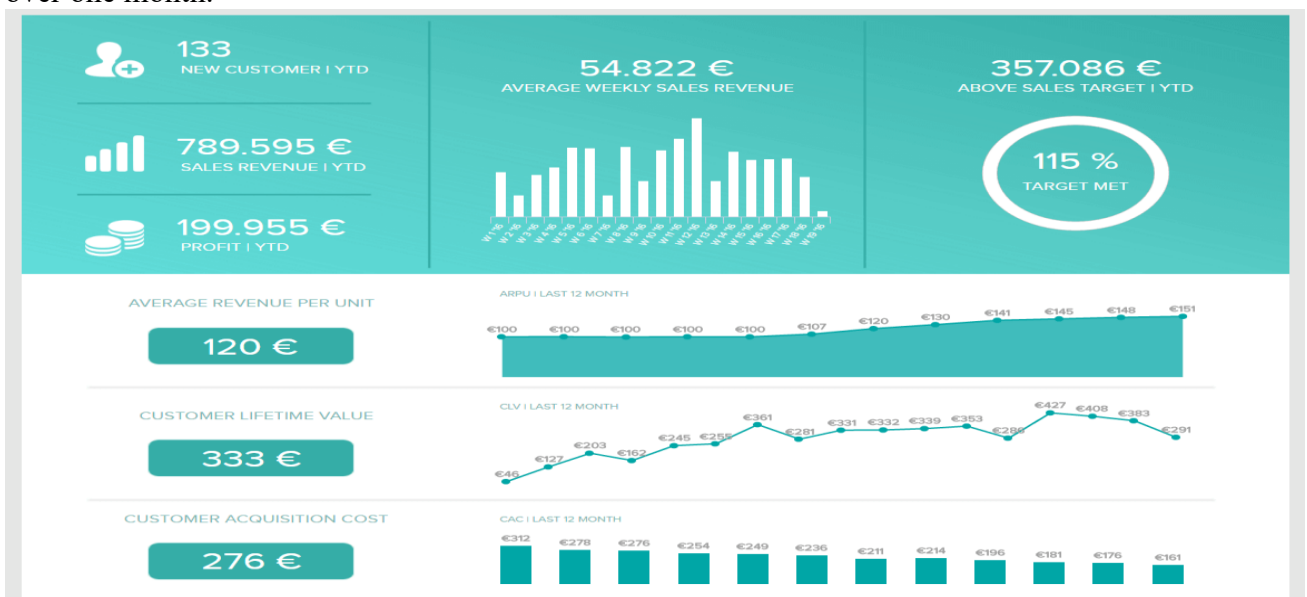


In this comprehensive sales analysis example, you can generate invaluable insights referred to outbound calls' trends, the sales team performance based on the contact rate, contracts closed, and average order value, among others. This visual enables you to compare your findings with the previous period, learn which is the most effective time to perform calls to be able to maximize results and profits.

In our example, you can see that the contact rate is highest mid-week while the details on the agents' performance are depicted on the right. The trends are indicated in comparison to the previous period and are, unfortunately, negative. The point is to examine further what happened in order to avoid such scenarios in the future. Do agents need more education or something unexpected happened that you can't really influence or change - it's time to start asking additional questions.

7) Sales performance report

As our final monthly report format, we chose one that displays a broad overview of your performance, combining a lot of different KPIs – which is useful if you decide to create a *monthly* report. The one displayed here, however, goes further, as it shows data over one year; but you can take data for just over one month.



From the number of customers you have acquired during that time span to the costs, it takes to get them, from the average revenue each of them brings you to the lifetime value they have, this sales

analysis report sample provides you with at-a-glance information to quickly see if your teams are meeting their goals.

In a practical sense, this [performance dashboard](#) will enable you to track the customer acquisition costs, the average revenue per unit, the customers' lifetime value, and the development over time. It's important to track and regularly evaluate your performance since it will create an informed sales environment, where you have the opportunity to make decisions based on data, and not "hunches" or assumptions that can cost you a significant amount of money and time.

2. Weekly Sales Reports

A weekly sales report is a measurement tool used by companies and individuals to track sales performance and essential KPIs, such as lead-to-opportunity ratio, lead conversion ratio, sales volume by channel, total sales per region, among many others, on a weekly basis.

A week is arguably the perfect unit of time to measure individual sales rep performance. A month is often too long of a time frame, leading you to miss out on course correction opportunities until after the fact. And a single day is often too short to see any real, meaningful outcome-dependent information. Of course, the perfect time to measure sales rep performance depends on your business model, too. You can also check our resources for using a [business report template](#) to expand your knowledge.

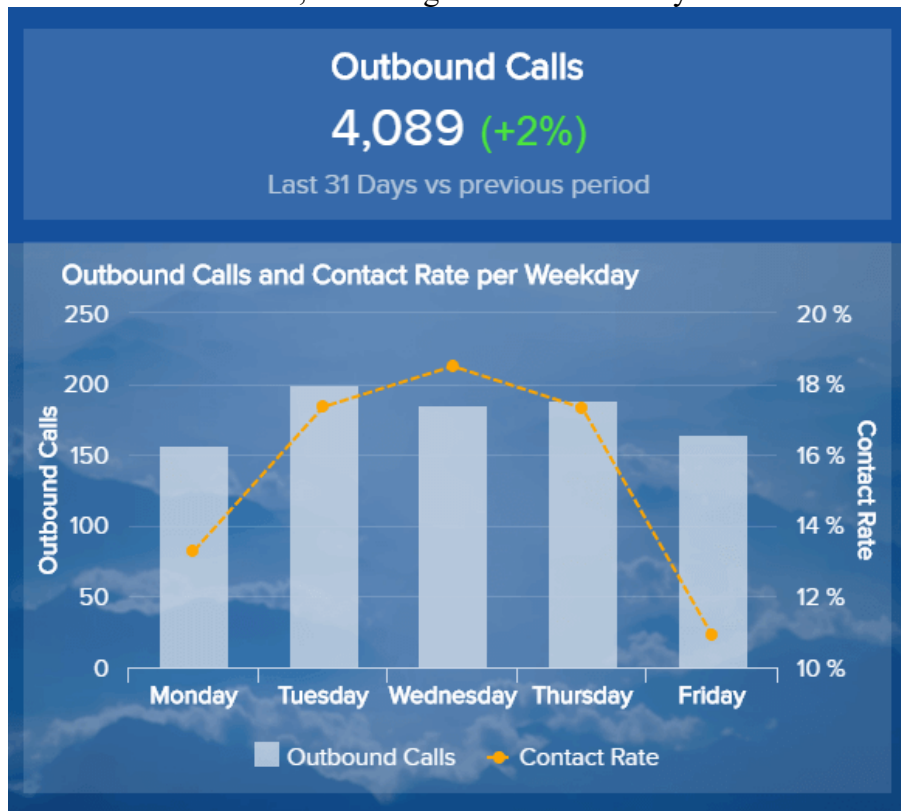
Here we will take a look at specific reports and KPIs you can track on a weekly basis based on a B2B and retail perspective.

a) Track Your Weekly B2B Sales With These Reports

As mentioned, the week is a perfect time unit to track your team's performance and get a more detailed overview of your sales numbers. Let's go through the top reports you can utilize for your weekly meetings.

1) Number of outbound calls

Telephone cold calling is another invaluable B2B KPI that can tell you which weekdays are the most promising for outbound calls. Usually, Tuesdays, Wednesdays, and Thursdays are particularly valuable for B2B sales, but it might be useful to set your own benchmarks.



You can set daily targets and track the performance during each day of the week, but do consider factors such as mentioned days of the week or local time.

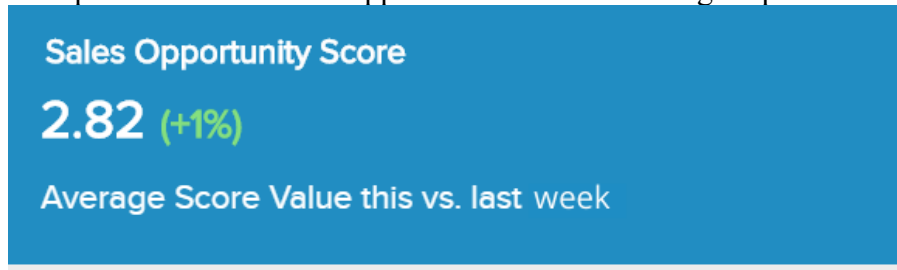
2) Sales volume by channel

This is a bit of a more “strategic” KPI that can also be used effectively on longer time scales. Essentially, this report shows you what physical areas and methods of customer acquisition are pulling in the most revenue.

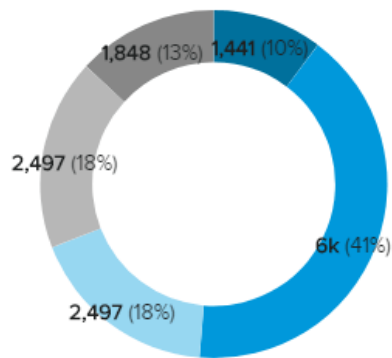
The total sales volume can make it easy to see where you should be prioritizing your sales efforts so that you can adjust accordingly.

3) Sales opportunity score

Scoring models will help you to set a standardized value to your opportunities since there are different classifications depending on the potential. That way, you can allocate your resources more effectively and spend more time with opportunities that have a higher potential.



Number of Opportunities



■ 1 - low potential ■ 2 ■ 3 ■ 4 ■ 5 - high potential

As we can see in our sales summary report above, the number of high-potential opportunities corresponds with the dark grey area and 13% of all opportunities. This metric, created with modern dashboard software, will help you create an effective weekly strategy and action plan on where your sales reps should focus their time and energy.

4) Revenue closed by rep

While a week may be slightly too short to get a meaningful revenue metric (depending on the length of your sales cycle), this is still a useful report to run. For shorter sales cycles, you’ll certainly be able to see trends by rep over 2-3 weeks.

For longer sales cycles, this report may provide some insight into what times of the month your reps tend to close sales, increasing the accuracy of your future projections.

5) Upsell and cross-sell rates

As it is well known in the sales industry, it is much easier to sell additionally to your existing customers than acquiring new ones.

UP SELL/CROSS-SELL RATES

UP/CROSS-SELL REVENUE	UP/CROSS-SELL SALES	UP/CROSS-SELL % OF SALES
Anna Krüger	5	15%
Tobi Schmidt	5	16%
Lisa Fischer	3	15%
Jakob Wolf	3	15%
Jonas Becks	2	14%

This daily sales report sample is useful to track on a weekly basis since tracking it daily is just too short of a time span to evaluate your strongest and weakest points. When you compare the results of each rep, you can see each rate and educate others to implement the same tactics. That way your sales numbers will grow, but there is a high chance that you will also improve customer loyalty and satisfaction.

6) Customer lifetime value

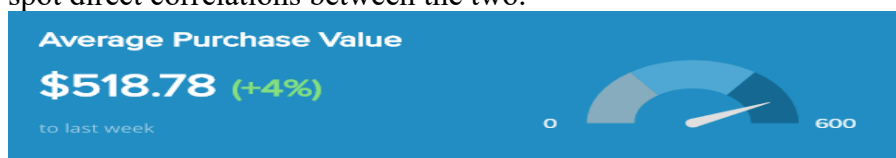
This is one of the most important KPIs you can track in a B2B sales setting, first on a weekly basis, and then expand over the months.



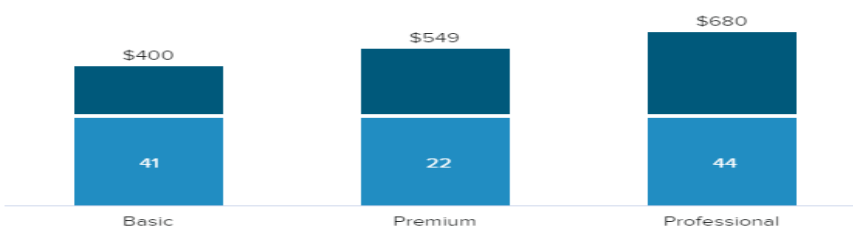
It basically shows how much is expected to earn per customer, and you can monitor it on a weekly basis to see whether the average is rising or decreasing. The goal is, of course, to keep the lifetime value as long as possible.

7) Average purchase value

Comprehensive sales analytics reports should include the average purchase value. It makes sense to compare this metric with the number of opportunities on a weekly basis since you can immediately spot direct correlations between the two.



Nr. of Opportunities & Average Purchase Value by package



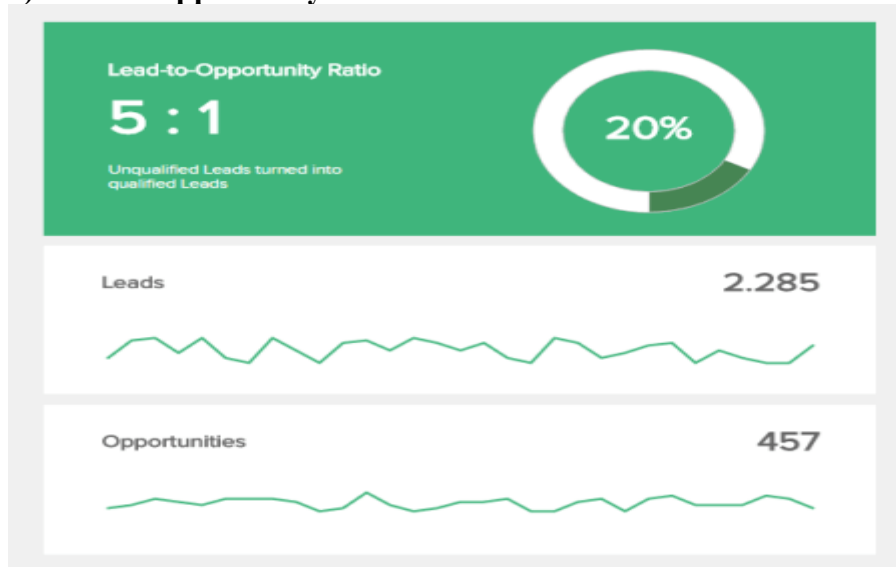
In our example of a sales report, we can see the number of opportunities and average purchase value is divided into 3 categories: basic, premium, and professional. The numbers can help you to identify if you need to offer additional incentives to your clients or customers in order to increase your chances to sell higher-end products or services. If you compare it with the previous week, you can see the growth of 4% which tells you you're on the right track.

8) Client meetings attended by rep

This is very good for a weekly sales report format. While in a day, it's hard to get meaningful conclusions from how many meetings are being attended by each rep, a week timeline shows a different story.

These meetings can either be virtual or in person, but either way, successful sales reps are going to be having them consistently, and this report will show you how they're doing.

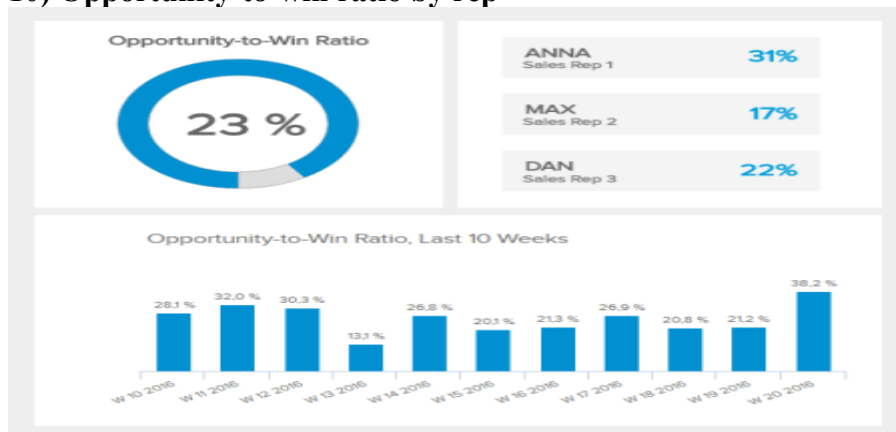
9) Lead-to-opportunity ratio



Tracking this metric weekly will let you evaluate the number of unqualified versus qualified leads. A qualified lead usually is an opportunity, i.e. positive interaction that leads to a face-to-face meeting or a phone call, opening favorable circumstances for closing a sale. The lead-to-opportunity ratio tells you the number of leads you need to stay on track with your objectives in terms of revenue. Once you have a baseline ratio, you know how many leads you need to create to reach your target growth – and at the same time, you have revenue that is predictable.

This reporting example can be assessed with the MQL (marketing qualified lead) and SQL (sales qualified lead), as it interconnects the departments since you need to define which are the most promising prospects that can turn into customers. Over the weeks you can determine which of your potential customers convert the most, and adjust your sales and marketing strategies accordingly.

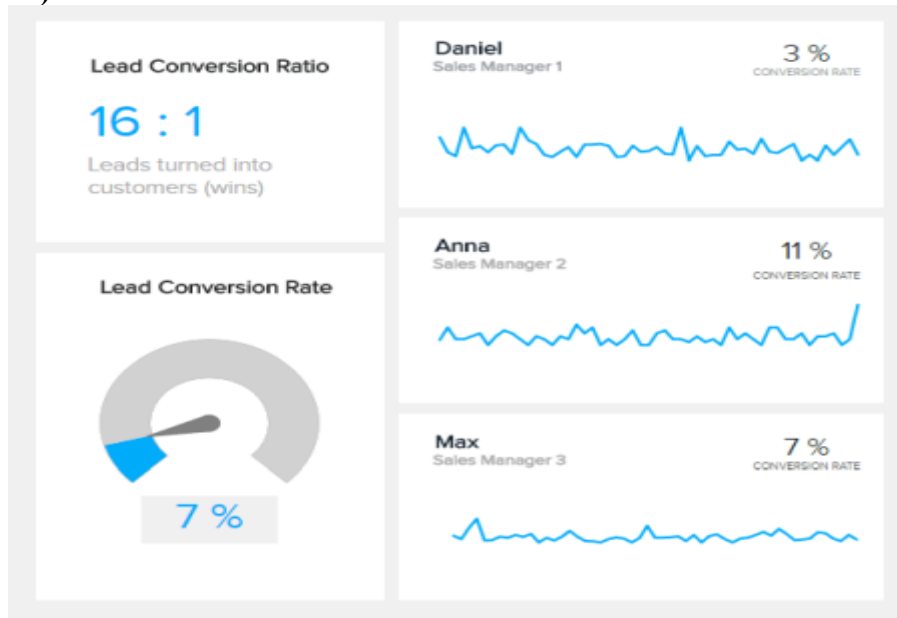
10) Opportunity-to-win ratio by rep



This report displays a straightforward sales KPI that shows how effective each of your reps is at closing their opportunities. While some variance is to be expected, if one rep is dramatically better than the others, it's possible they're getting the best leads. Or, it's possible that this rep has some skills they could teach the rest of your reps.

If a rep isn't closing at the same rate as his or her colleagues, this could just be a fluke – at least on a weekly basis. But if these weekly reports continue to indicate the same trend, it could be time to help this rep out.

11) Lead conversion ratio



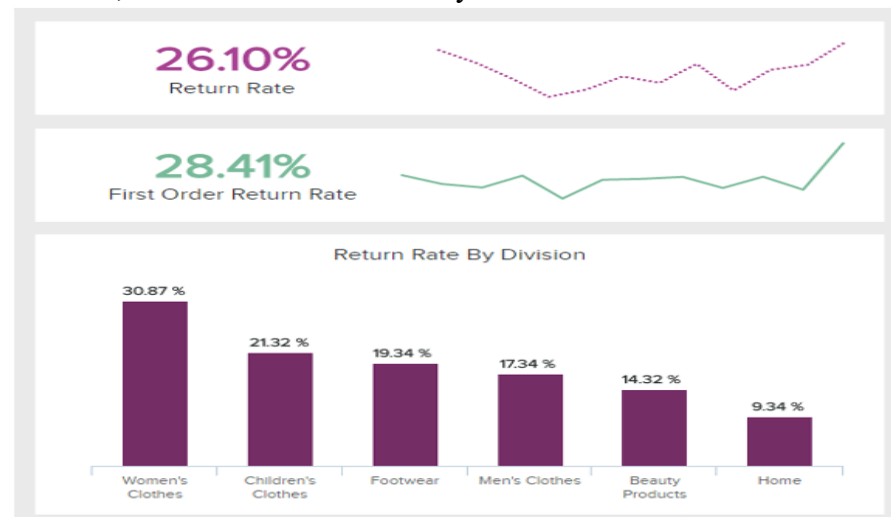
As the name states, this report will track the number of leads that end up in a “win”, i.e. that turn into paying customers. This is one of the most important ratios for a sales team, as it gives a baseline to determine the number of leads the team needs to meet business objectives. It will depend on each company and industry, but generally, a low lead-to-conversion ratio will alert you to the weakness of your sales pipeline.

b) Skyrocket Your Retail Sales With These Reporting Practices

As one of the most sales-oriented businesses, retailers must also track, measure, and report on important sales values on a weekly basis to be able to get a bigger picture in comparison with daily reports. Let's see which ones are the most prominent.

12) Rate of return

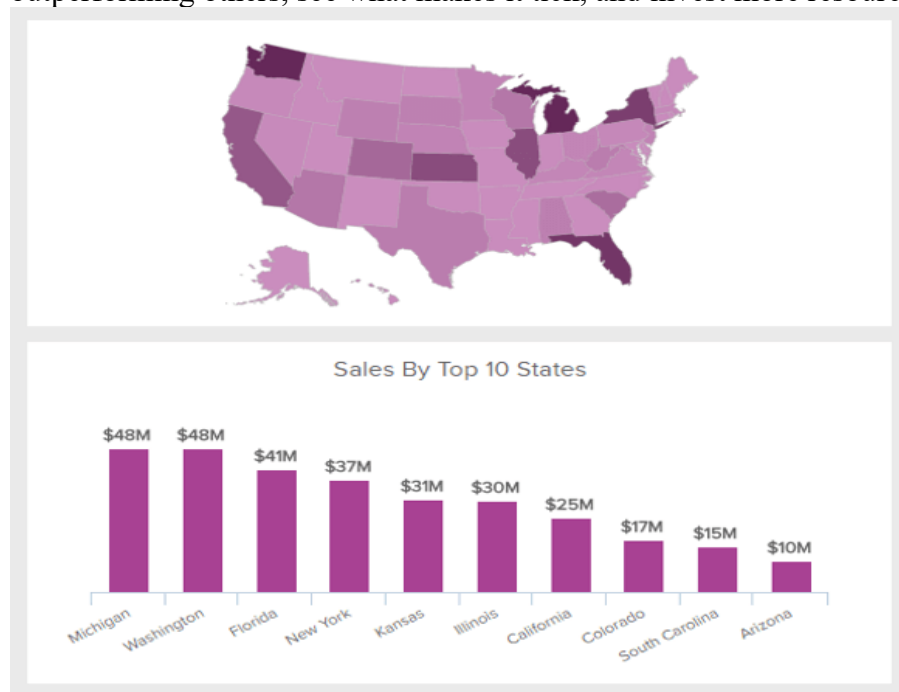
Our next example is a retail sales report template tracking the rate of return. Whether a big or small business, the rate of return can tell you a lot about what customers think of your merchandise.



No retailer is happy when their products are returned, therefore, tracking and reporting these values on a weekly basis will enable you to decrease this number in the future when you investigate why the goods are being returned, and what can you do to improve these items or your overall offer.

13) Total sales by region

Tracking your sales by region can tell you which of your stores (or customers' locations if you are an online business) are performing well. That way, you will be able to compare these values and implement various other marketing activities based on your results. If you see a specific location outperforming others, see what makes it tick, and invest more resources to grow even further.



Now that we have tackled monthly and weekly sales reports, provided examples you can implement in your own business strategies, it's time to take a look at some more detailed insights through daily sales reports.

3. Daily Sales Reports

A daily sales report is a management tool used by businesses, sales reps, and managers in order to extract the most relevant daily sales data such as the number of closed deals, client conversations, opportunities created, and many other sales-related KPIs.

When it comes to daily reports, you don't want to get too focused on outcome-dependent metrics. Instead, you want to focus more on process metrics. What's the difference?

An *outcome metric* is something like revenue earned which your sales rep can't directly control. A *process metric* is something your sales rep *can* directly control, like how many calls they've made, emails they've sent or meetings they've set up.

On a daily basis, your reps are simply going to have some bad days and some good days due to reasons beyond their control. So, seeing that a rep has one low earning day, and then calling them into your office, would be a little premature, and arguably an example of micromanagement.

However, if several days in a row are pretty bad, or if a week goes by where your reps aren't performing at their normal standards, that's a pretty good sign that you might want to ask them what's going on. Maybe they need to learn some new skills – or maybe their dog just died and they're in a bad spot. Either way, it's your role as a manager to support them. Hereafter are some examples of B2B and retail KPIs you can track in this sales reporting template.

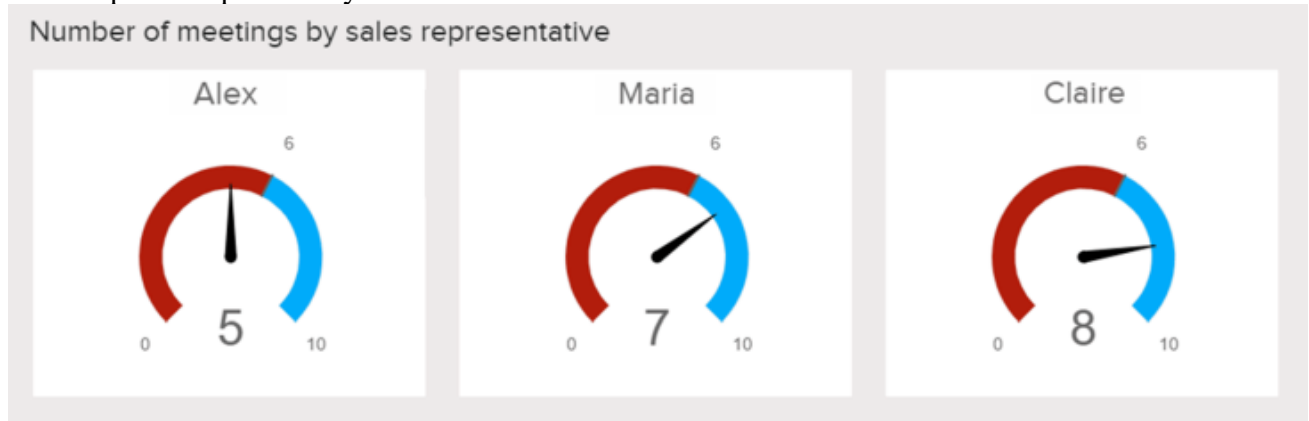
a) B2B Daily Reports To Control Your Operations

As mentioned, each day in a sales department is different and there are many things simply out of human control. But having a closer look at your daily sales operations, the better you can conclude

what works in your sales process and whatnot. Now we will focus on some examples you can track on a daily basis.

1) Number of meetings set up by a rep

While you can't actually force a potential customer to set up a meeting with you through sheer force of will, you can mostly control how many meetings you set up. Take note that we're not keeping track of phone calls and/or emails sent out explicitly, as while those KPIs can measure effort, they can also be manipulated quite easily.



And this contains an important lesson about KPIs, even daily ones – they have to serve your overall goals. If your daily KPI measures something that doesn't contribute to your overall goal, it's not valuable. All in all, it's hard to have too many sales meetings set up, and that's what makes this daily sales activity report format useful.

2) Number of client conversations by rep

This is the equivalent of: "How many phone conversations and in-person meetings are each rep having, each day?". Again, all else being equal, a rep who spends more time talking to customers is going to generate more results for your business than a rep who isn't.

This is assuming that you are qualifying your leads properly of course, which at times can be easier said than done.

3) Lead response time by rep



This daily sales report template can be tricky and controversial sometimes since it can vary greatly, based on the type of lead and actual scenario. The optimal response time should be determined after different strategies are tested. That means you should decide when is the right time to react when

prospects download a free trial or whitepaper, whereas prospects requesting an offer should be contacted as soon as possible.

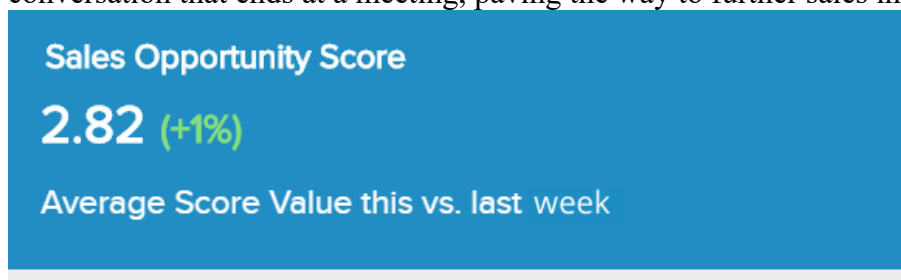
After you have your benchmarks, you can track on a daily basis how your sales reps are performing, and what their averages are. That way you can better analyze the effects on your overall strategy.

4) Number of outbound calls by rep

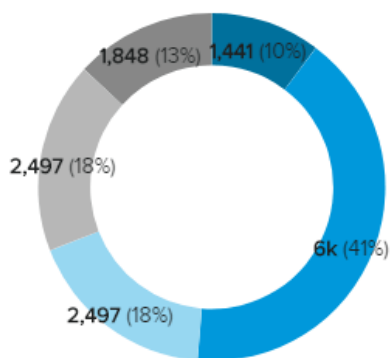
You can track the number of outbound calls made by each of your rep on a daily basis and see how effective they are in their performance and take appropriate measures if there are significant deviations from set targets. That doesn't mean you should micromanage sales reps on a daily basis, as mentioned earlier, but provide them a helping hand when needed.

5) Number of sales opportunities

An opportunity is basically a lead that gets qualified, because of the good response and interaction it had – meaning, this is no junk email address nor a fake phone number. An opportunity can be a conversation that ends at a meeting, paving the way to further sales interaction.



Number of Opportunities



■ 1 - low potential ■ 2 ■ 3 ■ 4 ■ 5 - high potential

Valid qualified leads are extremely important to sales as well as comparing the number of opportunities against the purchase volume. This sales analysis template will show you the potential purchase value of new opportunities and it would make sense to track it daily but also its development so that you can easily pinpoint successful days and try to recreate the processes in the future optimization of your sales funnel.

6) Number of touchpoints created by rep

This is a tie-in metric that looks at:

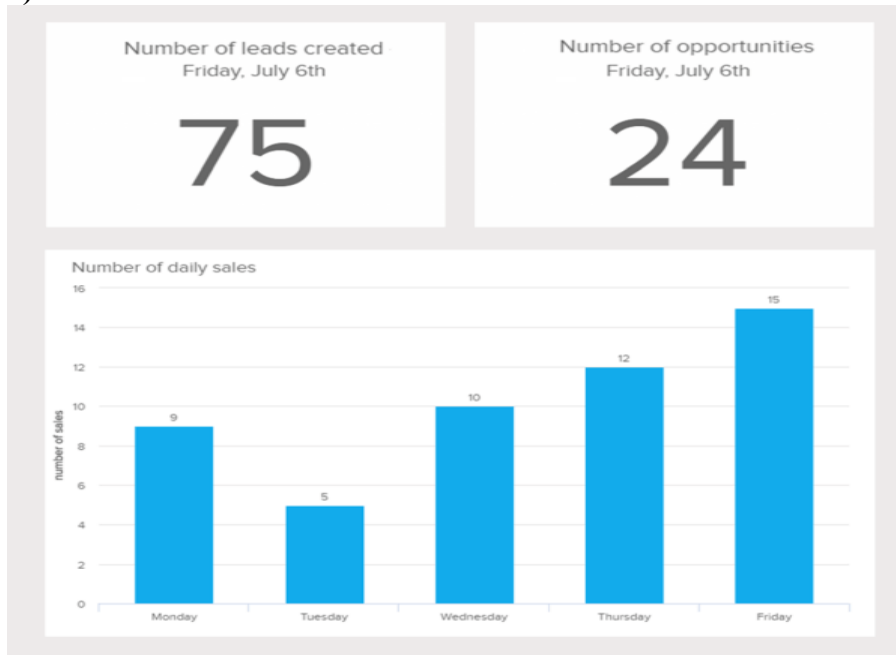
1. How many emails were sent to a potential customer that has shown interest
2. How many phone conversations were held, and/or voice mails left with potential customers who have shown interest

With this metric, we're trying to provide an overall "effort" KPI for each rep without making things too easy to manipulate. That's why it can be useful to specify that in order for an email or phone conversation to count, there has to have been prior contact with a customer identifying them as a lead.

7) Number of new leads created by rep

This is a pretty straightforward report. If you're worried about reps boosting their numbers with low-quality leads, you can identify specific qualifications for leads and base your report on those numbers.

8) Number of sales/closed deals



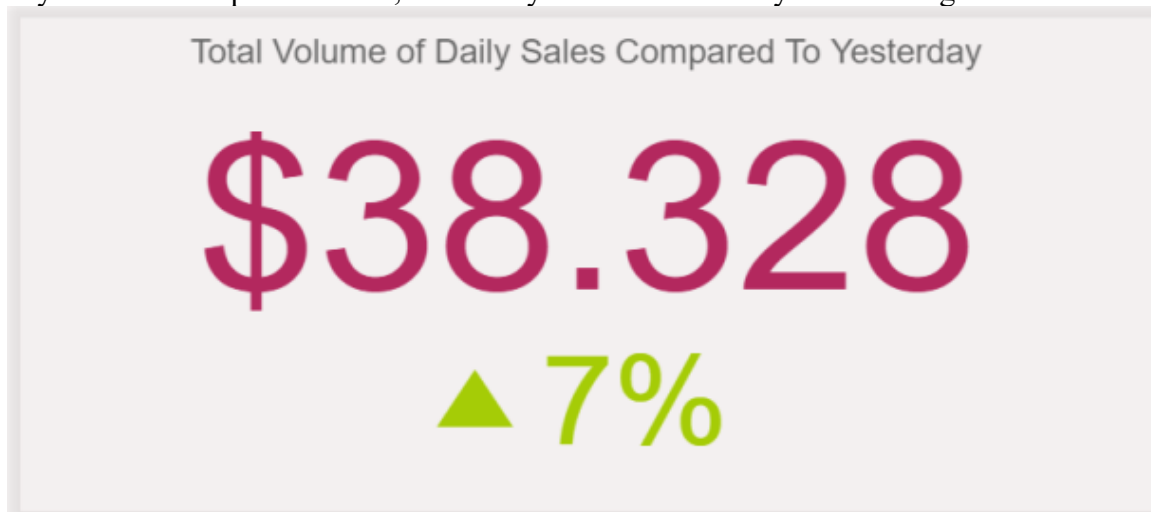
Quite straightforward, this KPI counts the number of sales performed on the day. This is particularly important for small retailers who have a lot of items with low-added value, and who hence need to close as many deals as possible to make a profit margin.

b) Retail Sales Reports You Should Track On A Daily Basis

The retail KPIs we will explain next are indispensable in the retail industry. Retailers must track these KPIs since they need to have a daily overview of their operations, costs, and expenses to be able to generate profit. Let's take a closer look at each of them.

9) The total volume of daily sales

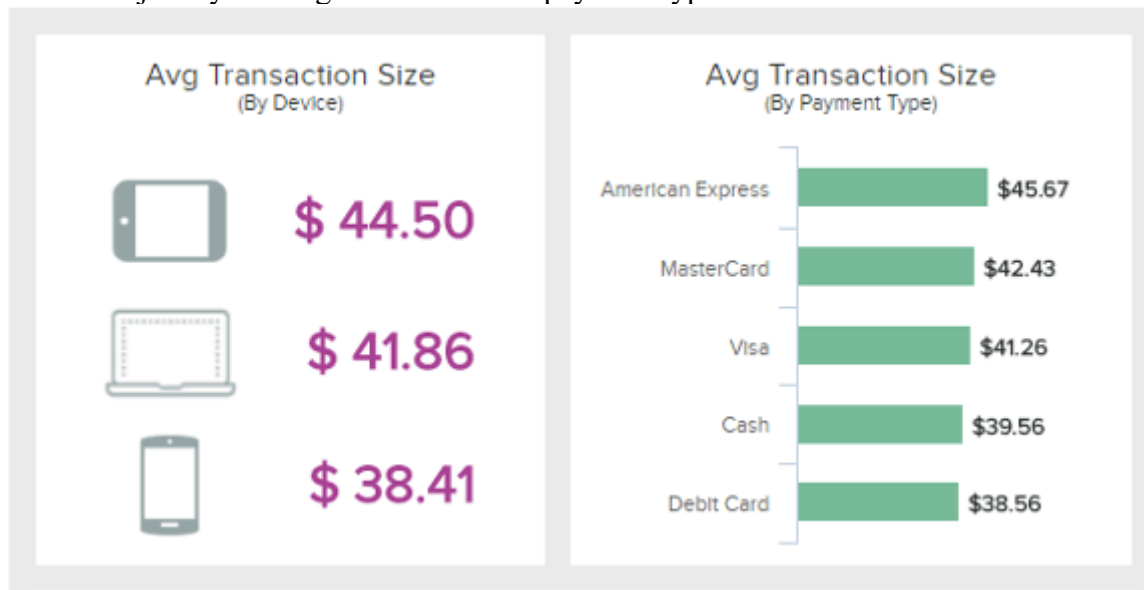
This is one of a clear-cut daily report that focuses on the number of sales achieved on a daily basis. It is quite important to track, especially in the retail industry, since daily volumes can indicate which days of the week perform best, and how you can use this to your advantage.



The goal is to keep your daily sales volumes growing, but don't panic if it starts to decrease - instead, investigate why, and adjust your strategies.

10) Average transaction size

Another retail KPI that is extremely useful to track since you can conclude a lot about customer behaviors just by looking at the device or payment type.



This KPI certainly varies, depending on the retail store type. But evaluating this KPI can tell you how to adjust your advertising and online shop to correspond with your customers' needs.

11) Total orders and average units per customer

Order placement must be tracked on a daily basis since retailers need to keep an eye on how many orders they received each day to ensure profitable results. This will enable you to improve your retail analytics and evaluate which weekdays are busy the most to avoid out-of-stock situations.

The average number of units per customer evaluates how many items are purchased by customers (on average, of course) which can set the tone of the purchase trends and give you enough data to evaluate your sales even more precisely.

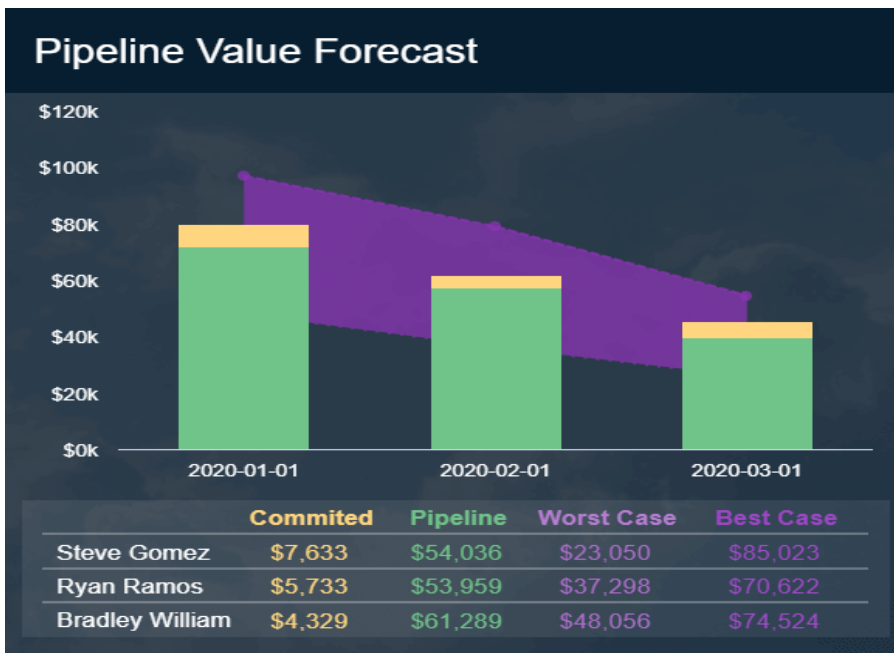
4. Bonus: Quarterly Sales Reports Examples

A quarterly sales report is a tool used to record the performance of sales metrics in a three months period. One month is often not enough time to track the success of strategies or to discover trends and patterns that will lead to improvement opportunities. For this reason, businesses use quarterly sales reports to track growth based on a target, a specific market, a geographical area, or any other relevant sales-related process.

After analyzing, monitoring, and evaluating the most prominent KPIs through a quarterly sales report, managers and sales representatives use the results to define what steps need to be taken in order to improve in the next quarter. As bonus content for our examples section, we will present you 3 quarterly sales report examples that you can apply to your business.

1. Pipeline Value Forecast

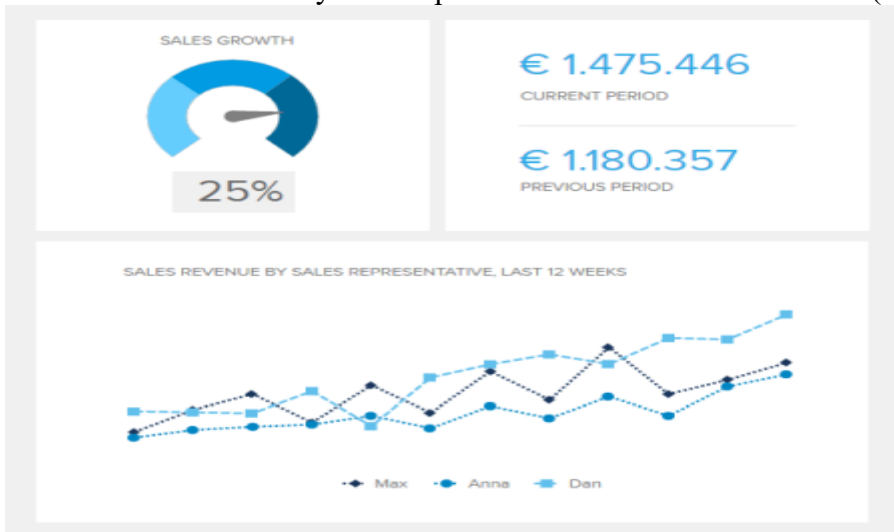
Our first quarterly sales report example is the pipeline value forecast. By analyzing your historical data to find trends and patterns, this powerful sales report aims to predict the sales value of your business as well as the performance of your sales representatives for the next three months.



The predictions not only consider the value of your sales pipeline but also your committed deals, which can also include old clients upgrading their contracts, as well as a worst and best case scenario for each value. By getting these predictions you can quickly understand if you are on the way to meet your sales targets or if you are facing some underperforming issues and implement strategies to fix them on time.

2. Sales Growth

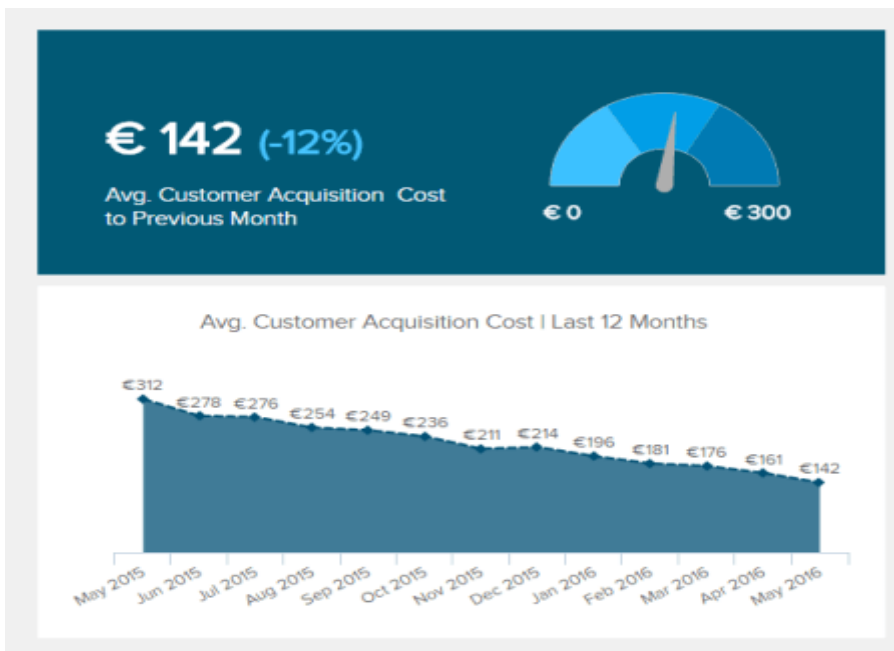
Arguably one of the most important quarterly sales reports to track, the sales growth aims to measure the amount of revenue by sales representatives in the last 12 weeks (or 3 months).



This is a relevant sales KPI to track as it allows you to drive several conclusions about your sales strategies. For instance, if each of your sales reps is working for a different target group or market, you can monitor which of them brings more revenue and focus your efforts on that target.

3. Customer Acquisition Cost (CAC)

Last but not least in our bonus sales report examples for quarterly reports is the customer acquisition cost. As its name suggests, the CAC aims to track all costs incurred in signing up a new customer. These costs will defer depending on your business type and what resources you implement to acquire new customers. Which can be from campaigns implementation to staff salaries and other related costs.



In the report example above, we see the CAC tracked for a year period, however, tracking it on a quarterly basis will allow you to fine-tune your strategies before bigger issues affect your entire revenue. It is recommended that the customer acquisition costs should be recovered in less than one year of your customer's subscription. The goal here should be to keep your CAC as low as possible while increasing your customer lifetime value.

After we have expounded these sales examples, we will now explain how to make one for yourself and your boss, provide some tips for conducting an effective sales reporting practice, and expound on why are sales reports important.

How To Make A Sales Report?

When you write a report, you need to keep your final objectives in mind. To master report writing, there are a couple of crucial questions that you need to ask yourself: who are you reporting for, and why? Is this a weekly check-up or an assessment of a situation or a campaign project? What is the time period of the report? What is the main message you want to share?

Once these questions have found an answer, you can easily articulate your report accordingly. Here's how to do it:



- **Define your audience:** before writing, think about who will read and what they need to know. Consider their background as well and if they are familiar with the jargon you might use. It's not the same if you write for a specific sales audience or a general one.
- **Define the purpose of your report:** sharing monthly advancement with top management, or just having the weekly overview and analysis of the sales objectives with your team. Both reports will have a different structure and the info you will share will also be very different. You can also benefit from report automation and schedule a specific time for your reports to be produced and shared.
- **Decide on a time period:** that means that you can create a daily as well as a monthly report, or choose to display the data of the last quarter or year. You can customize the examples we have presented based on your own goals, departmental structure, or c-level management's requirements.
- **Gather the right data:** since you have set specific KPIs to track, you now just need to compile them all together and analyze them with the help of online BI tools. They are specifically designed to ease your data and create compelling sales analysis reports in no time.
- **Visualize and communicate your findings:** the most important part, once you have analyzed and dug out insights from your data, is to convey this information to your audience. Using a professional business intelligence dashboard that works with real-time data will always let you up to date when sharing your insights.
- **Provide context:** an aspect that is often forgotten, when we are deep in the reporting mindset, is that numbers never tell the full story. Provide some background and a bigger picture to the figures, especially if you are presenting weekly sales report templates for instance: how was the situation been the month, the quarter? Is the general trend going up or down?
- **Get creative!** When building your report, add a little bit of fun or more personal touch that will catch the attention of your audience and make you more confident while presenting!

These tips will help you create a powerful business sales report that you can share with your colleagues and key stakeholders. But what to do when you need to create a sales reporting system and present data to your boss? Here we present to you some additional tips and tricks.

Top 7 Tips For Your Sales Reporting Process

Sales reporting can be a tricky task both for teams and managers. We have already expounded on how to make a report, but to be able to clearly compose your data which you can tell a story with, you should follow these additional tips:

1. Identify your goals

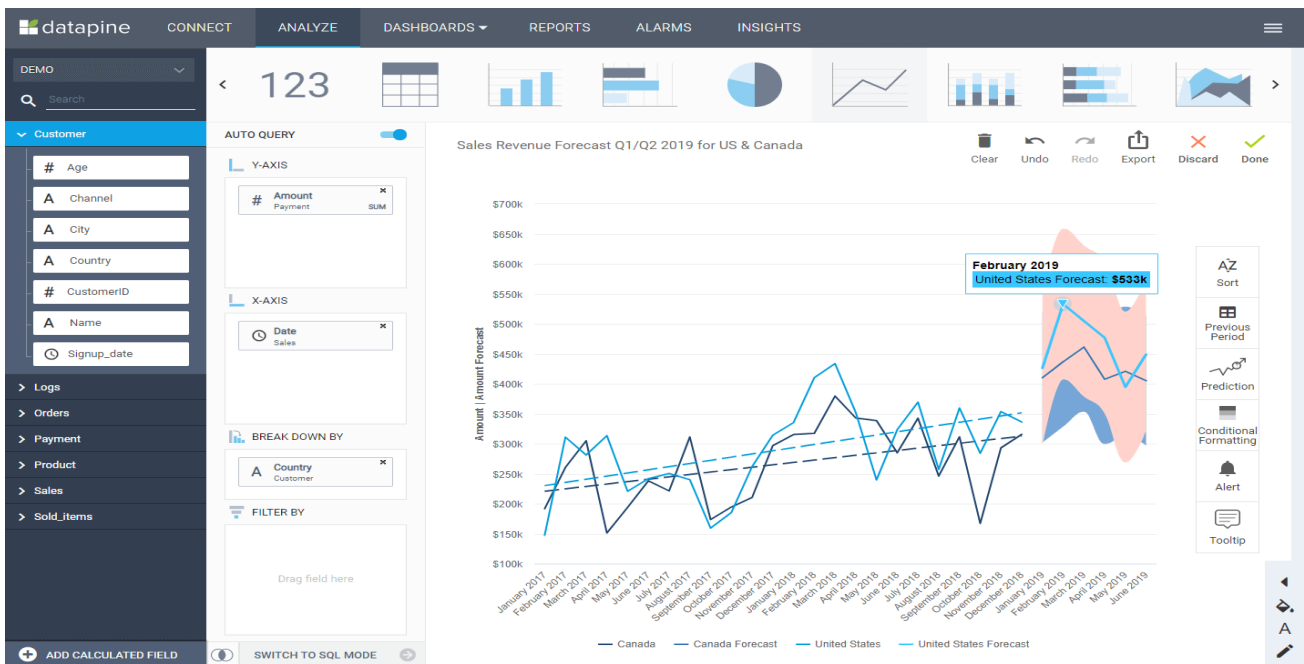
There is no point to create a solid sales reporting process if you don't have a goal in mind. Define specific questions you need an answer to, and tie all the metrics that correspond to your final destination.

2. Tell a story

As shown in our examples section, various types of reports tell different stories, based on the goals we have predefined. In this area, you also need to take a look at the bigger picture. If your goals aren't being met, there is a reason behind it – does your customer or client have a rough business patch that resulted in lower sales volumes?

3. Take advantage of sales forecasts

One of the most crucial tips we can give you is to utilize sales forecasts to be able to make better and more informed business decisions, predict future performance, and give insights on how to manage your sales strategies, like in our example below:



This example shows an intuitive user interface of modern business intelligence software like [datapine](#) that allows you to analyze and visualize sales data with a few clicks, and take advantage of advanced analytics features such as predictions, intelligent alerts, and conditional formatting.

4. Create an unforgettable presentation

Humans are visual creatures, and by visualizing all the numbers and correlations on a single screen, you enable faster insights, pattern recognition, easy-to-spot trends, and interactivity with data. A simple sales report presentation with visualized data is much more digestible and effective when it's done through the power of [online data visualization](#).

5. Identify patterns in your data

An important tip to consider when using sales reports for your [online data analysis](#) process is to act on results. Often organizations react when the numbers are negative, however, the true value of reporting lies in the fact that it provides a deeper look into your business. Once you get your sales reports done, examine the data carefully, find trends and patterns and patterns to understand why something is happening. Like this, you will not only fine-tune your sales strategies but will find new opportunities that will lead your business to grow.

6. Share your findings

Whether you need to input your colleague, show your sales manager or board of director's achievements, and current insights, these kinds of reports should be easily sharable. This can be easily done through modern [business dashboards](#). That way you empower collaboration and increase productivity between stakeholders.

Now that you know each bit of detail of creating and utilizing a sales working report from our selected examples, we will discuss why are these reports important and recap the key takeaways from this article.

7. Use automated reporting tools

One of the main benefits of sales reporting is to help businesses deal with their sales data in the most efficient way possible. To help you with this purpose is that sales business intelligence tools provide automated features that will autogenerate your reports with just a few clicks. By investing in these types of [business intelligence solutions](#) to leverage your sales data, you can leave the pains of manual reporting in the past and benefit from interactive dashboards filled with real-time data ready to extract fresh business insights.

Why Are Sales Reports Important?

If a sales team sets an ambitious quarterly goal of closing six figures in new revenue streams, and then check the progress about two months in... only to realize that they're way off target from hitting their

goal. They were probably busting their butts to make their goal become reality, but just working hard isn't enough. Setting goals is fine, but they need to be realistic as well as achievable. Tracking your progress with the help of [self-service data analytics tools](#) and regularly reporting on realistic goals make sales manager's reports one of the most critical parts of sustainable business development. But that's not all:

- **They provide a navigational system:** Think of reporting as your “navigational aid” for steering your sales team in the right direction. Modern reporting software will help you to get actionable sales insights to drive future revenue and crush quotas. They make things crystal clear for your sales team as far as what's important and what they should be working on.
- **They ensure consistent monitoring:** You need to work hard, on the right things, at the right time. In other words, you need to work hard with intention and awareness. And that's what a daily and a weekly sales report sample we presented in this article will help you achieve. They give you indications of how your team is performing on a constant basis so that you can course-correct things as needed.
- **They keep goals simple and clear:** As long as you're not overloading your team with too many KPIs, by using reports you can show your staff, “Hey, these numbers are crucial to our success. So, we're going to keep track of them on a frequent basis.”. When your team has a set of simple, clear [KPI examples](#) they need to execute on, they can invest all of their energy into drumming up revenue – instead of wasting time thinking about what they should focus on next.

To put things into perspective, let's say that you've been doing an aggressive cold calling campaign to drum up a new business. If you use a weekly report, you might find after a week that NOBODY has made any significant progress. Knowing this, you can switch to [another strategy](#) in time to still hit your monthly revenue goal.

Granted, all of this information depends in large part on your sales cycles. If you have a massively expensive enterprise software package that often takes half a year to close, then a monthly report would be your version of a weekly report, and your weekly report would be similar to a daily report for other businesses with shorter sales cycles.

In essence, what a sales report provides is a roadmap to track your progress and monitor the team's efficiency in order to develop the most profitable funnel, keep your costs at a minimum while productivity is at a maximum level. If you want to improve the performance management of your sales cycles periodically, you can also read our extensive article on the benefits and value of a [KPI scorecard](#).

In The End, What Should A Sales Report Include?

To sum up this long and rich article, here is a list of what you can find in a sales report:

- An overview of the sales operations and activity of the company
- Specific sales KPIs tracked and analyzed to assess said activity
- A determined time period over which the KPIs are analyzed
- Graphs and charts to visualize all the data collected
- An executive sales summary for top-management