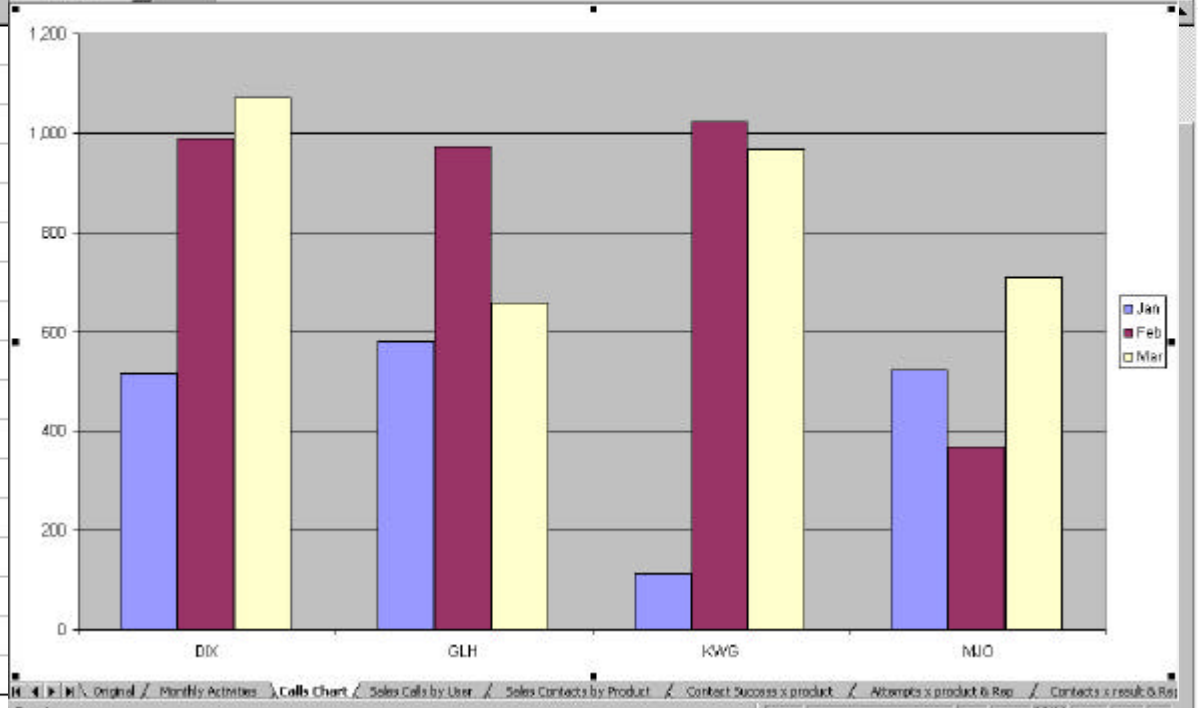
Call Analysis Scenario

	A	B	C	D
4	Source Group	(All)		
5	Status	(All)		
6	Contact Type	(All)		
7	OnDate	(All)		
8	Short Reference	(All)		
9	OnHour	(All)		
10	Result Code	(All)		
11	Activity Code	(All)		
12	Activity Group	(All)		
13	User Group	Sales		
14	OnDay	(All)		
15	Success	(All)		
16	OnWeek	(All)		
17	OnYear	2001		
18	OnQtr	Qtr1		
19	Record Type	Call		
20				
21	CHRecords	User ID		

22	OnMonth	DIX	GLH	KWG	MJO	Grand Total
23	Jan	517	580	113	523	1,733
24	Feb	988	972	1,022	368	3,350
25	Mar	1,070	658	968	709	3,405
26	Grand Total	2,575	2,210	2,103	1,600	8,488



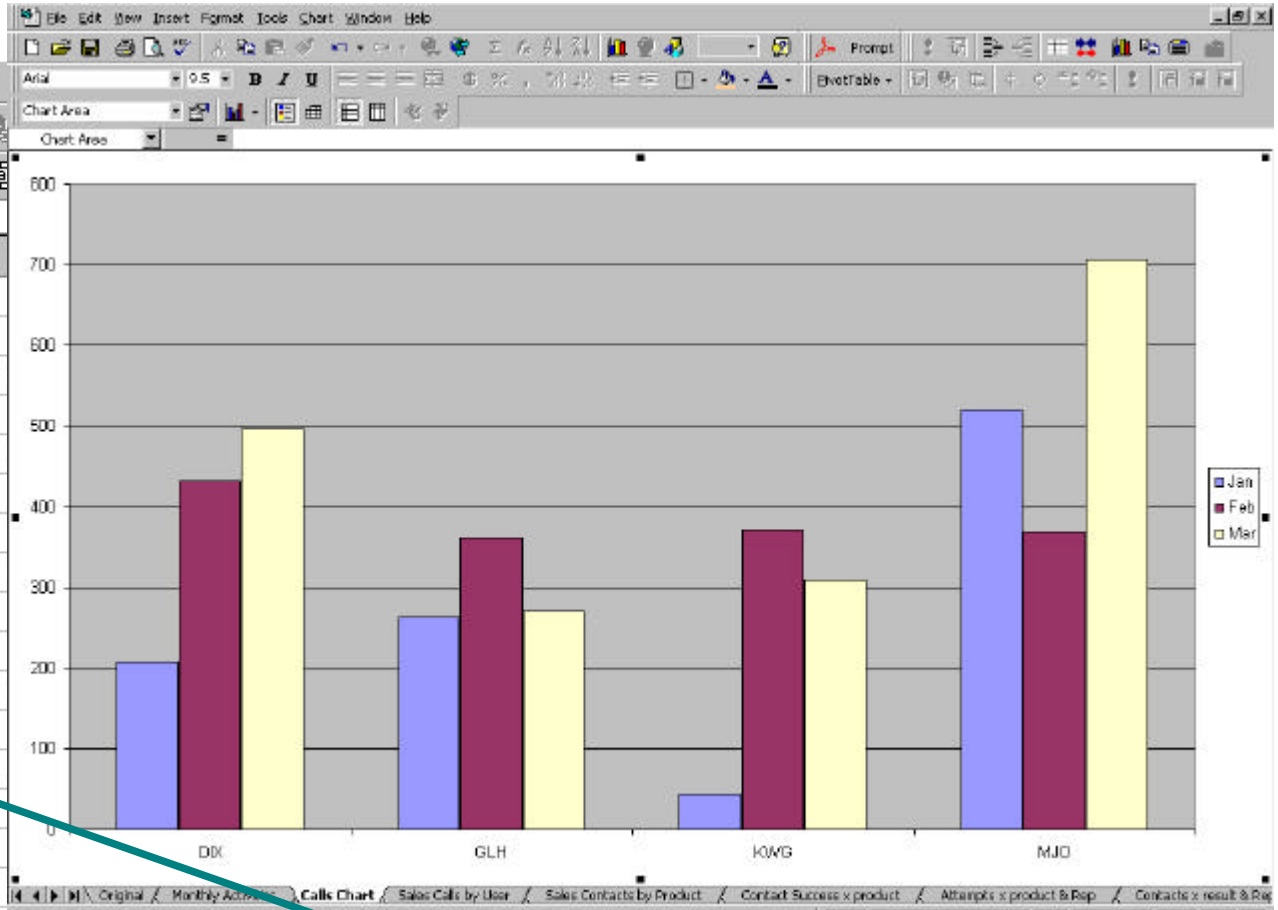
A simple overview of calls for the first quarter of 2001 shows that DIX appears to be our most productive caller and MJO our least productive.

The chart above dramatizes this fact, and shows month-to-month progress for the whole sales team.

But is this first impression correct?

Original | Monthly Activities | Contacts Chart | Chart9 | Chart10 | Chart12 | Sales Calls by User

Ready | Sum=3200 | NUM



	A	B	C
4	Source Group	(All)	
5	Status	(All)	
6	Contact Type	(All)	
7	OnDate	(All)	
8	Short Reference	(All)	
9	OnHour	(All)	
10	Result Code	(All)	
11	Activity Code	(All)	
12	Activity Group	(All)	
13	User Group	Sales	
14	OnDay	(All)	
15	Success	Reached	
16	OnWeek	(All)	
17	OnYear	2001	
18	OnQtr	Qtr1	
19	Record Type	Call	
20			
21	CHRecords	User ID	

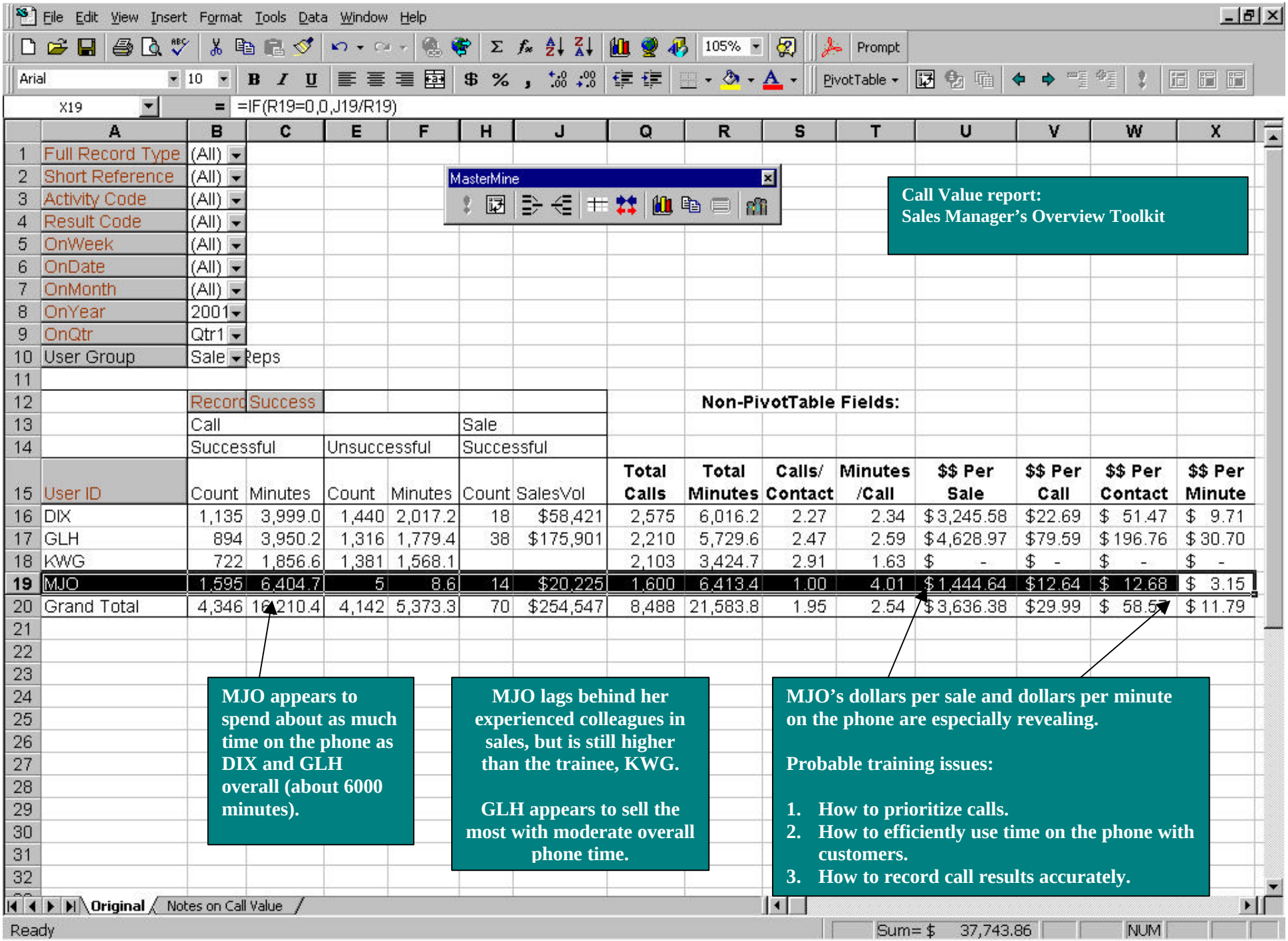
22	OnMonth	DIX	GLH	KWG	MJO	Grand Total
23	Jan	208	262	43	520	1,033
24	Feb	431	361	371	368	1,531
25	Mar	496	271	308	707	1,782
26	Grand Total	1,135	894	722	1,595	4,346
27						
28						
29						
30						
31						

Isolating on those calls where the contact was successful gives us important new information: MJO appears to be reaching her targets more reliably than her colleagues.

Several possibilities present themselves:
Could others learn from her techniques?
Is she accurately recording her calls?
Is she selling more as a result?

Original / Monthly Activities / Contacts Chart / Chart9 / Chart10 / Chart12 / Sales Calls by User

Ready Sum=3190 NUM



Call Value report:
Sales Manager's Overview Toolkit

	A	B	C	E	F	H	J	Q	R	S	T	U	V	W	X
1	Full Record Type	(All)													
2	Short Reference	(All)													
3	Activity Code	(All)													
4	Result Code	(All)													
5	OnWeek	(All)													
6	OnDate	(All)													
7	OnMonth	(All)													
8	OnYear	2001													
9	OnQtr	Qtr1													
10	User Group	Sale	Reps												
11															
12		Record	Success						Non-PivotTable Fields:						
13		Call				Sale									
14		Successful		Unsuccessful		Successful									
15	User ID	Count	Minutes	Count	Minutes	Count	SalesVol	Total Calls	Total Minutes	Calls/ Contact	Minutes /Call	$$ Per Sale	$$ Per Call	$$ Per Contact	$$ Per Minute
16	DIX	1,135	3,999.0	1,440	2,017.2	18	$58,421	2,575	6,016.2	2.27	2.34	$3,245.58	$22.69	$ 51.47	$ 9.71
17	GLH	894	3,950.2	1,316	1,779.4	38	$175,901	2,210	5,729.6	2.47	2.59	$4,628.97	$79.59	$196.76	$30.70
18	KWG	722	1,856.6	1,381	1,568.1			2,103	3,424.7	2.91	1.63	$ -	$ -	$ -	$ -
19	MJO	1,595	6,404.7	5	8.6	14	$20,225	1,600	6,413.4	1.00	4.01	$1,444.64	$12.64	$ 12.68	$ 3.15
20	Grand Total	4,346	12,210.4	4,142	5,373.3	70	$254,547	8,488	21,583.8	1.95	2.54	$3,636.38	$29.99	$ 58.5	$11.79

MJO appears to spend about as much time on the phone as DIX and GLH overall (about 6000 minutes).

MJO lags behind her experienced colleagues in sales, but is still higher than the trainee, KWG.

GLH appears to sell the most with moderate overall phone time.

MJO's dollars per sale and dollars per minute on the phone are especially revealing.

Probable training issues:

1. How to prioritize calls.
2. How to efficiently use time on the phone with customers.
3. How to record call results accurately.