Creating

Sales KPI Dashboards

Quick Setup Guide

Time Required: **Less than 10 minutes**

Prerequisites: **SimpleKPI account (free 14-day trial available)**

https://app.simplekpi.com/trial

simplekpi

Overview

This guide will take you from no data to a fully functional Sales KPI Dashboard in 5 simple steps. Sales dashboards are one of the quickest areas to see performance gains from KPI tracking.

What You'll Accomplish:

- Set up team organization and comparisons
- Select the most impactful sales metrics
- Engage your team with individual targets
- Automate data collection for real-time insights
- Create visual dashboards that tell your sales story

Step	Action	Time	Outcome
1	Set Up Groups	**1-2** min	Enable team comparisons
2	Choose KPIs	**2-3** min	Focus on key metrics
3	Add Users	**2-3** min	Drive engagement & account-ability
4	Add Data	**2-3** min	Ensure accurate tracking
5	Build Dashboard	**3-4** min	Visualize performance

Step 1: Setting Up Groups (Optional)

Purpose: Organize teams for side-by-side performance comparisons

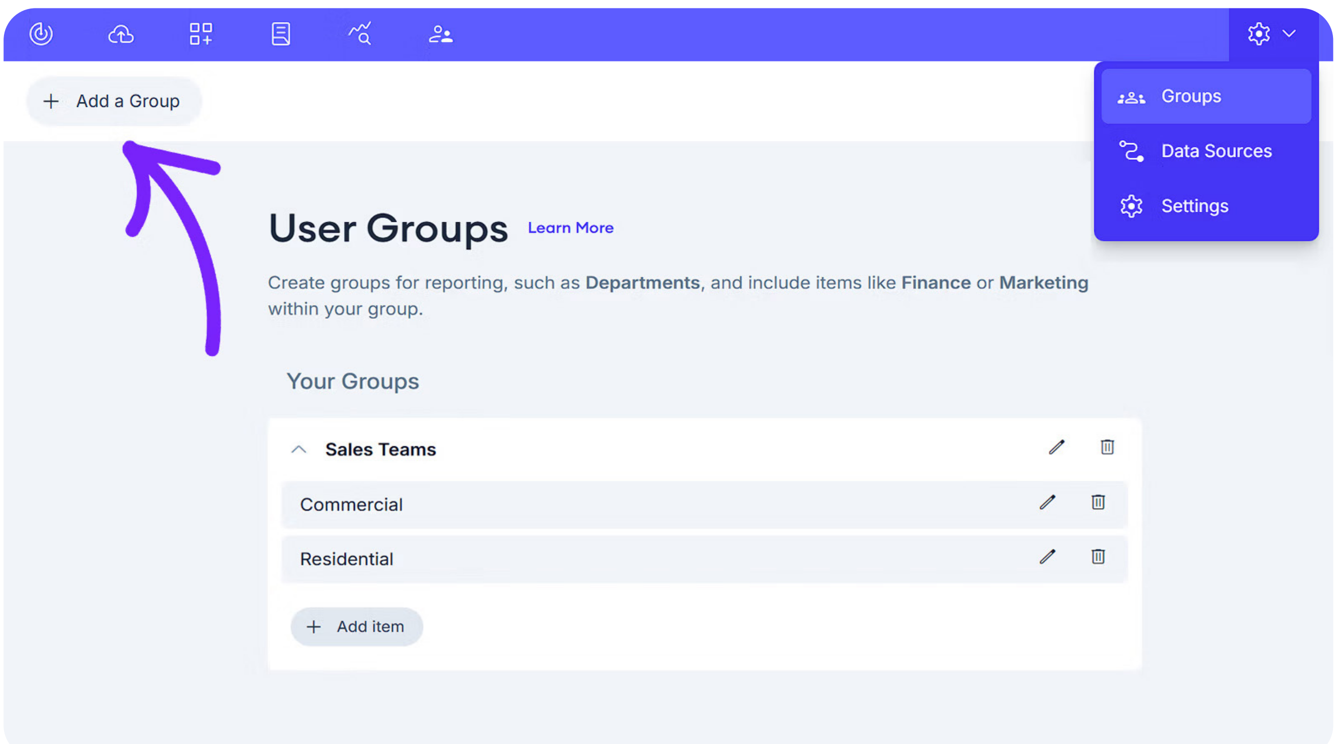
When to Use:

- Multiple locations (e.g., “New York” vs “LA”)
- Different products or services
- Team functions (e.g., “Commercial” vs “Residential”)

Skip if: Single team with uniform processes

Action Steps:

1. Navigate to Groups tab
2. Click “Add a Group”
3. Create group category (e.g., “Locations”)
4. Add group items (e.g., “East Coast”, “West Coast”)



Benefits:

Compare performance across teams/locations
Answer questions like “Is our East Coast team keeping pace with West Coast?”
Easy to refine later without affecting existing data

Step2: Choosing Your KPIs

Purpose: Select metrics that drive sales performance

Essential Sales Metrics to Start:

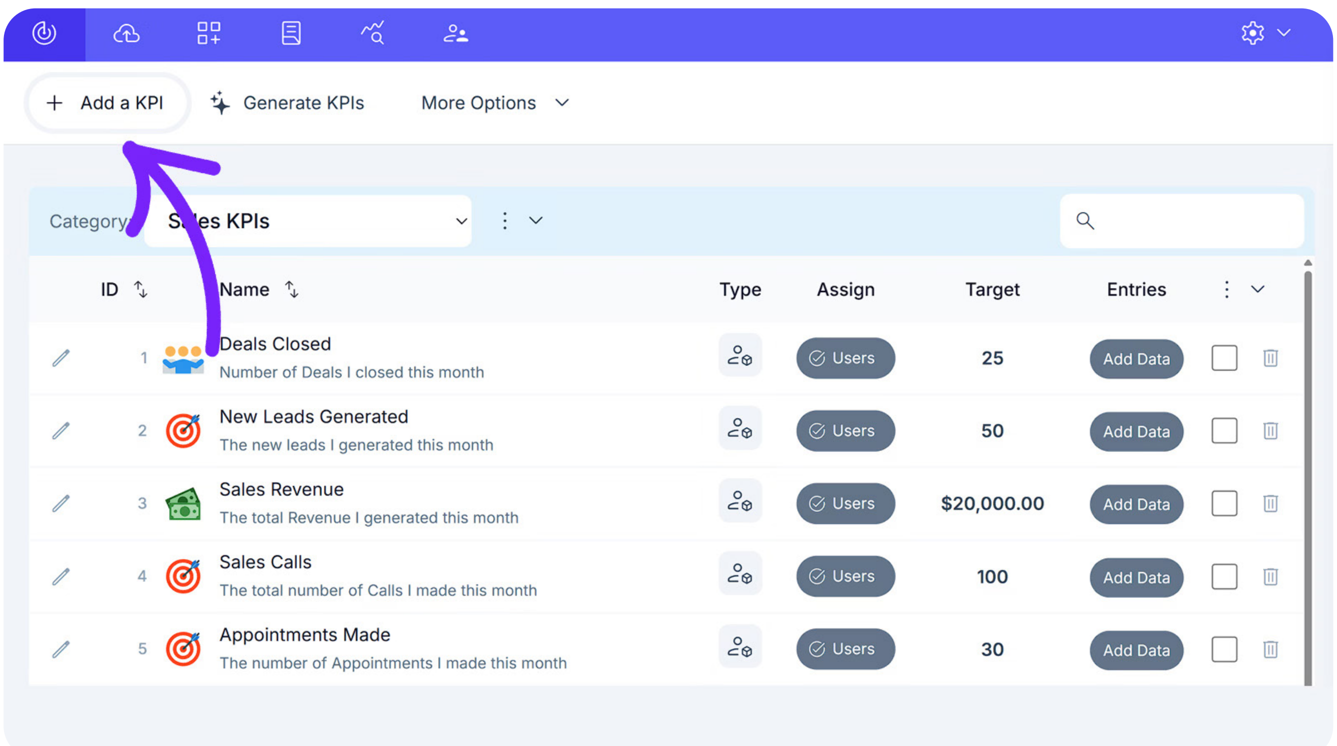
- Number of Deals Closed
- Number of Appointments Made
- Number of Sales Calls

Calculated KPIs (Advanced):

- Appointment Conversion Rate:
- (Deals Closed / Appointments Made) × 100
- Call Conversion Rate: (Appointments / Calls Made) × 100
- Average Deal Size: Total Revenue / Deals Closed

Action Steps:

1. Go to **KPI tab**
2. Click **“Add a KPI”** button
3. Enter KPI name
4. Select tracking frequency (daily or monthly recommended)



Benefits:

- Focus team attention on key performance drivers
- Identify efficiency vs. activity patterns
- Benchmark individual and team performance

Step3: Adding Your Users

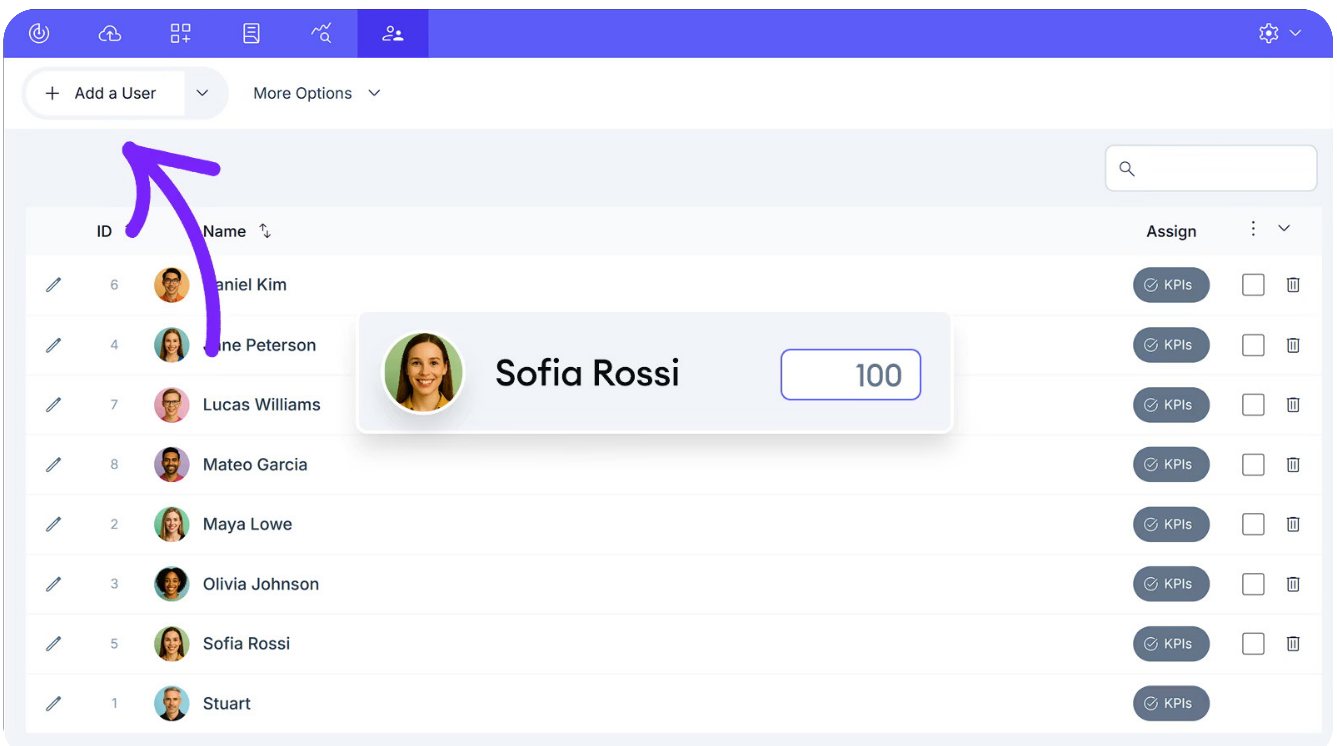
Purpose: Enable individual tracking and team engagement

Benefits of User Tracking:

- Ownership: Reps take responsibility for their results
- Gamification: Leaderboards and points drive competition
- Motivation: Real-time visibility boosts performance

Action Steps:

1. Navigate to Users tab
2. Click **"Add a User"** button
3. Enter user details
4. Assign to Groups (if created in Step 1)
5. Click **"KPI"** button to assign metrics
6. Set individual targets



Benefits:

- Real-time performance visibility for each rep
- Individual target setting and tracking
- Friendly competition through leaderboards

Step 4: Adding Your Sales Data

Purpose: Populate your dashboard with sales data

Action Steps:

For Manual Entry:

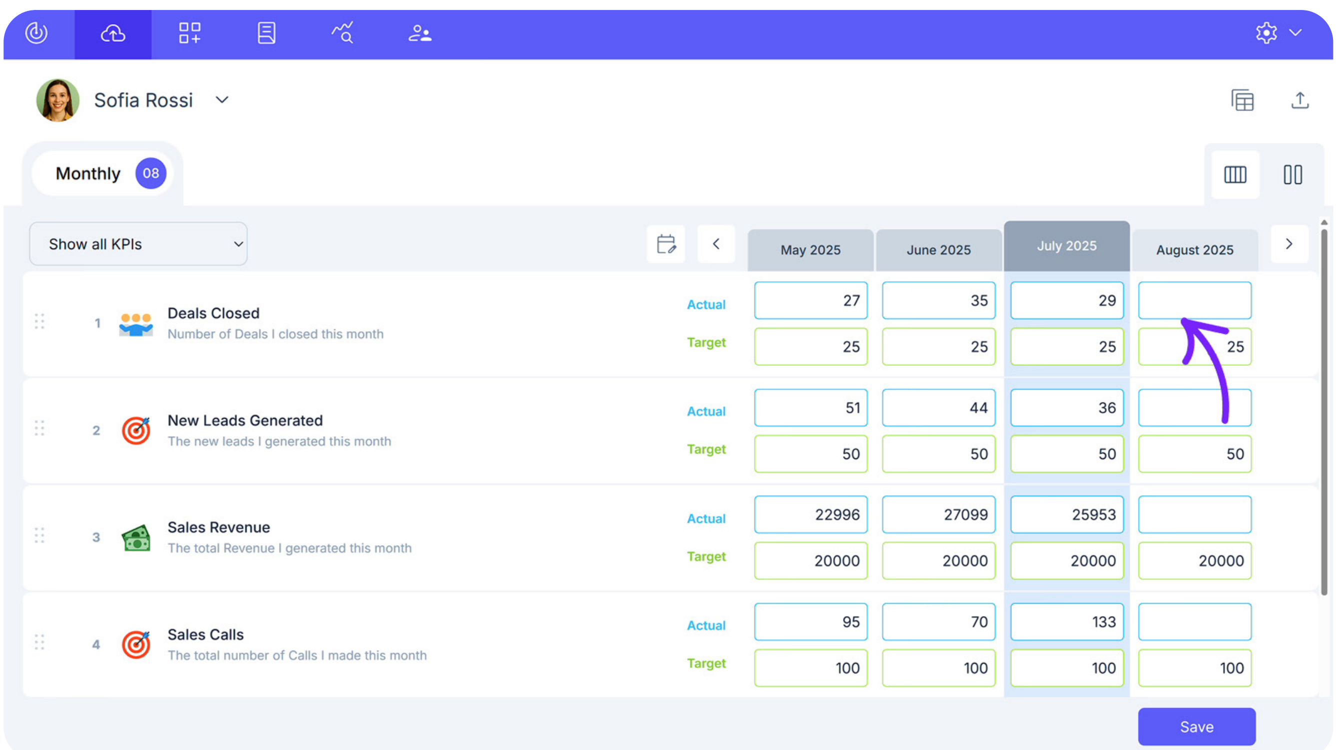
1. Go to Data tab in your SimpleKPI account
2. Input numbers directly into fields

For Spreadsheet Upload:

3. Go to Data tab
4. Click “Upload Spreadsheet”
5. Select formatted file

For Automation:

6. Go to Data Connections tab
7. Select your CRM/tool connector
8. Follow setup wizard



Benefits:

- Real-time dashboard updates
- Reduced manual work and errors
- Trusted, accurate business reflection

Step 5: Building Your KPI Dashboard

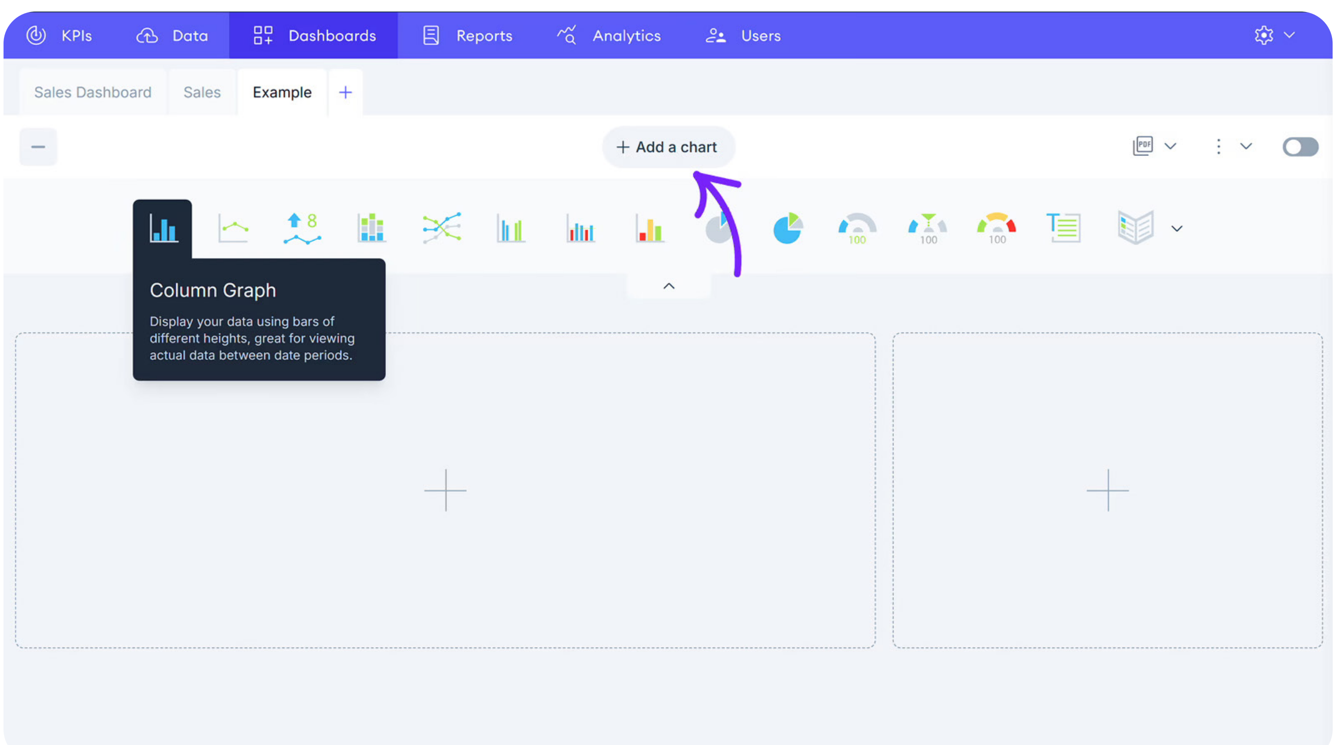
Purpose: Create visual story of your sales performance

Recommended Chart Types:

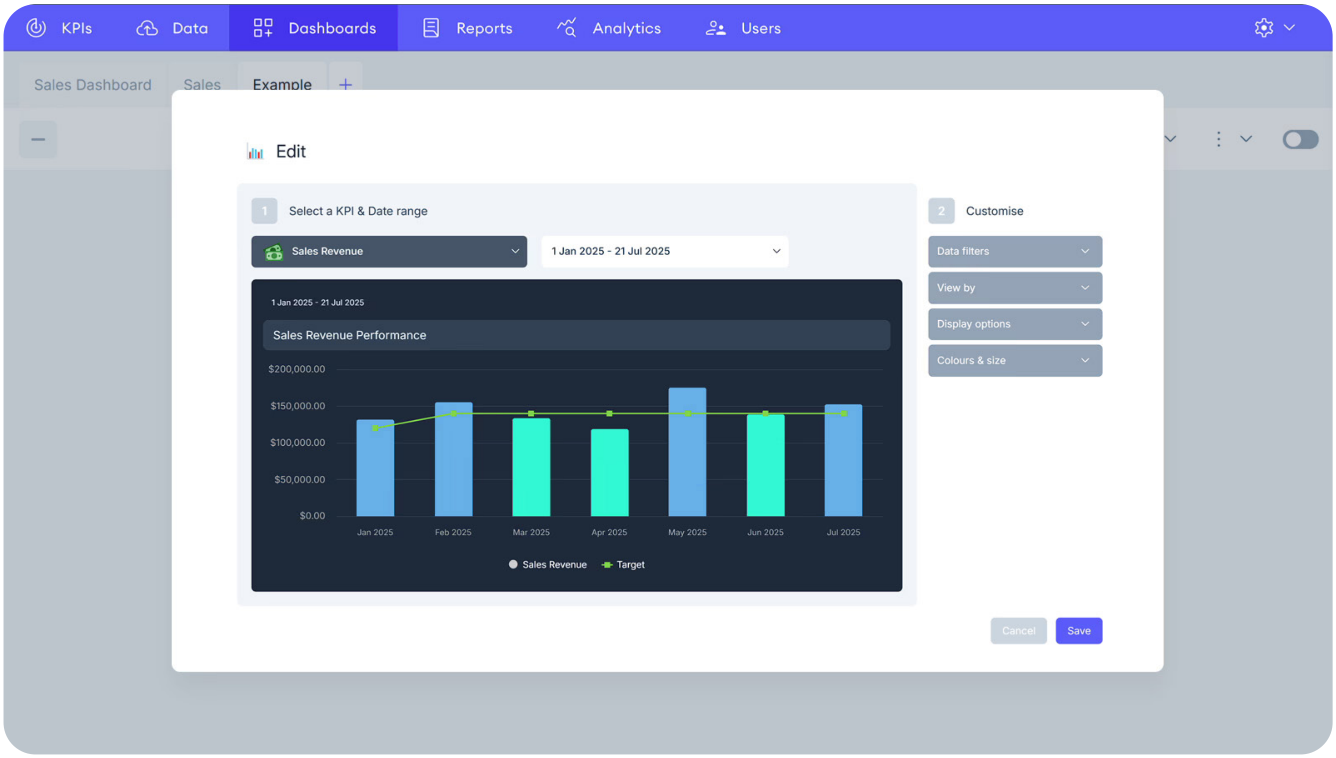
Step	Action	Time
Trend Graph	The Big Picture	**Sales revenue vs. targets over time**
Area Chart	Team Comparison	**Deals by team/group performance**
Gauge Chart	Efficiency Check	**Conversion rates at-a-glance**
League Table	Motivation	**Top performer rankings**

Action Steps:

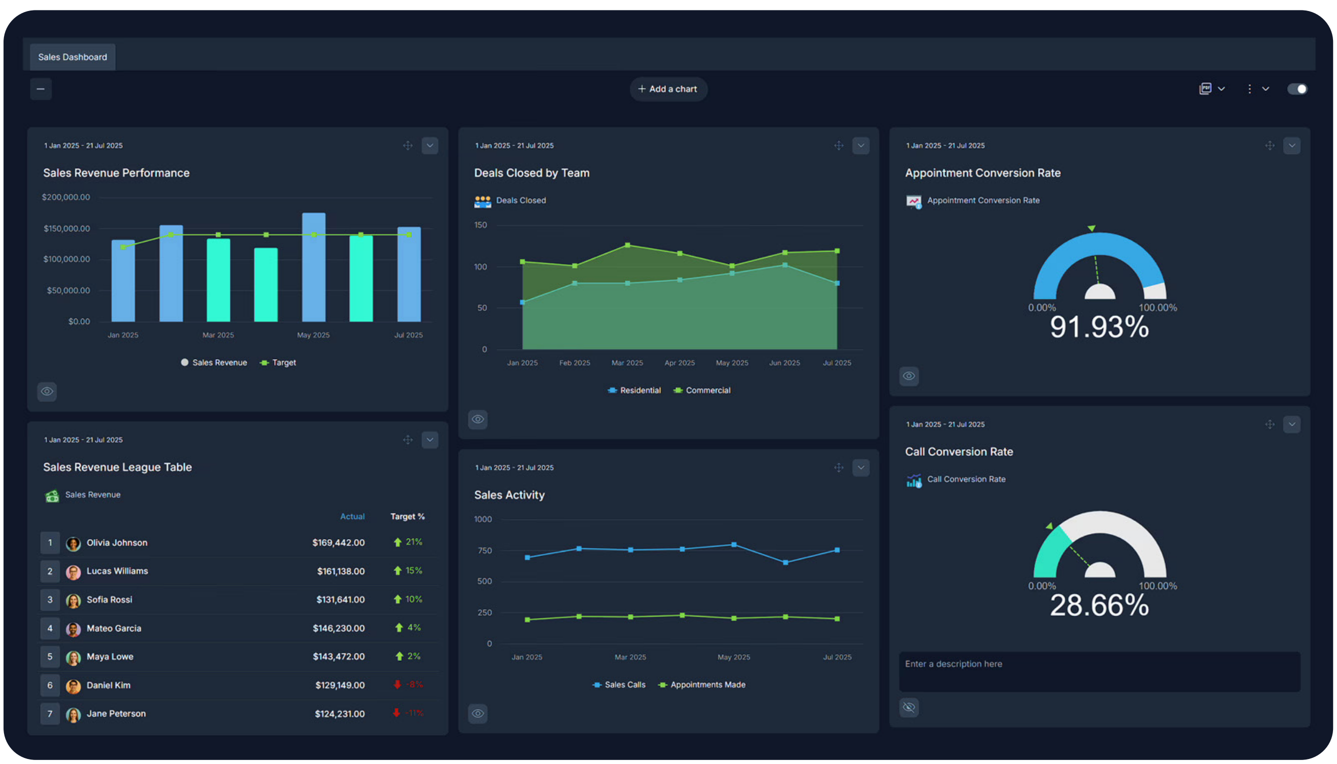
1. Click Dashboards tab
2. Click "Add a Chart" button
3. Select chart type from menu
4. Choose KPI to display
5. Set date range
6. Customize filters and colors
7. Save and position on dashboard



Step 6: Building Your KPI Dashboard



Adding a Sales KPI Chart



The complete Sales KPI Dashboard