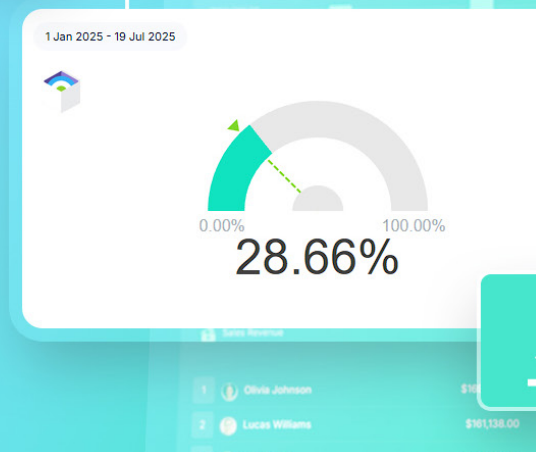


Creating

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>

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 & accountability
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

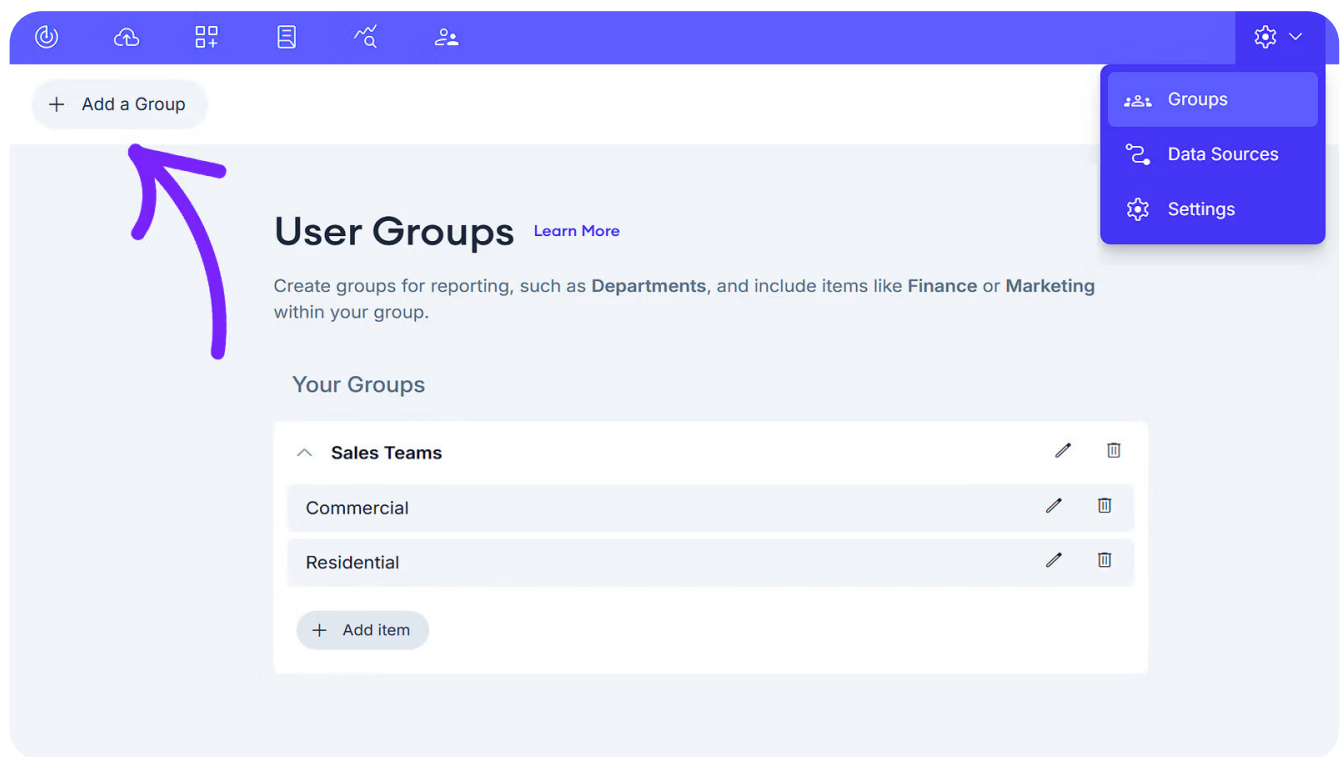
When to Use:

- 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:

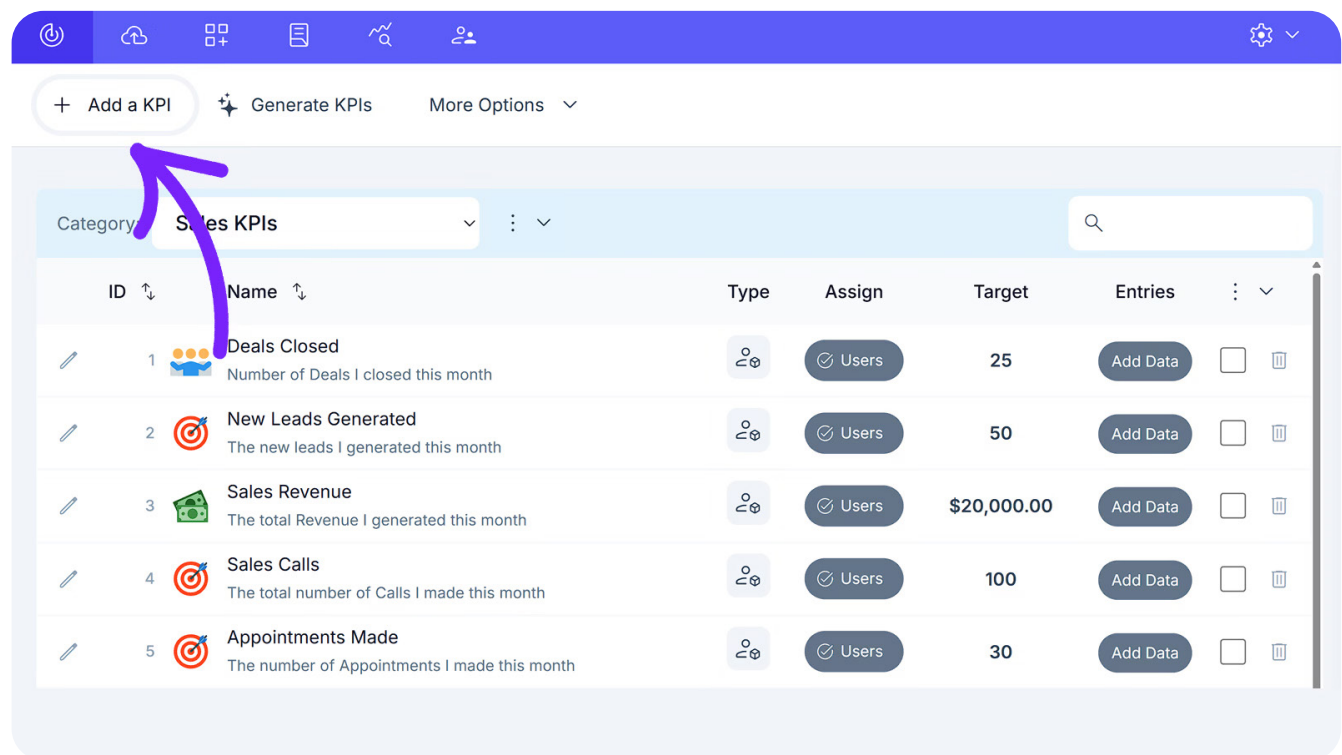
- Number of Deals Closed
- Number of Appointments Made
- Number of Sales Calls

Calculated KPIs (Advanced):

- Appointment Conversion Rate:
 $(\text{Deals Closed} / \text{Appointments Made}) \times 100$
- Call Conversion Rate: $(\text{Appointments} / \text{Calls Made}) \times 100$
- Average Deal Size: $\text{Total Revenue} / \text{Deals Closed}$

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)



The screenshot shows a web application interface for managing KPIs. At the top, there is a navigation bar with icons for power, cloud, grid, document, line graph, and user. Below the navigation bar, there is a header section with a '+ Add a KPI' button, a 'Generate KPIs' button, and a 'More Options' dropdown. The main content area is a table titled 'Sales KPIs' with a search bar. The table has columns for ID, Name, Type, Assign, Target, and Entries. A purple arrow points to the '+ Add a KPI' button. The table contains five rows of KPIs:

ID	Name	Type	Assign	Target	Entries
1	Deals Closed Number of Deals I closed this month	📊	👤 Users	25	Add Data
2	New Leads Generated The new leads I generated this month	📊	👤 Users	50	Add Data
3	Sales Revenue The total Revenue I generated this month	📊	👤 Users	\$20,000.00	Add Data
4	Sales Calls The total number of Calls I made this month	📊	👤 Users	100	Add Data
5	Appointments Made The number of Appointments I made this month	📊	👤 Users	30	Add Data

Benefits:

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

Step3: Adding Your Users

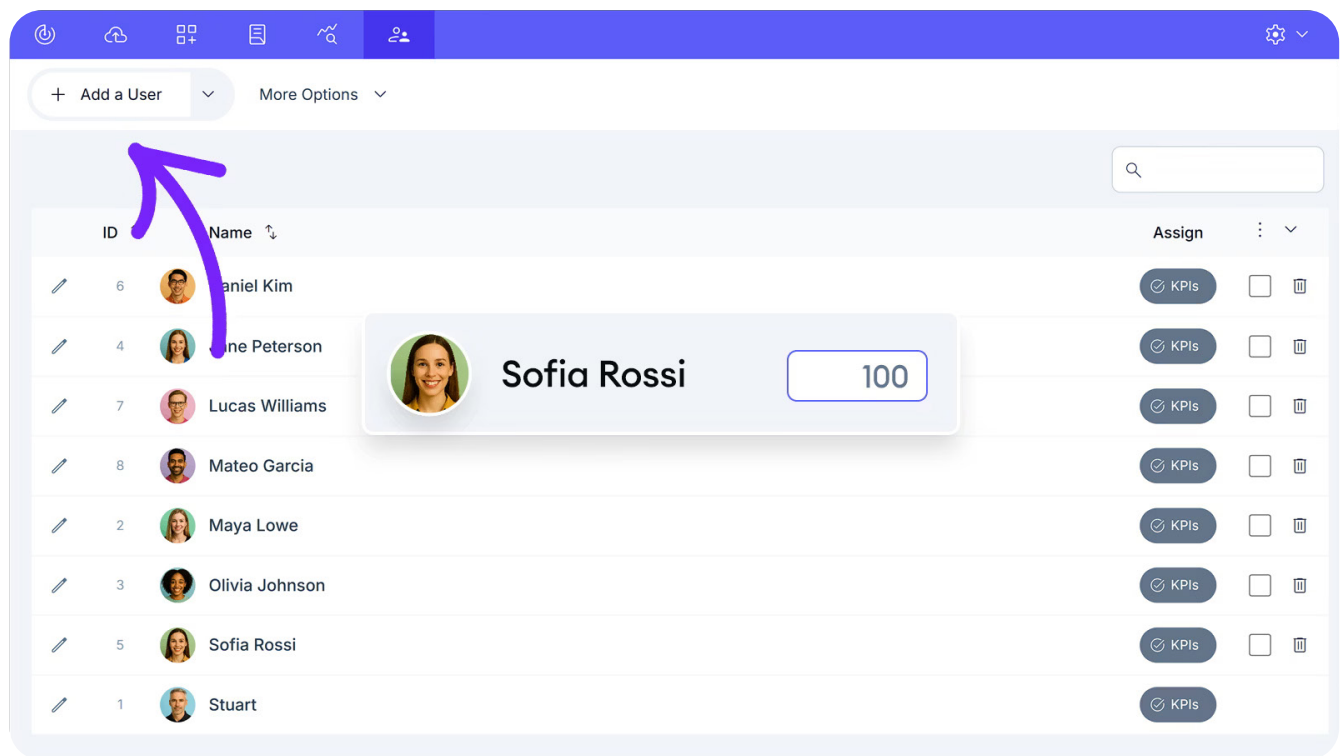
Purpose: Enable individual tracking and team engagement

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

The screenshot shows the SimpleKPI dashboard interface. At the top, there's a navigation bar with icons for power, cloud, grid, list, line chart, and user profile. Below the navigation bar, the user's name 'Sofia Rossi' is displayed. The main content area is titled 'Monthly 08' and contains a table for adding sales data. The table has columns for months: May 2025, June 2025, July 2025, and August 2025. The rows represent different KPIs: Deals Closed, New Leads Generated, Sales Revenue, and Sales Calls. Each row has an 'Actual' field (blue border) and a 'Target' field (green border). A purple arrow points to the 'Actual' field for 'Deals Closed' in August 2025.

	May 2025	June 2025	July 2025	August 2025
1 Deals Closed Number of Deals I closed this month	Actual: 27 Target: 25	Actual: 35 Target: 25	Actual: 29 Target: 25	Actual: <input type="text"/> Target: 25
2 New Leads Generated The new leads I generated this month	Actual: 51 Target: 50	Actual: 44 Target: 50	Actual: 36 Target: 50	Actual: <input type="text"/> Target: 50
3 Sales Revenue The total Revenue I generated this month	Actual: 22996 Target: 20000	Actual: 27099 Target: 20000	Actual: 25953 Target: 20000	Actual: <input type="text"/> Target: 20000
4 Sales Calls The total number of Calls I made this month	Actual: 95 Target: 100	Actual: 70 Target: 100	Actual: 133 Target: 100	Actual: <input type="text"/> Target: 100

Save

Benefits:

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

Step 5: Building Your KPI Dashboard

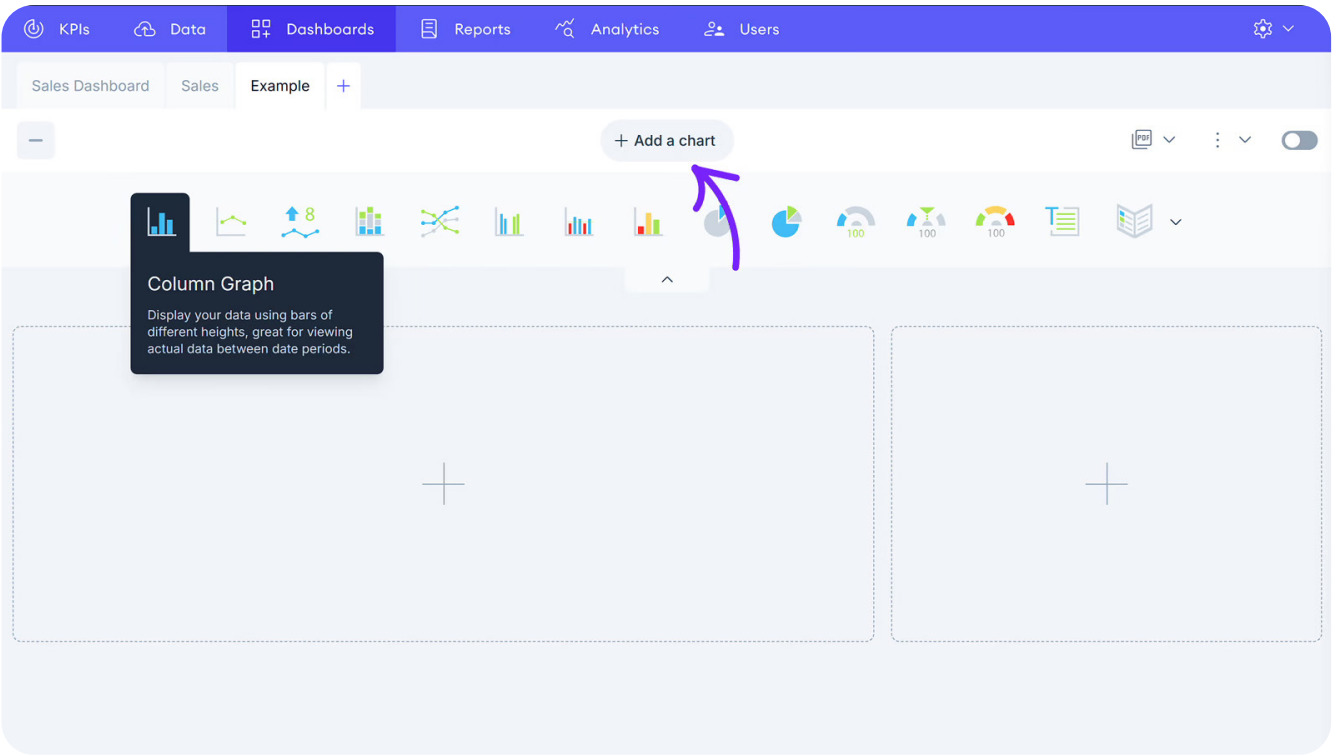
Purpose: Create visual story of your sales performance

Recommended Chart Types:

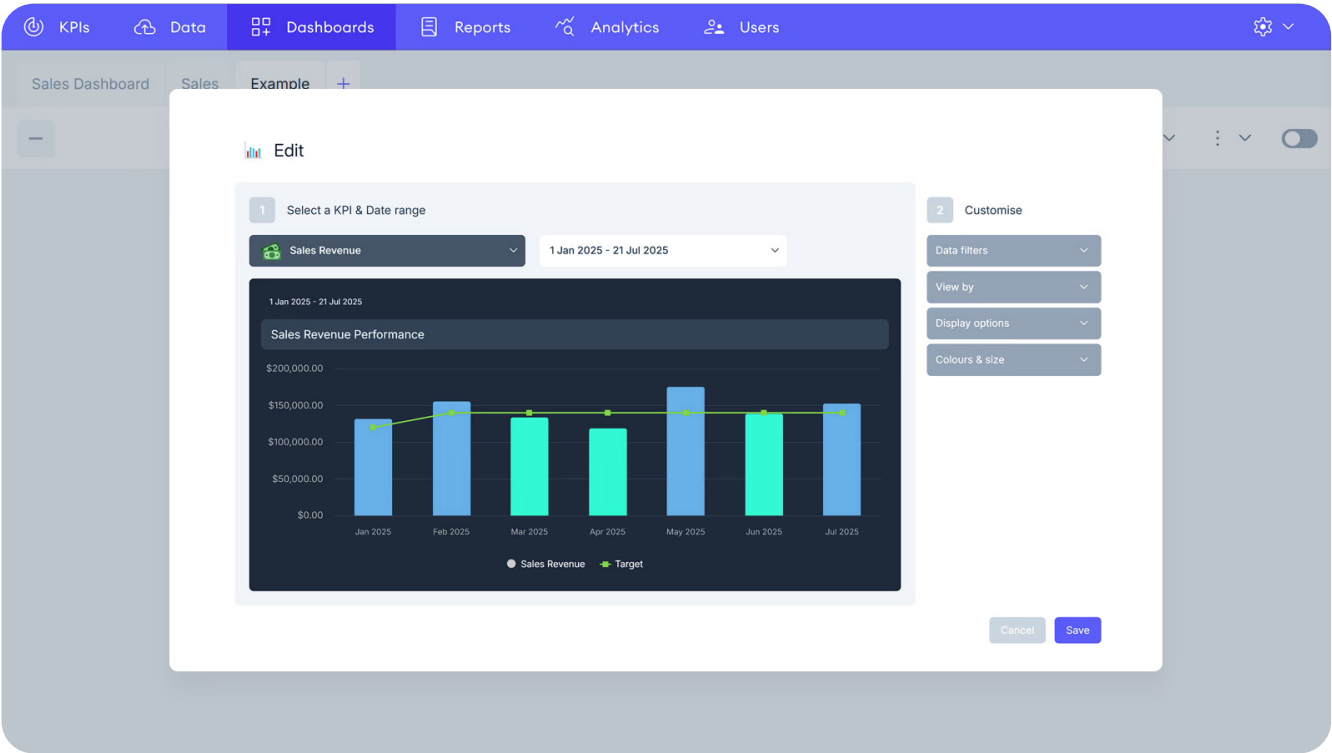
Step	Action	Time
Trend Graph	The Big Picture	Sales revenue vs. targets over time
Area Chart	Team Comparison	Deals by team/group performance
Gauge Chart	Efficiency Check	Conversion rates at-a-glance
League Table	Motivation	Top performer rankings

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