Managing Booking Targets

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Choose the Booking Target Dimension

In Pams, Booking targets are maintained through separate reporting views. Before entering or reviewing a target, choose the dimension that matches the question you need to answer. The selected dimension determines which target records Pams displays and the level at which you review Booking performance.

Select this dimension	Use it when you need to monitor
Branch	Booking expectations for a Branch or office location
Team	Booking expectations owned by a sales team
Account Manager	Individual Booking responsibility
Principal	Performance for a represented Principal, manufacturer, or brand
Product Type	Booking expectations for a product category or classification

Use **Branch** when management sets a Booking target for each office or operating location. This view is useful when different Branches have separate market coverage, budgets, or sales plans.

Choose **Team** when responsibility is shared by a defined sales group. A Team target helps you review collective ownership, even when members work across the same Branch.

Select **Account Manager** when each person has an individual Booking expectation. This view lets you confirm that every Account Manager who owns Booking activity has a maintained target.

Use **Principal** to review Booking from the Principal Relationship Management perspective. This is appropriate when the business needs to understand whether Booking results support the commercial plan for a specific Principal.

Choose **Product Type** when the focus is on product categories rather than people, teams, or locations. This helps when targets are set for different product classifications.

[SCREENSHOT: Booking Target screen showing the available dimension selections: Branch, Team, Account Manager, Principal, and Product Type.]

A target entered in one view belongs to that view. For example, a target for a **Branch** is not automatically an individual target for every **Account Manager** in that Branch. Review each dimension separately when you need complete target coverage.

Set Booking Targets for Branches and Teams

Use the **Branch** and **Team** views when you need to establish Booking expectations for offices and sales groups. These views support related planning, but each has its own target values.

1. Open the **Booking Target** area in Pams.
2. Select **Branch** as the target dimension.
3. Review the Branch entries shown in the Booking Target view.
4. Find the Branch that needs a target and enter or update its **Booking Target** value.
5. Click **Save** to keep the change.
6. Repeat the update for each Branch that needs a defined Booking target.

The **Branch** view gives you an office-level picture of planned Booking. Use it to make sure each Branch has a value that reflects its expected contribution to the business target. If your company uses more than one Branch, review each one rather than setting a target for only the largest location.

Next, maintain targets for the sales groups that own Booking activity.

1. Select **Team** in the Booking Target view.
2. Review the Team entries shown.
3. Enter or revise the **Booking Target** for each Team.
4. Click **Save** after each update.
5. Return to the **Branch** view when you need to compare Branch and Team targets.

[SCREENSHOT: Booking Target view with Branch selected and a Booking Target value ready to be saved.]

Keep Branch and Team targets aligned with the way work is assigned. A Branch target represents location-level expectations, while a Team target represents group ownership. Review the values together to check whether the expectations set for Teams reasonably support the Branch-level target. If a Team is responsible for

Booking across more than one Branch, maintain its Team target in the **Team** view and review Branch targets independently.

Assign Targets to Account Managers

Use the **Account Manager** view to maintain Booking targets for the people responsible for generating or owning bookings. Individual targets make personal responsibility visible alongside the broader targets maintained for Branches and Teams.

1. Open the **Booking Target** area.
2. Select **Account Manager** as the target dimension.
3. Review the Account Manager entries displayed in the list.
4. Locate the Account Manager whose target you need to set or change.
5. Enter the required **Booking Target** value.
6. Click **Save** to retain the updated target.
7. Repeat these steps for each Account Manager who needs an individual Booking target.

[SCREENSHOT: Booking Target view with Account Manager selected and individual Account Manager target entries.]

Start by checking whether every Account Manager with Booking responsibility appears with a defined target. An entry with no maintained target can make individual performance reviews less meaningful, especially when management compares personal results with Team or Branch expectations.

When setting a value, consider the person's assigned sales ownership rather than copying the full Team target to every individual. The Account Manager target is an individual perspective. The Team target remains a separate group perspective, and the Branch target remains a location perspective.

After updating individual values, switch between **Account Manager**, **Team**, and **Branch** views. Check that the targets make sense when viewed together:

- Account Manager targets should reflect individual ownership.
- Team targets should reflect the sales group's expected contribution.
- Branch targets should reflect the expected contribution of the office or location.

If an Account Manager changes teams or no longer owns Booking activity, revisit the **Account Manager** view and update the displayed **Booking Target** as needed. Keep changes in the individual view; changing a Team or Branch target does not replace the target maintained for an Account Manager.

Set Targets by Principal and Product Type

Booking targets can also be maintained from a commercial perspective, not only by sales ownership. Use **Principal** and **Product Type** when you need to monitor whether bookings support represented brands, manufacturers, or product categories.

1. Open the **Booking Target** area and select **Principal**.
2. Review the Principals displayed in the target list.
3. Find the Principal for which you need to maintain a target.
4. Enter or update the **Booking Target** value.
5. Click **Save**.
6. Repeat the process for each Principal that requires a defined Booking target.

A **Principal** target is useful when an agency represents multiple Principals and needs to monitor the planned Booking contribution of each relationship. It lets you review commercial expectations by Principal, regardless of which Branch, Team, or Account Manager owns the related sales activity.

To maintain category-focused targets:

1. Select **Product Type** in the Booking Target view.
2. Review the available Product Type entries.
3. Locate the Product Type that needs a target.
4. Enter or revise the **Booking Target** value.
5. Click **Save** to keep your changes.

[SCREENSHOT: Booking Target screen showing the Principal and Product Type selections.]

Use **Product Type** when your sales plan is organized around product classifications. For example, a business may need separate Booking expectations for different categories in its portfolio, even when the same Account Manager sells more than one category.

Do not treat Principal and Product Type targets as replacements for Branch, Team, or Account Manager targets. Each view answers a different question:

- **Principal** shows the target associated with a represented Principal.

- **Product Type** shows the target associated with a product classification.
- **Branch**, **Team**, and **Account Manager** show ownership and location perspectives.

Maintain each view that your business uses for performance reporting so targets remain meaningful in every reporting perspective.

Review Booking Targets Across Reporting Views

Reviewing Booking targets across all five views helps you see whether target responsibility is fully distributed across the business. In Pams, move between **Branch**, **Team**, **Account Manager**, **Principal**, and **Product Type** to review each perspective without assuming that one view automatically covers another.

1. Open the **Booking Target** area.
2. Select **Branch** and review whether every relevant Branch has a displayed **Booking Target**.
3. Select **Team** and check target coverage for each sales group.
4. Select **Account Manager** and identify people with missing or unexpected target values.
5. Select **Principal** to review target coverage for represented Principals.
6. Select **Product Type** to review target coverage by product classification.
7. Click **Save** if you make any corrections while reviewing a view.

Use the **Branch** view to assess target coverage by office or operating location. This helps you identify a Branch that has Booking responsibility but no maintained target.

Use the **Team** view to assess whether group targets are defined where sales ownership is shared. A Team with no value may need review even if its Branch has a target.

The **Account Manager** view is your individual assignment check. Look for Account Managers who are expected to own bookings but do not have a displayed Booking Target.

The **Principal** and **Product Type** views provide commercial analysis perspectives. They are particularly useful when management needs to monitor targets for individual Principals or product classifications alongside sales ownership.

[SCREENSHOT: Booking Target view being switched between Branch, Team, Account Manager, Principal, and Product Type.]

Compare related values carefully, but do not expect them to match line by line. The same Booking activity can be viewed by location, team, individual, Principal, and Product Type. The purpose of the review is to find missing coverage or values that no longer reflect current business ownership, not to treat every reporting view as the same target list.

Correct Missing or Misaligned Booking Targets

Correct a Booking target in the view where the issue appears. Because Pams maintains targets separately for **Branch**, **Team**, **Account Manager**, **Principal**, and **Product Type**, updating one reporting view does not automatically update the others.

1. Open the **Booking Target** area.
2. Select the dimension where you found the issue, such as **Team** or **Principal**.
3. Check whether the required Branch, Team, Account Manager, Principal, or Product Type appears in that view.
4. If it appears, enter or update the **Booking Target** value.
5. Click **Save**.
6. Reopen or revisit the same dimension view and confirm that the intended value is displayed.

If an expected Branch, Team, Account Manager, Principal, or Product Type does not appear in the relevant view, first confirm that it is available in Pams for normal business use. For example, use the relevant **Branches**, **Teams**, **Account Managers**, **Principals**, or **Product Types** area to check whether the item is present and available. Return to **Booking Target** after it is available, then review the correct dimension again.

If a target was entered at the wrong level, correct it in the intended view. For example:

- A target needed for one salesperson belongs in **Account Manager**, not only in **Team**.
- A target for a represented manufacturer belongs in **Principal**, not only in **Branch**.
- A target for a category belongs in **Product Type**, not only in **Principal**.

[SCREENSHOT: Booking Target list showing a selected dimension and a corrected Booking Target value.]

When totals or target coverage appear inconsistent, review all five dimensions one at a time. A Branch target, Team target, Account Manager target, Principal target, and Product Type target are distinct reporting perspectives. Confirm the displayed

Booking Target value in each affected view after saving, so the correction is visible where performance will be reviewed.

Overview

Booking targets in Pams provide a structured way to set expected Booking performance across the parts of the business that matter to your sales operation. Rather than relying on one broad target, you can maintain targets by **Branch**, **Team**, **Account Manager**, **Principal**, and **Product Type**.

This approach supports different types of management review:

- A Branch leader can review the expected Booking contribution for a location.
- A sales leader can review the Booking expectation assigned to a Team.
- An Account Manager can be assigned an individual target that reflects personal ownership.
- A Principal-focused review can assess the expected contribution of each represented Principal.
- A product-focused review can assess planned Booking by Product Type.

The five views are designed to be used together. They do not represent a single target divided automatically across every perspective. Instead, each view supports a separate reporting need. For example, a Team may have a Booking target, while each Account Manager in that Team also has an individual target. Similarly, a Principal target can be maintained independently from the targets for the Branches and Account Managers selling that Principal’s products.

[SCREENSHOT: Booking Target area showing the five reporting dimensions available for review.]

Keep target values current when sales ownership, represented Principals, Branch responsibilities, Teams, or Product Types change. A target that was appropriate for an earlier sales plan may no longer provide a useful basis for review after responsibilities shift.

Booking targets are most useful when they reflect actual ownership and commercial priorities. Review them before using target-related dashboards, reports, or performance discussions. If a target is missing, placed in the wrong view, or no longer aligned with current responsibilities, correct it in the relevant Booking Target dimension so Pams displays the intended target for that reporting perspective.

Prerequisites

Before maintaining Booking targets, make sure the people, groups, locations, Principals, and Product Types that you want to target are already available in Pams. The Booking Target view can only display entries that are available for the selected dimension.

Prepare the following before you begin:

- A clear decision on which of the five views you need: **Branch**, **Team**, **Account Manager**, **Principal**, or **Product Type**.
- The Booking target value to maintain for each relevant entry.
- Confirmed sales ownership for the Branches, Teams, and Account Managers that will be reviewed.
- A current list of represented **Principals** where Principal-level Booking targets are required.
- A current set of **Product Types** where category-level Booking targets are required.

If you are setting targets by Branch, confirm that the required Branch is available in **Branches**. If you are assigning targets by Team or Account Manager, confirm that the appropriate Team and Account Manager are available in Pams. For Principal and Product Type planning, confirm that the Principal or Product Type you expect to target is available in its corresponding area before returning to **Booking Target**.

You should also agree internally on how the views will be used. For example, decide whether all Account Managers require individual targets, whether every Principal needs a commercial target, and whether Product Type targets apply across the full portfolio or only selected classifications. This prevents incomplete coverage and avoids entering targets in a view that does not match the intended review.

Do not assume that targets maintained in one view will appear in another. If you need Branch, Team, and Account Manager targets, maintain each of those views separately.

After targets are in place, continue with Measuring Equivalent Booking to understand how Pams uses reference commission and reference margin to compare Booking performance across deals with different commercial terms.