Reviewing Sales Performance

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Orienting Yourself in the Sales Performance Dashboard

Use the **Dashboard** area in Pams as your central workspace for reviewing sales performance. The dashboard brings together the performance indicators that matter in day-to-day sales management: current results, **Forecast**, **Target**, profitability, and team achievement. Rather than reviewing Sales Jobs, Offers, and Orders one at a time, start with the dashboard to understand the current overall position.

Dashboard values provide a snapshot of the performance shown in the current reporting view. Use them to see what has already been achieved, booked, or sold. The **Forecast** and **Target** values add a forward-looking comparison:

- **Current results** show the sales performance already reflected in the dashboard.
- **Forecast** shows the expected sales outcome based on available sales information.
- **Target** shows the planned sales outcome for the period.
- **Profitability** shows whether the sales results are producing financially valuable outcomes.
- **Team achievement** shows how the overall result is distributed across the sales team.

[SCREENSHOT: Dashboard showing sales performance, Forecast, Target, profitability, and team achievement indicators]

Read these indicators together. A strong current sales result does not automatically mean that the team will meet its target, because the forecast may show that expected future performance is lower than planned. Likewise, a high sales value is not necessarily a strong business result if profitability is weak.

When reviewing booking performance, use the **Equivalent Booking** values shown in Pams where available. Equivalent Booking makes deals with different commission or margin terms comparable. For the calculation and meaning of this value, see Measuring Equivalent Booking.

Use the dashboard first to identify where attention is needed, then review the relevant Sales Jobs, Offers, or team results in more detail.

Reviewing Current Sales Results on the Dashboard

1. Open the **Dashboard** area in Pams and select the dashboard view that displays sales performance indicators. Review the current values shown for sales performance before drawing conclusions from forecasts or targets. Focus first on what Pams currently reports as achieved, booked, or sold in the displayed reporting view.
2. Check the overall performance values against the dashboard's **Target** and **Forecast** indicators. This gives you an immediate view of whether current sales activity is progressing in line with expectations. A value below Target may still be acceptable if the Forecast shows that expected Sales Jobs or Orders are likely to close during the period. A current value that is high may still require attention if the Forecast is weakening.
3. Review the available team achievement indicators alongside the overall result. Compare the combined team result with the achievement shown for individual sales members or Sales Teams. This helps you determine whether performance is broadly shared or concentrated in only part of the team.
4. Record the measures that need follow-up. Prioritize indicators where the dashboard shows:
    - Performance below **Target**
    - A **Forecast** lower than the Target
    - Weak profitability despite a strong booked or sold value
    - Large differences between team achievement results
    - A team result that does not support the overall forecast
5. Use the dashboard as the starting point for a focused sales review. For example, if sales performance is behind plan, open the relevant **Sales Jobs**, **Offers**, or **Orders** to review the work contributing to that result. Keep the dashboard visible as your reference point so that individual deal discussions remain connected to the wider target and forecast position.

[SCREENSHOT: Sales performance dashboard with an overall result and team achievement indicators highlighted]

Comparing Forecasts with Sales Targets

1. On the sales performance dashboard, find the **Forecast** value for the current reporting view. Treat this as the expected sales outcome based on the sales information currently available in Pams. The Forecast helps you look beyond the results already booked or sold and assess where the period is likely to finish.
2. Compare the Forecast with the corresponding **Target** value. The difference between these two values is the most useful starting point for judging whether the sales plan is on track:
    - A Forecast at or above Target indicates that expected performance supports the planned outcome.
    - A Forecast close to Target indicates that active follow-up is important because relatively small changes may affect achievement.
    - A Forecast below Target indicates a gap between expected performance and the planned outcome.
3. Focus your review on the gap, not only on the absolute sales value. A large Forecast can still represent a problem when the Target is larger. Conversely, a lower Forecast may be acceptable if the Target for the reporting view is also lower. Use the Target as the planned benchmark and the Forecast as the expected outcome.
4. Distinguish a current-result shortfall from a forecast shortfall. A current-result shortfall means the dashboard's achieved, booked, or sold value has not yet reached Target. This may recover if the Forecast remains strong. A forecast shortfall means the expected outcome itself is below Target, which signals that the gap is likely to continue unless Sales Jobs, Offers, or Orders develop differently.
5. Use the comparison to direct sales follow-up. Review Sales Jobs and Offers that could improve the Forecast, especially where expected order timing, commercial terms, or customer decisions affect whether the Target can still be achieved.

[SCREENSHOT: Dashboard comparison showing Forecast below, equal to, and above Target]

Evaluating Profitability Alongside Sales Results

1. Review profitability indicators together with the sales performance values on the **Dashboard**. Do not judge performance only by the amount achieved, booked, or

sold. A high sales value can be less valuable to the business when the related margin, commission, or expected earning is low.

2. Compare the dashboard's performance result with its profitability result. Look for cases where sales output appears strong but profitability does not increase at a comparable level. These results require closer review because they may be helping the team reach a booking or sales target without delivering the expected financial outcome.
3. Use **Equivalent Booking** as part of this review when it is available in the dashboard. Equivalent Booking allows you to compare deals fairly when they carry different commission rates or margins. This is particularly useful for sales agencies representing multiple Principals, where a large order for one Principal may generate a different level of earning than a similar-sized order for another.
4. Compare profitability with both **Forecast** and **Target**. If the Forecast suggests that the Target will be achieved, check whether the forecasted performance is also profitable. A sales plan should support both target attainment and financially sustainable growth. Reaching Target through low-profitability work may require a closer review of commercial terms, Principal commissions, or the mix of Sales Jobs.
5. Flag dashboard results that show any of the following:
    - Strong achieved or booked sales with weak profitability
    - A Forecast that supports Target achievement but does not support expected earning
    - High team achievement that relies mainly on lower-value sales
    - Profitability declining while sales performance increases

Use these findings when reviewing sales priorities. Give appropriate attention to Sales Jobs and Offers that strengthen both the sales result and the profitability result.

[SCREENSHOT: Dashboard widgets comparing sales performance with profitability and Equivalent Booking]

Assessing Team Achievement Against Performance Goals

1. Review the team achievement indicators displayed on the sales performance dashboard. These indicators show how the overall sales result is distributed across the team. Begin by comparing the total team achievement with the dashboard's overall performance value, Forecast, and Target.

2. Check whether the team's combined activity supports the expected outcome. If the overall Forecast is close to or above Target, look for team achievement results that support this position across the Sales Team. If only one person or a small part of the team is carrying most of the result, the total Forecast may be more exposed to changes in a limited number of Sales Jobs or Offers.

3. Identify significant differences between achievement results. Differences can indicate where a manager may need to review workload, deal progress, or sales activity. Use the dashboard to identify the area requiring attention before opening the related Sales Jobs, Offers, or Tasks.

4. Discuss team achievement in the context of the performance goal. A team member with a high booked or sold value may be making a strong contribution to the Target. However, also check profitability and Equivalent Booking where available. This ensures that achievement is assessed using comparable and financially meaningful results, especially when team members work with different Principals, product portfolios, or commercial terms.

5. Use the dashboard findings to guide practical follow-up:
    - Review Sales Jobs that are important to the Forecast.
    - Review Offers that may affect the Target gap.
    - Balance attention across team members where achievement is uneven.
    - Focus coaching or deal review on results that are below performance or profitability expectations.
    - Recognize when a team result depends heavily on a small number of expected orders.

[SCREENSHOT: Team achievement indicators compared with overall Forecast, Target, and profitability]

Investigating Gaps Between Performance, Forecasts, and Targets

1. Start with the dashboard measure that shows the largest gap. Compare the current sales performance result with the **Target**, then compare the **Forecast** with the same Target. This separates a gap in today's results from a gap in the expected outcome.

2. When current performance is below Target, use the Forecast to determine whether the shortfall is likely to recover. A Forecast near or above Target suggests that

available Sales Jobs, Offers, or Orders may close the gap. A Forecast that remains below Target indicates that the shortfall is expected to persist unless sales activity changes.

3. When the Forecast is below Target but the current dashboard result appears strong, review the forward-looking position carefully. This combination can mean that earlier sales activity produced good results, while the expected sales outcome for the remainder of the reporting view is falling behind plan. Review the Sales Jobs and Offers that are expected to contribute to the Forecast.
4. When Target achievement is high but profitability is weak, do not treat the Target as fully successful without further review. Check which sales results are contributing to the profitability gap. Look for deals with lower margins, lower commissions, or weaker expected earning compared with their sales value or Equivalent Booking result.
5. When overall performance and team achievement do not align, compare team-level achievement results. For example, a strong overall number with uneven team achievement may show that performance is concentrated in a small group. A broadly active team with a weak overall result may indicate that sales effort is not converting into sufficient booking, sales value, or profitability.
6. Record the specific gap you need to address: performance to Target, Forecast to Target, profitability to sales output, or team achievement to overall result. This keeps Sales Job and Offer reviews focused on the issue visible in the dashboard.

[SCREENSHOT: Dashboard showing an overall performance gap, Forecast gap, profitability gap, and uneven team achievement]

Overview

The sales performance dashboard in Pams gives you a single place to review whether sales activity is producing the expected business result. Use it to compare current performance with the planned **Target**, assess the expected **Forecast**, review profitability, and understand how results are distributed across the Sales Team.

The dashboard supports four connected review questions:

Review area	What to compare	What the comparison tells you
Current performance	Achieved, Booked, or Sold values against Target	Whether results already recorded are meeting the plan

Review area	What to compare	What the comparison tells you
Forecast	Forecast against Target	Whether expected performance is on track, at risk, or ahead of plan
Profitability	Profitability against sales performance and Forecast	Whether sales results are financially valuable as well as high in volume
Team achievement	Team indicators against overall performance	Whether results are shared across the team or concentrated in selected members

Use **Target** as the planned outcome for the reporting view. Use **Forecast** as the expected outcome based on the sales information currently available in Pams. Use current performance values to understand what has already been achieved. Review all three together; none provides the full picture on its own.

For agencies working with multiple Principals, review **Equivalent Booking** where shown. Equivalent Booking helps compare performance fairly across sales with different commission or margin terms. It gives managers a more consistent basis for reviewing team contribution than sales value alone.

Profitability is equally important. A strong sales result can require attention if it produces weak profitability. Conversely, a result below Target may still contain high-value Sales Jobs that deserve focused follow-up. Use the dashboard to identify these differences before reviewing individual Sales Jobs, Offers, Orders, and team results.

Prerequisites

Before reviewing sales performance in Pams, make sure the dashboard contains the sales performance indicators relevant to your reporting view. The review depends on the values shown for current sales results, **Forecast**, **Target**, profitability, and team achievement.

Prepare the following information before using the dashboard:

- The reporting view you want to assess, such as the period used for your team's sales target and forecast review.
- The relevant **Target** value, so you can compare planned performance with actual and expected results.
- The current **Forecast** value, so you can assess whether available Sales Jobs, Offers, and Orders are expected to support the Target.
- The dashboard's sales performance and profitability indicators, so you can review output and financial value together.

- The displayed team achievement indicators, so you can see how the overall result is distributed across the Sales Team.
- Access to the related **Sales Jobs**, **Offers**, and **Orders** for any dashboard value that requires follow-up.

If your sales activity includes deals for multiple Principals or deals with different commission and margin terms, make sure you understand the **Equivalent Booking** measure before comparing team results. Read Measuring Equivalent Booking for guidance on using comparable booking values in performance reviews.

Keep the review focused on the dashboard values shown in Pams. When you identify a gap, use the relevant Sales Job or Offer to investigate the commercial situation behind it rather than relying only on the total dashboard number. This approach connects target review with the actual sales work that can improve the Forecast, profitability, and team achievement.