

Course : Sales dashboards: driving performance

communication and monitoring tools

Practical course - 2d - 14h00 - Ref. TBC

Price : 1500 CHF E.T.



How can you build effective tools to monitor, support and give visibility to the performance of your sales team? This highly practical training course will enable you to define your indicators and build your management tools to better support your teams and communicate results.

Teaching objectives

At the end of the training, the participant will be able to:

- ✓ Identify the indicators needed to monitor the sales team's actions
- ✓ Define indicators for external contacts
- ✓ Efficient visibility of selected indicators and target deviations
- ✓ Build dashboards and corresponding schedules
- ✓ Present the tools to the sales team and deal with resistance
- ✓ Support sales staff based on results obtained

Intended audience

Sales managers, heads of sales and sales directors for whom sales management is a daily priority.

Prerequisites

No special knowledge required.

Practical details

Hands-on work

Definition of performance indicators. Construction of steering tools and a sales reporting plan.

Teaching methods

Work in sub-groups.

Course schedule

PARTICIPANTS

Sales managers, heads of sales and sales directors for whom sales management is a daily priority.

PREREQUISITES

No special knowledge required.

TRAINER QUALIFICATIONS

The experts leading the training are specialists in the covered subjects. They have been approved by our instructional teams for both their professional knowledge and their teaching ability, for each course they teach. They have at least five to ten years of experience in their field and hold (or have held) decision-making positions in companies.

ASSESSMENT TERMS

The trainer evaluates each participant's academic progress throughout the training using multiple choice, scenarios, hands-on work and more. Participants also complete a placement test before and after the course to measure the skills they've developed.

1 Frame control and monitoring actions

- Define the key points for effectively managing a sales team.
- Master the rules needed to succeed as a sales manager.
- Diagnose the skills required in relation to the objectives set and the market environment.

Hands-on work

Discussions based on best practices.

2 Defining the right tools for effective dashboards

- Identify and prioritize the key information needed for effective day-to-day management.
- Define relevant measurement indicators.
- Measuring quality: which indicators should be taken into account?
- Integrate indicators for external contacts: n+1, other departments, customers, suppliers.
- Draw up different types of schedules: task flowcharts, backward planning.

Hands-on work

Presentation of selected key performance indicators to the group.

3 Create management dashboards and provide visibility

- Define the objectives and functions of the dashboard.
- Establish the periodicity of the dashboard.
- Anticipate risks of deviation and implement alert procedures.

Hands-on work

Preparation of sales reports. Adaptation to different contexts. Analysis of individual objectives.

4 Involve and coordinate sales team members

- Unite sales teams around shared goals and actions.
- Use participative and delegative management techniques.
- Assert leadership during meetings to present objectives, follow up and summarize results.
- Define a shared information system: present the rules of the game, draw up and update the document base
- Deploy the necessary collaborative tools.

5 Support sales staff based on results obtained

- Manage results and discrepancies using analysis tools.
- Manage emotional aspects and stay in your role as sales manager.
- Provide assistance and support to help employees achieve their objectives.

Role-playing

Support for sales representatives. Building a CAP.

TEACHING AIDS AND TECHNICAL RESOURCES

- The main teaching aids and instructional methods used in the training are audiovisual aids, documentation and course material, hands-on application exercises and corrected exercises for practical training courses, case studies and coverage of real cases for training seminars.
- At the end of each course or seminar, ORSYS provides participants with a course evaluation questionnaire that is analysed by our instructional teams.
- A check-in sheet for each half-day of attendance is provided at the end of the training, along with a course completion certificate if the trainee attended the entire session.

TERMS AND DEADLINES

Registration must be completed 24 hours before the start of the training.

ACCESSIBILITY FOR PEOPLE WITH DISABILITIES

Do you need special accessibility accommodations? Contact Mrs. Fosse, Disability Manager, at psh-accueil@orsys.fr to review your request and its feasibility.

Dates and locations

REMOTE CLASS

2026 : 4 June, 17 Sep., 19 Nov.