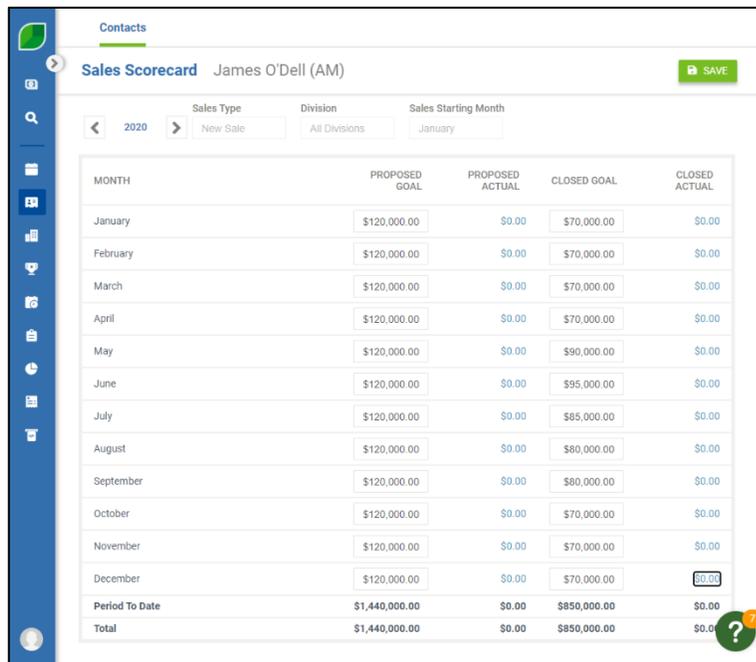


Sales Scorecard

Sales scorecards allow managers to establish and track sales goals for sales reps or account managers. These scorecards can be established on the *Scorecards* section of the *Contact* screen for each employee. The *Scorecards* section is only available on the *Contact* screen for employee contacts who also have a user account set up. To add new scorecards, the logged in user must have role with either *System Administrator* permission or *Sales Manager* permission.



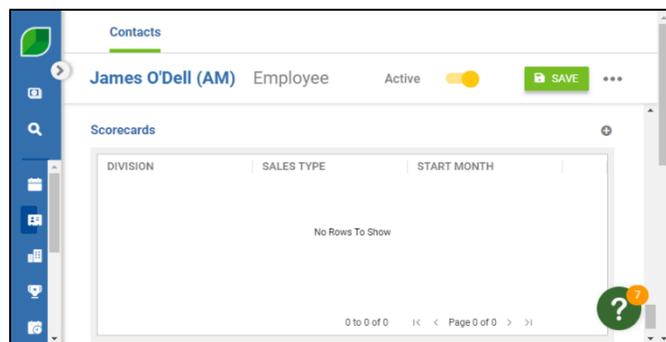
MONTH	PROPOSED GOAL	PROPOSED ACTUAL	CLOSED GOAL	CLOSED ACTUAL
January	\$120,000.00	\$0.00	\$70,000.00	\$0.00
February	\$120,000.00	\$0.00	\$70,000.00	\$0.00
March	\$120,000.00	\$0.00	\$70,000.00	\$0.00
April	\$120,000.00	\$0.00	\$70,000.00	\$0.00
May	\$120,000.00	\$0.00	\$90,000.00	\$0.00
June	\$120,000.00	\$0.00	\$95,000.00	\$0.00
July	\$120,000.00	\$0.00	\$85,000.00	\$0.00
August	\$120,000.00	\$0.00	\$80,000.00	\$0.00
September	\$120,000.00	\$0.00	\$80,000.00	\$0.00
October	\$120,000.00	\$0.00	\$70,000.00	\$0.00
November	\$120,000.00	\$0.00	\$70,000.00	\$0.00
December	\$120,000.00	\$0.00	\$70,000.00	\$0.00
Period To Date	\$1,440,000.00	\$0.00	\$850,000.00	\$0.00
Total	\$1,440,000.00	\$0.00	\$850,000.00	\$0.00

Scorecards Section

The *Scorecards* section available on the *Contact* screen displays a list of scorecards for an employee. Each scorecard allows for the management of sales goals.

Clicking the *Add Scorecard*  icon displays the [Sales Scorecard screen](#)

allowing you to add a new sales scorecard for the user. Clicking on an existing scorecard in the list displays the same screen to show the selected scorecard.

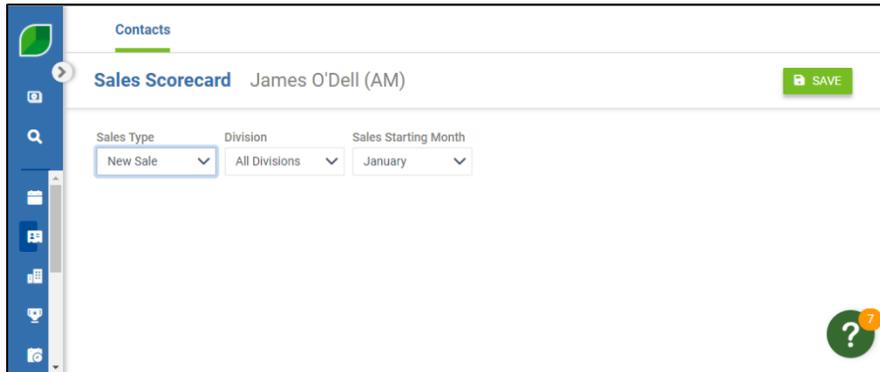


Sales Scorecard Screen

The *Sales Scorecard* screen allows you to specify sales goals for total revenue of opportunities that the sales rep is targeting to propose and close each month, and to view their year-to-date actual performance against those goals. It is accessed from the *Sales Scorecard* tab of the

Contact screen by clicking either the *Add Scorecard* icon , or clicking on one of the line items in the list of existing sales scorecards.

When you initiate creation of a new sales scorecard for an employee by clicking the *Add Scorecard* icon , the screen looks like this...



You fill in the *Sales Type* field (All Sales Type, New Sale or Renewal), the *Division* field and the *Sales Starting Month* field to define the scorecard and click the *Save* icon . The scorecard will expand to show the months of the year and to lock in the scorecard parameters as shown at right.

At this point, you can enter goal numbers into the *Proposed Goal* column^a and the *Closed Goal* column^b to reflect total revenue of opportunities that sales rep is targeting to propose and close (respectively) each month.

As the months advance, Aspire will fill in the values in the *Proposed Actual* and *Closed Actual* columns based on

opportunities entered into the system. When calculating the *Proposed Actual* and *Closed Actual* values for T&M services on opportunities (contracts and work orders), if any amount has been invoiced for the service, Aspire replaces the amount estimated with the total amount invoiced for the service. Additionally, for contract opportunities with changes, the value on the *Sales Scorecard* does not include the changes.

