Sales Reporting Helps an IT Services Team Hit Revenue Targets

bluemargin

This client is a public sector IT services firm. They sell, distribute, and implement cloud-based software products across federal, state, local, and education segments.


[Sample Data]
Product Pipeline

impact

- United Sales team around revenue targets
- Performance monitoring and proactive intervention
- Real-time pipeline visibility supports decision making

issues and goals

The firm's sales leaders had limited data visibility and struggled to meet revenue targets. To monitor their sales pipeline, leaders ran manual, time-intensive Excel reports. The larger sales team had no clearly defined metrics and processes, so the resource team rejected reporting results. As a result, leaders struggled to progress against key revenue targets and annual performance goals.

solution

This client approached Blue Margin (BMI) for expert help implementing Sales & Pipeline Reporting. They needed real-time data to power top-line revenue growth. In response, BMI executed a rapid design and development engagement, partnering with the client to quickly wireframe necessary report pages, extract and load data from their data sources, and build an Azure data warehouse to support Sales, Pipeline, and future reporting.
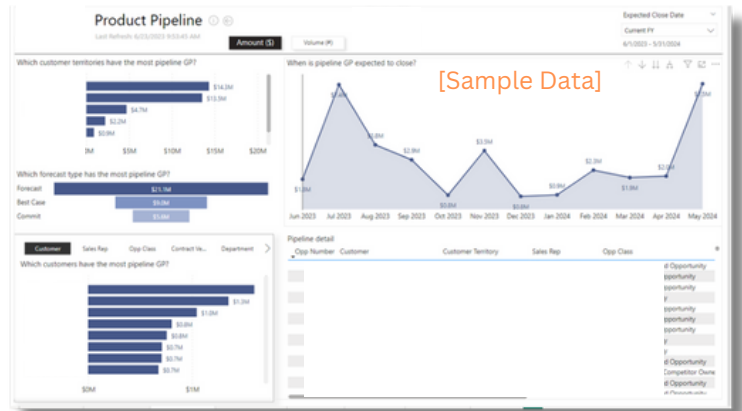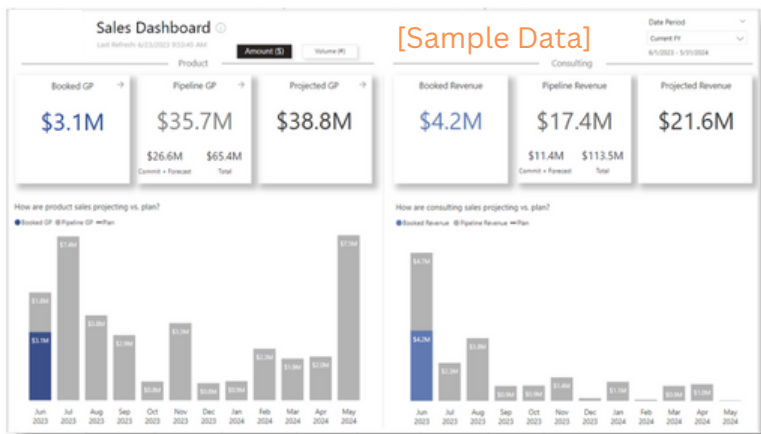
The project took 10 weeks from kickoff to completion. Sales & Pipeline Reporting deployed by the start of Q4, well-positioning the client for planning and forecasting sales for the next year.

results

Through working with BMI, our client:

- United their sales team around key revenue targets and annual performance goals
- Gave sales leaders and reps data visibility to monitor and manage job performance
- Created buy-in across the sales function, powering employee accountability and job ownership

Sales Dashboard   [Sample Data]

Booked GP	Pipeline GP	Projected GP	Booked Revenue	Pipeline Revenue	Projected Revenue
$3.1M	$35.7M	$38.8M	$4.2M	$17.4M	$21.6M

> Your team is great - highly professional. They think through their questions and clearly articulate what they need. We've dealt with a lot of different groups, and your team is a joy to work with.
>
> – CFO