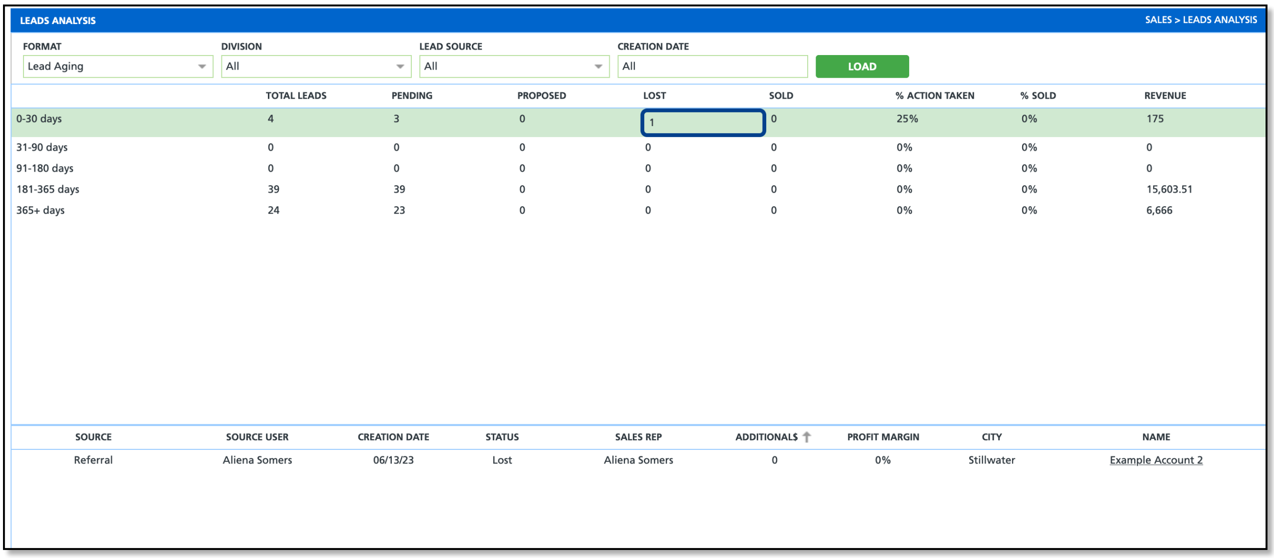
Leads Analysis

Last Modified on 06/22/2023 2:50 pm EDT

Pathway: *Sales > Leads Analysis*

The Leads Analysis screen provides sales managers the ability to sort and review lead data in multiple formats. This screen consists of two grids: the upper grid provides a summary of leads and the lower grid provides a breakdown on a selected lead data point.



Required Permissions

The following permissions are required to use this tool:

Permission ID	Permission Name
195	Sales \ Leads Analysis

Fields and Descriptions

Filter Fields	
Format	Determines how sales data is loaded and sorted on the screen. Format options include: • **Assigned to Sales Rep** - option to view the screen by each sales representative. Only representatives with a lead linked to them through a proposal, contract or order form will display. • **Provided By** - option to view the screen by who added the lead to the system. This can be someone other than the sales representative. • **Lead Source** - option to view the screen by the lead source (referral, online, cold call and etc.) selected when a user records a new lead in the system. • **Lead Aging** - option to view the screen by the current aging of all leads.
Division	Option to filter the screen on the division leads belong to. Division is determined on the account a lead is attached to.

Lead Source	Option to filter the screen to only return leads by the source that was selected when a new lead is created (referral, online, cold call and etc.). When 'Lead Source' is select from the Format field, the Lead Source field defaults to 'All' and can not be changed.
Creation Date	Option to filter the screen to only return leads based on the selected time frame. When 'Lead Aging' is selected as the Format, the 'Creation Date' field defaults to 'All' and can not be changed.
Display Fields	
Total Leads	The total amount of leads across all categories (Pending, Proposed, Lost and Sold). **If a lead is linked to an 'Open' contract or proposal, the lead is included in the Total Leads count, but it will not display in any of the other columns.*
Pending	Displays the total count of leads that are not attached to a proposal or contract.
Proposed	Displays the total count of leads that are linked to a proposal or contract where status is 'Submitted to Client'.
Lost	Displays the total count of leads that are linked to a proposal or contract where status is 'Lost'.
Sold	Displays the total count of leads that are linked to a contract where status is 'Sold'.
% Action Taken	Displays the percentage of leads from the 'Total Leads' column that have progressed in the sales process. $\%\text{ Action Taken} = \dfrac{\text{Proposed + Lost + Sold}}{\text{Total Leads}}$
% Sold	Displays the percentage of leads from the 'Total Leads' column that have ended in a sold contract. $\%\text{ Sold} = \dfrac{\text{Sold}}{\text{Total Leads}}$
Revenue	Displays a combined revenue amount of Total Leads.