



Milestone Selling

A tool for B2B growth

- Add instant gratification to long sales cycles
- Visualize opportunities in a motivating way
- Measure future business value of progress today - in real time

Milestone Selling

- AppExchange Product
- Opportunity Pipeline Monitoring
- Quotas & measuring the sales performance.

SCOPE

Client has a requirement to manage their opportunity flow to assess their employees' performance. Currently, there is no component in Salesforce which suits the client's requirement.

CHALLENGES

Client wants to set User's Quota for Monthly, Quarterly & Yearly. He is not able to measure the performance of the sales people as there is no way to count how many opportunities are moved among the stages and how much revenue generated. All these quotas should be based on Opportunity Sales Process.

ACCESS LINK (APPEXCHANGE)

<https://appexchange.salesforce.com/listingDetail?listingId=a0N30000000qEa0EAE>

SOLUTION

Solution we offered helps client now to:

- Set the User's Quota
- Measure how much revenue generated for each Sales process by Users
- Single view to move Opportunities among stages and Also can see the opportunity movement against the Quota among the stages in Graphical way.

Technologies used: JQuery, JavaScript along with Visualforce & APEX to implement this UI.

RESULTS

Now Client is easily able to move the opportunities stages using different Sales Processes at the same time he is able to see the revenue flow among the stage per user and per Sales Process. He can also assess the performance of the sales people.