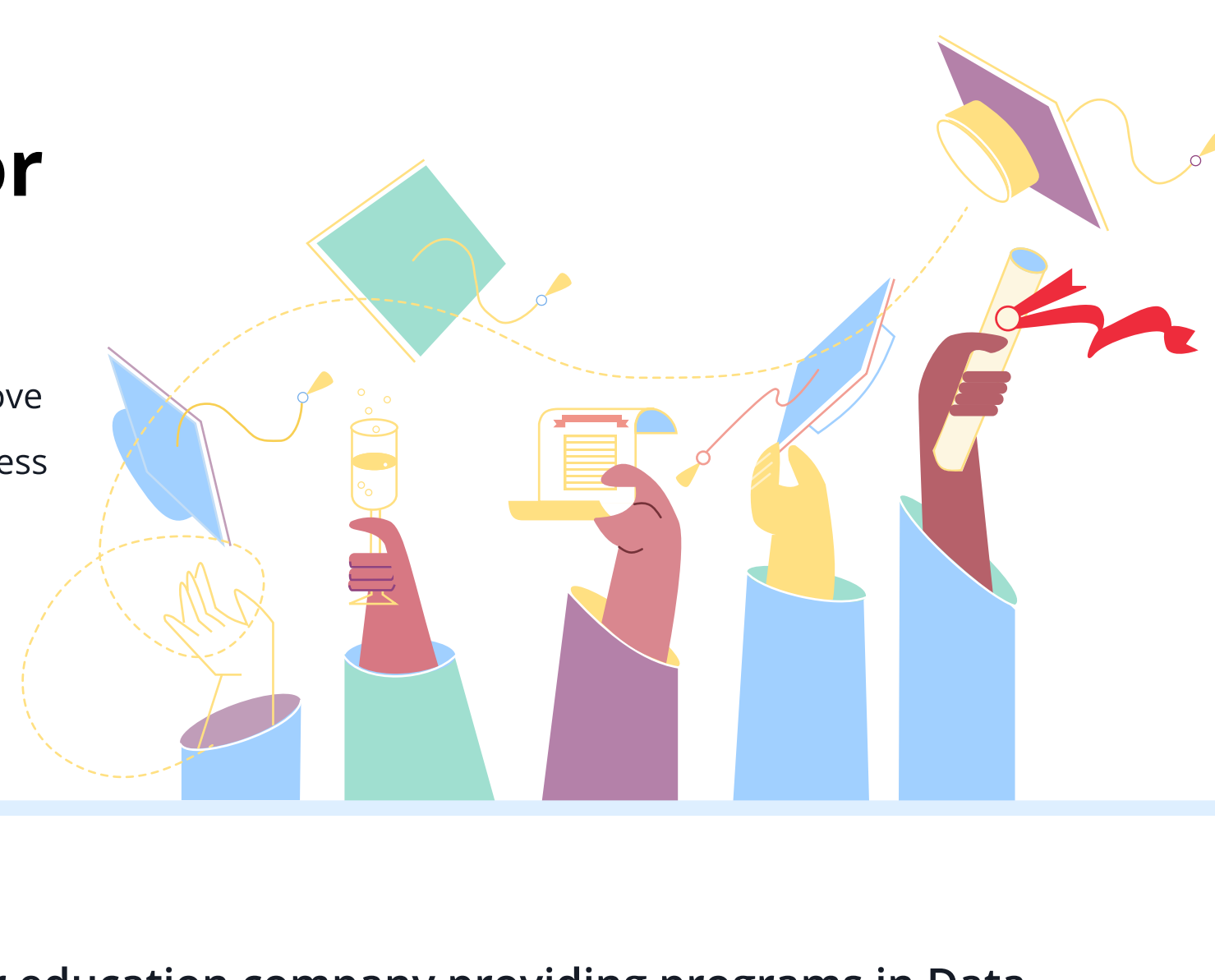
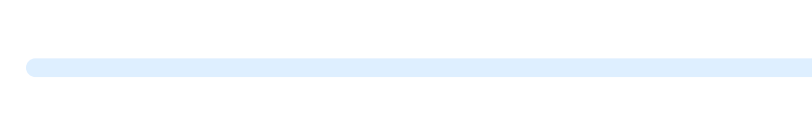


# Calling for a New Way to Monitor Sales Performance for upGrad

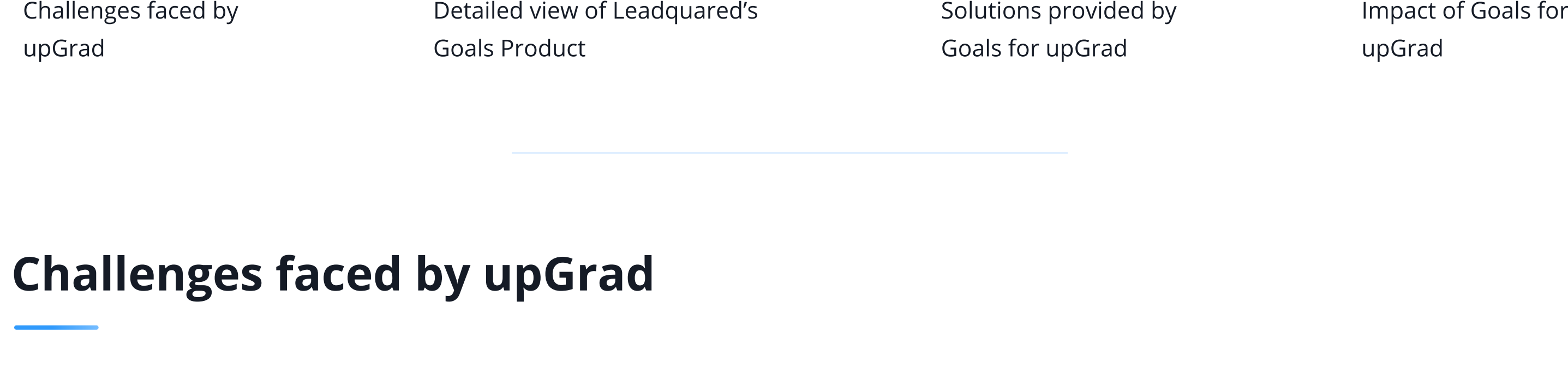
A Case study on how Leadsquared Goals Product helped upGrad improve sales performance monitoring using well-structured configuration process and dashboards



Founded in 2015, upGrad is India's largest online higher education company providing programs in Data Science, Technology, Management and Law, to students, working professionals and enterprises. With an 85% program completion rate, a robust tech platform, an outcome-based learning approach, industry-relevant curriculum, strong mentorship, and placement support, upGrad has established its position as the leader in the Indian education system.

upGrad was facing reporting related challenges, hence tracking and monitoring team members' progress became increasingly difficult. Automating the process was essential to increase sales efficiency by employing faster and simpler working methods.

## We will talk about following in details in this case study



## Challenges faced by upGrad

- 1 Excel Sheet Doesn't Scale**

Managing employees and tracking their progress on excel sheets was hard which decreased sales efficiency.
- 2 Multiple sources of truth**

Struggle to report and consolidate sales performance data.
- 3 High Manual effort**

It's much more difficult to get to desired insights with manual solutions.
- 4 Disintegrated Processes**

Teams were facing improper data flow.
- 5 Strenuous Analysis of Data**

With huge data around the sales process, it was getting difficult for leaders to analyze and utilize them to their advantage.

As quoted by Vertical Head at upGrad ,

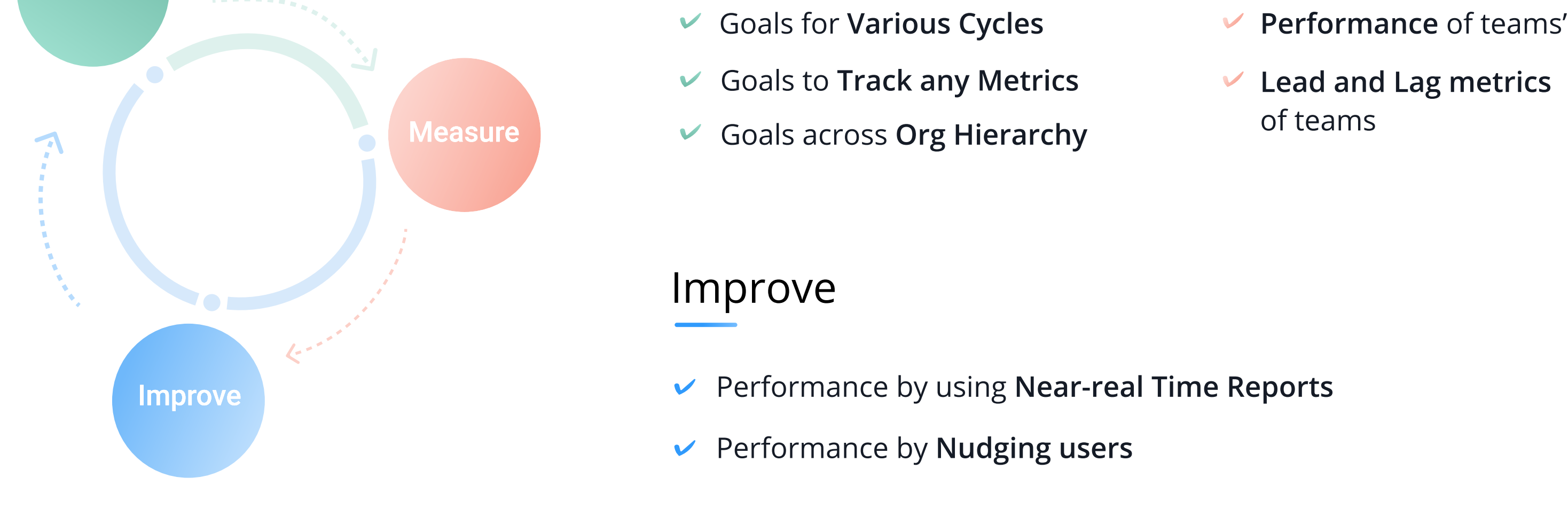
*"Keeping track of our agents conversations, monitoring our teams and evaluation of productivity became tedious as the operations scaled."*

Rohit Katoch, Vertical Head, upGrad

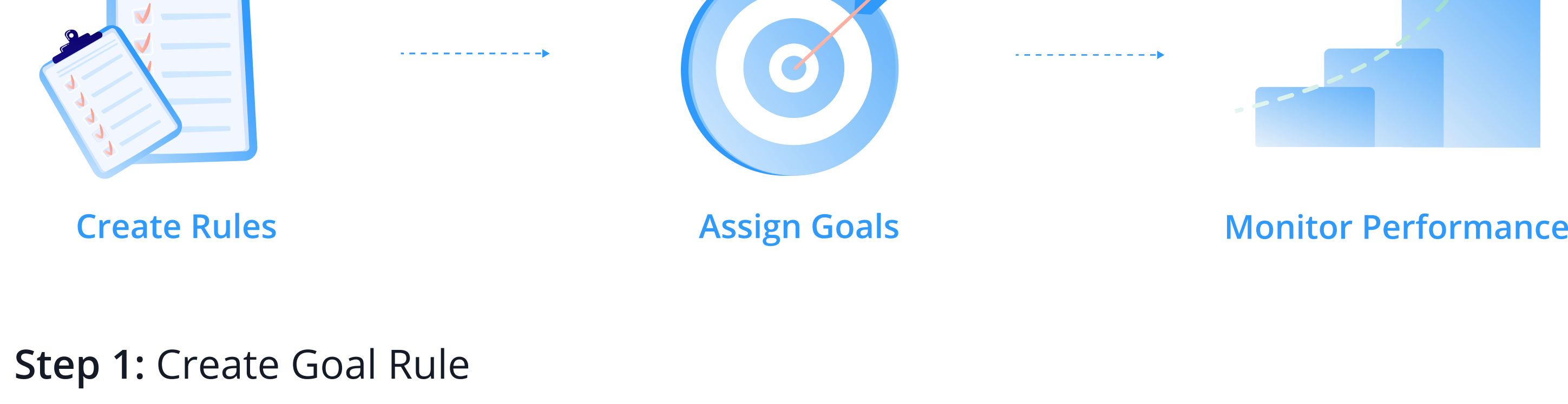
upGrad needed a flexible, user-friendly tool capable of handling complex scenarios. So, they decided to go with Leadsquared's Goals product. It helped them define, measure, and improve numerous metrics that impact the performance of their sales team.

## Goals: Introduction

Leadsquared's Goals help improve critical business metrics by empowering sales leaders to set clear objectives for their sales teams and equipping them with psychological & analytical tools that ensure accomplishments.



## Leadsquared's Goals Process



### Step 1: Create Goal Rule

Various criteria come into play when defining performance metrics for sales teams.

For example, tracking revenue can involve conditions like invoice status, payment date fulfillment date, prospect owner & deal owner, and tracking Phone Calls with a prospect may need to consider factors like call connection status, call duration, and authenticity of the call itself.

Leadsquared's Goals helps you with defining simple or complex metrics effortlessly, which can be used by anyone in the organization. This centralized approach allows tracking metrics accurately and consistently at any scale and across multiple teams.

[← Goal Templates](#)

Interested Leads

What are your Goal Rules?

Goal Rules help you define what to aggregate to measure the achievement, by selecting entities and roll-up fields. Essentially, a template is the sum of all the goal rules created.

Add More Goal Rules

**Goal Rule 1**

Measure Achievement when

Follow Up Call Activity is Created or Updated on Lead

Count

Activity ID field of Follow Up Call Activity

Identify the User by

Activity Owner field of Follow Up Call Activity

Identify the Date by

Created On field of Custom Field Set of Follow Up Call Activity

Conditions

1 condition

**Goal Rule 2**

Measure Achievement when

Lead is Created or Updated

Count

Prospect ID field of Lead

Identify the User by

Created by field of Lead

Identify the Date by

Created On field of Lead

**Goal Rule 3**

Measure Achievement when

In-Person Meeting Activity is Created or Updated on Lead

Count

Activity ID field of Lead In-Person Meeting Activity

Identify the User by

Created by field of Lead

Identify the Date by

Created On field of Lead

Done

Publish Template

### Step 2: Assign Goals to your teams'

Once these metrics are defined, the next important step is to ensure all responsible stakeholders have a well-defined goal to improve these metrics.

Leadsquared's Goals helps managers plan, allocate & update goals to individuals based on their domain expertise, territory, historical performance, and many more factors.

Create Goal

Revenue Target for South

1. Set Attributes 2. Select Users 3. Distribute Goals

Done Publish Goal

Add Goals for Users in Each Cycles

7 Weekly Cycles

# 1 24 Apr 2021 to 30 Apr 2021

Cycle Goal Value 200

User	Email	Region	Goal Percentage	Allocated Goal Value
Reena Tass	tass.reena@lsq.com	South Ind	10 %	20
Krishna Murthy	krishna.3321@lsq.com	South Ind	5 %	10
Jayvardhan Rathod	jayrathod@lsq.com	South Ind	2 %	4
Safna Ismail	safna.ismail@lsq.com	South Ind	5 %	10

March 2021

#1: 14 Mar 2021 - 20 Mar 2021 200

#2: 21 Mar 2021 - 27 Mar 2021 300

#3: 28 Mar 2021 - 3 Apr 2021 500

April 2021

#4: 4 Apr 2021 - 10 Apr 2021 500

#5: 11 Apr 2021 - 17 Apr 2021 900

#6: 18 Apr 2021 - 24 Apr 2021 800

#7: 24 Apr 2021 - 30 Apr 2021 --

Allocated Percentage 44 of 200

Total Allocated Goal Value 44 of 200

Copy current distribution to all cycles & users

### Step 3: Monitor Performance

Finally, with our Achievement Dashboard and Nudges, managers can monitor progress to the tee, and users can stay motivated to accomplish their goals till the last minute.

Goals Managed by Me

Revenue Target for South

4th cycle of the goal is in progress

Edit Unpublish

Achievement updated 5 minutes ago

#4 of 7 Weekly Cycles 66% 66/100 6 Users Remaining 4 Days

4 Apr 2021 - 10 Apr 2021

Filter Search Users

User	Email	City	Department	Achieved (%)	Achieved Value
Nalin Oberoi	Nalin.oberoi@1234.com	Bangalore	Customer Success	86.6%	262 Of 300
Norman Osborn	Norman.sborn@1234.com	Bangalore	Customer Success	72.8%	204 Of 280
Ra's Al Ghul	Ra's.AlGhul@1234.com	Bangalore	Customer Success	55%	26 Of 20
Mark Octavius	Mark.tavious@1234.com	Bangalore	Customer Success	32%	16 Of 50
Ra's Al Ghul	Ra's Al Ghul@1234.com	Bangalore	Customer Success	66%	33 Of 50
Mark Octavius	Mark.tavious@1234.com	Bangalore	Customer Success	15%	3 Of 20

## Solutions provided by Leadsquared Goals

**Setting up daily counselled calls target**  
UpGrad's teams set up a target to measure the number of counselled calls made with customers. After they set the goals in the system, they were able to follow the activity flawlessly and without losing any data.

Leadsquared's Goals helped team members become more accountable and comply with the established processes, making it easier for management to keep track of the leads.

**Setting up weekly sales target**  
Sales being a backbone of any organization and with a huge number of sales teams, sales agents at upGrad post an enormous number of sales activities, it becomes a difficult task to keep track of agents' progress.

Leadsquared's Goals helped teams' at upGrad to analyze the performance data clearly and identify trends that may impact the company's future performance.

**Setting up weekly talktime target**  
Inside Sales Team at upGrad are given a personal quota of talk-time that they need to clock every single day to achieve their targets. Talk-time is a Top of the Funnel metric, which directly impacts the Sales Pipeline and eventually Revenue.

With the help of Leadsquared's Goals, Managers at upGrad were able to monitor and ensure their team achieves talk-time targets daily.

**Setting up FOS count target**  
Face-to-face meeting targets are provided to upGrad sales staff to get to the next meeting, sell/upsell a product, collect feedback, and so on. They were able to define goals for feet-on-the-street sessions using Leadsquared's Goals.

Leadsquared's Goals helped teams at UpGrad to assign and manage targets with ease.

## The Results

- Centralised**

Sales Performance data
- Enhanced**

Workforce Productivity
- Easy**

Examination of trends in performance
- Near Real-Time**

Performance evaluation

upGrad offers its sales reps, sales managers and administrative teams access to the Leadsquared Goals. Reps can view performance charts and detailed information related to their targets. Managers can access these same insights plus look at each rep's performance, prompting them to coach underperformers.

Finally, because data is more transparent and sales reps are now more motivated to perform better, upGrad has more predictable revenues and can streamline its sales teams.

*"We were able to configure all the required targets for our team like how many leads we are getting, what actioning has been done, what is conversion rate, how many leads have been getting by the team w.r.t their target. Being able to configure all different kinds of targets makes goals a very critical feature for us now"*

Rohit Katoch  
Vertical Head, Inside sales

At last, upGrad experienced that transparency brings the departments closer, which has changed the culture for the better. They also feel that Leadsquared's Goals has also had a significant influence on performance. Their employees experience easier decision-making. This is because they are now provided with the needed overview to take fast, data-driven decisions while being able to identify hindrances and obstacles before they land on their desk.

## Want to know more?

Find out how Goals can help your organization

Request a demo