CAPITOL DATA ANALYTICS

IN HOME SALES

SALES REP SCORECARD

One page per rep, filled in every week

REP	TRADE	SALES MANAGER	PERIOD AND REVIEW WEEK

LINE FOR THIS TRADE = AVERAGE NET SALE × YOUR CLOSE RATE LINE × YOUR SIT RATE

DEFINITIONS (WRITE YOURS ONCE)

Sit = rep got in the door. Net = after cancels, counted when the cancel happens. Change orders stay out.

RESULTS: WHAT THE REP DID WITH THE LEADS

NUMBER	FORMULA	MONTH TO DATE	ROLLING 90 DAYS	LINE OR LIMIT	STATUS
Leads issued	Appointments handed to the rep				
Sit rate	Needs assessments ÷ leads issued				
Close rate	Net sales ÷ needs assessments				
Average net sale	Net sale dollars ÷ net sales (no change orders)				
Net sales per lead issued (NSLI)	Net sale dollars ÷ leads issued				
Cancel rate	Cancels in the period ÷ sales in the period				

ACTIVITY: WHAT A MANAGER CAN COACH NOW

NUMBER	FORMULA	MONTH TO DATE	ROLLING 90 DAYS	RULE FOR THE BAND	STATUS
Multi visit rate	Sits that needed a second visit ÷ sits				
Open demos being worked	Sits with no sale and a follow up on the calendar				
Ride alongs logged	Entered after the visit, against the rule for the band				

☐ **ON PLAN**
Rolling 90 day NSLI at or above the line. First in line for the next lead, up to the weekly ceiling.

☐ **COACH**
80% to 99% of the line. Ride alongs on the schedule for this band; find which rate is short.

☐ **ACT**
Under 80% of the line. More ride alongs and a conversation. The owner and sales manager decide what happens next.

NEXT STEP (ONE SENTENCE)

SET IT UP ONCE, THEN FILL IT IN EVERY WEEK

1
Pull 12 months per rep: issued, sits, sales, cancels, net dollars.

2
Write your definitions and tag every rep with a trade.

3
Set the line per trade and draw the three bands.

4
Set each rep's weekly floor and ceiling from last year.

5
Review Tuesday. Next lead by 90 day NSLI, under the ceiling.

6
Log ride alongs after each visit. Decide at month end.