

Sales Management Dashboard - T52W Avg Charts to Manage "What Causes Sales"

UPDATED -- 2010 <--- EXAMPLE: SEE below to BUY IT!

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--> PAGE DOWN 2-3 PAGES FOR INSTRUCTIONS FOR USING ANY T52W/T12M CHART & FOR SPECIFICS ABOUT THIS 12-CHART TOOL!

ABC Company: Sales Management Statistics T52W Avg Charts 12-Charts using Trailing 52-week Charts to Manage Sales on a Weekly Basis



Chart 1: "A" Bids \$ Avg per Week

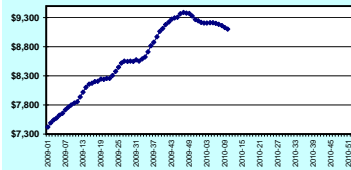


Chart 2: "A" Bids # Avg per Week

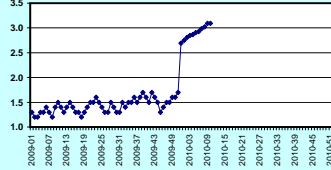


Chart 3: "A" Bids \$/# Avg per Week

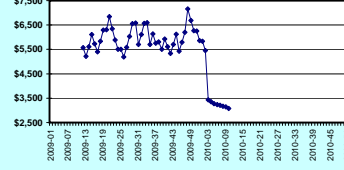


Chart 4: "B" Bids \$ Avg per Week

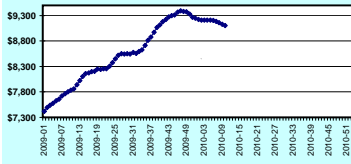


Chart 5: "B" Bids # Avg per Week

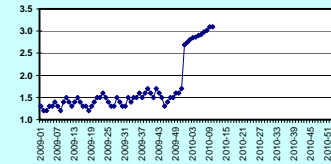


Chart 6: "B" Bids \$/# Avg per Week

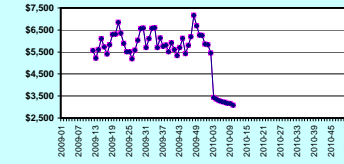
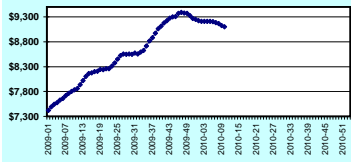
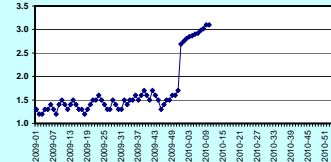


Chart 7: "C" Bids \$ Avg per Week



Charts 8: "C" Bids # Avg per Week



Charts 9: "C" Bids \$/# Avg per Week

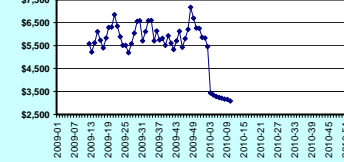
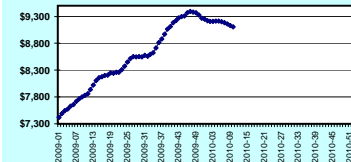
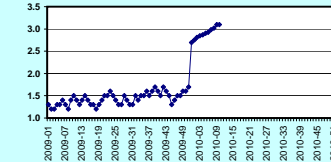


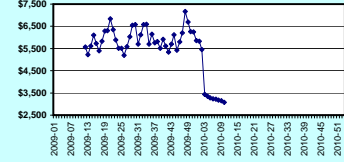
Chart 10: "D" Bids \$ Avg per Week



Charts 11: "D" Bids # Avg per Week



Charts 12: "D" Bids \$/# Avg per Week



QUICK-START for using this 12-chart tool - VERY IMPORTANT TO UTILIZE THE FOLLOWING!

- 1 - Click the data tab below to enter your data for each chart.
- 2 - Enter data in green & yellow cells, pink/red auto-calculate, but do copy logic + monthly.
- 3 - Double-check the logic in each red-headed column to be what you want (see pg 5 below).
- 4 - Edit the headings of the green & red columns as well as the chart titles.
- 5 - Re-scale your charts (see the section on re-scaling on the fifth page below).
- 6 - Re-set the Print Area to be just the pages you want to print each time.
- 7 - Be sure to SAVE your changes at each stage of working with this dashboard.
- 8 - Delete extraneous "ceo tools" descriptions if you like (add your company name).
- 9 - Use this dashboard for tracking any number of different key indicator applications

BUY IT! To buy this tool in easy to use Excel Format, go to: www.ceotools.com and use Visa or M/C. Only \$58.00 in ready-to-use Excel format. Download link emailed immediately to your inbox!

This 12-Chart Tool is from the author of: CEO TOOLS...for EVERY Manager's Success!
Visit us at www.ceotools.com for more tools and information on the hot-selling book/CD.
Contact Kraig Kramers at 770-389-8511 or email kwker@mindspring.com, please!



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12-Charts T52W Tool: Manage up to 12 Key Indicators with T52W Charts

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HOW TO USE THIS EXTRAORDINARY MANAGEMENT TOOL FOR UP TO 12 KEY INDICATORS:

1. Understand how to use Trailing 12 Month (T12M) Charts by visiting www.ceotools.com website and getting the free download of T12M Charts (click the refresh button until T12M appears in the free tools box on the right of the homepage, then request that tool and it will be in your email in-basket instantly). Even better, read all about T12M Charts in Kraig Kramers' book (pages 86 - 97): **"CEO Tools: the Nuts 'n Bolts of Business for Every Manager's Success."**
2. To prepare your 12-Charts on one page, either enter or import your data into the appropriate data fields (green headings) under the "Data" tab at the bottom of your screen. If you plan to use the 12 charts shown above, you're almost done once you've entered your data. All you need to do to complete your chart page is to re-scale each of the four charts and type the name of your business at the top. To re-scale the charts, double-click your cursor in the vertical scale on the left side of the chart. Then select "Scale" at the top of the dropdown. Enter the minimum and maximum amounts for your data and click "okay." Save your chart-tool under the name you choose.
3. If you wish to change the charts to reflect other information, simply change the titling to suit. **Even better, go to www.ceotools.com to check out the GREAT 4-Chart Tool and 5-Charts Ultimate Tool/Dashbord (also known as "What Causes Sales" tool) for each indicator!**
4. With that approach you can catapult your business to higher long-term profits by managing the things that drive profit, namely Billings \$, Gross Margin-%, and Operating Expenses. Figure out what drives billings (i.e., "what causes sales" page 92 of CEO Tools), and MANAGE THAT! Work on gross margin improvement through price, mix and volume enhancements. Finally, control operating expenses to be in line with gross margins, especially as to timing of expense control. You'll find you react sooner to cut expenses, and faster to accelerate sales, by using these charts.
5. You can also add Bookings \$, Collection \$, and Backlog \$ to your dashboard since you have a total of 12 charts to customize. You'll be managing everything that's important on a single page of 12 charts. And, the ultimate dashboard of all is the MeasureUp Dashboard, also at www.ceotoolos.com as a downloadable tool -- the chief executive and the financial officer will be in complete synch with the key indicators needed to make the business grow consistently and profitably within the cash/credit constraints of the real world!



The 12-Charts Tool is from the author of: [CEO TOOLS...for EVERY Manager's Success!](#)
Visit us at www.ceotools.com for more tools and information on the hot-selling book/CD.
Contact Kraig Kramers at 770-389-8511 or email kwker@mindspring.com, please!



Kraig's Chart Tips

- 1. Line graphs, never bar charts, seldom pie.**
- 2. One graph per chart...stack charts vertically if you want comparatives!**
- 3. Two years of history plus the year we're now in and tracking.**
- 4. Re-scale to fill up vertical space (see Page 7 aka Fix Up Your Chart!).**
- 5. T12M for one variable vs. 12MMA for two (% , ratio, index).**
- 6. Right chart time frequency: T12M, T4Q, T52W, and/or T365D.**
- 7. Power-Tools: 4-Charts, 5-Charts, 8-Charts @ www.ceotools.com.**
- 8. Only T12M-type charts; those ordinary and YTD charts lie!**
- 9. You can track ANYTHING with T12M and related charts.**
- 10. Use to forecast budget or projections – and track actuals against.**
- 11. No trailing 3-month, 6-month, or 18-month charts: they'll bite you!**
- 12. Charts should have white background and big data point markers along the lines of your graphs.**
- 13. Eventually, we'll talk about 3-over-3 and 12-over-12 charts (also known as rate-of-change charts), but please understand T12Ms thoroughly first, else confusion will probably result! Yes, I do love those RoC charts, too!**
- 14. Try Dashboards: visit www.ceotools.com, click on New Tools Catalog, then scroll down to various dashboards on many business topics!**

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FIX UP YOUR CHARTS!

From CEO Tools at www.ceotools.com

Many users have complained that Microsoft Excel's charting is not user-friendly and doesn't "work." This forced us to develop some information on using, applying, and overcoming Excel's charting shortcomings. Excel can indeed work, and we're all stuck with it, so here are a few tips, tools, and ideas based on extensive use of Excel's XP versions...other versions and operating environments before and after XP (e.g., 95, 2000, Vista, Seven) contain many of the same challenges, inconveniently re-packaged by Microsoft into even more challenging apps. Please use this guide to overcome these, but also please adapt our approach to different Excel versions. These tips also work for most charts in other software.

How to Re-Scale Your Charts: It is necessary to re-scale your chart when you first enter your data in any Trailing 12-Month (T12M) Chart or 12-Month Moving Average (12MMA), dashboard, or for that matter, any ordinary chart (it's just basic Excel 101A), and then every once in a while thereafter. The idea is to get your graph on each chart to "fill up" the vertical space of the chart border, so that your eye can most easily see ups and downs over the months. To re-scale, right-click in the vertical (left-hand, Y-axis) of each chart to get a "Format Axis" dropdown; then just select "Options" or "Format Axis" and you should see where you can select "Scale." Do select Scale and then change the Min, Max, Major & Minor Units, as well as the X-Axis Cross Point to be compatible with the full range of your calculated or entered numbers being charted. Again, the idea is to run your graph from your smallest number to the largest from that column (take a look at how we did it on T12M Charts at www.ceotools.com). Save after re-scaling!

Another thought: you may need to re-scale or change the horizontal axis to show the right months. At www.ceotools.com we re-set all charts each year so that you can download them with the upcoming year ready-to-go. If you want to do this yourself, just follow the same logic presented for the vertical axis to change your time (horizontal) axis.

How to Structure Your Charts: We like our charts to have two years of history plus the year we're currently tracking (currently in). What this does is allow you to see an overall trend, not just this year versus last. But at the same time, you don't want more than two years of history, else your chart might be scaled so severely that you don't see the fluctuations in current months that you need to see. So, let's say you want to set up a chart to track your sales each month during 2010 – you'll want to show each month of actual sales for 2008 and 2009 with the 12 months of 2010 on the chart with no numbers in them as you start the year. Take a quick look at the free PDF of the T12M Chart at www.ceotools.com to see an example of this.

How to Update Your T12M or 12MMA Charts Each Month: As you enter your regular monthly number each month into the data column for an Excel chart, it will be necessary to *copy-paste* the logic for calculating that month's *T12M* or *12MMA number* down one row each month as you enter the actual new monthly number.