

# Track Goals vs. Actuals

Ledgeview  
partners CRM FOR OIL & GAS

NATIONWIDE-  
PREFERRED  
SOLUTION

## Are you tracking your goals vs. actuals, or do you even have a way (or known reason) to?

When you integrate your accounting (back office) system with CRM (with the right partner to help) and set goals within the solution, you can join the group of Lubricant Marketers that are using CRM to track Goals vs. Actuals to create growth.

### CRM FOR OIL & GAS:

- **TAKE THE GUESS WORK OUT OF TRACKING YOUR GOALS VS. ACTUALS**

Though you may have an idea in your head, CRM for Oil & Gas will provide you the clear information you need to know where you actually are with meeting end-of-year quotas. This is crucial for Sales Managers and salespeople alike to have access to, and gives them more motivation to focus on the right opportunities.

- **MANAGE YOUR SALES PROCESS & PIPELINE MORE EFFECTIVELY**

With CRM for Oil & Gas, Lubricant Marketers can adjust their analyzation settings according to Gross Profit or Volume. The function works the same, but uses different numbers dependent upon the user's selection since the system is configurable to meet individual organizational needs. Tracking Goals vs. Actuals helps to create accountability between sales managers and reps, which leads to more efficient meetings and collaboration.

- **GOAL DASHBOARDS HELP YOU REACH YOUR GOALS**

Within a Goal Dashboard, Lubricant Marketers can compare Goals vs. Actuals according to brand or product category, whichever is their preference. Lubricant Marketers can also track how they're doing on growing current business (a la "Share of Wallet"), or Goals with new customers. Sales Managers in the Oil & Gas Industry especially love this feature for helping to keep their team on task to reaching their individual and organizational goals.

"There were lost sales we didn't even know about once we implemented CRM for Oil & Gas."

**GAUBERT OIL**

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DEMO**