Reports Overview

ClickPoint Lead Manager provides a reporting engine that feeds three unique report types that will provide transparency critical to the alignment of your marketing and sales team. Each type of reporting solution has a very specific purpose, designed to improve your sales culture by providing real-time results that motivate teams, provide accountability, and allow for collaboration.

Scoreboards – Culture

To elevate your sales culture, you must first reward the activities you want to see in your sales team. With scoreboards, sales metrics become goals and milestones the whole team can rally around. Once you have decided which metrics matter most, Scoreboards will visually do the work for you. The Scoreboards are custom to display the metrics that matter most to your sales success. The metrics displayed on the Scoreboard will help drive not only a cultural shift in your sales team but drive user adoption as well.


- Create a new sales culture, driven by shared results

- Real-time results appointments, dials, won deals, and contact rate

- Set custom statuses for the key sales milestones that are unique to your company

- Ability to set any time range to reward daily, weekly, or monthly goals

Dashboards – Collaboration

Much like Scoreboards, our custom dashboards allow you to create visual tiles that help you understand in real-time how your lead sources and salespeople are performing. Dashboards are designed to help managers share key metrics with anyone in the company. You can create shared dashboards for multiple branch locations or teams within a branch.

- Align your team with shared sales metrics and compete with other branch locations

- Real-time, configurable tiles that show salesperson and lead source performance

- Ability to create different time ranges, tile size, and sales unique metrics
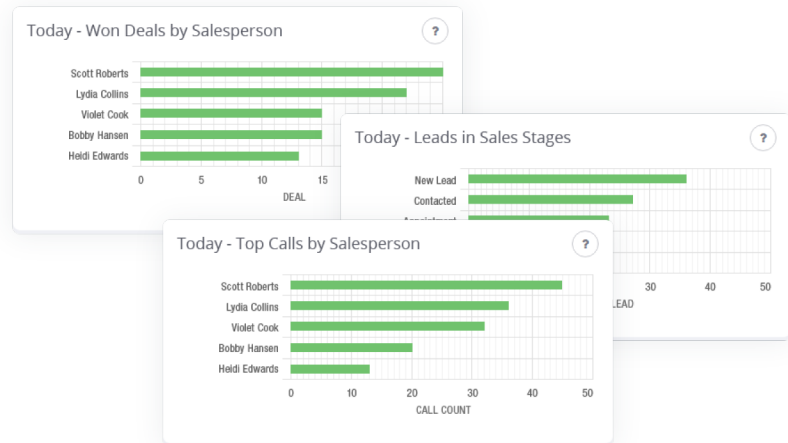
Configurable Reports – Analyze Lead Source and User Performance

Out of the box reports built on over a decade of inside sales and call center knowledge. These reports are designed to help you analyze your sales and marketing efforts. These reports not only help you identify problems but also opportunities.

- Highly configurable out of the box reports built on years of industry experience

- Actionable insights into lead source and salesperson performance

- Respond to key metrics like: Contact to Close, Contact Time, Lead Penetration, Call Center Gaps, Distribution Performance, and Campaign Performance