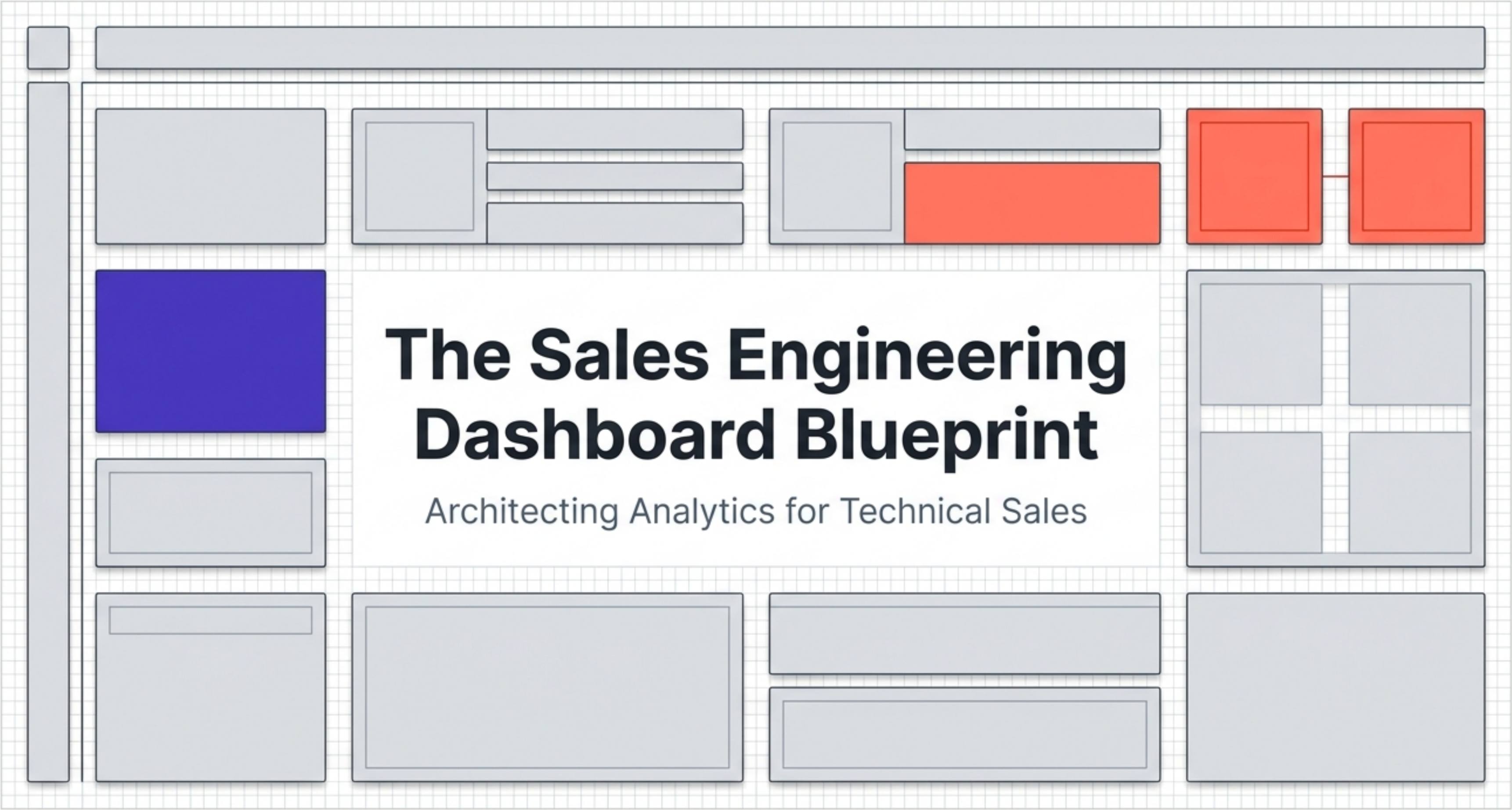
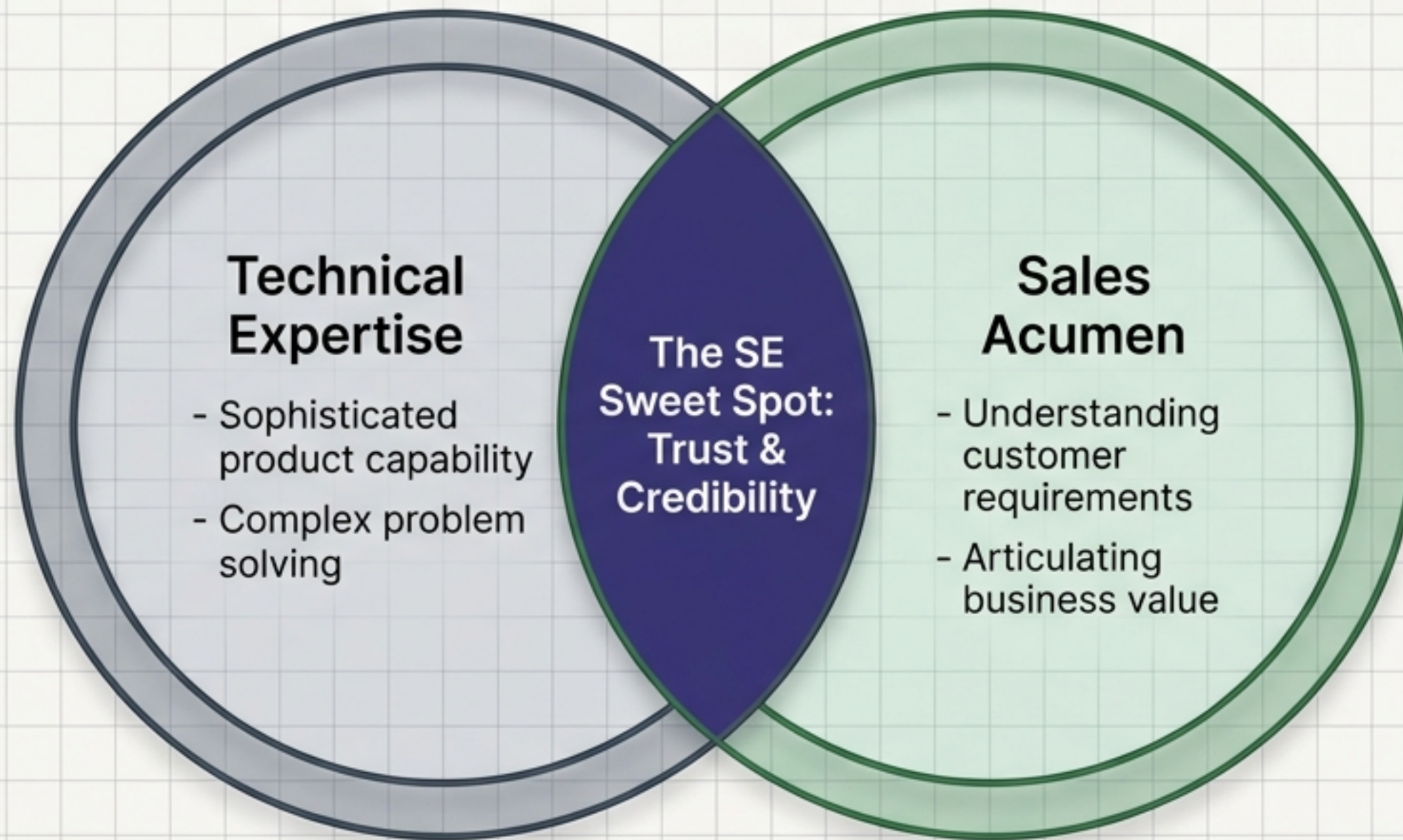




# The Sales Engineering Dashboard Blueprint

Architecting Analytics for Technical Sales

# The SE Value Equation requires specialized monitoring.

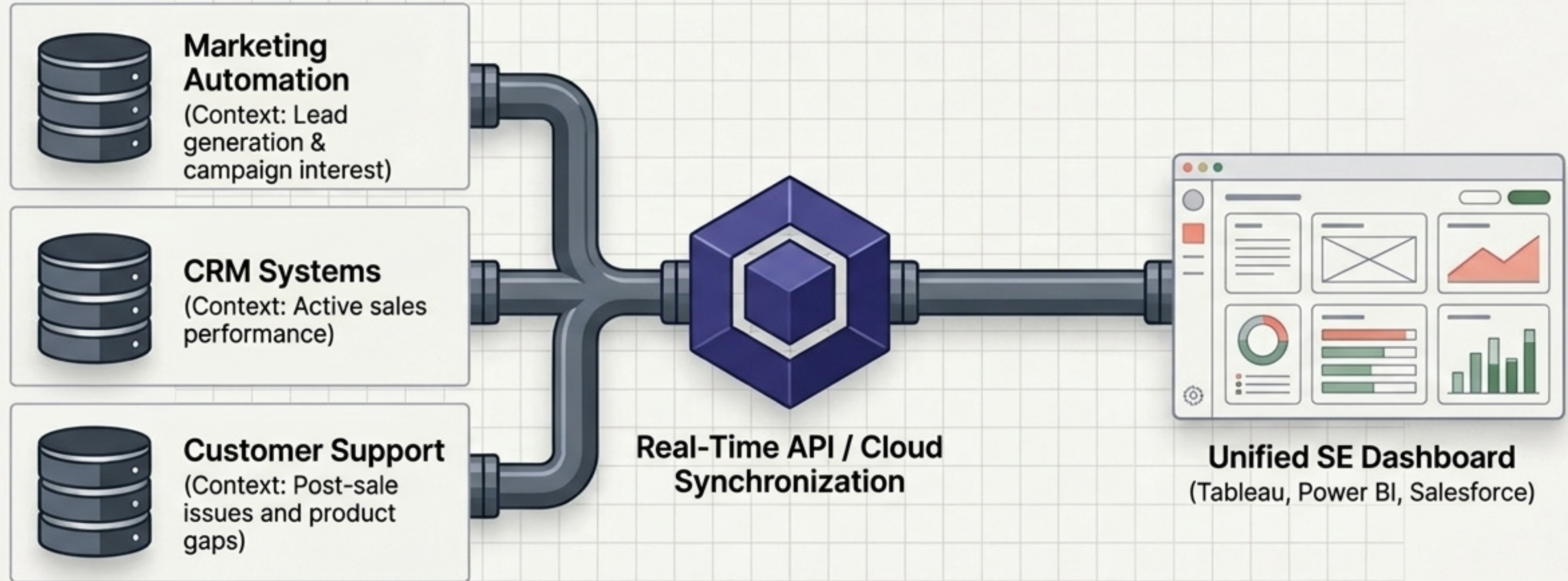


This dual capability drives long-term relationships, repeat business, and referrals—requiring a unique set of analytical lenses beyond standard pipeline metrics.

# The Core Metrics Matrix balances quality with velocity.

| Effectiveness (Quality)                                                                                                                                                                                                                                               | Efficiency (Velocity & Scale)                                                                                                                                                                                                                                                                  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <div></div> <div><b>Conversion Rate</b><br/>Percentage of leads successfully closed.</div> <div><i>Why it matters: Proves the SE's ability to address core customer needs.</i></div> | <div></div> <div><b>Average Deal Size</b><br/>Financial impact of technical intervention.</div> <div><i>Why it matters: Evaluates if SE strategies yield profitable outcomes.</i></div>                     |
| <div></div> <div><b>Customer Feedback Scores</b><br/>CSAT throughout the sales cycle.</div> <div><i>Why it matters: Measures expectation management and client trust.</i></div>    | <div></div> <div><b>Time Spent per Stage</b><br/>Duration of demos and follow-ups.</div> <div><i>Why it matters: Identifies process bottlenecks, like over-investing time in unqualified demos.</i></div> |

# Holistic monitoring requires eliminating data blind spots.



Connecting disparate data points reveals the complete customer lifecycle—from initial marketing contact through post-sale support.

# Anatomy of a high-adoption UI.

## Color Coding

Visualizing target vs. actual performance to immediately identify areas requiring attention.

## Clutter-Free Layout

Intuitive, simplified navigation prioritizing clarity over data density.

## Drill-Down Interactivity

Clicking high-level metrics reveals deeper contextual layers without overwhelming the primary interface.

## Responsive Formatting

Accessible across tablets and smartphones for Sales Engineers operating on the go.



# One underlying dataset, customized through role-specific lenses.

## The SE Practitioner View

**Focus:** Tactical execution and active pipeline.



- Lead engagement scores
- Individual conversion rates
- Active stage bottlenecks

**Goal:** Quick decision-making for daily prospect interactions.

## The Management View

**Focus:** Strategic oversight and resource allocation.



- Overall revenue trends
- Aggregate team performance
- Historical comparisons

**Goal:** Evaluating financial impact and team capacity.

Personalized views foster data ownership and encourage proactive analysis across all levels.

# The Proactive Engine transforms passive data into immediate action.

## Workflow Stream 1

**Trigger:** Sudden 15% drop in product demo requests



**Automated Alert:**  
Real-time notification to the SE team



**Human Action:** Investigate market condition shifts or competitive actions

## Workflow Stream 2

**Trigger:** Spike in customer support tickets post-sale

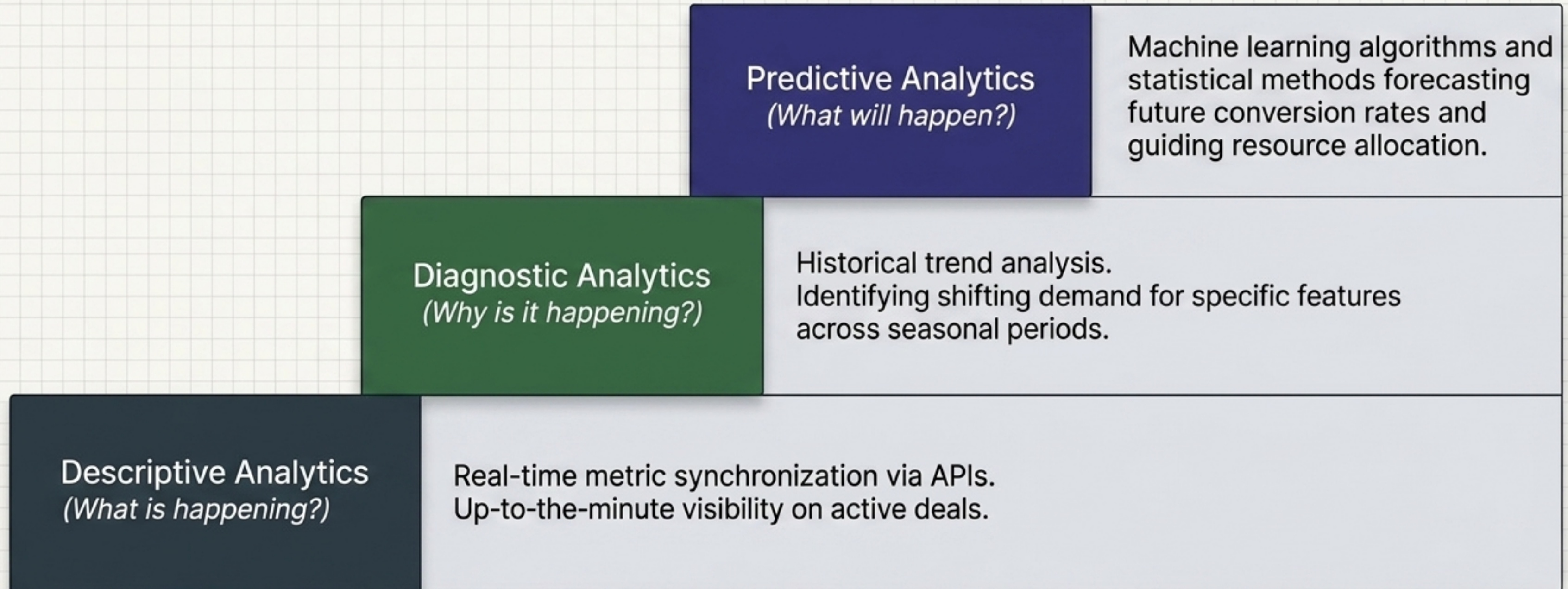


**Automated Alert:**  
Notification routed to the original SE

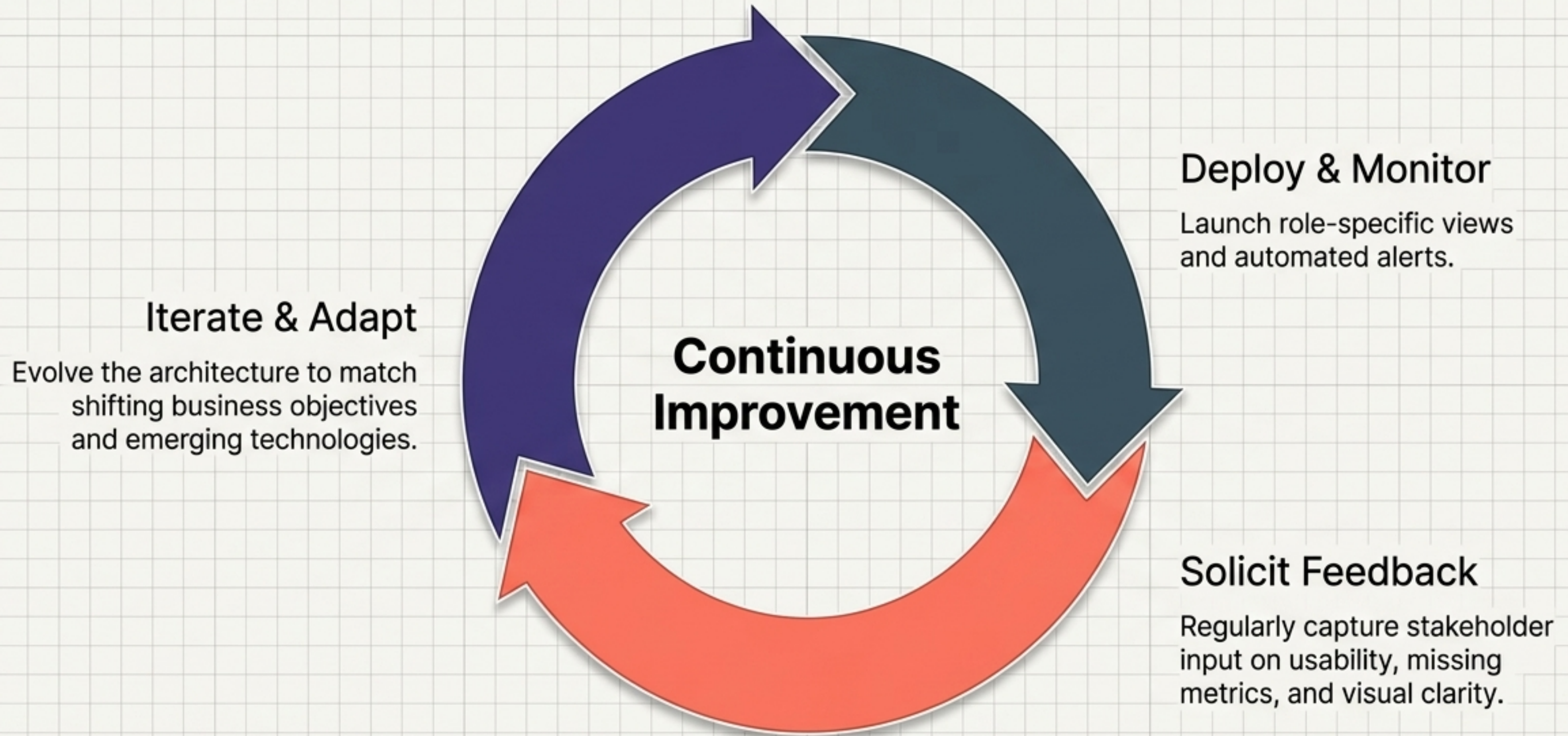


**Human Action:** Proactively address implementation gaps and salvage client satisfaction

# Evolving from operational hindsight to strategic foresight.



# Dashboards are living products, not static documents.



# The SE Dashboard Execution Checklist

## Foundation (Metrics)

- ✓ Conversion Rate
- ✓ Average Deal Size
- ✓ Time per Stage
- ✓ CSAT Scores

## Architecture (Data)

- ✓ Integrate CRM, Marketing, Support
- ✓ Enable Real-Time APIs
- ✓ Deploy UI (Tableau/Power BI/Salesforce)

## Design (UI)

- ✓ Role-Specific Views
- ✓ Color Coded Targets
- ✓ Drill-Down Interactivity

## Action (Workflows)

- ✓ Automate KPI Alerts
- ✓ Track Historical Trends
- ✓ Iterate via Feedback Loop