

WITH AMANDA RICHARDS  
MONDAY NOVEMBER 16, 2020

# Daily Bite Size Training

Topic:  
Goal Management



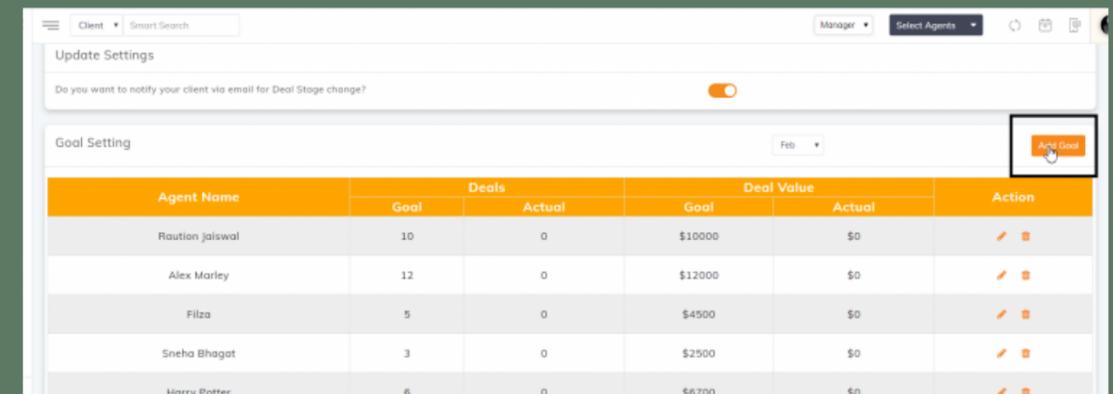
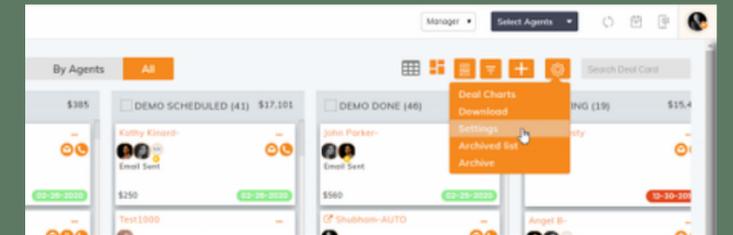
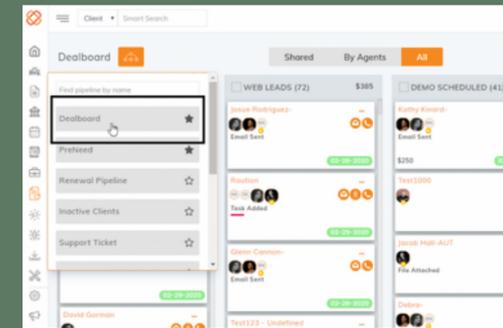
**Purpose of  
Goal  
Settings**

# Goal Management

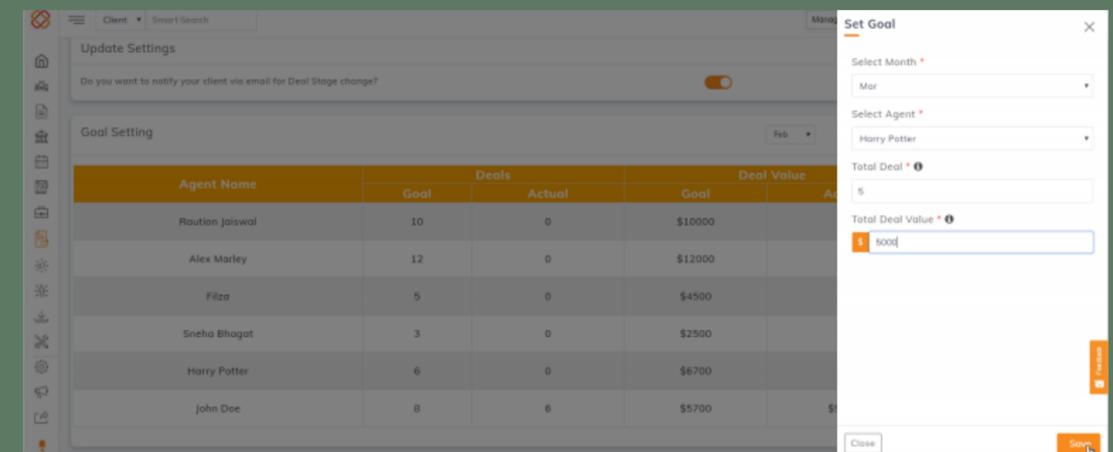
- USE & DEVELOP YOUR EMPLOYEES' TALENT, SKILLS, AND EXPERIENCE
- HELP YOUR ORGANIZATION MEET ITS OVERALL GOALS

# How to set goals

1. Login in with the manager/admin account and then go to the Pipeline Manager
2. Select the board for which you want to set the goals for
3. Click on the Settings option
4. Click on the Add Goal button and fill in the required details



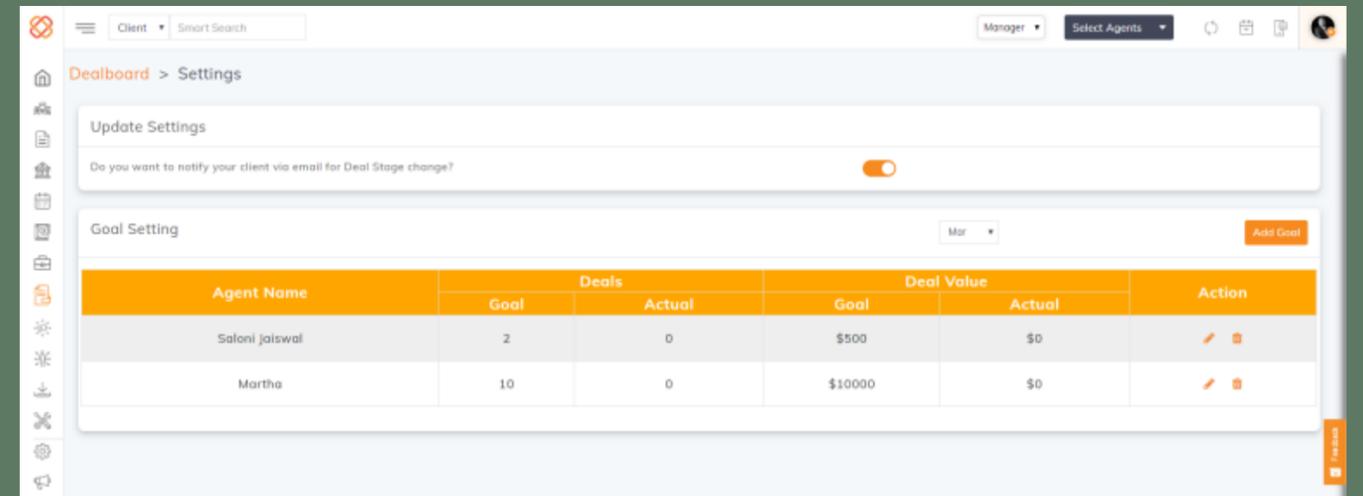
Agent Name	Deals		Deal Value		Action
	Goal	Actual	Goal	Actual	
Raution jaiswal	10	0	\$10000	\$0	 
Alex Marley	12	0	\$12000	\$0	 
Filza	5	0	\$4500	\$0	 
Sneha Bhagat	3	0	\$2500	\$0	 
Harry Potter	6	0	\$6700	\$0	 



# How to set goals

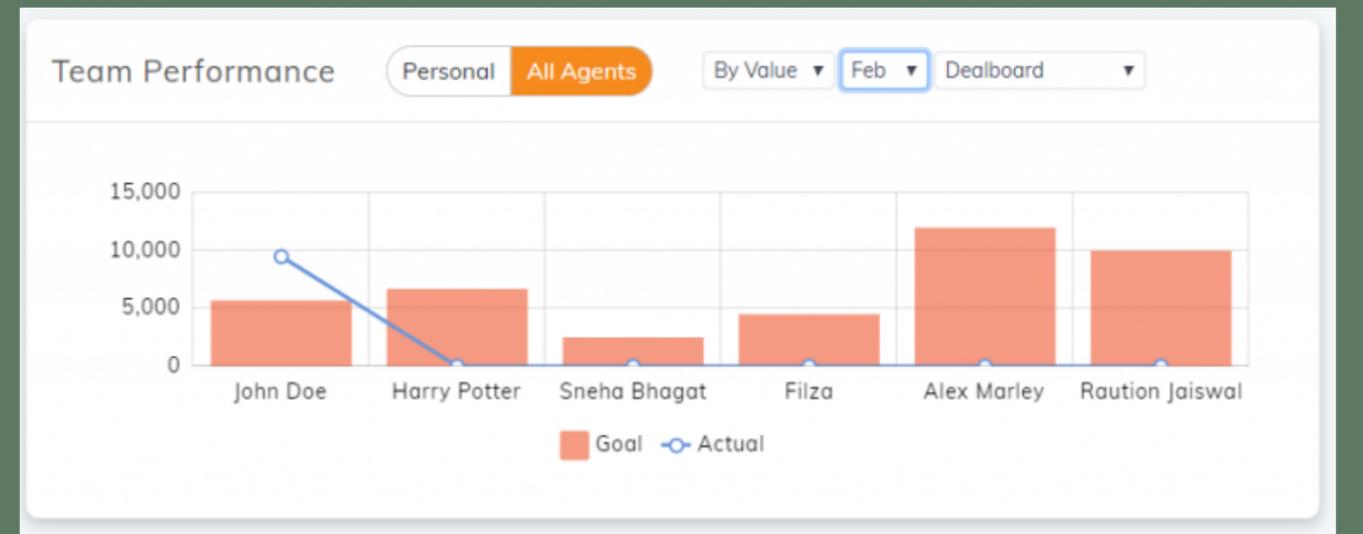
1. Add as many agents as you want. You will also be able to edit or delete an assigned goal for a particular agent
2. After your goal is set, you can keep a track of the progress made by the agents from the widget "Team Performance" on the dashboard.

- Filter goals by month, different pipeline, or by value
- View your personal goal progress by switching to Personal



The screenshot shows the 'Dealboard > Settings' page. Under the 'Goal Setting' section, there is a table with columns for Agent Name, Deals (Goal, Actual), Deal Value (Goal, Actual), and Action. The table contains two rows of data for agents Saloni jaiswal and Martha.

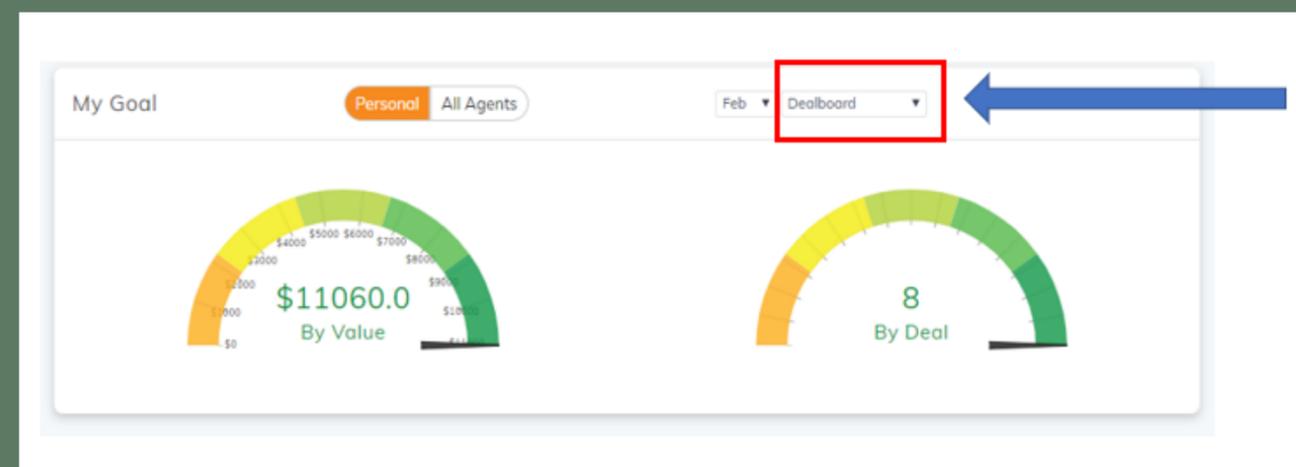
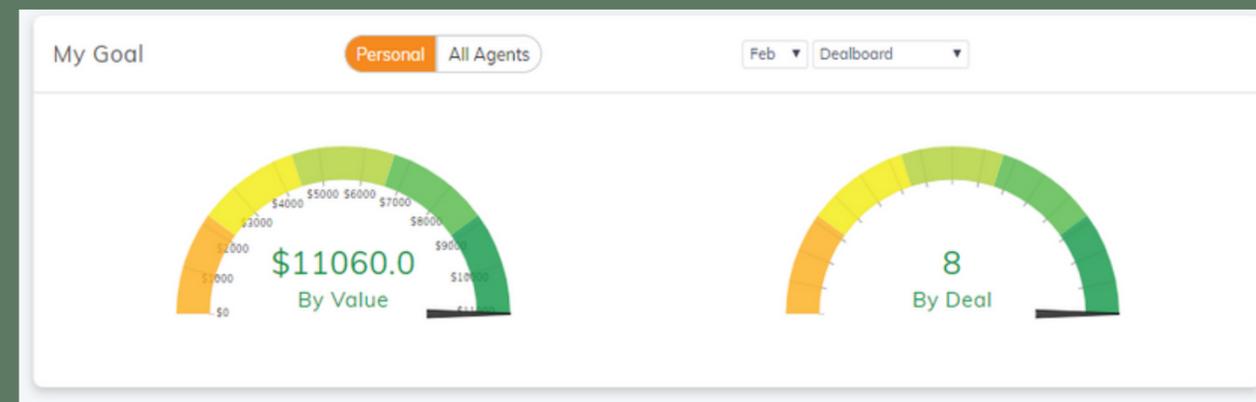
Agent Name	Deals		Deal Value		Action
	Goal	Actual	Goal	Actual	
Saloni jaiswal	2	0	\$500	\$0	 
Martha	10	0	\$10000	\$0	 



# Goal Management for Agents

Agents can track goals to stay on target

1. Go to my Goal widget on your Dashboard and follow your progress
2. Click on the drop-down to choose the deal board for which you want to see your goals



# THANK YOU!

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