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





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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

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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





My Goal

THANK YOU!

To learn more please visit <u>Knowledge base</u>

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