

# 5 Essential Simpleview CRM Reports to Fuel Smarter Sales Teams

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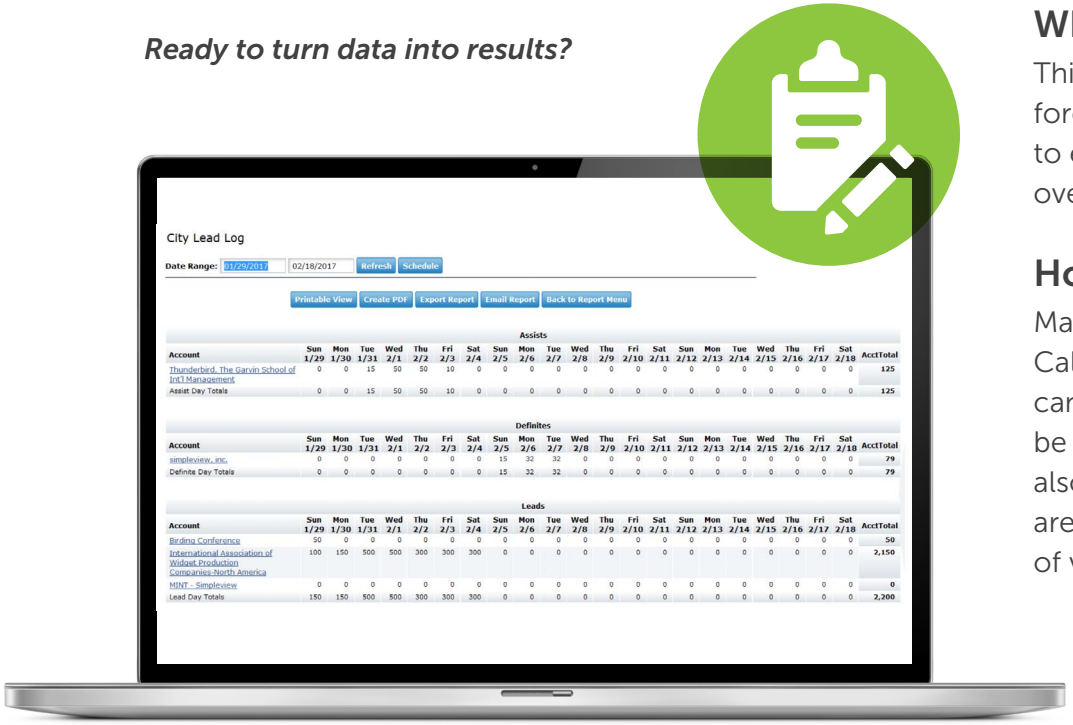
In the dynamic world of destination sales, comprehensive data is crucial for understanding the health of your pipeline and making informed decisions. Simpleview CRM gives you the power to distill your data into actionable reports.

**We've pulled together five of the most common reports that DMOs around the world use to develop a holistic view of sales activities so you can start selling smarter.**

***Ready to turn data into results?***




# City Lead Log Report

## What is the report?

**The City Lead Log provides daily insights into room block data for leads in "Definite," "Assist," and "Lead" statuses.** It details bookings by hotel or property so you can monitor room capacity effectively.

## Why does it matter?

This report is crucial for strategic planning. It helps you forecast busy periods and communicate with local businesses to ensure they are prepared for visitor surges — enhancing the overall visitor experience and optimizing local operations.

## How should you use it?

Many DMOs make this report and the Definite Convention Calendar report available on the client portal so restaurants can schedule staff according to which nights are projected to be busy. If you don't want to post the report publicly, you can also send it to select businesses and partners in the area to alert them to a potential influx of visitors.

# Lead Progress Report

## What is the report?

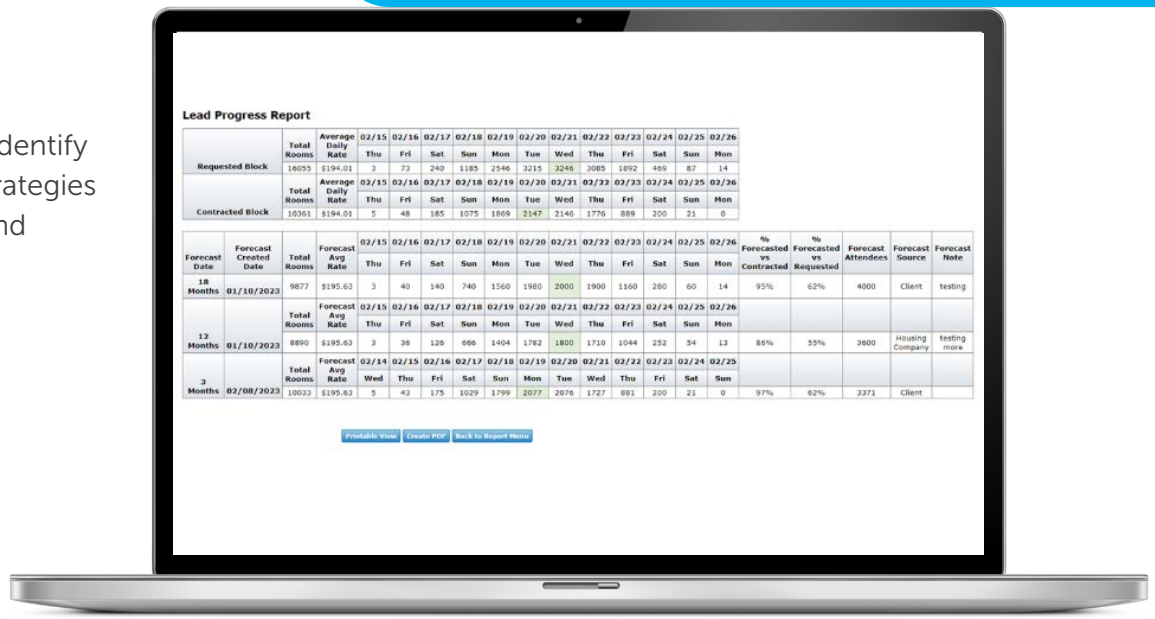
The Lead Progress report provides a historical view of a lead's attendee and room block information. It displays forecast data in chronological order, highlighting peak attendee numbers for easy comparison.

## Why does it matter?

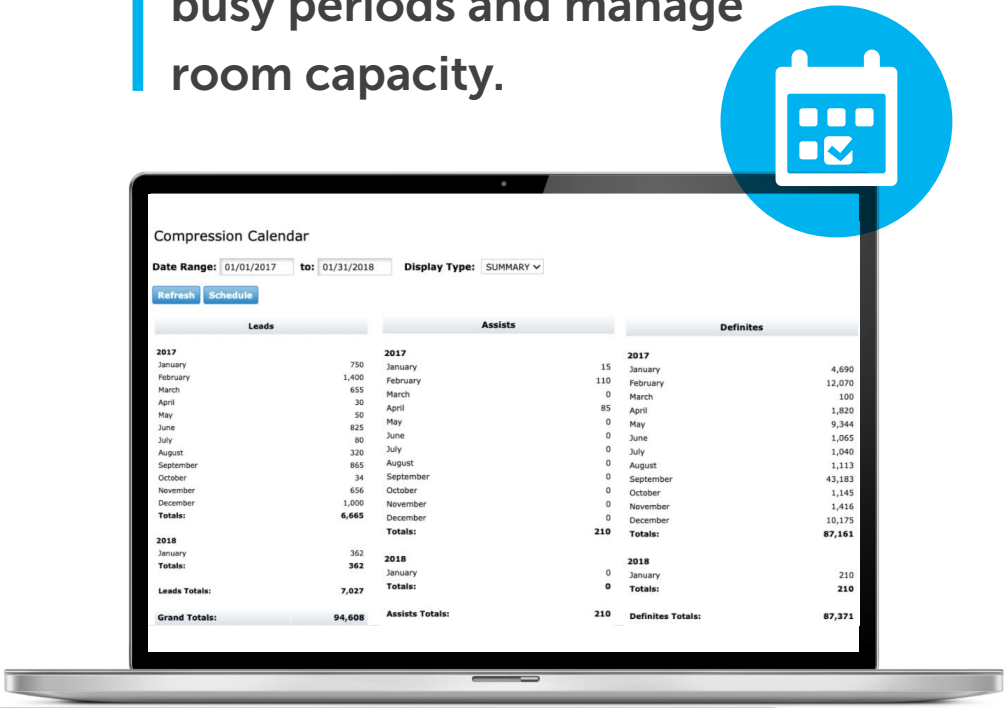
This report is essential for tracking the evolution of a lead's data, identifying peak values, and comparing forecasts to actual pickups. It offers valuable insights into the evolution of a lead over time. By tracking attendee numbers and comparing forecasts, you can identify trends, measure progress, and make data-driven decisions.

## How should you use it?

Use this to compare historical attendee values and identify peak periods to refine future forecasts and adjust strategies accordingly, ensuring optimal resource allocation and better planning.



## Use this report to forecast busy periods and manage room capacity.




# Compression Calendar Report

## What is the report?

The Compression Calendar report provides detailed insights into your booking volume for specific date ranges. It breaks down leads into statuses and shows the rooms booked for each night, allowing you to monitor room capacity effectively.

## Why does it matter?

Knowing your room capacity during peak and slow times is essential for managing bookings and identifying opportunities. By understanding your room limits, you can pinpoint overbooked nights, prioritize leads, and recognize periods for strategic prospecting or promotional offers. This information empowers you to optimize your booking strategy, address potential issues, and maximize revenue.

## How should you use it?

Use this report to forecast busy periods and manage room capacity. Schedule it monthly to compare past and current data, helping you make smarter decisions. Share insights with hotels to coordinate efforts and optimize resource allocation for maximum efficiency.

# Leads by User Report

## What is the report?

The Leads by User report shows leads updated within a specific date range, categorized by status so you can see which leads have turned “definite” and review detailed information on meeting dates, attendees, total rooms, and economic value.

## Why does it matter?

This report tracks your sales team’s performance. It helps you monitor lead conversions, understand the economic impact of your efforts, and ensure that all leads are progressing as expected.

## How should you use it?

Use this report to filter and review updated leads by status and date range. Refresh the report to get up-to-date insights on your team’s performance, identify successful strategies, and address any issues promptly. This enables you to maintain a clear overview of your sales pipeline and optimize your sales efforts.




**Use this report to filter and review updated leads by status and date range.**

# Lost or Cancelled Leads Report

## What is the report?

The Lost or Cancelled Leads Report tracks all leads with a lost or canceled status within a selected date range. It provides data filtered by date, user group, lead status, and lost codes.

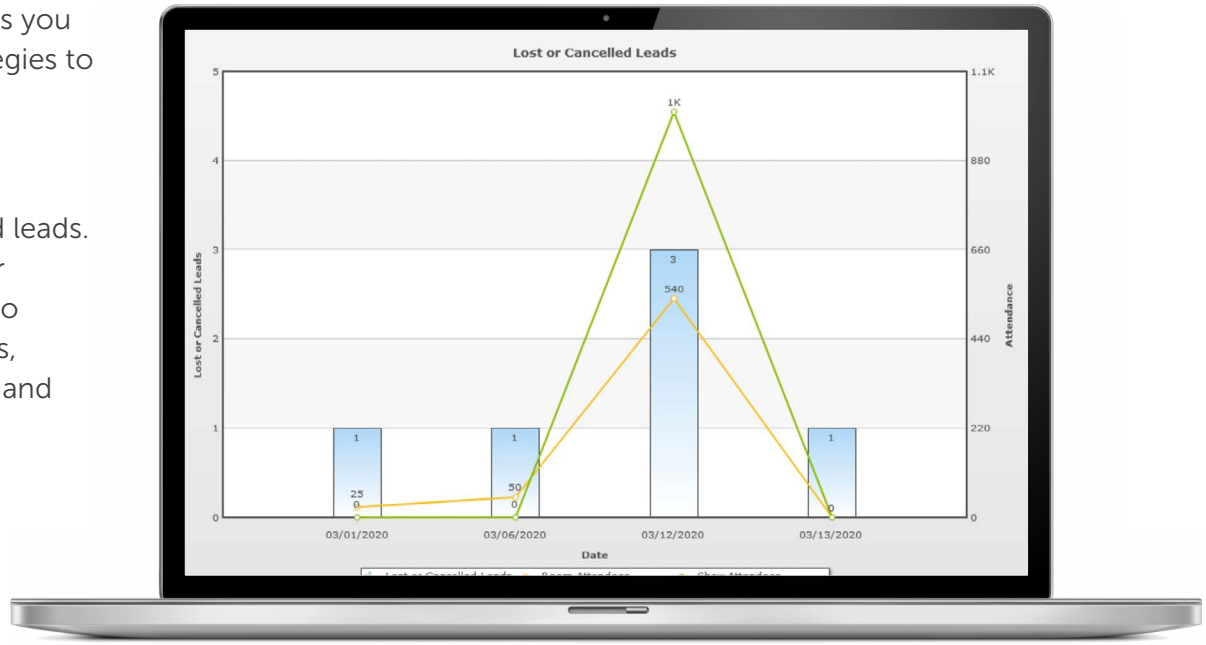
## Why does it matter?

This report is essential for assessing the impact of lost and canceled business on your sales efforts. It helps you understand patterns in lost leads and informs strategies to improve lead conversion and retention.

## How should you use it?

Use this report to identify trends in lost or canceled leads. Filter the data to focus on specific timeframes, user groups, or reasons for loss. Analyze these insights to refine your sales approach, address common issues, and enhance your team's effectiveness in securing and retaining leads.

**Use this report to identify trends in lost or canceled leads. Filter the data to focus on specific timeframes, user groups, or reasons for loss.**



BONUS!

# Booking and Lead Production Detail Reports

## What is the report?

This suite of four reports provides a comprehensive overview of your sales pipeline. They track the progress of leads through different stages — from initial inquiry to confirmed booking. Each report offers both summary and detailed views of lead generation and conversion metrics.

**The four reports are:**

**LEAD PRODUCTION:**
A summary report of leads generated in a "Lead" status

**LEAD PRODUCTION DETAIL:**
Detailed information for the summary provided in the lead

**PRODUCTION REPORT BOOKING PRODUCTION:**
The same report as the Lead Production Report, but for leads in a "Booked" or "Assist" status

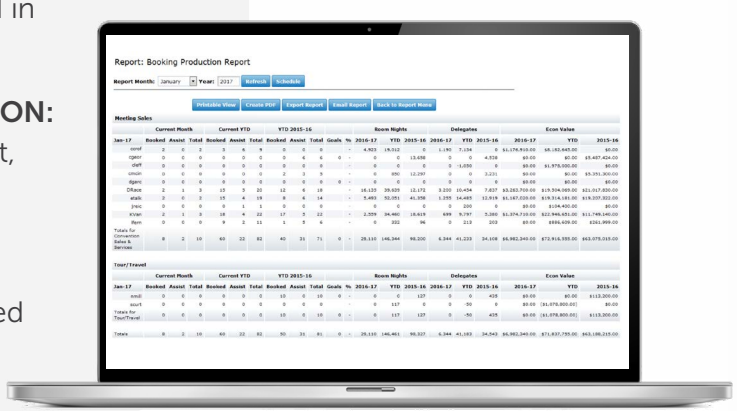
**BOOKING PRODUCTION DETAIL:**
The detail information for the summary provided in the Booking Production Report

## Why do they matter?

These reports offer invaluable insights into your sales team's performance and the overall health of your sales pipeline. By tracking key metrics like lead volume, conversion rates, and economic impact, you can identify strengths, weaknesses, and opportunities for improvement.

## How should you use them?

Use this report to monitor the status of leads and bookings. Regularly review the detailed information to assess performance, identify trends, and adjust strategies as needed to ensure your team meets its targets.







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