

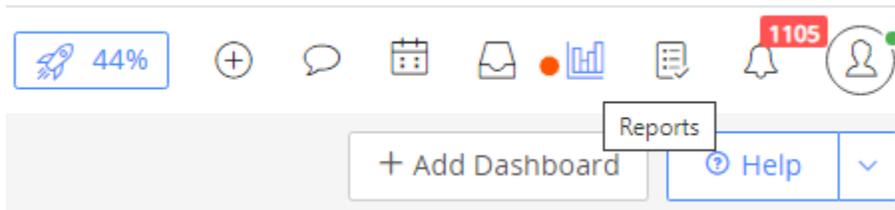
Taking a Call Ratio

This report is taken once a week to track the sales teams' phone calls and customer service interaction

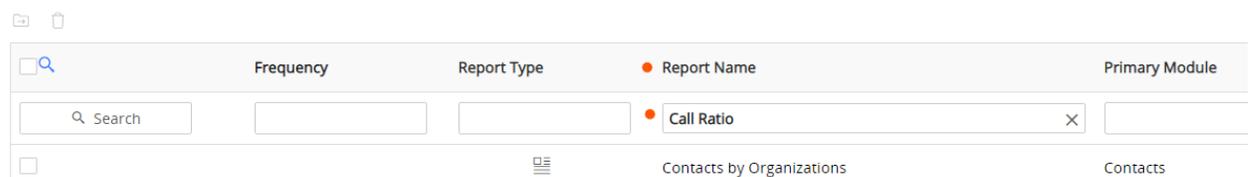
Programs used: Excel, Vtiger, Shared Folder/Marketing

Directions:

1. Login to Vtiger
2. Click on Reports in the top right-hand corner



3. Under "Report Name" type: "Call Ratio" and hit enter



4. Choose the "Call Ratio" option that appears
5. Choose your Report Conditions:
 - Date Range:**
 - a. Take the report on a weekly basis, choosing from the previous Friday to Saturday
 - i. Note* we include the Saturday so that it doesn't miss anything that was entered on the current Friday
 - ii. In the example below we are taking the report for any time AFTER Friday, May 27th, 2022 and BEFORE June 4th, 2022
 - b. **Make sure to include the names of all sales team members**
 - i. The example below includes the Sales Team member's: Ben, Chris, John and Ashray

Report Conditions

All Conditions (All conditions must be met)

Calendar Start Date & Time	after	27-05-2022
Calendar Start Date & Time	before	04-06-2022
Calendar Event Status	equals to	Held
Calendar Assigned To	equals to	Ben Mathis, Chris Borecky, John Trumpy, Ashray Kwatra

+ Add Condition

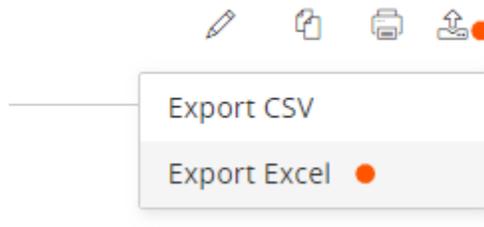
Any Conditions (At least one of the conditions must be met)

+ Add Condition

6. After you have chosen your conditions, select the blue “Save and Generate Report” button below

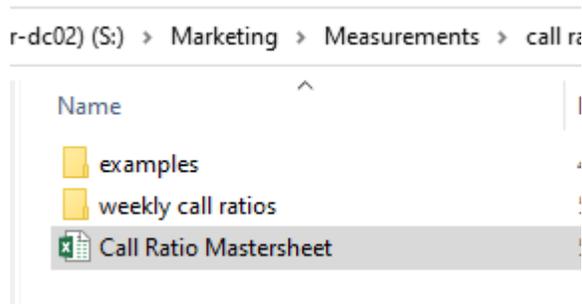


7. Export the report to Excel (option at the top right-hand corner of screen)



8. Open the “Call Ratio Master sheet” found in the Marketing folder:

S:\Marketing\Measurements\call ratio & opportunities examples



9. Open the exported weekly call ratio file (But **DON'T** save or enable editing yet!)

10. Select its entirety (by clicking the arrow in the top left-hand corner of the worksheet) and copy the worksheet

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Calendar	Calendar	Organizati	Calendar	Calendar	Organizati	Organizati	Organizati	Organizati	Calendar	Organizati	Calendar	Subject	
2	Chris Bore	Potential	School Sp	30-05-202	1 920-734-5712	- 5/30 - 15 minu	Greenville	WI			NO	School Specialty Inc.	- Andy - em	
3	Chris Bore	Potential	KRONES, I	31-05-202	1 414-409-4000	- 5/31 - GREAT n	Franklin	WI			NO	Krones Inc -		
4	Chris Bore	Potential	Lamplight	31-05-202	(262) 781-9590	- 5/31 - good me	Menomor	WI			NO	Lamplight Tiki - WC Bradley		
5	Chris Bore	Potential	VOLLRATH	02-06-202	920.457.4851	- 6/2 - great meet	Sheboyga	WI				The Vollrath Company -		
6	Chris Bore	Potential	Toshiba E	31-05-202	414-475-2814	- 5/31 - A Potenti	West Allis	WI			NO	Toshiba Energy Systems - system		
7	Chris Bore	Potential	Aprilaire	01-06-202	(800) 334-	Logistics		Madison	WI			Aprilaire		
8	Chris Bore	Potential	The Brew	02-06-202	262.251.9530	x7177 - 6/2 - met	Menomor	WI			NO	The Brewer Company -		

11. In the "Call Ratio Master sheet" paste the copied worksheet (from the weekly call ratio file) at the bottom of the names in the sheet titled "worksheet"

29423	Ashray Kwatra	Prospect Cold Call	Allseating Corporation	5/6/2022	905-5
29424	Ashray Kwatra	Prospect Cold Call	Westex International	5/6/2022	866-9
29425	Ashray Kwatra	Prospect Cold Call	Yanfeng Automotive Interiors	5/6/2022	905-5
29426	Ashray Kwatra	Prospect Cold Call	Unicorn Enterprises Corporation.	5/6/2022	(905)
29427					
29428					
29429					
29430					

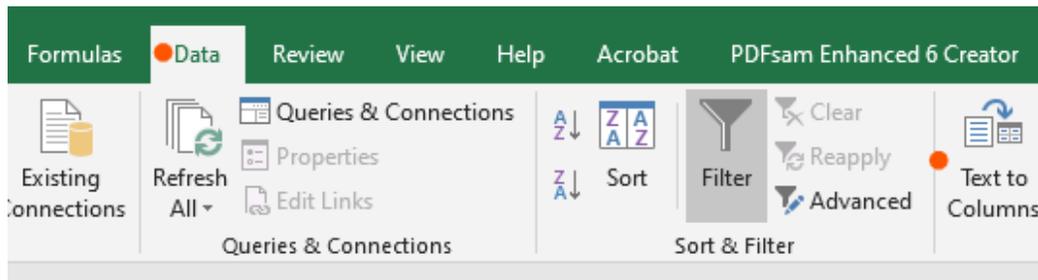
29422	Ashray Kwatra	Prospect Cold Call	Wainbee Limited	5/6/2022	905-568-1700
29423	Ashray Kwatra	Prospect Cold Call	Allseating Corporation	5/6/2022	905-502-7200
29424	Ashray Kwatra	Prospect Cold Call	Westex International	5/6/2022	866-937-8397
29425	Ashray Kwatra	Prospect Cold Call	Yanfeng Automotive Interiors	5/6/2022	905-502-3800
29426	Ashray Kwatra	Prospect Cold Call	Unicorn Enterprises Corporation.	5/6/2022	(905) 564-237
29427	Calendar Assigned To	Calendar Activity Type	Organizations Organization Name	Calendar Modified Time	Calendar De:
29428	Chris Borecky	Potential Call or E-Mail	School Specialty Inc.	30-05-2022 09:45 AM	1 920-734-57
29429	Chris Borecky	Potential Call or E-Mail	KRONES, INC.	31-05-2022 01:07 PM	1 414-409-40
29430	Chris Borecky	Potential Meeting	Lamplight	31-05-2022 01:15 PM	(262) 781-955
29431	Chris Borecky	Potential Meeting	VOLLRATH COMPANY LLC, THE	02-06-2022 11:36 AM	920.457.4851
29432	Chris Borecky	Potential Meeting	Toshiba Energy Systems	31-05-2022 06:31 PM	414-475-2814
29433	Chris Borecky	Potential Meeting	Aprilaire	01-06-2022 05:22 PM	(800) 334-60:
29434	Chris Borecky	Potential Meeting	The Brewer Company	02-06-2022 05:33 PM	262.251.9530
29435	Chris Borecky	Potential Meeting	MITA (Madison International Trade Association)	31-05-2022 12:52 PM	5/31 - good t
29436	Chris Borecky	Potential Meeting	Wigwam Mills	01-06-2022 06:04 PM	920-783-1000
29437	Chris Borecky	Potential Call or E-Mail	RockAuto, LLC	31-05-2022 06:33 PM	(608) 661-13:
29438	Chris Borecky	Potential Meeting	Brady Corporation	31-05-2022 06:40 PM	414-358-6600
29439	Chris Borecky	Client Service Call or E-Mail	Fresh Water Fish Marketing Corporation	30-05-2022 10:54 AM	204.984.2363

12. Delete the title row in purple (By right clicking and choosing delete, the delete button on your keyboard won't work)

13. Insert 2 blank columns between D & E (by selecting the insert option after right clicking on the E column)

D	E	F
5/6/2022		
5/6/2022		
5/6/2022		
5/6/2022		
5/6/2022		
5/6/2022		
5/6/2022		
5/6/2022		
5/6/2022		
30-05-2022 09:45 AM		
31-05-2022 01:07 PM		
31-05-2022 01:15 PM		
02-06-2022 11:36 AM		

- Highlight all of the newly added dates in column D and use the “text to columns” feature to make an accurate date
- Once all of the newly added rows are highlighted (for column D), select the “Text to Columns” feature under Data



30-05-2022 09:45 AM

C	D
Mastermind Toys	31-05-2022 10:37 AM
Mega Furniture Imports Ltd.	03-06-2022 12:12 PM
ETC Furniture	02-06-2022 12:07 PM
Team Ltd	31-05-2022 10:54 AM
Divine Sleep	31-05-2022 09:28 AM
NEXLEDS	02-06-2022 10:18 AM
International Comfort Products	02-06-2022 11:53 AM
Multimatic Inc.	01-06-2022 01:19 PM
Elm Sales & Equipment Inc	02-06-2022 02:20 PM
Be A Part Of	01-06-2022 10:53 AM

- Choose Delimited then next:

Convert Text to Columns Wizard - Step 1 of 3

The Text Wizard has determined that your data is Fixed Width.
If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

Delimited - Characters such as commas or tabs separate each field.

Fixed width - Fields are aligned in columns with spaces between each field.

Preview of selected data:

29427	30-05-2022	09:45	AM
29428	31-05-2022	01:07	PM
29429	31-05-2022	01:15	PM
29430	02-06-2022	11:36	AM
29431	31-05-2022	06:31	PM

Cancel < Back **Next >** Finish

17. Check off all the boxes and click next:

Convert Text to Columns Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

Tab

Semicolon

Comma

Space

Other:

Treat consecutive delimiters as one

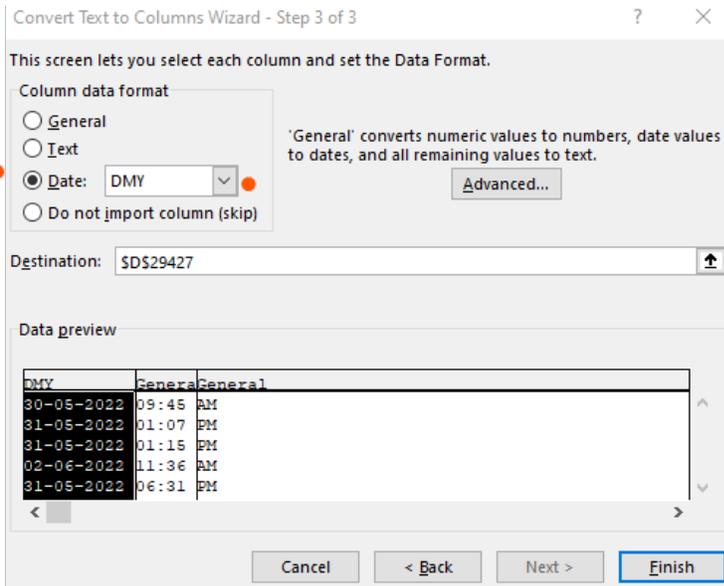
Text qualifier: ▼

Data preview

30-05-2022	09:45	AM
31-05-2022	01:07	PM
31-05-2022	01:15	PM
02-06-2022	11:36	AM
31-05-2022	06:31	PM

Cancel < Back **Next >** Finish

18. Under Date, choose DMY (We're in Canada) and select finish.



19. Highlight columns E & F and Delete

a. Again, you must delete by right clicking (keyboard delete won't work)

	E	F	
6/2022			905-856-4
5/2022			905-602-6
5/2022			905-696-2
5/2022			(905) 670-
5/2022			905-696-7
5/2022			905-564-2
5/2022			(905) 457-
6/2022			(905) 457-
6/2022			Called ag
6/2022			905-670-7
6/2022			Spoke wi
6/2022			905-362-5
6/2022			905-461-1
6/2022			905-696-8
6/2022			905-795-1
6/2022			905-812-8
6/2022			905-795-6
6/2022			905-568-1
6/2022			905-502-7
6/2022			866-937-8
6/2022			905-502-3
6/2022			(905) 564-
0/2022	9:45 AM		1 920-734
1/2022	1:07 PM		1 414-409
1/2022	1:15 PM		(262) 781-
2/2022	11:36 AM		920.457.4
1/2022	6:31 PM		414-475-2

20. Under the call Ratio worksheet, click into the pivot table and choose to refresh the table (by right clicking)

21. Highlight the last rows and drag down to the bottom (to continue the formulas)

	130		7%		55%	18%	20%
	122		2%		46%	26%	25%
	45		2%		47%	22%	29%
	128		38%		30%	15%	17%
	178		31%		44%	13%	12%
	188		20%		51%	26%	3%
	190						
	184						
	158						
	101						
	126	29571					

13		99		52%		13%	25%	10%
15		99		57%		15%	14%	14%
32		152		40%		21%	19%	20%
28		108		31%		26%	22%	21%
33		139		38%		24%	26%	12%
28		175		34%		16%	22%	29%
47		170		19%		28%	32%	22%
29		106		24%		27%	32%	17%
72		183		11%		39%	28%	21%
77		177		20%		44%	21%	15%
71		130		7%		55%	18%	20%
56		122		2%		46%	26%	25%
21		45		2%		47%	22%	29%
39		128		38%		30%	15%	17%
79		178		31%		44%	13%	12%
95		188		20%		51%	26%	3%
97		190		27%		51%	14%	8%
103		184		8%		56%	20%	16%
43		158		47%		27%	13%	13%
39		101		43%		39%	14%	5%
10558	126	29571		25%		38%	22%	15%

22. No copy the entire worksheet

	I	J	K	L	M
247	4		1	68	
248	2			116	
249	1			101	
250				97	
251				112	
252	2			103	
253	5			98	
254	26			107	
255	40		1	116	
256	6		2	15	
257	28			100	
258	47			127	
259	44			132	
260	50			133	
261	46			133	
262	39			147	

23. Paste Values into the “Weekly call ratio” you exported earlier into a newly created worksheet in the file

a. Note you will now have to enable editing*

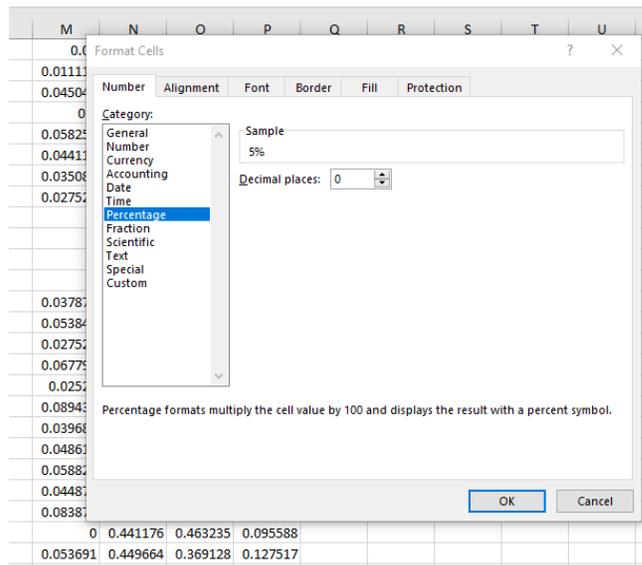


1 To

F	G	H	I	J	K	L	M	N	O
Organizati	Organizati	Organizati	Organizati	Calendar	Organizati	Calendar	Subject		

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1																	
2																	
3	Count of Calendar A	Calendar Activity Type										targets	0.15	0.2	0.45	0.2	
4	Calendar / Calendar I	Client Ser	Client Ser	Email Pot	Potential	Potential	Prospect	Prospect	F Relations	Grand Total		Prospect	Prospect	Potentials	Client service		
5	Ben Math	9/21/2020	1	4		1	1	10			17	0.588235	0	0.117647	0.294118		
6		9/28/2020	4			1		6	1	1	13	0.461538	0.076923	0.076923	0.384615		
7		10/12/202	10	1			1	14			27	0.518519	0	0.037037	0.444444		
8		10/19/2020 - 10/25/2020						2			2	0	0	1	0		
9		10/26/202	10	1				3		15	8	1	38	0.394737	0.210526	0.078947	0.315789
10		11/2/2020	6					2		4			12	0.333333	0	0.166667	0.5
11		11/9/2020	5	1				1		13			20	0.65	0	0.05	0.3
12		11/23/202	4							6			10	0.6	0	0	0.4
13		11/30/202	17				1			19	3		40	0.475	0.075	0.025	0.425
14		12/7/2020	10	1						11			22	0.5	0	0	0.5
15		12/14/202	7	1				2		7	2		19	0.368421	0.105263	0.105263	0.421053
16		1/11/2021	5					3		5	7		20	0.25	0.35	0.15	0.25
17		1/18/2021	19	1				7		15	31		73	0.205479	0.424658	0.09589	0.273973
18		1/25/2021	13					3		5	21		42	0.119048	0.5	0.071429	0.309524
19		2/15/2021	29					8	3	13	27		80	0.1625	0.3375	0.1375	0.3625
20		2/22/2021	13					7	1	9	37	2	69	0.130435	0.536232	0.115942	0.217391
21		3/1/2021 -	2								8		10	0	0.8	0	0.2
22		3/8/2021 -	1					1		10	27		39	0.25641	0.692308	0.025641	0.025641
23		3/15/2021	12	1				1	1	3	30		48	0.0625	0.625	0.041667	0.270833
24		3/22/2021	6					1		4	21		32	0.125	0.65625	0.03125	0.1875
25		4/5/2021 -	8	2				2		1	17		30	0.033333	0.566667	0.066667	0.333333
26		4/12/2021	6	3				2		2	13		26	0.076923	0.5	0.076923	0.346154
27		4/19/2021	8	3				3		11	12		37	0.297297	0.324324	0.081081	0.297297
28		4/26/2021	1								1		2	0	0.5	0	0.5
29		5/3/2021 -	4	5				2		6	34	4	55	0.109091	0.618182	0.036364	0.236364
30		5/10/2021	8	5				3		9	63	1	89	0.101124	0.707865	0.033708	0.157303
31		5/17/2021	19	6				2	2		54		83	0.650602	0.048193	0.301205	
32		5/24/2021	7	5				1			24		37	0	0.648649	0.027027	0.324324
33		5/31/2021	3	2						3	4		15	0	0.2	0.2	0.6
34		6/14/2021	17	5				1			33		56	0	0.589286	0.017857	0.392857
35		6/21/2021	11	1				4		4	13	2	35	0.114286	0.371429	0.114286	0.4
36		6/28/2021	6	3				4			28		41	0	0.682927	0.097561	0.219512
37		7/12/2021	7	2						6	25		40	0.15	0.625	0	0.225
38		7/19/2021	10					3	1	2	24	1	41	0.04878	0.585366	0.097561	0.268293

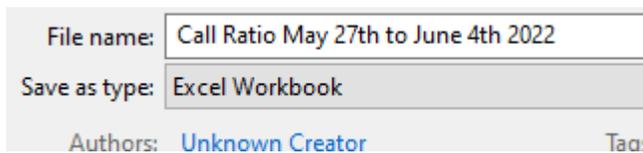
24. Format columns M to P to be percentages (to 0 decimals)



25. Highlight/bold/expand worksheet to make it look nicer

26. Save the file as "Call Ratio – the date range" under Marketing → Measurements → Call Ratio & Opportunities → Weekly Call Ratios

a. As an Excel Workbook



27. Save the Call ratio Mastersheet as well

28. Send the weekly call ratio to Mike and the sales team (the master sheet is too large to send over email)