The Big Picture, Confirming Sales Results

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In AI-Enabled Sales Management, the ultimate goal in the relationship between a sales manager and professional salesperson is ensuring the rep knows exactly what success looks like.

I believe that micro tools—including agentic AI call reporting, calendar planning, AI-generated prospecting, and auto-filled dashboards—help salespeople understand whether they're winning. This can be true even during economic downturns or when circumstances are beyond your control.

KPIs Drive strategic decisions

It's still the macro key performance indicators (KPIs), however, that serve as the lifeblood of a growing, profitable business. I recommend that each month you review sales using micro tools. Then use critical KPI measurements to confirm sales results and to drive strategic decision-making.

Confirming Sales Results: Key Performance Indicators

KPI Description	Sep-24	Sep-25	Oct-25	YOY #	YOY %	YTD Chg. #	YTD Chg. %
Sales	$275,000	$255,000	$300,000	$25,000	9.1%	$100,000	15.6%
Gross Margin	$170,000	$210,000	$202,000	$32,000	18.8%	$120,000	36.7%
New Acc Margin	$2,500	$2,900	$5,400	$2,900	116.0%	$11,600	22.6%
New Acc Margin %	61.8%	82.4%	67.3%				
% Added	0.9%	1.1%	1.8%				

Understanding the Numbers

Before a manager and salesperson can create a strategic plan for the future, they must scrutinize past and present performance through KPIs. Both year-over-year (YOY) trends and month-over-month (MOM) momentum are essential for accurate analysis.

- **Sales: The Revenue Story**

By comparing the same months in different years (YOY), you can draw accurate conclusions despite seasonal fluctuations in consumer behavior. This comparison provides a quick indication of whether the salesperson needs to adjust his selling strategy. For example, do you need to ramp up prospecting efforts

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or focus more attention on existing accounts?

In contrast, MOM momentum reveals immediate trends within your business or market. MOM signals when it's time to introduce new products to existing accounts or to pivot your approach.

Notice the value of reviewing both YOY and Year-to-Date (YTD) changes in both dollars and percentage. Each metric tells part of the story.

- Gross Margin: The Profitability Indicator

While sales numbers may fluctuate, businesses ultimately succeed by controlling net profit. Since gross margin is calculated by subtracting the cost of goods sold (COGS) from total sales, the salesperson's pricing decisions directly impact profitability.

AI tools for the distribution industry are evolving rapidly. With rising costs, supply chain disruptions, and shifting customer expectations, AI-powered pricing tools help maximize profitability amid new challenges. To stay ahead, distributors must embrace innovative pricing strategies, advanced customer segmentation, and digital transformation. **A monthly review of gross margin ensures that salespeople are effectively engaging these tools and making smart pricing decisions.**

- New Account Margin: The Growth Engine

Monitoring the growth of new account margin is as important as monitoring existing account gross margin. **The new account margin ensures that reps understand that they are consistently adding new business — the lifeblood of growth — especially in a down economy.** Use this KPI review to focus on new account conversions. I strongly recommend incentive plans with aggressive bonuses tied to new account margins to drive this critical behavior.

When Sales Results Count Most

While the micro tools mentioned earlier give salespeople a clear understanding of what drives their business, the macro review of Sales Results provides proof that those micro tools are working effectively.

In my 50+ years of sales management experience, I know of no exceptions. **Consistent growth in micro indicators always produces exciting results in macro sales result KPIs.** To stay on track and maintain momentum, sales managers must review these results monthly with each direct report.

The bottom line — micro tools drive daily activities, but macro KPIs confirm success. Both are essential for sustainable sales growth and profitability.

5 KEY TAKEAWAYS

1. ***Reps need to know exactly what success look like.***
2. ***Use KPIs to confirm sales results and to drive strategic decision making.***
3. ***Both YOY trends and MOM momentum are essential for accurate sales analysis.***
4. ***Businesses succeed by controlling net profit and adding new business.***
5. ***Micro tools drive daily activities: Macro KPIs confirm success.***