How do I… run a KPI report?

Recruit Studio offers you a suite of reporting tools, one of which is Key Performance Indicators so you can keep track of the performance of each consultant in your business. In this tutorial I will show you how to use the KPI report tool to display coloured charts of the sales calls and interview logs entered by your consultants.

To use this tool, you need to have the KPI module installed and if you don't already have this installed; you can do this from the Support section of our website.

The KPI module is designed to be used in conjunction with the Sales Calls function in Recruit Studio which you will find on the Main Menu. Sales Calls help you plan your plan your daily calls to clients, recording the outcome of the conversation in a format that can be tracked. There is a separate tutorial on making Sales Calls.

To begin, go to the Tools menu and choose 'KPIs'. The Key Indicators report page will open and you'll see that the screen is divided into two panels. The top panel shows a chart and you can use the lower panel to show the data behind the graph or you can display two charts at once.

There is a ribbon toolbar at the top of the page to help you build your report. The idea is that you work from the left hand side of the screen to the right, building your chart.

Firstly you need to select which consultant you wish to produce the report for. Choose their name from the list and move on to select the week that you wish to review. The day that you choose indicates the start of the week so if you choose a Tuesday, your week will commence on that day.

Next you need to decide whether you want to look at the Sales Calls or the Interviews entered by this consultant. If you choose Sales Calls the chart will be displayed in the panel beneath. It will show you a break down of the outcome from the Sales Calls that the consultant recorded.

In the lower panel, you can look at the data in more detail. If you click the Interviews button you can see a chart of the interviews created by the consultant within the week you selected.

If you need to adjust the report to show a different consultant or date, just make the change using the ribbon toolbar and click the Sales Calls or Interviews button again to run the new report.

The KPI reports can also be exported and imported, should you need to do so. For instance you may need to share data between separate databases in your organisation. You can use the import and export tab at the top of the screen to do this.