

SOP: Sales Tracking and Reporting During Promotions

This SOP details the procedures for **sales tracking and reporting during promotions**, including real-time monitoring of promotional sales data, recording promotional offers and discounts, analyzing sales performance against targets, generating accurate and timely sales reports, and providing insights for strategic decision-making. It ensures consistent tracking of promotional effectiveness and supports informed business adjustments.

1. Purpose

To establish standardized procedures for tracking and reporting sales during promotional campaigns, ensuring accuracy, consistency, and relevance of promotional sales data.

2. Scope

This SOP applies to all sales, marketing, and analytics personnel involved in sales data collection, analysis, and reporting during promotional periods.

3. Responsibilities

Role	Responsibility
Sales Team	Record sales and promotional data accurately in real-time.
Marketing Department	Provide details of promotion, including dates, eligibility, and offer criteria.
Data Analyst	Analyze and report on sales performance, generate insights, and distribute timely reports.
Sales Manager	Review reports, provide feedback, and initiate strategic adjustments as needed.

4. Procedures

- Set Up Promotion Tracking:**
 - Coordinate with marketing to define and document promotional offers and criteria.
 - Configure sales systems to flag and separate promotional transactions.
 - Communicate promotion details and data entry requirements to the sales team.
- Real-Time Sales Monitoring:**
 - Record each promotional sale, including item, discount value, date, and transaction reference.
 - Verify the accuracy of data entered in POS/CRM systems.
- Daily Data Compilation:**
 - At specified checkpoints (e.g., end of shift, daily), export sales data from the system.
 - Consolidate data in agreed-upon reporting templates or dashboards.
- Performance Analysis:**
 - Compare actual sales against promotional targets (overall and by segment).
 - Analyze average discount, units sold, revenue impact, and promotion redemption rates.
- Sales Reporting:**
 - Generate and distribute reports (daily, weekly, and post-promotion) to relevant stakeholders.
 - Ensure reports include:
 - Total sales vs. base period
 - Promotion-specific revenue and margin
 - Top-performing products/channels

- Key insights and recommendations

6. Insights and Strategic Feedback:

- Summarize trends, promotion effectiveness, and areas for improvement.
- Share findings with management for review and future planning.

5. Documentation & Records

- Promotion setup sheets and approval documents
- Raw sales and discount data exports
- Compiled sales performance reports
- Insights and strategic recommendation notes

6. Review & Continuous Improvement

At the end of each promotional period, review the effectiveness of tracking and reporting processes. Gather feedback to update and refine the SOP as necessary.

7. References

- Company Sales Policy
- Data Management Guidelines
- Reporting Templates and Dashboards