

Course Overview

Implementing an Analytics Strategy for the Sales Cloud

Overview

This course is a must for anyone responsible for using analytics to drive business results in a sales organization. Implementing an Analytics Strategy for the Sales Cloud provides you with the skills and knowledge you need to gather analytics requirements, design and build custom reports and dashboards, and deploy them to your users. Using real-world scenarios, this course gives you the tools to analyze your key sales metrics, including lead generation, pipeline and trends, closed business, and sales team performance.

Who should take this course?

Implementing an Analytics Strategy for the Sales Cloud is for anyone responsible for developing and maintaining reports and dashboards for their sales organization in Salesforce, including: Sales operations analysts Business analysts Sales managers System administrators and power users may also benefit from this course.

Delegates will learn how to

When you complete this course, you'll be able to:

- Establish a process for developing and deploying analytics solutions for your sales organization.
- Set up an efficient analytics infrastructure to ensure users can find the reports and dashboards they need.
- Create effective sales reports and dashboards to address the needs of users at all levels.
- Maximize users' consumption of sales reports and dashboards.

Course Outline

Discovery

Establish a process for delivering analytics solutions

Discover high-level requirements

Defining Your Analytics Infrastructure

Define a report and dashboard architecture

Clean up reports and dashboards

Pipeline Analysis

Analyze executive requirements

Design an executive dashboard solution

Analyze pipeline

Determine top 10 opportunities with a row limit filter

Analyze opportunity size with a bucket field

Closed Business Analysis

Compare closed business month over month

Analyze win rates with a joined report

Pipeline Trend Analysis

Understand opportunity trends with stage history

Analyze opportunity trends with an analytic snapshot and a combination chart

Forecast Analysis

Understand the capabilities of Collaborative Forecasts

Analyze the company's sales forecast with a custom report type

Analyze quota attainment with a joined report

Validate that a solution meets requirements

Lead Performance Analysis

Analyze which types of leads perform best

Monitor lead conversion times

Analyze campaign revenue generation

Sales Management Analysis - Activities

Design a dynamic team dashboard

Understand activities

Report on activities

Analyze neglected accounts with a cross filter

Sales Management Analysis - Opportunities

Identify stalled opportunities and bottlenecks

Identify opportunities at risk with a cross filter and a joined report

Sales Rep Analysis

Monitor individual pipelines

Deploying Your Analytics Solution

Communicate changes to users

Maximize user adoption of reports and dashboards

Improve report performance

Prerequisites

The prerequisites include a solid understanding of basic Salesforce concepts and sales functionality.

In particular, students should have some knowledge of:

- Navigating Salesforce.
- Salesforce objects and their relationships to one another.
- Creating reports with the report builder, including filtering, grouping, and summarizing data.
- Creating dashboards with the dashboard builder.

Special Notices