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5 Ways to Maximize Your Salesforce Data

Without data, you're just another sales person with a quota; it's a strong statement, but there's no confidence found in making decisions without it. When it comes to sales metrics, everything from your pipeline to your revenue is mission critical—so your analytics solution needs to be fast, easy and talk seamlessly with your entire data ecosystem.

Saving time in every step of your sales data workflow is fundamental. From accessing and analyzing complex data sets, publishing interactive dashboards, and sharing across your organization, for your sales data to be impactful, the insight-to-decision process must be swift.

Salesforce is one of the most widely used customer relationship management tools in business today, and the data collected with it is vital to decision making throughout every sales organization.

Utilize these 5 tips for boosting your pipeline with Salesforce data:

1. Connect to Data Everywhere
2. Blend Salesforce Data with Other Data
3. Answer Big Questions with Better Visualizations
4. Use your Data in the Field
5. Put Data Findings Everywhere





► Watch this webinar to learn how Citrix enables sales interactive metrics in Salesforce.

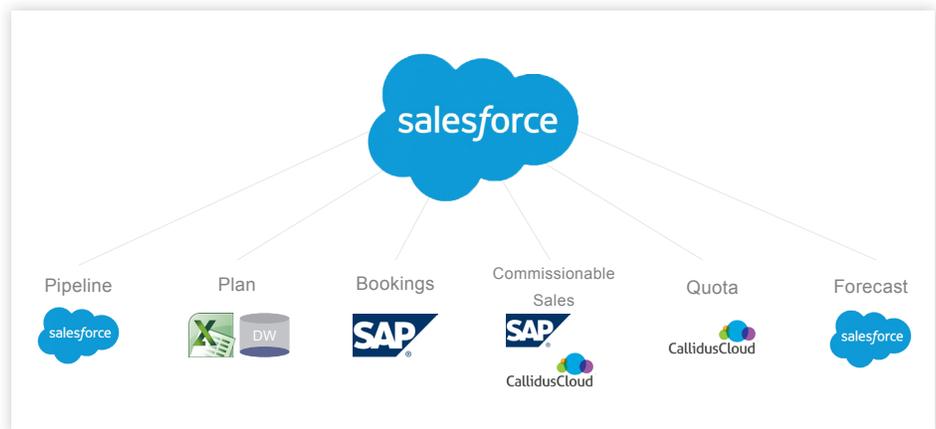
1. Connect to Data Everywhere

Salesforce built the cloud. And the cloud is a powerful place to access and analyze data. But don't forget, the cloud isn't the only place.

There once was a time when organizations aspired to have all of their sales and business data in one place, but with today's continuous innovation, it's no longer a need or even a best practice. While Cloud-based analytics implementations are now on a par with on-premises installations in terms of reliability, performance and flexibility, it is important to remember that the Cloud is just one of many great places to put data. The new best practice is having access to and utilizing data in both environments, with a seamless integration and automatic refreshment so you're always working with the most current data in your dashboards.

Citrix, a global software company, wanted to help their salespeople manage their business by providing access to all available sales metrics and key performance indicators. Citrix salespeople live and breathe inside Salesforce.com, but much of their data and metrics don't exactly live in the same place.

"At Citrix, we have our data in a lot of different places. We have Salesforce.com, where we manage our opportunity information and forecast information. We have bookings and order information coming from our ERP system, which is SAP, and then we manage our quota and commissionable sales from Callidus, which is a Cloud provider ... We had already made these investments, so we found a way to visualize this data together inside the Salesforce.com portal," explains Kevin Sonsky, Senior Director of Business Operations.



Utilizing all of their data, Citrix is able to build interactive dashboards and reports and embed any views they want right inside of Salesforce.

Unlock your data's greatest potential by choosing to utilize all of your data inside Salesforce—no matter where it lives, in the cloud, or on-premise.

2.

Blend Salesforce Data with Other Data



- ▶ *This three minute video will show you how to embed your blended data visualizations with Salesforce Canvas.*

As mentioned before, connecting to multiple data sources is principal. Sales data alone, without territory, company, or marketing data, has a lessened value as it only supports a limited range of decisions. So, it isn't just connecting to other data that's important—it's the combining, or blending, of sales data with other data that is essential to unlocking maximum insight value.

By joining your data on a common field, you can get a single, holistic view of your prospects, sales pipeline, accounts, sales performance and track completion of goals at every step of the sales process.

All of an organization's data should be accessible for mixing and matching regardless of data location, type, or analysis solution.

Here's what the competitive advantage of blending other data with your Salesforce data looks like:

- Blend your Salesforce data with product data to look at product profitability.
- Combine your territory planning with your Salesforce data to perform "what if" analysis and evaluate territories by multiple measures.
- Mix Salesforce data with marketing activity and customer support data to get a 360-degree view of the customer.
- Blend Salesforce data with demographics to understand market penetration and new opportunities.
- Join Salesforce data with any needed data in an excel spreadsheet to ask and answer any of your wildcard questions.

Rosetta Stone, an interactive technology company, needed to ask and answer more questions from their Salesforce data, so they started blending other sales, customer and financial data with it.

"Salesforce is our lead and opportunity management tool. But it's not our financial system of record. We're able to blend Salesforce data on the fly with our system of record for financial data and see some bigger trends and better funnels of opportunity to close (deals) for our institutional team," explained Joseph Bertram, the Senior Business Intelligence Architect at Rosetta Stone.

*“They would say,
‘Oh, my God, I’ve
never seen our
Salesforce data in this
perspective before!’”*

—Joseph Bertram, Rosetta Stone

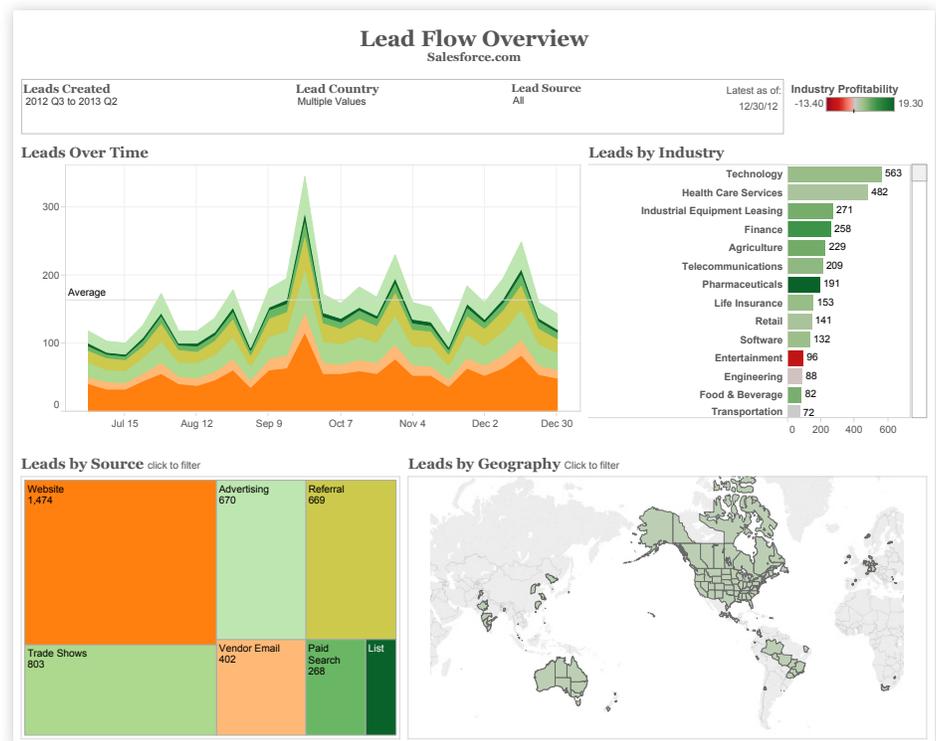


► Watch and learn more about how to answer your own questions with data blending.

The more the Rosetta Stone teams utilized data blending, the more ‘ah-hah’ moments they were having. Smart organizations put their Salesforce data to work for them, alongside other data assets, and then use those insights from the whole picture to drive decision-making.

The competitive advantage of flexible mobile analytics for Salesforce is information in a few seconds, and insights in a few minutes.

Business intelligence for Salesforce data should be natively mobile to support analytics quickly from the road. From accessing and analyzing to editing and publishing complex data sets as interactive dashboards, the insight-to-decision process on mobile must be swift for a true business impact.



By pulling data directly from Salesforce.com, this dashboard is designed to give you an up-to-date overview on various aspects of your leads so that you can adjust your sales efforts on a timely basis.

The top left view gives you a great overview of your lead generation performance by country and time. The rest of views break down your data by lead industry, lead source and lead origin country. These three views also function as filters for each other. An additional filter panel below the dashboard title filters the dashboard by time frame, lead country and source.

Learn more by clicking into and interacting with this dashboard.



► *Measuring and monitoring sales progress with standard reports is no longer enough to be successful as a sales leader. Read more to see specific examples of five best practices for visualizing sales data.*

3.

Answer Big Questions With Better Visualizations

When asking the big questions about your revenues, quotas, targets and transactions at the global, regional team and individual levels, you'll need freedom and flexibility to explore your answers in different visual structures. In today's marketplace, the basic, built-in sales charts are just table stakes, and the real data wins are found in multiple types of advanced visuals such as bullet graphs for measuring progress to a target, geographical KPI maps, and even seasonality time trends for sales forecasting and planning.

Core to modern sales visualizations:

- **Variety**

Not every visual has to be a pie or a bar chart. Because the human brain processes a single number, visualization or a picture as single "chunk" of information, the process of comprehension and insight is dramatically faster when data is visually displayed on a dashboard in various graphs and charts.

Utilizing multiple types of visualizations, colors and filters in a dashboard, you can quickly understand and share the complete picture of your sales pipeline to get to the bottom of all those questions that standard reports just don't anticipate.

- **Current & Interactive**

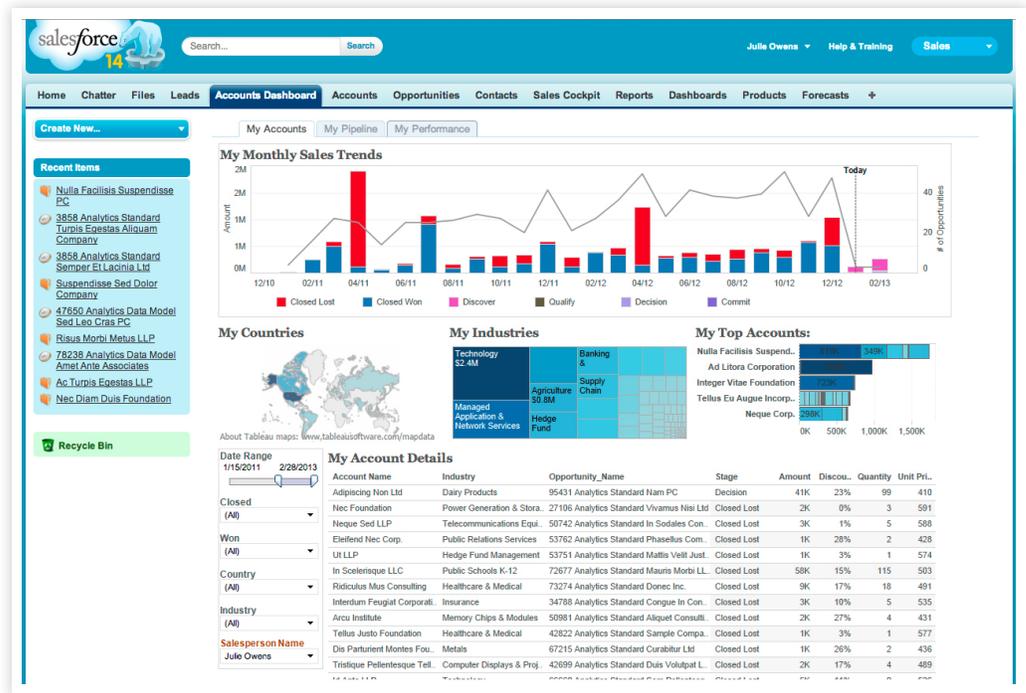
Need answers on-the-fly in an important meeting?

Data can be from this quarter, this week, this hour, or thirty seconds ago—there's no doubt about it, real-time data will elevate your sales operations.

Interactive dashboards with a live data feed enable basic analytical tasks, such as filtering views, adjusting parameters, quick calculations, and drilling down to examine underlying data. Answer the unanticipated questions immediately with a few mouse clicks.

- **Forward Looking**

Utilizing visuals to looking at a time trend for a seasonal influence gives you the ability to forecast and plan appropriately. Make decisions by applying data for historically slow quarters, summer slumps, and end-of-year booms.



Adding a variety of interactive visualizations to your Salesforce Accounts Dashboard will improve your action-to-insight turnaround time.

4.

Use your Data in the Field

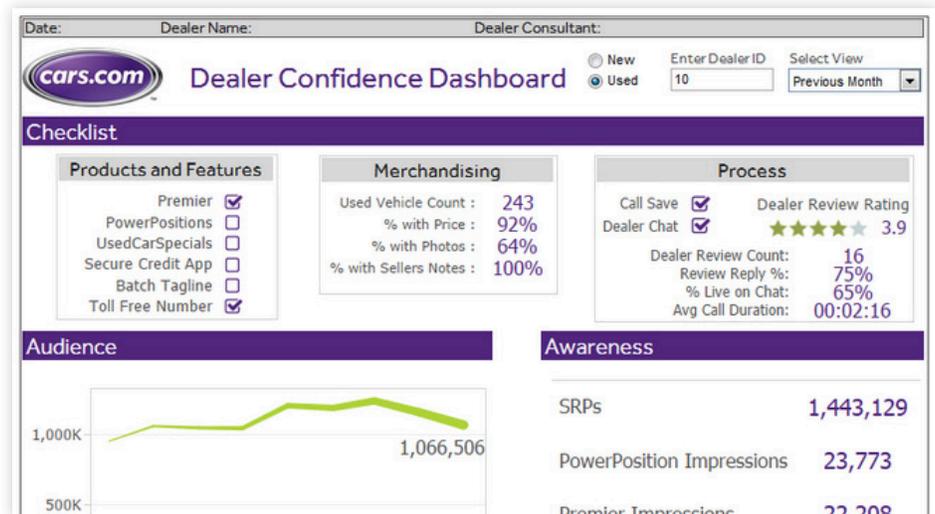


► Read more about how Cars.com is empowering their sales teams with data in the field.

It's true, people are spending less time at their desks, but they can still get more work done. That's because they aren't any less informed by data while on the go. One of the primary jobs of any mobile app is to help people do the job they're in the field to do—for salespeople, getting fast answers about which accounts are active, or which opportunities are the best to focus on now can mean more closed deals. There's no time to wait around the office for a daily or even hourly ETL process.

The good news is that the mobile solutions for analytics tools, which emerged years ago, are finally reaching a level of maturity for business users—mobile analytics is transitioning from limited, standalone apps to analytics that integrate seamlessly with Salesforce. This means that mobile workers really can do analysis from the road, and the growing emphasis on mobile has forced vendors to offer more natural and intuitive interfaces across the board.

Cars.com has a 600-person sales team that need to access Salesforce data and other data. But Cars.com doesn't want their sales teams waiting around for reports, or needing to have to log into multiple systems to find the information they need. So they found support with mobile analytics that is flexible enough to access Salesforce data and other data, and fast enough to provide current, timely data visualizations and dashboards.



Here is a sample dashboard built with Cars.com brand standards.

“At 9:00 a.m., as the sales reps are starting their day, they can pull fresh information on their customers and they're ready to go, whereas before it may not have been available until the afternoon,” explains Kevin Wyderka, Director of Data Warehouse and Business Intelligence for Cars.com

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For example, the standard view of opportunities in the Salesforce mobile app appear as a long list, and proves difficult to wade through for quick insights.

Adding blended data and visualization to your Salesforce opportunity list, and viewing it all in the same mobile app, will immediately show trends like a recent rise in lost opportunities relative to won opportunities—the critical information will jump out right away.

Mobile business intelligence is finally fulfilling the promise of a 30-year old industry: to provide information when and where it's needed.

“Our sales people are ‘people’ people, not ‘data’ people. And when you give them a tool that strips away the stuff you traditionally associate with looking at data—and you turn it into information—it’s really helpful.”

—Rohan Mandelia,
Data analyst of Progressive Insurance.

5.

Put Data Findings Everywhere

Sales people pass around tablets, mobile phones and laptops all day long. They carry them to meetings and utilize them everyday in the field, and all of this mobility tends to foster much more social interaction from workers on the go than from workers stuck at their desks. Take advantage of the social tendencies of your sales people by posting your interactive sales dashboards everywhere. Of course, you can embed them right into Salesforce Canvas, and in the Salesforce mobile app, but you can also post them to your company Wikis, embed them in emails, Sharepoints, community forums and even power points to foster a data-driven sales environment—always referencing one single source of truth.

Salespeople can also take advantage of social interactions as they work with and share highly interactive dashboards with a live data feed. Users can comment on a view, and share the most up to date information seamlessly from mobile to mobile, or with a dashboard back to the office desktop. Whatever mobile BI solution you choose, make sure it’s fast enough to keep up with a discussion; people won’t stop to wait for a view to load.

Cars.com’s Kevin Wyderka also knew that visualization would help several audiences that touch his sales teams, in and outside of his company, make better use of this data. Cars.com depends on gathering and analyzing consumer behavior on its site to improve experiences for its visitors, and they use the same approach to help the site’s paying advertisers like primarily car dealers and automotive manufacturers improve their results. For optimization, Cars.com posted one dashboard across many channels, in and outside of the Car.com firewall.

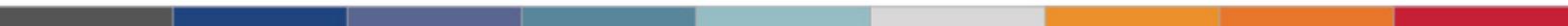
“We track impressions, conversions and other key activities a consumer can take on our site that indicate engagement with an auto brand or to a dealership ... We wanted to be able to publish in the customer portal that we created for our advertisers,” says Wyderka. “We also want to be able to publish those same dashboards to Salesforce, because most of our sales reps work strictly within that solution,” explained Wyderka.

Two birds, one dashboard; find quick wins with the tractability to post data visualizations anywhere.

Conclusion

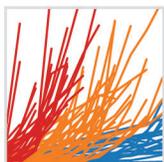
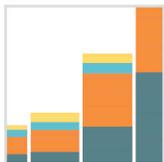
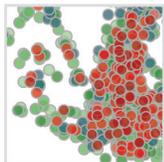
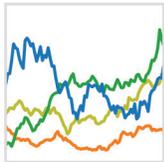
Nobody understands decision-making better than sales people. In today's marketplace, how fast is the speed of business, actually? The hallmark of data-driven sales teams is the ability to see and understand data analysis at the speed of thought—allowing for the asking and answering of questions as fast as salespeople and business leaders can think of them, even against multiple large data sets.

What number can you hit? What deals can you close? What regions matter most today? Don't limit your decision-making; for maximum results, sales performance demands flexibility and finesse from their people, their processes and most critically, their data.



About Tableau

Tableau offers a revolutionary new approach to business intelligence for sales analytics that will allow you to quickly connect to, visualize, share, and report on your sales data, with a seamless experience from the PC to the iPad. You can even connect directly to salesforce.com—negating the need for a separate database. Tableau solutions generate fast, visual, easy-to-use self-service data dashboards with no programming skills required. See how Tableau can help your sales operation by downloading the free trial at www.tableausoftware.com/trial.



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