

06. Sales Reporting & Analytics

06. Sales Reporting & Analytics



From Prospect to Sales



Click [on this link](#) for the full training material (PowerPoint)

Added Value

- A lot will be expected from the sales reps in terms of **input** into the CRM system, and without reports (and dashboards) the sales rep may find it difficult to understand the **outcome of his input**, and where he is in terms of the maintenance of the database.
- **Individual and team objectives** (like number of visits, management of the pipeline, etc.) may need to be monitored and dashboards will help the sales rep to estimate progress towards these objectives.
- On top of existing reports and dashboards, personal reports and dashboards can be created. They will help the sales rep to anticipate certain results management may see, in their own dashboards or in the Qlik analytics. Note that they are **real-time in Salesforce** (while Qlik isn't)
- The Salesforce reports and dashboards are a day-to-day tool that should encourage the sales rep's behaviour and guide him in his tasks

Other advantages:

- These dashboards are **easily customizable** by anyone with the right training and access within the GBU (not dependent on "development" by IT).

Table of Contents

- Introduction SFDC & Qlikview
- Reporting in SFDC - Definition
- Reporting in SFDC - Viewing existing dashboards in SFDC (depends on profile)
- Reporting in SFDC – Create reports in SFDC
- Reporting in SFDC – Select the right Report Type
- Qlikview - Analytics
- Reporting in SFDC - Viewing existing reports in SFDC (depends on profile)

What you need to know to start...

Two types of reports are available, SFDC reports & QlikView Reports, with different visibility models



- **Collaboration tool**
 - Input data
 - Monitor activity with customers
 - Collaborate within commercial community
 - Source: SFDC data (real-time)



- **Analytical tool**
 - Visualize data to manage the business
 - Analyse data through filters
 - Source: SFDC data and SAP (daily synchro)

Example of scenarios of by KPI in the 2 platforms:

Opportunities

- Visibility on all opportunities (even those of other GBUs provided are not confidential)

Sales performance

- Not visible

Order book/Sold & Pending

- Not visible

Visit Reports

- Visibility on all opportunities (even those of other GBUs provided are not confidential)

Opportunities

- Visibility only on the opportunities of my GBU

Sales performance

- Full visibility of info from my GBU
- Visibility only revenues of other GBUs

Order book/Sold & Pending

- Full visibility of info from my GBU

Visit Reports

- Limited to no visibility

What reports are available to whom today?

Today, several reports are already available in the system. In addition, the Project Team is working on collecting and prioritizing needs for new reports (e.g. for sample and customer requests) to have a more complete picture.

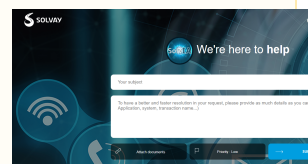
SFDC		Qlik
Profiles		
Sales	Sales Reps Dashboard Dashboard allows me to pilot activities in one glance: • Customer visits & visit reports • Complaints for your accounts • Opportunities • Tasks → You can see only your own activities & figures	Order Book Sales Performance Overview & DSO Opportunities
Sales Manager / executives	Sales Manager dashboards Dashboards allowing managers to pilot activities in one glance for the team (N-1): Customer visits & visit reports, complaints, Opportunities, etc.	
	Adoption dashboards (4 in total) Dashboard allowing to follow the adoption of the system in the GBU / Region in terms of logins, creation of objects, management of objects	
	PDCR dashboard Dashboard showing the PDCR objectives in terms of logins & object creation	
Cust. Service, Quality, Prod.	Complaints N/A	Complaints

Focus of today



Need Help?

To request any support or if you have identified a bug or incident, please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>



you can copy users with email address, default priority is Low, then Submit. We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example