

Project Title: Sales Performance Reporting

Phase 10: Final Presentation & Demo Day

1. Pitch Presentation

Prepare a professional presentation summarizing your project journey:

- Problem Statement (manual sales reporting → delays).
 - Proposed Solution (Salesforce dashboards, automation, notifications).
 - Phases of Implementation (1–9, from Org setup to Reporting).
 - Key Features (Dashboards, Closed Won notifications, Quota attainment tracking).
 - Benefits (real-time insights, less manual work, better decision-making).
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2. Demo Walkthrough

Show a live demo of your Salesforce solution:

- Open your **Sales Dashboard App** in Lightning.
 - Walk through the reports and dashboards:
 - Monthly Sales by Rep (bar chart).
 - Sales by Region (pie chart).
 - Pipeline Stages (funnel chart).
 - Quota vs Achievement (gauge).
 - Show how entering or updating an Opportunity instantly reflects on dashboards.
 - Demonstrate automation like **Closed Won Notification** or email alerts.
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3. Feedback Collection

- Present to peers, instructors, or stakeholders.
 - Gather questions and suggestions.
 - Note improvement ideas (e.g., advanced forecasting, AI insights).
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4. Handoff Documentation

- Create a **User Guide** explaining how to:
 - Access dashboards.
 - Run and filter reports.
 - Interpret charts.
 - Handle errors (like duplicate rules or validation rules).
- Document technical aspects (Flows, Apex, Permissions).