

Salesforce Sales Reporting & Dashboard Strategy

Presentation Script

Opening (30 seconds)

"Good morning everyone. Today I'll show you how we've streamlined our sales reporting in Salesforce to give our Direct Sales Team better insights and save time. We've built a complete system that takes just minutes to check, instead of hours to compile."

Section 1: Organization (45 seconds)

"First - Organization"

"We created a dedicated folder called 'Direct Sales Reports' - think of it as our sales data headquarters. Everything lives here, everyone has access, and there's no more hunting around for the right report."

[Show folder structure on screen]

Section 2: Key Reports (1 minute)

"Next - Our Core Reports"

"Two main reports power everything:

1. **Open Deals Pipeline** - Shows all active opportunities grouped by stage with dollar amounts. No more guessing what's in the pipeline.
2. **Accounts by Region** - Geographic view of our customer base using North America, Europe, APAC, and Other categories."

[Show sample reports]

Section 3: Automation (30 seconds)

"Then - Automation"

"The pipeline report emails itself to the team every Monday morning. No manual work, no forgotten updates. Everyone starts the week with the same information."

Section 4: Dashboard (45 seconds)

"Finally - The Dashboard"

"Our Sales Performance Dashboard puts everything in one place:

- Pie chart showing accounts by region
- Funnel showing deal progression
- Progress meter tracking our \$5M goal

Visual, instant, actionable."

[Show dashboard components]

Closing (30 seconds)

"The Result"

"Our sales team now has:

- One place for all reports
- Automatic weekly updates
- Visual insights for faster decisions

Questions?"

Total Time: 4 minutes

Presenter Notes:

- Keep slides visual - show actual Salesforce screens
- Practice transitions between sections
- Have laptop ready for quick demo if needed
- Prepare for common questions about access and customization