**OpenText Analytics**

**10-Step Demo Script – Innovate Sales Dashboard**

<http://analytics.eimdemo.com/iportal/apps/Innovate/?userID=Administrator&password=TMAnalytics16>

NOTE!: this demo is a LIVE environment that opens in full edit mode. DO NOT click SAVE!

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| Narration | Clicks |
| 1. Through the Content Server CONNECTED WORKSPACE feature, Corporate Sales Execs can see a historic sales revenue dashboard using data from Salesforce.com. The dashboard shows metrics across promotions, product lines, and sales channels. | Launch “Innovate Sales Dashboard” sample app using URL above |
| 1. The dashboard is flexible, allowing users to filter charts on the fly | On the ANNUAL SALES BY CHANNEL area chart (upper right), click the legend values (Warehouse, Value Added Reseller, Premium Outlet) to filter/un-filter the chart by sales channel. |
| 1. iHub charts provide drill down to lower levels of detail. | On the CAMPAIGN PERFORMANCE INSIGHT bar chart (top left), click the bars for any Year to drill down to Quarters. Click again on a bar to drill down/drill up.  Before moving on, drill up to the top level on the chart: year |
| 1. Selectors allows users to set context and filter all displayed information at once | Under SELECT PROMOTION (right side of screen) click "New Product Launch". Under SELECT PRODUCT LINE click "Tablets and Notebooks".  **Clear all selectors before moving on**. |
| 1. The user can also EXTEND their experience by adding NEW GADGETS to help their analysis. I’d like to track how we have been performing historically with our new product launch campaigns. I’ll add a chart that shows how the margins between product manufacturing costs and sales price have been performing historically. | CLICK EDIT upper right of the dashboard, in toolbar click INSERT>GADGET FROM GALLERY, select the “Average Margin (Mfg Cost vs Sale Price).gadget” and click OK.  CLICK “HIDE” in the upper right of the dashboard to close the toolbar |
| 1. Now lets drill into my area of specific interest. Since our upcoming campaigns will be for our latest new product, I’ll select “New Product Launch”. I am also wondering how much our Value Added Resellers are contributing to the bottom line, are they a truly profitable channel? | Select “New Product Launch”  Next select “Value Added Reseller”  Next select “ Wearable Devices” |
| 1. Hmm….sales are up across the board historically according the revenue chart, but look at the Average Margin metric! Products are being sold at a loss by our VARs! This is a VALUABLE BUSINESS DISCOVERY, facilitated by the OpenText Analytics iHub Dashboard. If we had just taken the initial sales figures at face value we would have missed the issue, but the interactive, flexible and personal experience provided by the iHub allows the user to quickly make these types of discoveries! | Point out below 0 bars on Margin chart. Optionally drill down on Margin chart bars (be sure to drill back up to the top level year before moving on).  NOTE! **Clear all selectors before moving on**. |
| 1. OpenText Analytics can not only review history, it can also make predictions based on statistical algorithms. I’ll add a sales forecast gadget to the dashboard to help my management team set goals for our sales teams   Behind the scenes, OpenText Big Data Analytics processes millions of records instantly, running the historic sales through a predictive FORECASTING algorithm in order to project future sales. | CLICK EDIT upper right of the dashboard, in toolbar click INSERT>GADGET FROM GALLERY, select the “Predicted Sales Forecast (6 mos).gadget” and click OK. Drag gadget to center of layout.  CLICK “HIDE” TO CLOSE TOOLBAR |
| 1. The ability to analyze data so quickly allows me to even adjust the prediction on the fly. Lets see how well sales are predicted to go for our VAR’s, based on our margin issue discovery… | Select “Value Added Reseller” |
| 1. Hmm, does not look so positive, likely due to the unsustainable business practice we discovered!   Thanks to OpenText Analytics, Sales Execs can manage sales operations more effectively and efficiently! | Point out the predicted forecast becomes bad when filtering on Value Added Reseller sales channel.  CLOSE THE DASHBOARD WITHOUT SAVING! |