

Guide to

# SALES ANALYTICS

Turn insight into performance with Sales Analytics.





Sales Analytics from Salesforce gives everyone in your sales organization the answers they need to make smarter decisions, faster. With predesigned dashboards built for Sales Cloud data, executives, sales managers, reps, and operations have the power to dive deep and explore, slicing and dicing data down to the individual record. And because it's natively integrated with Salesforce, you can take action directly from Sales Cloud. Everyone on your sales team can interact with their data, get answers, and turn insight into performance. Sales Analytics instantly unlocks answers to key sales questions, including what's going on and why, what will happen, and what your next steps should be.

In this guide we'll review Sales Analytics dashboards and explain how each person in your sales organization can get the answers he or she needs to make smarter decisions about your customers.

## Start blazing your trail to amazing service at Trailhead.

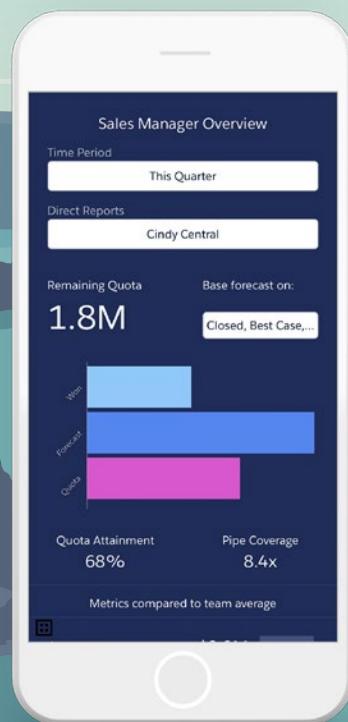
Astro and friends will guide you through everything you need to know about Salesforce. With fun, easy-to-follow trails you'll be up and running in no time.

Find your path forward at  
[salesforce.com/trailhead](https://salesforce.com/trailhead)



# Sales Analytics

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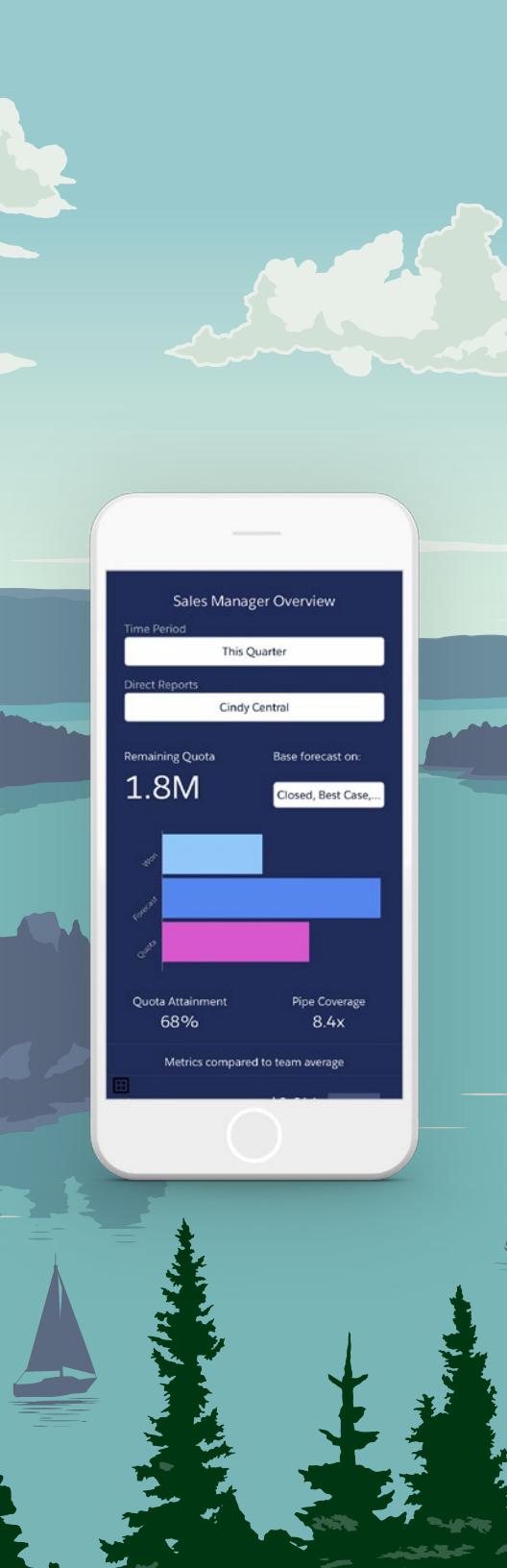
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# Sales Analytics

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# Introduction

## WHAT YOU'LL LEARN

- ✓ How to ask new questions, interactively explore your sales data, and uncover insights and trends
- ✓ How to get a clear path through your Sales Cloud data on any device
- ✓ How to take action back into Salesforce from any dashboard
- ✓ How to find and explain the underlying reasons behind patterns regarding sales performance, pipeline changes, and deal wins and losses

## WHO THIS GUIDE IS FOR

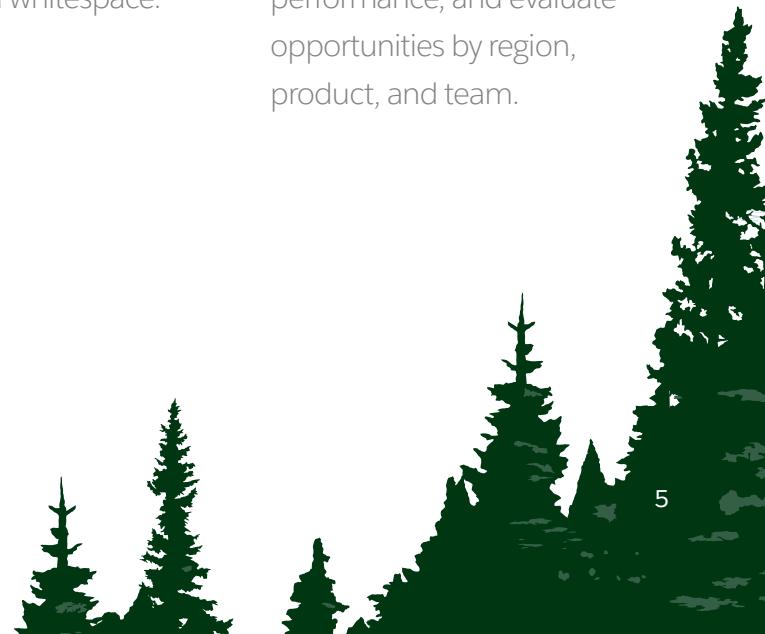
Your entire sales organization can benefit from Sales Analytics.

**Sales execs** get a single view of the data, so they can quickly pivot their strategy to grow sales.

**Sales managers** get visibility into performance and pipeline to accelerate deals and coach reps.

**Sales reps** can track their performance and identify new opportunities and whitespace.

**Sales ops** can spot trends, analyze historical performance, and evaluate opportunities by region, product, and team.



# Sales Executives

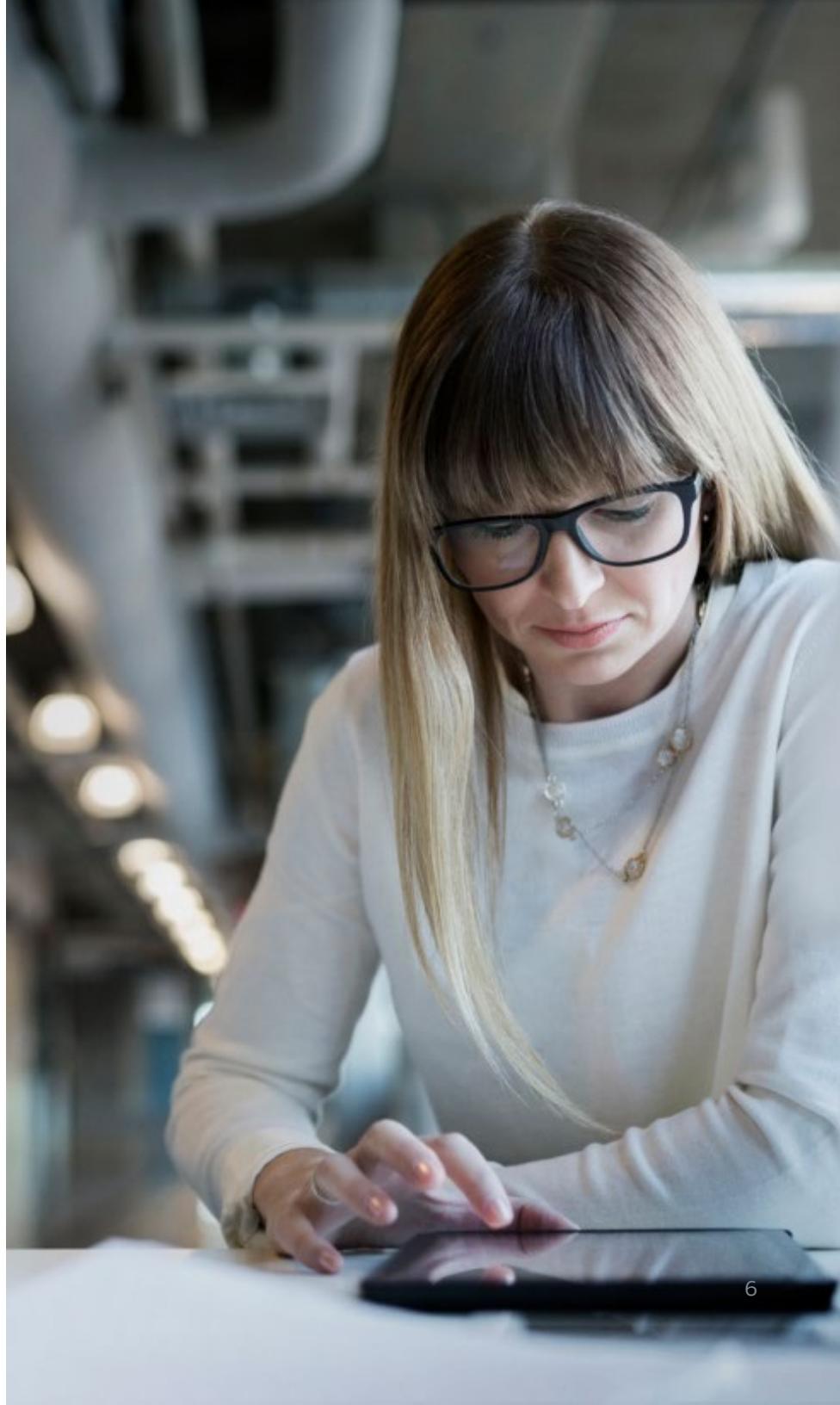
**Sales executives** are under a ton of pressure to meet their monthly, quarterly, and yearly sales quotas. The last thing they want to do is put their CEO on the hot seat at the quarterly shareholder meeting. They need to lead, inspire, and motivate their sales talent to sell more, faster.

Sales Analytics gives execs fast answers to critical sales questions like:

*How fast is pipeline moving? What percentage of deals are lost or won? How long does it take for deals to convert? And how profitable are those deals?*

**IF YOU ARE A SALES EXECUTIVE, TAKE A LOOK AT THESE CHAPTERS:**

1. SALES EXECUTIVE OVERVIEW
2. SALES PERFORMANCE OVERVIEW
3. SERVICE PERFORMANCE OVERVIEW
4. LEAD ANALYSIS



# Sales Executive Overview

## GET THE BIG PICTURE, FAST

The Sales Executive Overview dashboard gives you a complete view of your sales and service operations in a single place. Look at business across geographies, customer types, products, and time periods. Monitor top-level KPIs such as pipeline performance, booked business, and case duration – and drill down into detailed data for further analysis into trends.



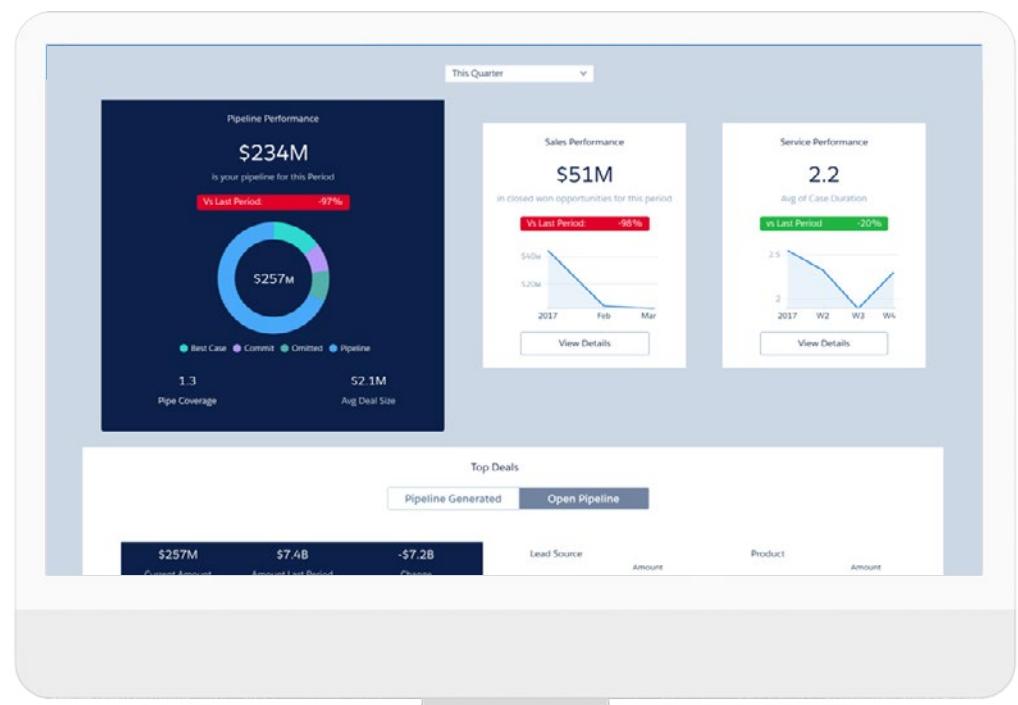
### HOW IT CAN HELP YOU SELL MORE:

See how close you are to beating quota and where you need to allocate and reallocate resources

Identify your best lead sources so you can double down on marketing efforts

Discover the correlation between your product and CSAT

Get a clear picture of why sales performance is down from last quarter



# Sales Performance Overview

## TRACK DISTANCE TO QUOTA

The Sales Performance dashboard lets you drill down into pipeline details so you can strategize the best business direction to increase win rates. View performance trends by month, quarter, or year, including the percentage of deals won and lost, lead conversion rates, and opportunity size. Zero in on individual performance to see who needs help pushing deals forward.



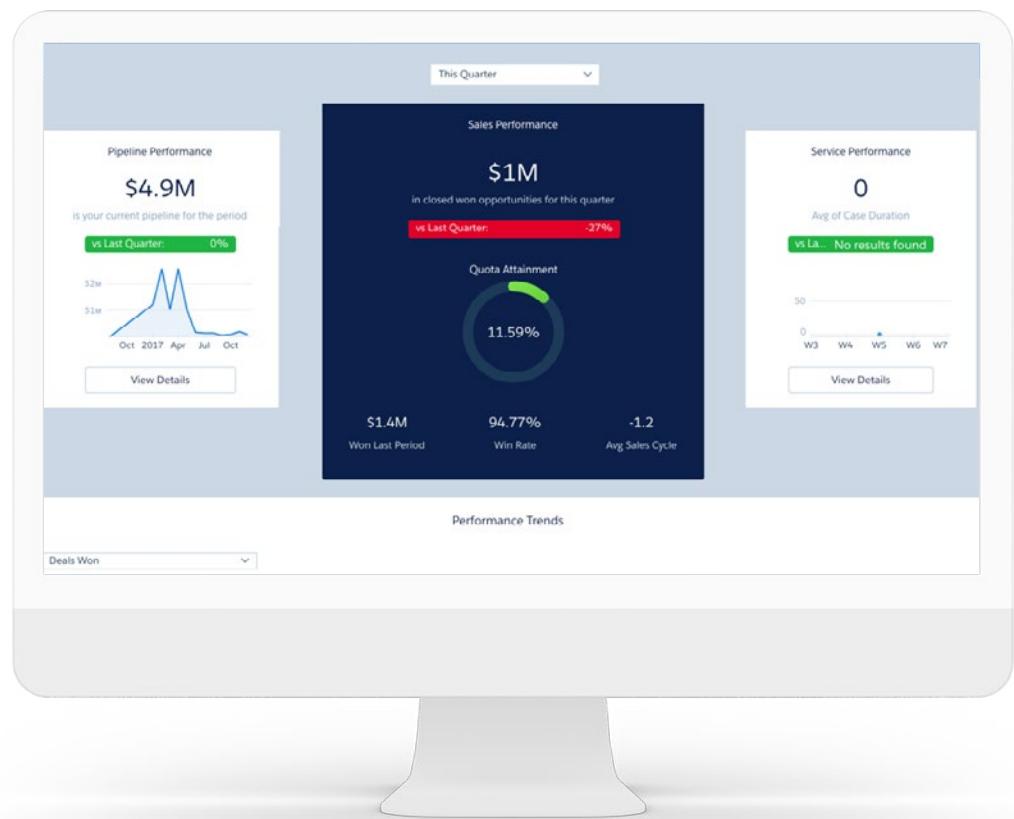
### HOW IT CAN HELP YOU SELL MORE:

View historical trends and better predict which current deals will convert to sales

Uncover the best way to target the most profitable opportunities

Monitor pipe activity as a benchmark (open vs. won deals) for determining best practices for enhancing deals

Identify whitespace opportunity to grow the value of existing accounts while improving customer profitability



# Service Performance Overview

## PREVENT CUSTOMER CHURN

Track multiple customer service metrics to get a clear, unified view of your service team's strengths and weaknesses. Monitor case duration by account, channel, and region, and identify which open cases have the highest account value.



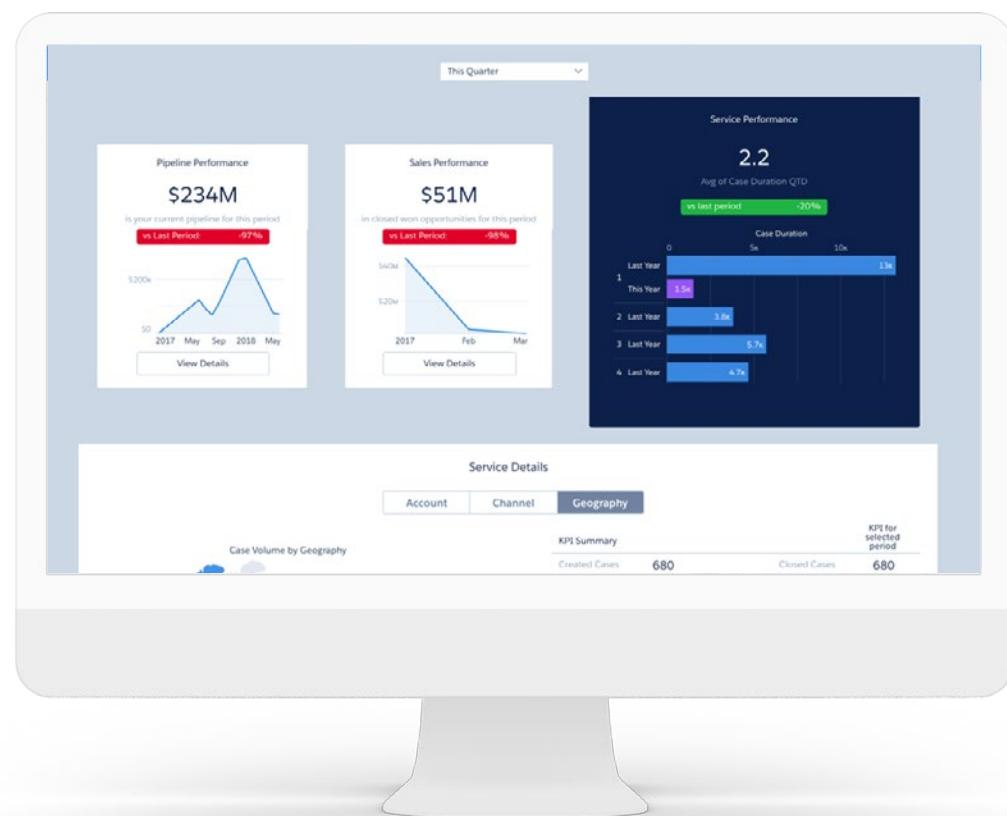
### HOW IT CAN HELP YOU SELL MORE:

See if you're retaining enough customers to grow sustainably

Identify the reason behind longer case durations so you can optimize your service operations

View satisfaction trends that drive business and improve customer service

Get insights into customer retention practices and help prevent churn



## CHAPTER 4: SALES EXECUTIVES

# Lead Analysis

### SPOT TRENDS TO ACCELERATE FUTURE SALES

The Lead Analysis dashboard gives executives, sales leaders, and operations teams real-time insights on lead performance. Slice and dice lead data by customer, geography, source, and product to uncover trends that close deals faster. Identify your hottest leads and accelerate key opportunities to crush your quota.



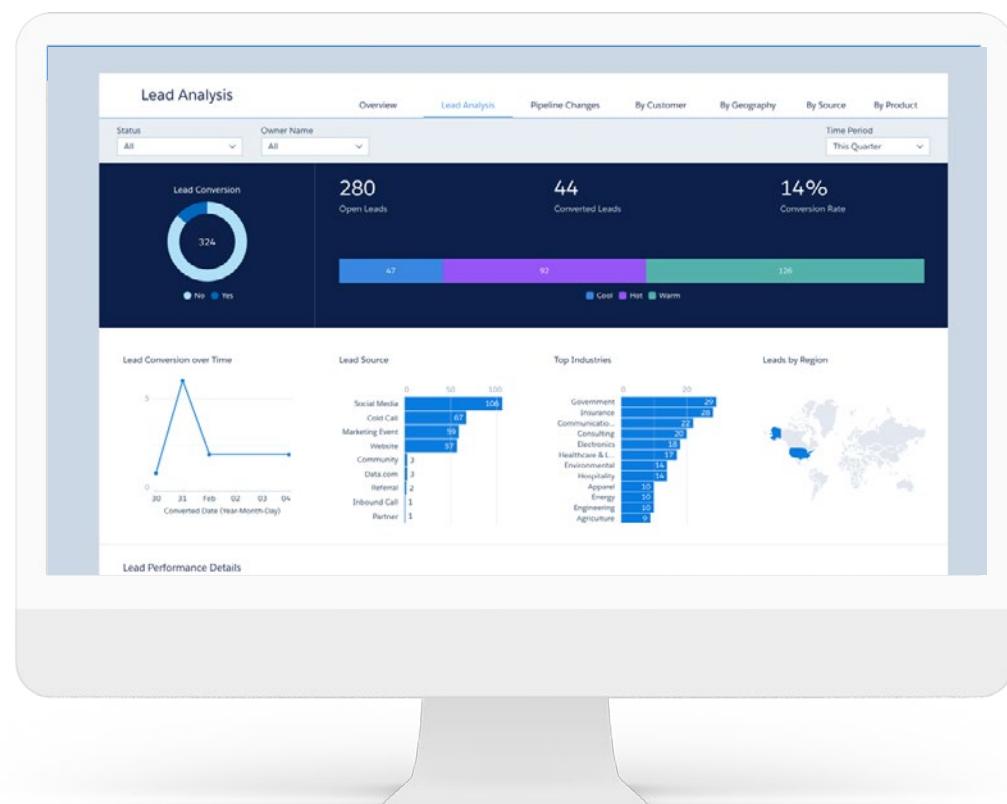
#### HOW IT CAN HELP YOU SELL MORE:

Identify and optimize lead distribution across sales teams and reps

See which lead sources bring in the most profitable business

View your top-performing industries

Find out which leads or accounts have the highest probability to convert



# Sales Managers

**Sales managers** are thinking about a million things at once:

*Am I going to hit my quota? What is my most current forecast? What happened to my forecast? Do I need to change my forecast? And what's the best way to manage team behavior and coach reps?* With Sales Analytics, you'll get answers to all your business issues and take care of your reps, too.

## SALES MANAGERS SHOULD CHECK OUT THESE CHAPTERS:

- 5. SALES MANAGER OVERVIEW
- 6. PIPELINE CHANGES
- 7. TEAM PRODUCTIVITY
- 8. QUOTA PROGRESS



## CHAPTER 5: SALES MANAGERS

# Sales Manager Overview

### CHECK THE PULSE OF YOUR BUSINESS

The Sales Manager Overview dashboard is for first-level managers who supervise sales opportunity owners. This dashboard gives managers a quick overview on how team members are performing for a given time period.



#### HOW IT CAN HELP YOU SELL MORE:

Know the state of your overall business

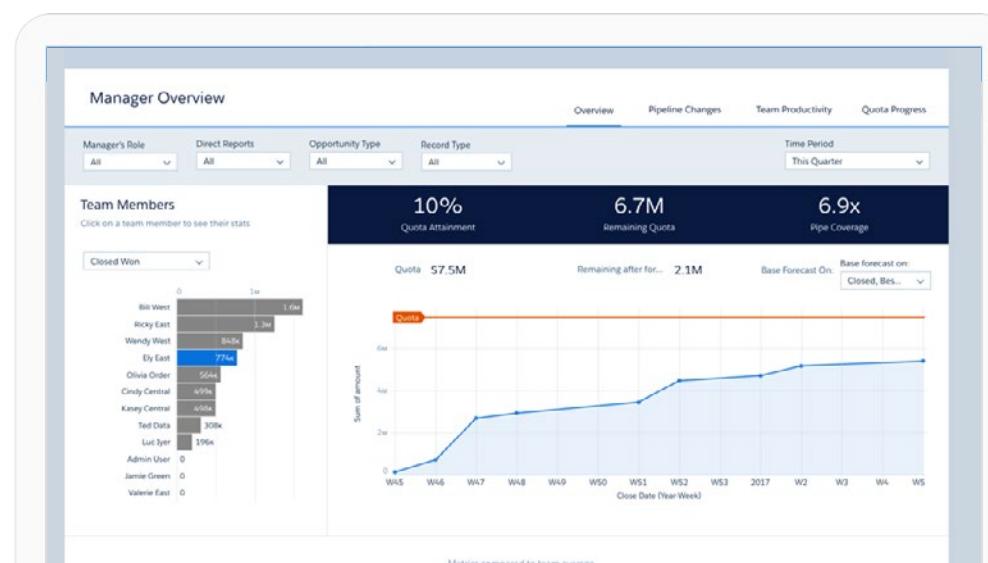
Understand your win rate percentage by dollars

Know how your bookings increased compared to the same period last year

See your top five closed/won deals

Know your top five new deals

See the activities completed in the last seven days



# Pipeline Changes

## KNOW THE KEY CHANGES TO YOUR PIPELINE

Understanding how your pipeline changes over time has never been easier. This dashboard gives you instant visibility into where your pipe started at the beginning of a period, where you ended up, how you got there, and what actions to take.



### HOW IT CAN HELP YOU SELL MORE:

Know what has changed in your open pipeline

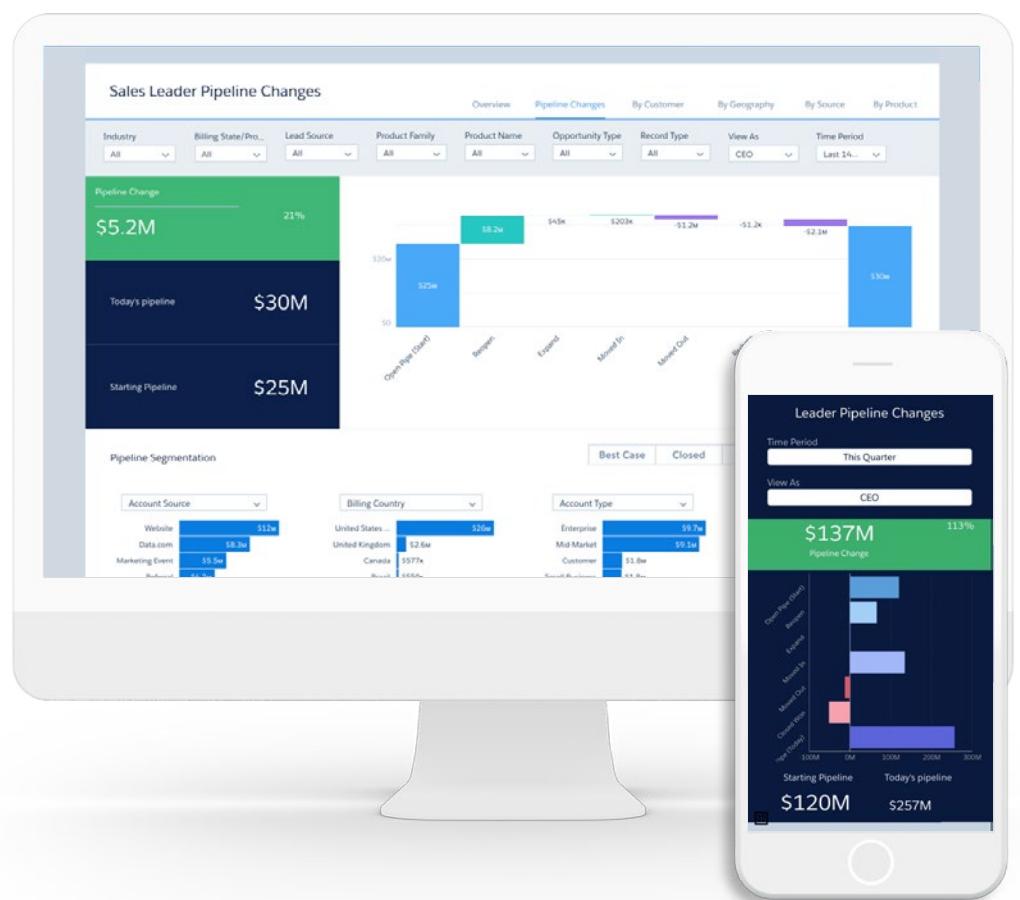
Understand pipeline increases  
(New, Re-open, Moved In, Expand)

Know what caused your pipeline decreases  
(Closed Won, Closed Lost, Moved Out, Reduced)

See the movements in your open pipeline by geography and by customer

Discover where deals are getting stuck in the pipeline – and why

Know what action to take to revive stale deal cycles



# Team Productivity

## SEE TOP- AND BOTTOM-RANKED PLAYERS ACROSS KEY PERFORMANCE CATEGORIES

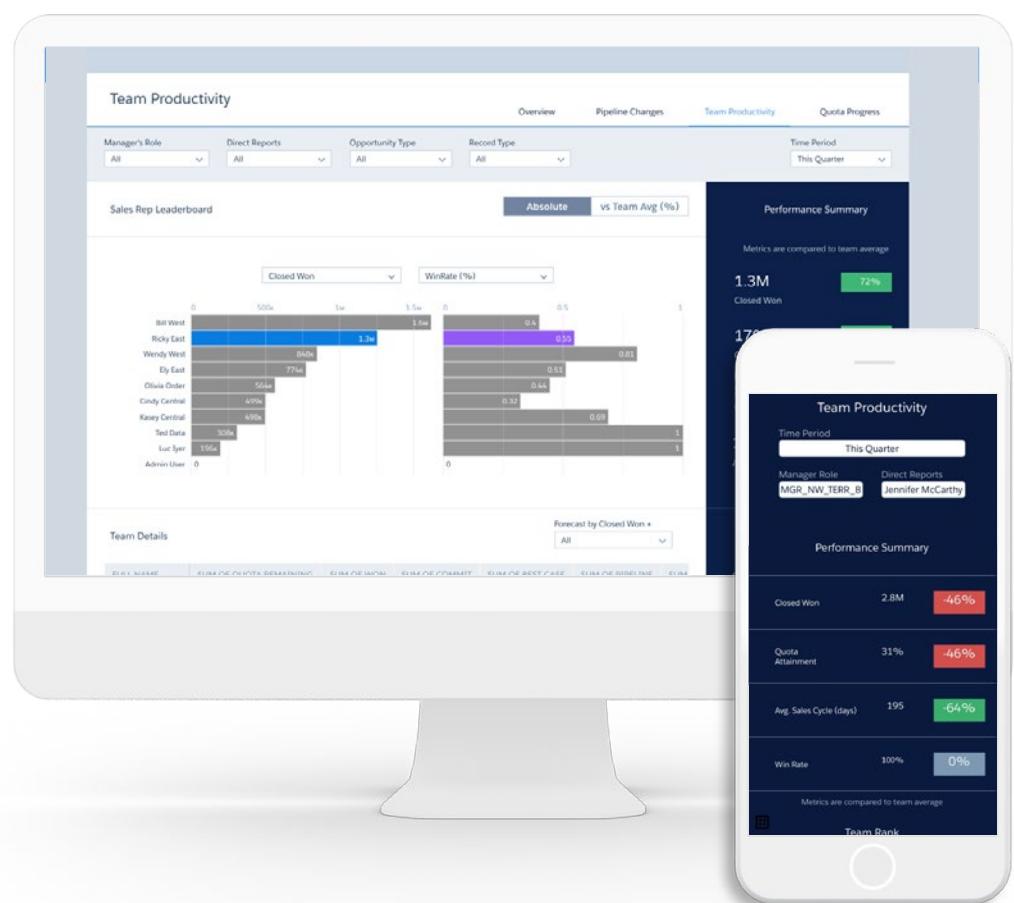
Being a manager isn't just about dollars; it's also about people.

Get a view across all of the sales reps on your team and see how they rank on various key performance categories and time periods. See top- and bottom-ranked players and identify coaching opportunities to make the whole team more productive.



### HOW IT CAN HELP YOU SELL MORE:

- Find the teams and reps winning the most deals
- Uncover the teams and reps adding new deals to the pipeline
- See the teams and reps with closing deals in the pipeline
- Track the top and bottom teams' and reps' activities
- Know the top and bottom teams and reps by quota attainment dollars
- View which elements the unsuccessful teams had in common
- Identify best practices to coach those teams to success



# Quota Progress

## GET AN IN-DEPTH UNDERSTANDING OF HOW YOU'RE TRACKING TO QUOTA

Dive deep into your quota attainment and look at opportunities set to close this quarter for improved forecast accuracy. Look ahead at next month or next quarter by changing the time selector and identify possible opportunities to move up.



### HOW IT CAN HELP YOU SELL MORE:

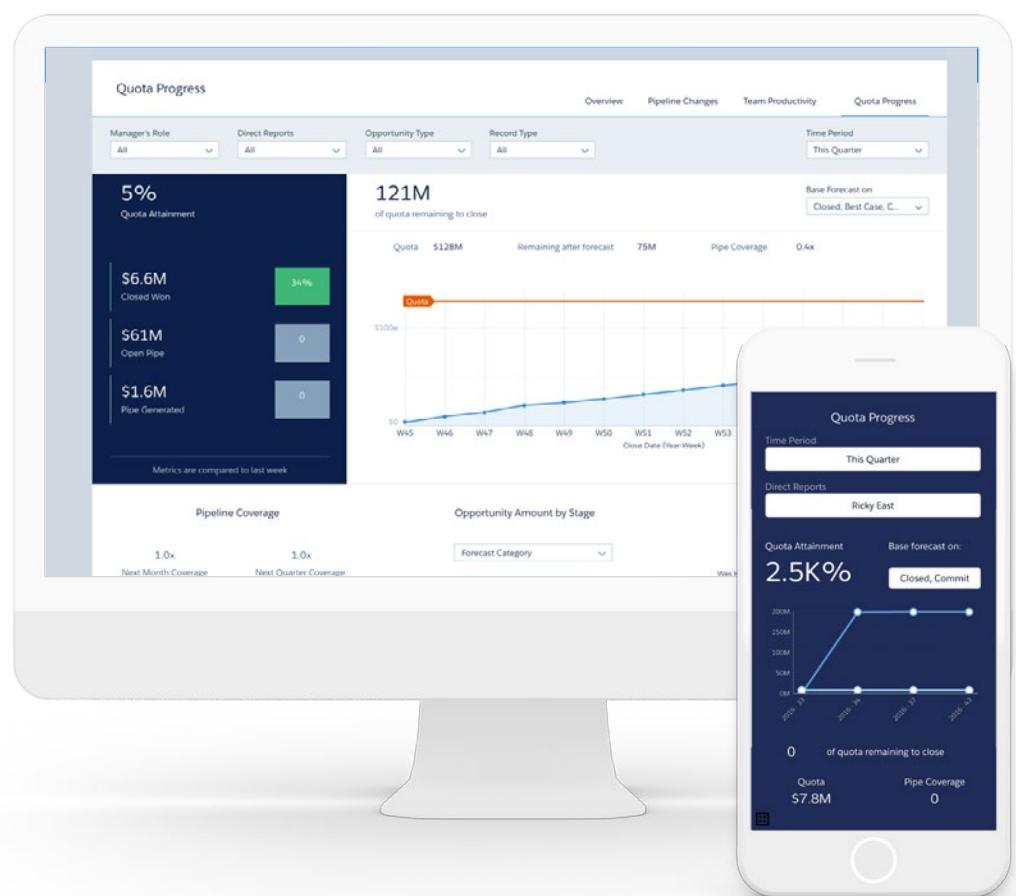
Find out if your team hit its quota

Identify the reps forecasted to hit their quotas

See the top open deals this quarter and next

Know the deals your team should focus on to ensure you hit your quota

Understand which actions will have the biggest impact to close a prospect



# Sales Representatives

**Sales reps** are totally focused on making quota and need to know where they stand at any given moment. *How am I tracking to quota? What open opportunities do I need to focus on? What are my customers' underlying needs, and are they being met today?*

Sales Analytics gives reps the insights they need to identify new opportunities, close bigger deals, and become trusted advisors to customers.

## IF YOU ARE A SALES REP, TAKE A LOOK AT THESE CHAPTERS:

9. SALES REP OVERVIEW

10. OPPORTUNITY DISCOVERY



# Sales Rep Overview

## QUICKLY IDENTIFY YOUR TOP OPEN DEALS

The Sales Rep Overview is for reps who own opportunities and carry a quota. Look at your quota attainment and get instant insight into closed/won opportunities, open pipe, and completed activities for a given time frame. View your forecast and how you're tracking toward your quota.



### HOW IT CAN HELP YOU SELL MORE:

Know the state of your overall business

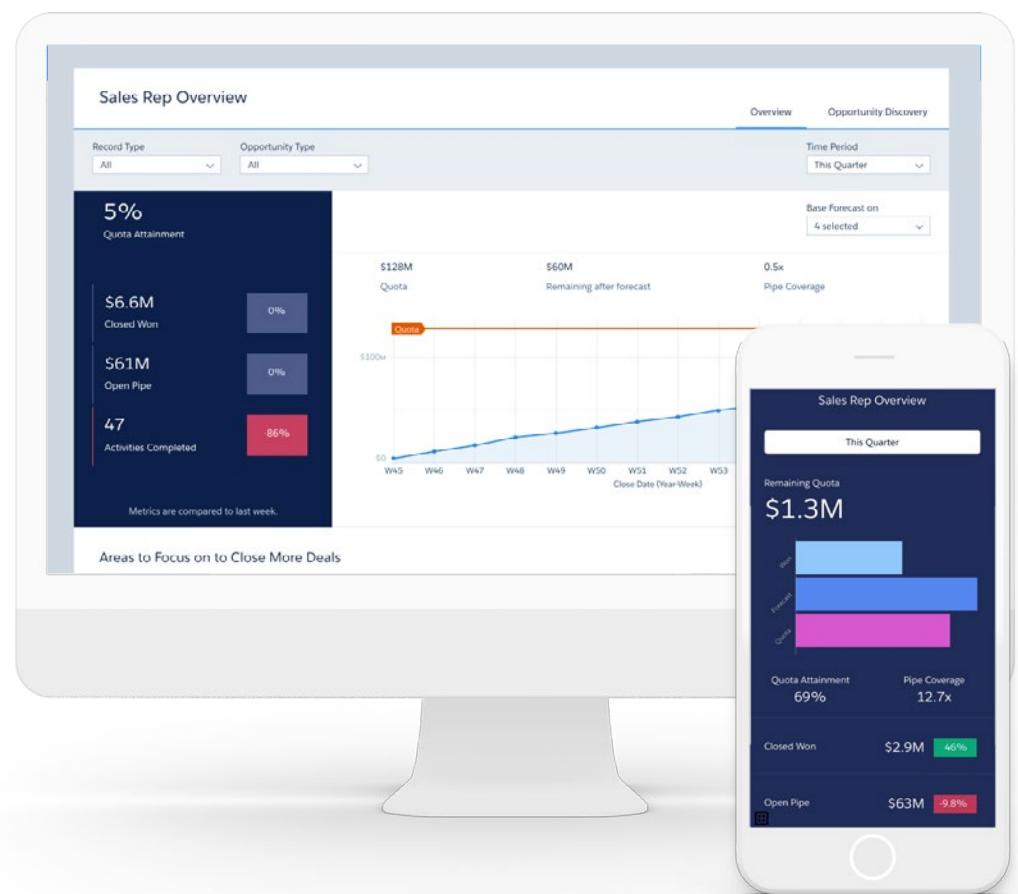
See your win rate percentage by dollars

Know which bookings increased compared to the same period last year

Know your top closed/won deals and new deals

See how many activities have been completed in the last seven days

Identify which deals you should accelerate



# Opportunity Discovery

## UNCOVER NEW OPPORTUNITIES, INSTANTLY

Quickly identify whitespace and discover new opportunities.

Slice and dice opportunities and closed/won business by owner, customer, geography, product, and source; then drill into the details to take an action on the Sales Cloud record.



### HOW IT CAN HELP YOU SELL MORE:

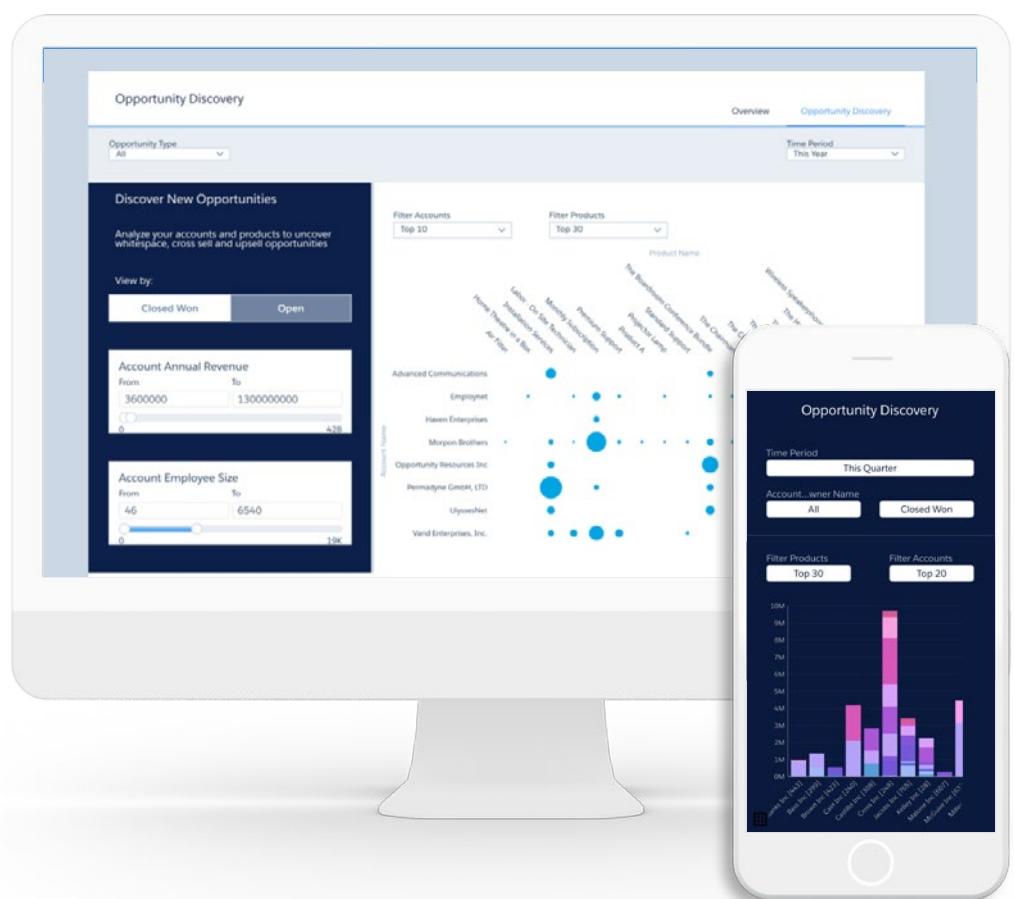
Dive into the new/existing business you have closed/won in the last week/month/quarter/years

See an increase or decrease in growth by different parts of the business

Instantly identify the whitespace by slicing and dicing across key account and deal qualities

Take action – like logging tasks – right on the account record for immediate follow-up

Understand what actions you need to take to drive sales

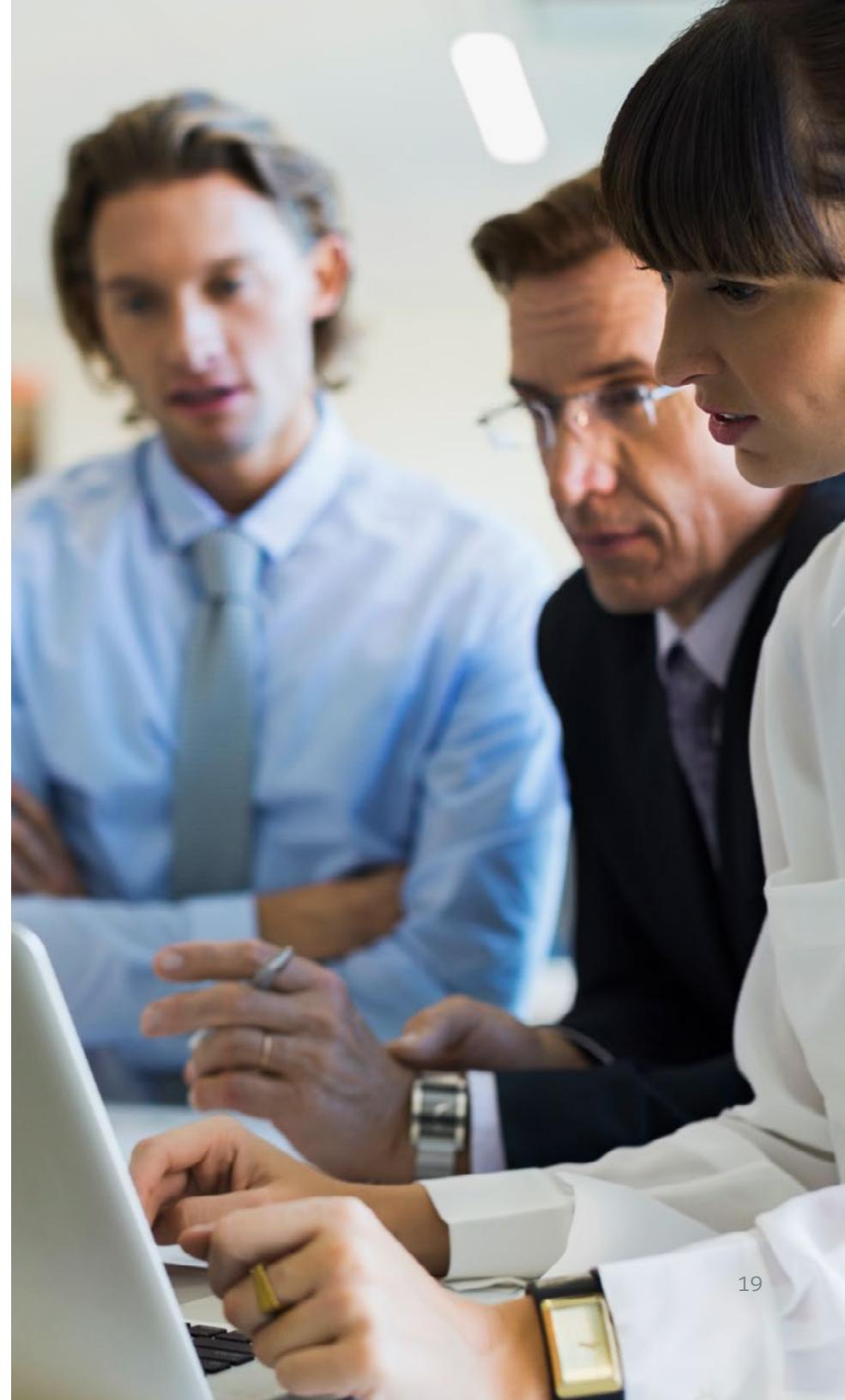


# Sales Operations

**Sales operations** is critical to a sales team's success. Ops is the strategic advisor, guiding the decisions that drive efficiency and maximize revenue. Ops understands the business from the ground up: *What's the sales cycle time, and how has that changed? How are the company's products selling across industry, region, segment? Where are the sales team's gaps, and how should we think about growing the team and influencing behaviors?*

## IF YOU ARE IN SALES OPERATIONS, THESE CHAPTERS ARE FOR YOU:

- 11. SALES OPERATIONS OVERVIEW
- 12. HOME DASHBOARD
- 13. PIPELINE CHANGES
- 14. PERFORMANCE BY CUSTOMER
- 15. PERFORMANCE BY GEOGRAPHY
- 16. PERFORMANCE BY SOURCE
- 17. PERFORMANCE BY PRODUCT
- 18. EINSTEIN DISCOVERY



# Sales Operations Overview

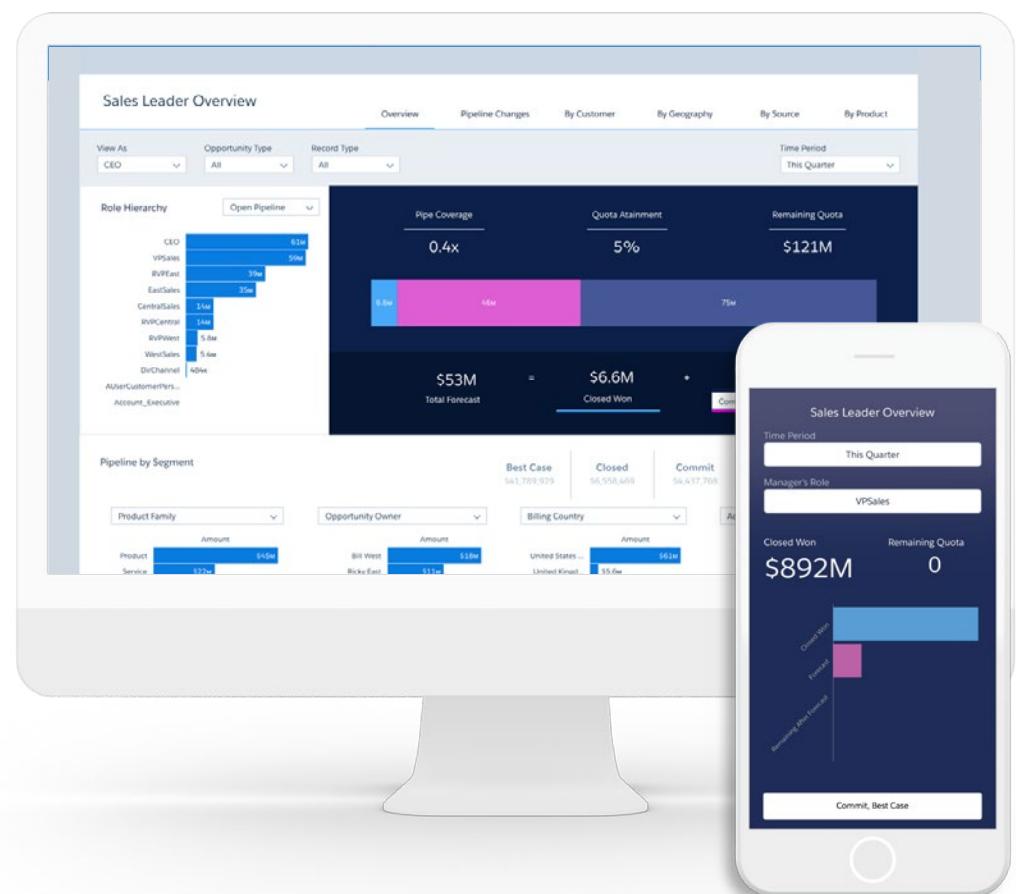
## KEEP A WATCHFUL EYE ON PIPELINE HEALTH

The Sales Leader Overview dashboard is designed for sales execs and operations who are level-two managers and above. It provides an overview of open pipeline rolled up by role one level below the selected manager role. Because users need to see more opportunities, they can slice and dice by product, customer segment, owner, and geo.



### HOW IT CAN HELP YOU SELL MORE:

- Monitor the state of the overall business
- Track win rate percentage by dollars
- See how bookings increased compared to the same period last year
- Rank the top five closed/won deals
- Know the top five new deals
- Report activities completed in the last seven days



# Home Dashboard

## CHOOSE YOUR DASHBOARDS

Now, sales reps, managers, and executives have specialized views of their most important sales KPIs – allowing them to easily uncover opportunities, track sales activities, and manage sales performance to increase productivity. Once Sales Analytics is activated, an onboarding screen lets users choose which dashboards will be most useful to them according to their role. Dashboards automatically populate with live data from Sales Cloud, giving users the instant insights they need to make decisions more effectively.



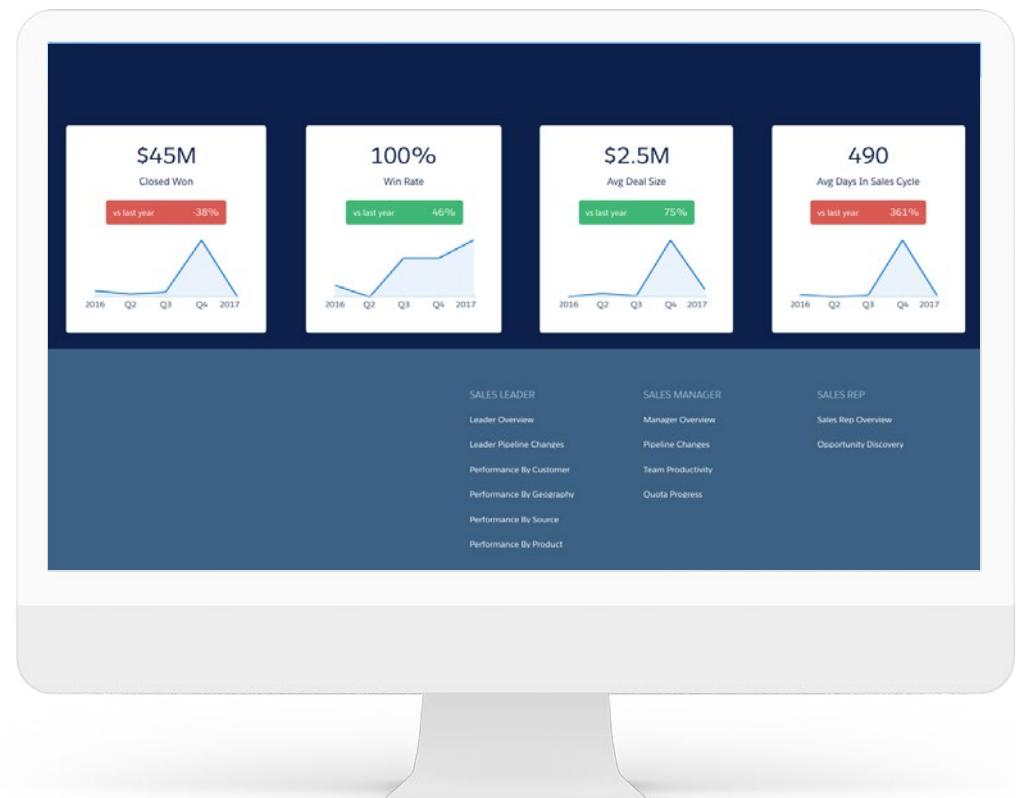
### HOW IT CAN HELP YOU SELL MORE:

Get a quick view of your critical business in a single place

Slice and dice sales data by customer, geography, source, or product

View pipeline changes over time

See how close you are to beating quota



# Pipeline Changes

## STAY ON TOP OF KEY PIPELINE CHANGES

The sales leader Pipeline Changes dashboard is built for users at the top of the role hierarchy with access to volumes of opportunity records. New filters make it easy for sales execs and operations to drill down further on pipeline details to adjust strategic business direction and deliver better operational support.



### HOW IT CAN HELP YOU SELL MORE:

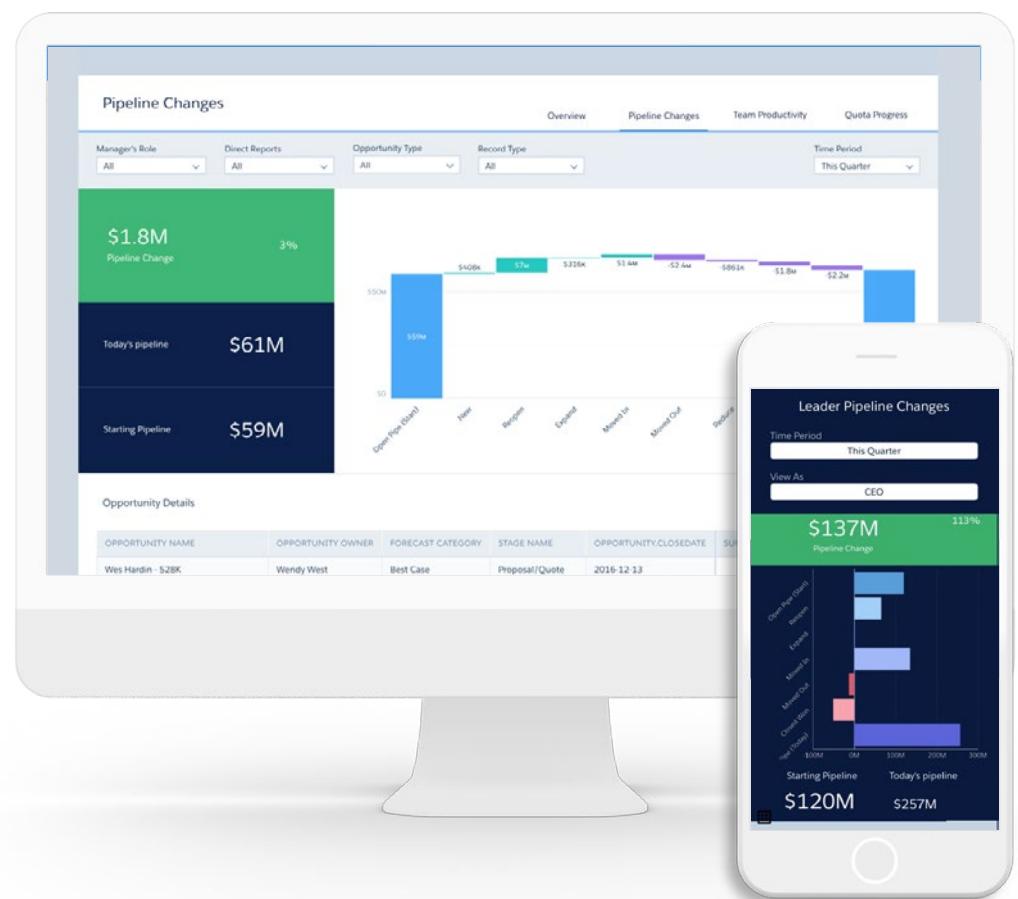
Track closed won/lost opportunities that were closed, won, or lost after the beginning of the selected period

Look into opportunities where total amount is less than it was at the start of the selected quarter

See new opportunities created after the start period

Understand pipeline changes by quarter

Monitor all opportunities set to close since the beginning of the quarter



# Performance by Customer

## GET A CLEAR PICTURE OF YOUR CUSTOMERS AND ACCOUNTS

Optimize your sales strategy by digging into performance by account and opportunity. Quickly see the latest trends across your customers – know what to talk about every time you pick up the phone, and quickly evaluate where there may be new opportunities.



### HOW IT CAN HELP YOU SELL MORE:

Know how much a particular account has spent

See the open opportunities per customer account

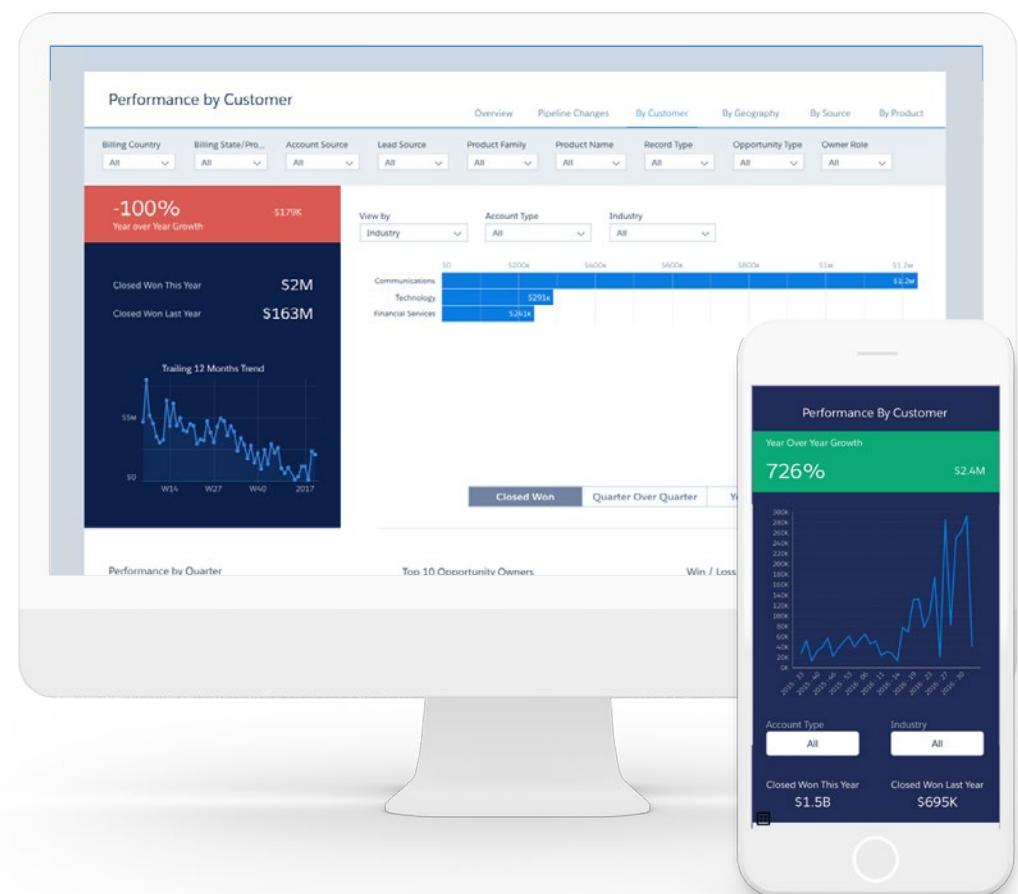
Understand what stage these open opportunities are in

Know your average win rate percentage by dollar per account

Find your average sales cycle by customer

See the correlation between product and customer satisfaction

Discover potential upsell opportunities



# Performance by Geography

## KNOW WHAT PRODUCTS ARE DRIVING THE MOST BUSINESS

Zero in and analyze performance numbers by country or state.

Quickly get the details on how your business is performing across every key metric. Slice and dice closed/won business by geography; then drill into the details in the related dashboards.



### HOW IT CAN HELP YOU SELL MORE:

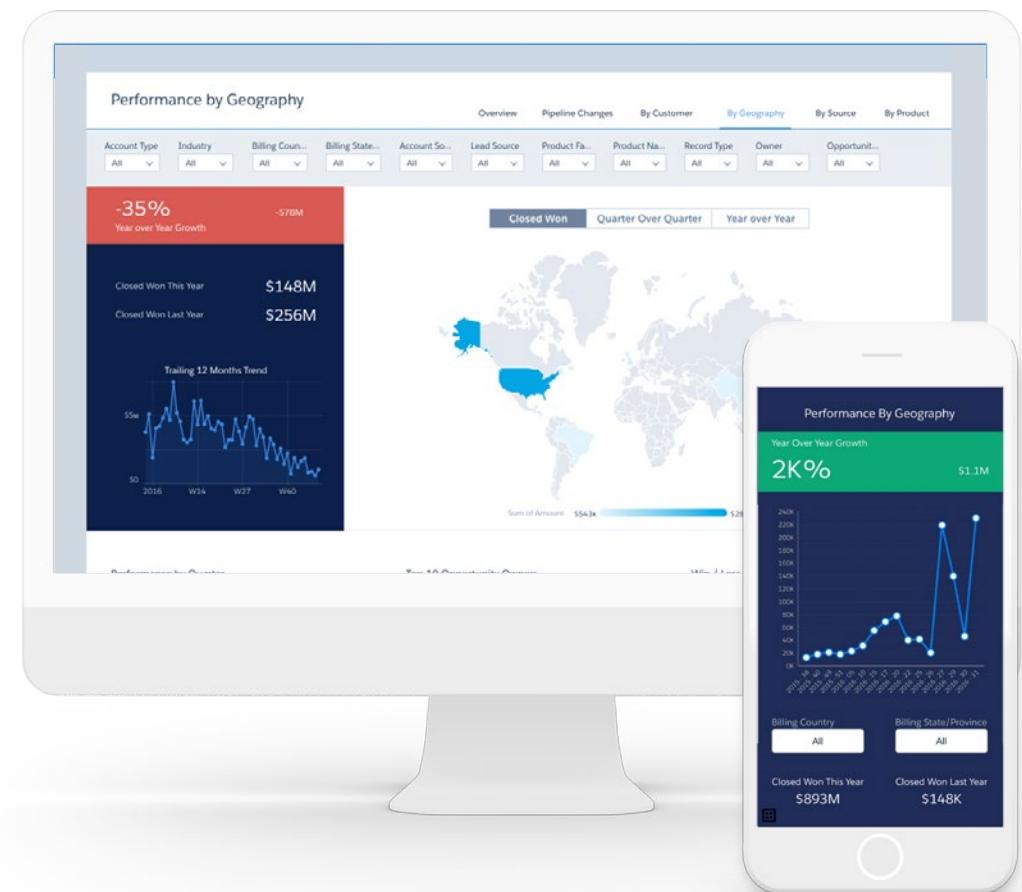
- Choose world map or U.S. map

- See year-over-year growth by area

- See top sales rep opportunities by region

- Get quarter-over-quarter growth trend and won/loss analysis by geography

- Know where you can upsell additional product



# Performance by Source

## INSTANTLY UNDERSTAND WHERE DOLLARS ARE COMING FROM

This is the dashboard that every sales ops manager is going to want to share with his or her marketing team. Understand all of your lead sources and those that are driving closed deals across every rep and segment. Know where to invest to grow the business.



### HOW IT CAN HELP YOU SELL MORE:

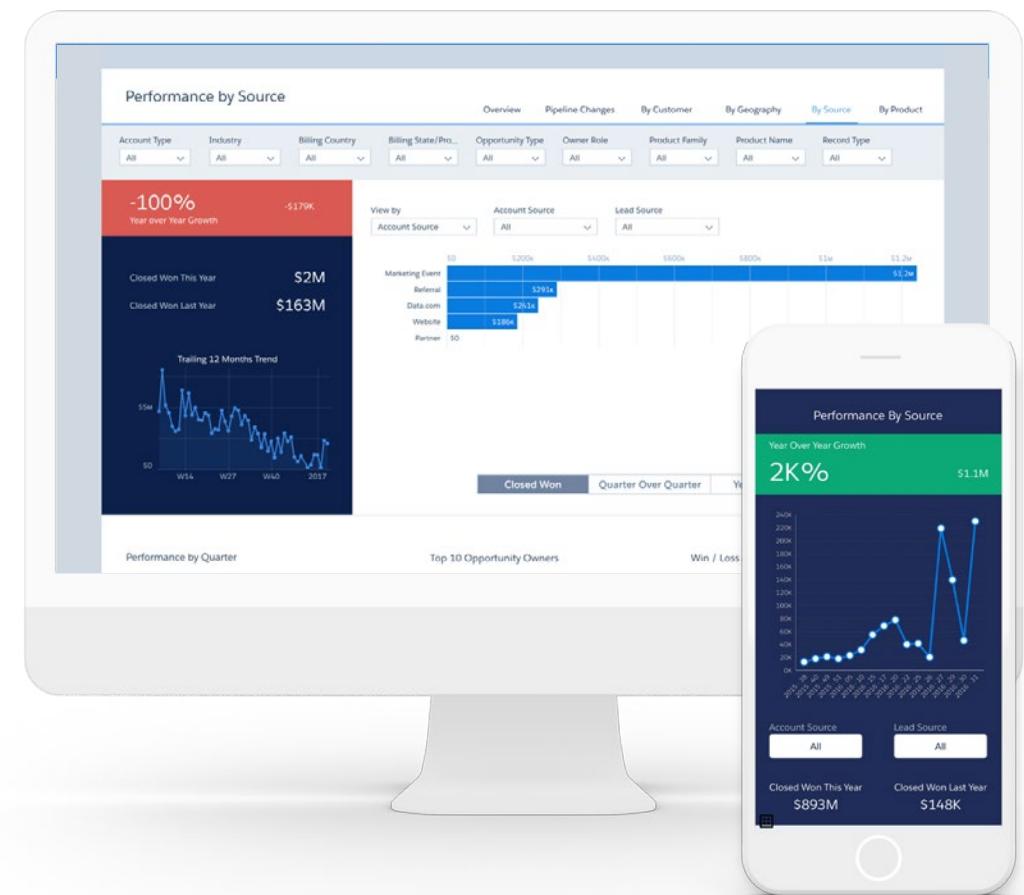
Know how much new/existing business has closed/won in the last week/month/quarter/year by different marketing sources

Understand the marketing sources that make up most of your closed/won business

See an increase/decrease in year-over-year growth by different marketing sources

Compare top marketing sources

Understand which lead sources generate the most ROI, and identify where you should invest resources



# Performance by Product

## KNOW WHICH PRODUCTS DRIVE THE MOST BUSINESS

Filter for trends by every product, and get an in-depth understanding of what products are driving the most business and what products need your attention.



### HOW IT CAN HELP YOU SELL MORE:

Know how much new/existing business has closed/won in the last week/month/quarter/year by different products

See what products make up most of your closed/won business

See an increase/decrease in year-over-year growth by product

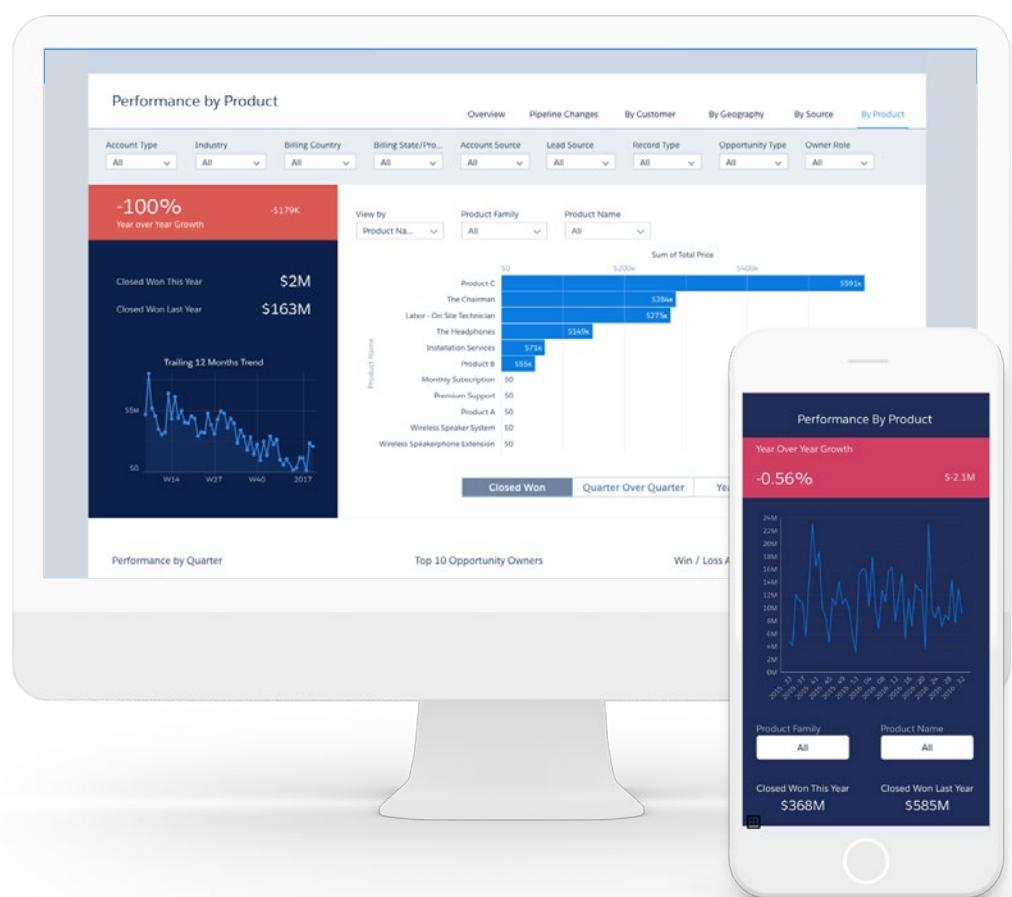
Understand when it is time to shift the bookings mix across different products

Know the product portfolio mix sold by different teams and people

See your win rate percentage by dollar and across different products

Compare top products

Identify trends across product matrix



# Einstein Discovery

## GET THE WHOLE STORY BEHIND YOUR DATA

Your organization is sitting on massive amounts of data – but what good is it if you can't analyze and learn from it? Most complex sales issues have causes that weave through layers of interrelated variables, so just scratching the surface isn't enough. You need to drill down. Sales Analytics with Einstein Discovery does the heavy lifting for you – helping you find the right insights in your data and presenting them to you in simple, narrated stories. By uncovering key relationships and trends, you'll be able to act on your data – right from where you work – to close deals faster.



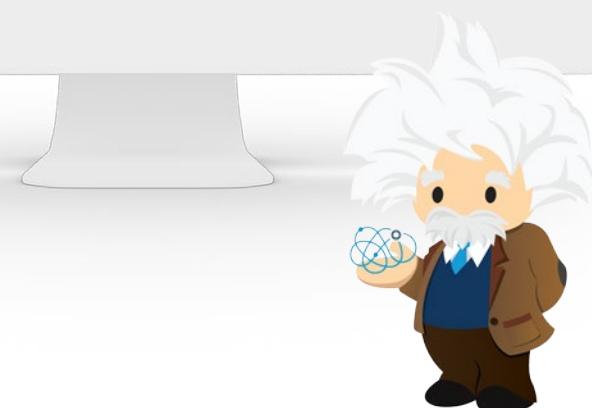
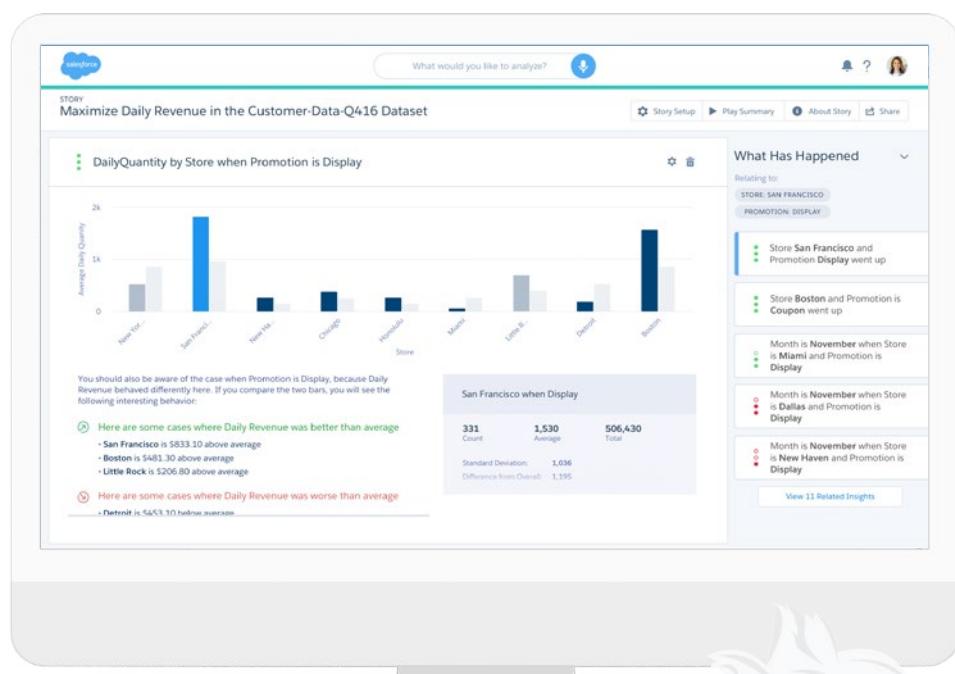
### HOW IT CAN HELP YOU SELL MORE:

Identify the best opportunities to capitalize on to reach quota faster

Discover what leads are going cold – and why

Build more accurate customer profiles so you can better predict what customers will buy and when

Understand how you can coordinate with marketing to increase win rates





# Where do you go from here?

With Sales Analytics, everyone on the team has the power to dive deep and explore, slicing and dicing data down to the individual record. See data from multiple angles, and uncover insights into how deals are moving through pipeline and the action you should take to make a close. Understand key business performance drivers, visualize trends, assign actions, and get fast answers to questions about business results, from any device, in any location.

**For more detailed information and a free demo, contact your sales rep.**

Or go to [salesforce.com/analytics](https://salesforce.com/analytics).



CONNECT TO YOUR CUSTOMERS  
IN A WHOLE NEW WAY