

# REPORTING STRATEGIES FOR BUSINESS ANALYSTS



## OVERVIEW

This course is a must for anyone responsible for using analytics to drive business results in a sales organization. Implementing a reporting strategy for business analysts provides you with the skills and knowledge you need to gather for analytics requirements, design and build custom reports and dashboards, and deploy them to your users. Using real-world scenarios, this course gives you the tools to analyze your key sales metrics, including lead generation, pipeline and trends, closed business, and sales team performance.

## WHO SHOULD TAKE THIS COURSE?

Implementing a reporting strategy for business analysts is for anyone responsible for developing and maintaining reports and dashboards for their sales organization in Salesforce, including:

- Sales operations analysts
- Business analysts
- Sales managers
- System administrators and power users may also benefit from this course

## WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

- Establish a process for developing and deploying analytics solutions for your sales organization
- Set up an efficient analytics infrastructure to ensure users can find the reports and dashboards they need
- Create effective sales reports and dashboards to address the needs of users at all levels
- Maximize users' consumption of sales reports and dashboards



### DURATION

- 3 days

### DELIVERY FORMAT

- Classroom
- Live Virtual

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## MODULES & TOPICS

### Discovery

- Establish a process for delivering analytics solutions
- Discover high-level requirements

### Defining Your Analytics Infrastructure

- Define a report and dashboard architecture
- Clean up reports and dashboards

### Pipeline Analysis

- Analyze executive requirements
- Design an executive dashboard solution
- Analyze pipeline
- Determine top 10 opportunities with a row limit filter
- Analyze opportunity size with a bucket field

### Closed Business Analysis

- Compare closed business month over month
- Analyze win rates with a joined report

### Pipeline Trend Analysis

- Understand opportunity trends with stage history
- Understand historical trending
- Analyze opportunity trends with an analytic snapshot and a combination chart

### Forecast Analysis

- Understand the capabilities of Collaborative Forecasts
- Analyze the company's sales forecast with a custom report type
- Analyze quota attainment with a joined report
- Validate that a solution meets requirements

### Lead Performance Analysis

- Analyze which types of leads perform best
- Monitor lead conversion times
- Analyze campaign revenue generation

### Sales Management Analysis – Opportunities

- Identify stalled opportunities and bottlenecks
- Identify opportunities at risk with a cross filter and a joined report

### Automating BusiSales Rep Analysis

- Monitor individual pipelines
- Manage activities

### Deploying Your Analytics Solution

- Communicate changes to users
- Maximize user adoption of reports and dashboards
- Improve report performance



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