

Salesforce - Implementing an Analytics Strategy for the Sales Cloud (STR 301)

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This course is a must for anyone responsible for using analytics to drive business results in a sales organization. Implementing an Analytics Strategy for the Sales Cloud provides you with the skills and knowledge you need to gather 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.

Skills Gained

- 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.

Who Can Benefit

Implementing an Analytics Strategy for the Sales Cloud is for anyone responsible for developing and maintaining reports and dashboards for their sales organization in Salesforce, such as sales operations analysts, business analysts, and sales managers. System administrators and power users may also benefit from this course.

Prerequisites

The prerequisites include a solid understanding of basic Salesforce concepts and sales functionality. In particular, students should have some knowledge of:

- Navigating Salesforce.
- Salesforce objects and their relationships to one another.
- Creating reports with the report builder.
- Creating dashboards with the dashboard builder.

Course Details

Discovery

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

Defining Your Analytics Infrastructure

- Determine permissions and folder access

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

Analyzing Opportunity Pipeline

- Analyze executive requirements
- Design an executive dashboard solution
- Build reports to analyze pipeline
- Build top 10 opportunity reports
- Analyze opportunity size

Closed Business Analysis

- Report on won opportunities against targets
- Compare closed business month over month
- Build top 10 won opportunities reports
- Build a top sales rep leaderboard
- Analyze win rates

Analyzing Pipeline Trends

- Report on opportunity trends with stage history
- Analyze opportunity trends with analytic snapshots

Forecasting Analysis

- Analyze the company's sales forecast
- Analyze sales reps' quotas and forecasts

Lead Performance Analysis

- Analyze which types of leads perform best
- Monitor lead conversion times
- Monitor lead qualification performance
- Compare sales rep conversion performance

Sales Team Management Reporting

- Identify stuck opportunities and bottlenecks
- Identify opportunities at risk
- Analyze sales rep activities
- Monitor data quality

Reports and Dashboards for Sales People

- Monitor individual pipelines
- Manage activities
- Analyze individual quotas

Validate and Deploy Your Analytics Solution

- Validate that a solution meets requirements
 - Provide guidance on how users can use a solution to meet their objectives
 - Maximize the consumption of reports and dashboards
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