Salesforce Analytics Cloud (Analysts and Implementers)

STR301: Implementing a Reporting Strategy for the Sales Cloud

$2,700.00

- 3 Days

Upcoming Dates

Course Description

This course is a must for anyone responsible for using analytics to drive business results in a sales organization. Implementing a Reporting Strategy for the Sales Cloud 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.

Course Outline

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

Sales 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

Audience

Implementing a Reporting Strategy for the Sales Cloud 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

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, including filtering, grouping and summarizing data
- Creating dashboards with the dashboard builder
- Create effective sales reports and dashboards to address the needs of users at all levels
- Maximize users' consumption of sales reports and dashboards

What You Will Learn

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