



Plan for a Dynamic Future with Advanced Sales Analytics

Our changing world

In a matter of months, the world has changed dramatically, shifting the ground underneath the feet of businesses and communities alike. Sales teams are facing some of the stiffest headwinds in generations, making “staying the course” no longer an option. Sales professionals need to adapt to this changing landscape faster than ever.



In any sales organization, you build competitive advantage by understanding both the big picture and the on-the-ground details; a thousand-foot view without losing sight of the day-to-day activities that close deals. This is more true today than ever before.

The recent health and economic crisis has accelerated the need for sales teams to continually adapt to changing conditions, making traditional, annual planning a quaint practice of the past.

Sales KPIs—including sales performance, cost-to-revenue ratios, and quota attainment—are only a few of the many metrics that will create the holistic picture of dynamic sales environments.

But how do you achieve such an expansive view of your sales processes? With a powerful business intelligence and analytics platform, you can leverage all of the data in your enterprise to build actionable insights quickly and consistently.

Data is the flashlight in the dark

Our customers come in every shape, size and industry focus, but the one common theme that we've heard from them is that the shift to digital is accelerating.

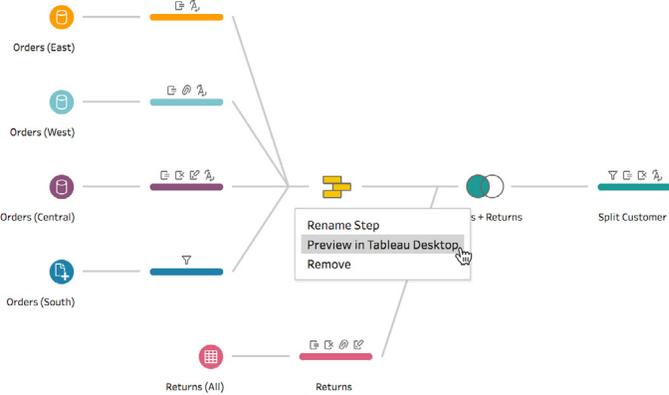
Employees, customers, and entire communities are now working and interacting in a completely digital world. From Zoom calls with colleagues to ordering groceries with smart phones, this world of connected digital experiences is here to stay. But we believe that truth presents a great opportunity for businesses and sales teams because every digital interaction generates data, and a lot of it. When your customers interact with your website, your mobile apps, your CRM system, and your sales team, plenty of helpful data is being created.



Only by fully leveraging data can we succeed in this environment—and it's never been more important to move with both speed and precision. Let data be your flashlight to guide your way. Organizations that are able to harness their data are the ones that are most successfully leading through these unprecedented times.

The most successful organizations are those that understand how data informs change—and does it at scale. When every employee has access to data insights that help them understand their part of the business, they can use data to drive their decisions and create meaningful impact.

Simply stated, analytics that knits together not only sales data, but information from across your organization, is critical. An intuitive analytics platform like Tableau provides a complete view of the metrics that sales operations needs to support better forecasting, planning, and real-time decision-making. The ability to integrate customer, finance, and marketing data is fundamental to understanding selling scenarios and building competitive advantage without slowing your momentum and progress.



How to set a smarter sales strategy

Like every other part of the modern enterprise, sales teams need to harness data to answer their most important questions:

- How do I know what's actually working and what's not moving the needle?
- How do I forecast in an environment that's constantly changing?
- How do I avoid making decisions too late and get ahead of the forces buffeting my business?

Build a culture of data

One of the first steps in creating a smarter sales strategy is to build a solid data culture. In the sales context, this means creating a shared mission to empower every seller with data. This kind of culture builds teams that put data at the heart of every decision and fosters creative ways of examining data and implementing new solutions. It is Sales Operations creating powerful data visualizations that sellers run with. It is sellers taking that data and tailoring it for their own purposes and to react to what their seeing in the field. It is creating a virtuous cycle of cooperation between Sales Ops and sellers to build, leverage, adapt, and share data and visualizations between the teams.

Data transparency uncovers insights and opportunities for LinkedIn

LinkedIn is an example of a company that needed a robust, scalable platform to gain insights from their sales data. Their business analytics team adopted Tableau to centralize petabytes of customer data, using dashboards to track performance and predict churn, creating a more proactive sales cycle and increasing revenue. Before Tableau, LinkedIn stored sales data in internal databases, Google Analytics, and other third-party tools.

Then, one sales operations analyst serviced daily sales requests from over 500 salespeople, creating a reporting queue of up to six months, leaving team members questioning their performance or wondering where customer relationships stood.

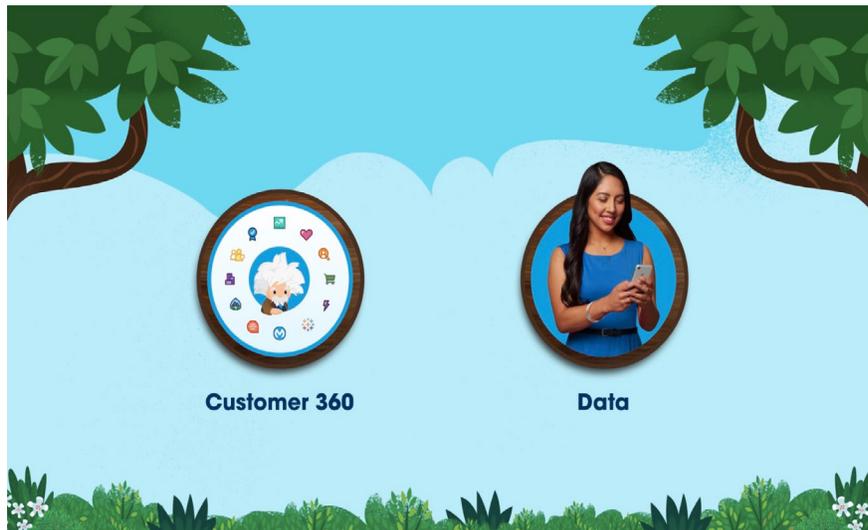
Today, 90 percent of LinkedIn's sales force accesses Tableau weekly. With the option to track overall sales performance and dig deeper to understand the underlying customer experience, salespeople can now identify when customers have increased product usage and proactively reach out to them to discuss opportunities or product engagement, potentially increasing overall spend and avoiding account churn.

[Read the full story](#)

Pull together data from across the enterprise

A critical piece of business data for every company is the data that reflects how their customers are interacting and engaging with their customer-facing teams. In many companies, this data is housed in their Customer Relationship Management (CRM) system. CRMs like Salesforce Customer 360 give teams a shared view of their customers so they can work together to build lasting, trusted relationships and deliver the personalized experiences their customers expect.

The ability to see and understand customer data ensures teams can maximize their understanding of what customers need, and effectively plan how to deliver great customer experiences and growth.



But companies also have data that lives in other systems beyond their CRM: their enterprise-wide data assets, such as their Enterprise Resource Planning (ERP) systems, Enterprise Data Warehouses (EDW), and Human Resources solutions. These systems hold a wealth of valuable business insights.

Having a way to see and understand data that spans both the CRM and wider enterprise data assets provides the most potent combination to help employees drive truly company-wide, data-driven transformation. With a clear view across silos of data, it's easier to make the most informed decisions, and if necessary, change course to ensure goals are achieved. Sales teams need a platform that brings their data together to answer complex questions from leadership, customers, vendors, and team members.

Data transparency from self-service analytics elevates Brown-Forman's global sales team

Tim Nall, chief information officer at Brown-Forman—one of the top ten largest global spirit companies— believes communication is critical to determining best practices and selling more product. Their teams need insight into pricing and shipping details, so they can effectively manage their SKUs.

Optimizing their existing technology investments in data storage and analytics, Brown- Forman's teams are achieving optimal collaboration. "From a global perspective, it is paramount to have all of this information and be able to understand it. Now with what we've created with our logical data warehouse and Tableau, people can collaborate, and all of that information is accessible," Tim noted.

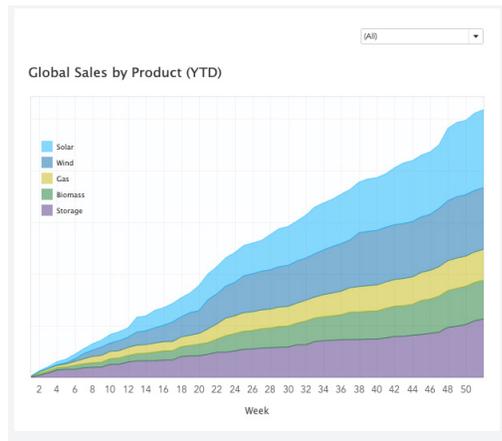
Tableau also makes it simple to publish sales dashboards whether your data is live, or refreshes often. With single sign-on, Brown-Forman has one-click access to dashboards using their desktop browsers or mobile devices.

As you gain experience and learn what your team needs by tracking dashboard views on Tableau Server, like Brown-Forman, you'll know what is or isn't working and can collaborate to refine the dashboards for better success.

[Read the full story](#)

Interactive visualizations help you go deeper

Dashboards shared across an organization are important because they allow everyone to see the same data. Tableau dashboards are quick to create and easy to consume—plus, they tell a story that won't leave sales staff questioning how to read and interpret the information.



Old school spreadsheets can't compete with data visualizations. Spreadsheets require considerable time and work to build and maintain, and they lack the insights you get from interactive visualizations. Interactive visualizations enhance basic analytical tasks, such as filtering views, adjusting parameters, and quick calculations. They also help you examine underlying details with intuitive selections, transforming data into actionable insights.

Instead of spending time trying to understand rows and columns, sales can now focus on closing deals, problem solving, and decision-making.

The most successful organizations are those that understand how data informs change—and does it at scale. When every employee has access to data insights that help them understand their part of the business, they can use data to drive their decisions and create meaningful impact.

All hands on data

Self-service analytics are practically mandatory for today's information-driven sales organizations. The insight-to-decision process must be swift. Gone are the days of relying on IT to build, customize, and publish sales dashboards. Armed with self-serve to build their own dashboards, sales teams can continually ask and answer their own questions in pipeline review meetings or when hammering out the next strategy.

Scale insights across sales and beyond

The data and insights that power your sales team don't have to remain siloed in your department or leadership meetings. With Tableau, you can easily and securely share those insights across your organization, no matter the size. Published visualizations, smart subscriptions, company-wide dashboards, and certified data sources help place curated data into the hands of everyone who needs it. Wrapped in a powerful governance framework, you'll always be sure the right people are empowered with the right data at the right time.

MillerCoors uncovers sales leads with a real-time view of data

With more than 450 years of combined brewing heritage, MillerCoors is a U.S.-based producer of popular beer brands such as Miller, Coors, Blue Moon, and artisanal hard ciders and sodas. Their retail sales team is always on the move, communicating with bars and restaurants, but a culture of Excel reporting made it difficult for salespeople to distinguish which report was correct. Bigger opportunities were missed simply because they didn't have an efficient way of discovering them.

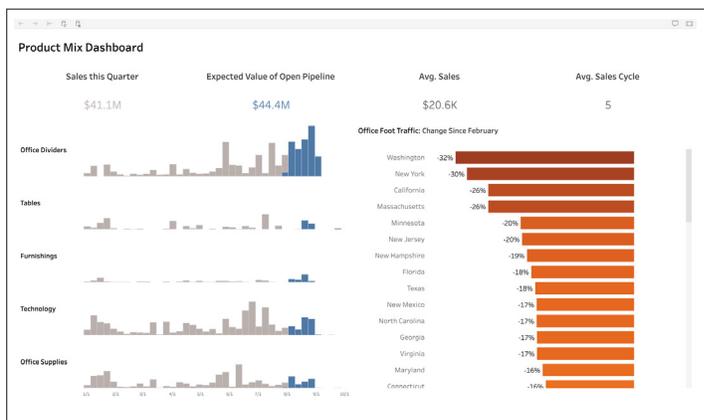
In a matter of three months, MillerCoors went from pilot to enterprise deployment of Tableau across a 300-person sales team. With Tableau, the sales team now has a clear view into the full spectrum of customers and they can take action when opportunity arises. A MillerCoors salesperson can pull up a dashboard in minutes on a mobile device, offering

a distinct competitive advantage by simplifying communication with their customers. Before Tableau, they had to manually extract data from countless Excel reports, often working through the weekend to understand the data. The team now publishes sales target dashboards on Tableau, creating better visibility, collaboration, and healthy competition among their team of several hundred members.

[Read the full story](#)

Power any sales use case inside and outside your CRM

Whether your team works inside Salesforce CRM or outside of it, Salesforce Analytics can provide data insights to augment their workflow and help them make better data-driven decisions. The following are just a few of the unlimited ways the full suite of Salesforce Analytics products can help your sales team take on the challenge of the new normal.



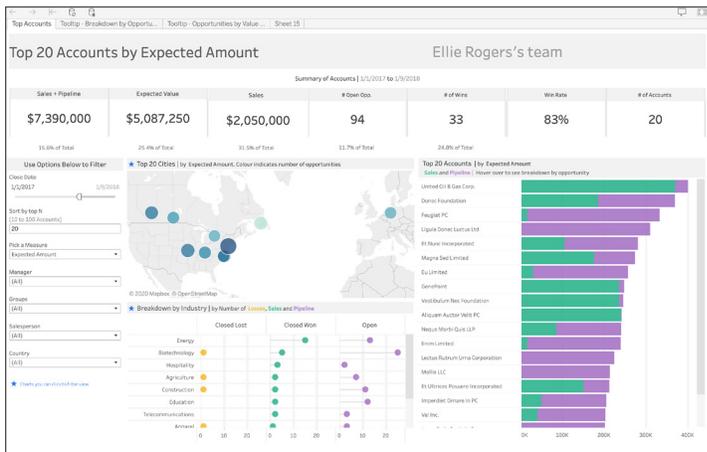
Growth potential and new targets:

Pull in additional data related to product sales such as foot track to stores or shipping durations, to better identify new sales targets and potential areas to concentrate sales resources.



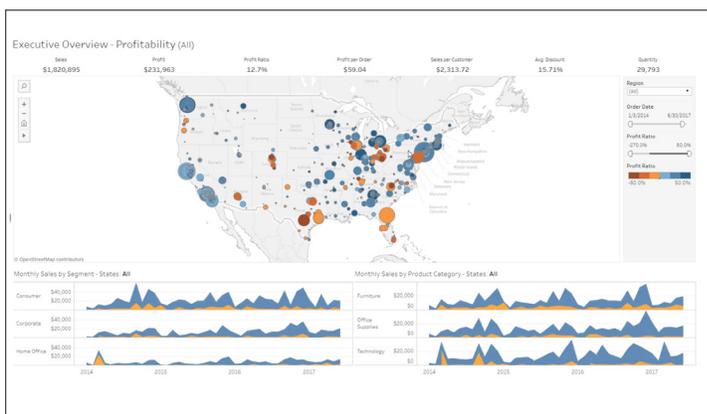
Conduct in-depth pipeline risk assessment:

Using visuals to look at seasonal trends gives you the ability to predict future trends, forecast, and plan appropriately. You can also make decisions by applying data for historically slow quarters, summer slowdown, and end-of-year sales explosions. By having the same calendar month's results stacked next to each other, it's easy to see cyclical trends that influence sales going up or down.



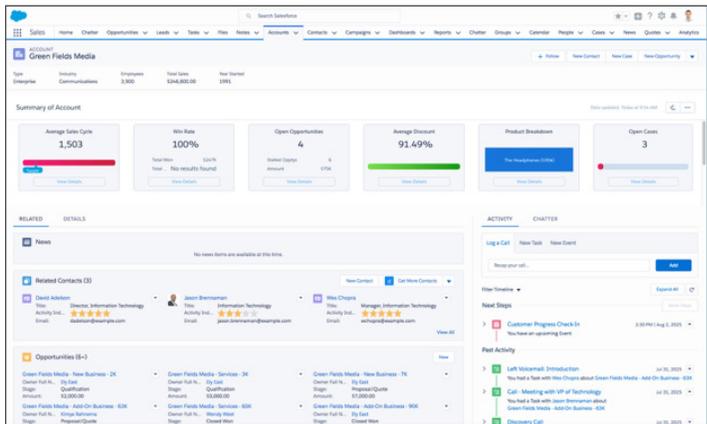
Explore staffing allocation for different regions and sales patches:

Identify the best allocation of personnel with historical sales data, geographic data, as well as additional metrics like total addressable market.



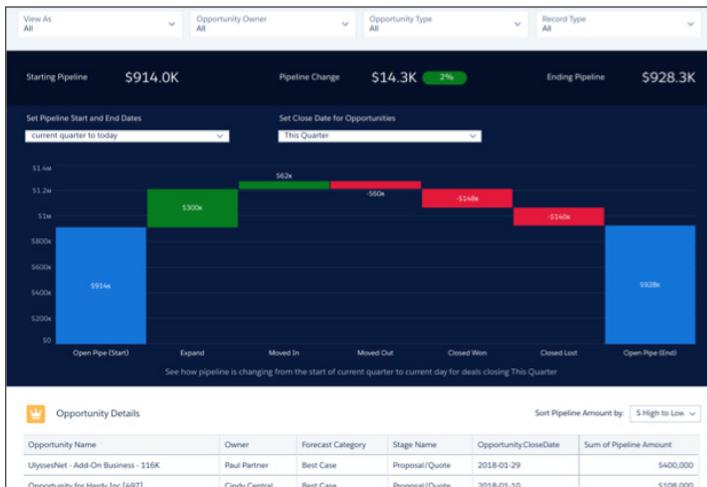
Profitability analysis:

Sales doesn't always mean profit. Keep an eye on profitability with dashboards that show sales and profit by segment, product line, and region, allowing sales leaders to quickly identify and take action to address any unprofitable selling activity.



Best practice discovery:

Discover what's working with analysis of sales performance and quota attainment across teams. Train AI models to cascade those discoveries to individual sellers to help them close deals faster.



Distance to quota:

Build visualizations that show the distance from the quota by product or opportunity type. Add historical data to provide additional context and a window into future trends.

These are just some of the limitless ways you can use data and analytics to optimize your sales operation, plan your strategy, promote best practices, and build a resilient sales team for the future.

Tracking 78,000 SKUs helps Oldcastle better capture sales opportunities

Oldcastle is a leading manufacturer of building products and materials. With 20 divisions and 206 facilities across North America, Oldcastle first found success with Tableau by transforming a 500-page monthly report into a governed dashboard that's accessible across the organization.

The Oldcastle sales team spearheads an inventory of over 78,000 stock-keeping units (SKUs) so it's imperative that they can quickly and easily identify losses, track margins, and seize opportunities. But scaling a solution for the entire sales team was difficult. Oldcastle can now pull ERP and Salesforce data into Tableau, and the sales team can access and understand all of their data.

Everyone from sales managers to sales representatives consult Tableau dashboards to track their quotas daily and monthly. For a sales team, having access to insights from massive quantities of customer data is empowering and helps them better service customers, too.

Paul Lisborg, manager of business intelligence, says "Now a sales rep can come into a dashboard, look to what he sold yesterday, look to how he's doing this month, and look how he's doing year-to-date. They can then drill into what customers are doing well, what are customers buying, and what their margins are on those items."

[Read the full story](#)

Are you ready to maximize the possibilities of your sales data?

Sales organizations need a steady stream of actionable data in order to remain competitiveness, satisfy their customers, and determine where they need to focus their next initiatives. Salesforce can help. Explore the full Salesforce Analytics suite of products at salesforce.com/analytics.

Additional resources to help you get started:

[Build a Data Culture](#)

[Tableau Blueprint](#)

[Tableau COVID-19 Data Hub](#)

[Free trial of Tableau](#)

[Free training videos](#)

[Do's and Don'ts of Dashboards visual analysis best practices guide](#)