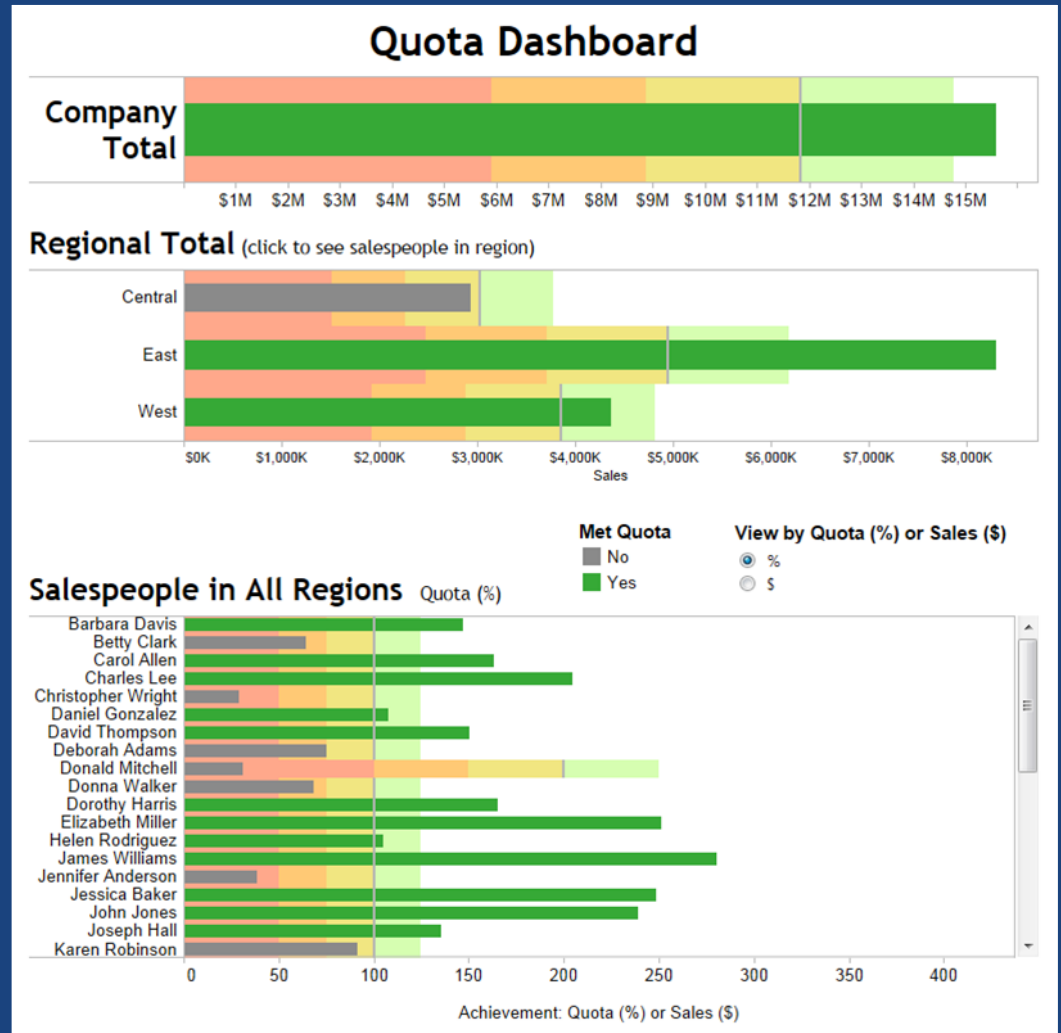


6

Tips to Improve Salesforce Reports

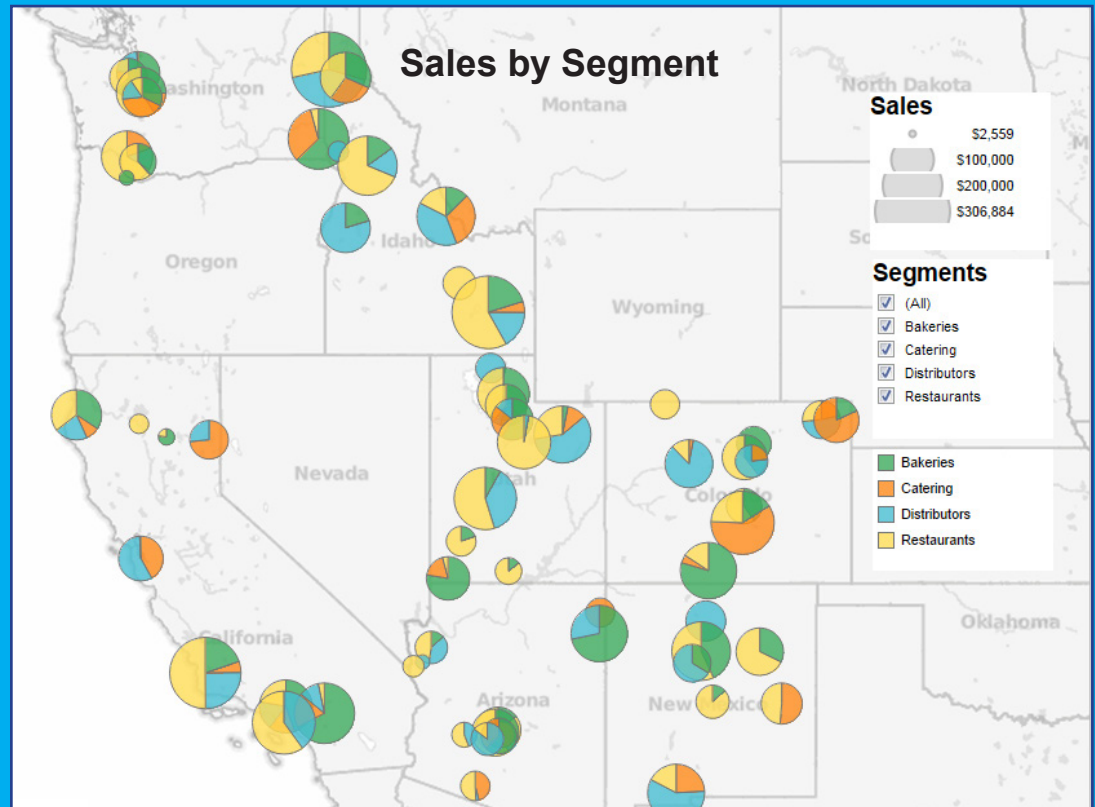
Stop Waiting for Data and Reports

Connect directly to your sales data. Update your sales dashboards on the fly, without waiting in a queue from the IT department or taking weeks of work by your Salesforce.com administrator. Show territory changes, new quotas, personnel changes, and new business rules.



Segment Your Sales Data

Understanding corporate sales performance is key to determining what adjustments you need to make to your business today. Typical comparative analysis, such as year over year growth, is easy to do as a single calculation. But you also need to look at your performance over time by segment, by top customers, and by region.



Mash Up Data

Salesforce and Force.com give you lots of options to bring data directly into Salesforce, but you may have data to integrate from other cloud sources and your website as well as your on-premise databases and spreadsheets. Blend your Salesforce data with leads, market research, web analytics, quotas, demographics, and more. Now you can bring it all together.



Salesforce data



Product data
Market research
Website data
Demographics



GENIUS

Take Out Your Trash

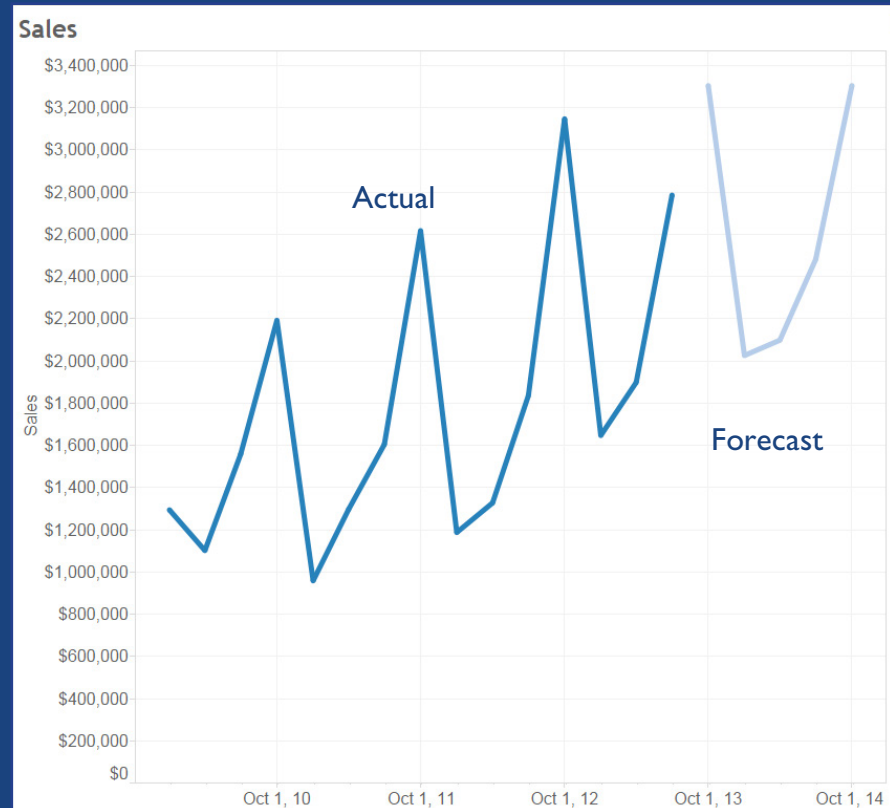
Don't fall into the trap of keeping a long list of poor-quality leads in the pipeline. Instead of being safe with padded numbers, this just wastes your time and resources. Have a pipeline with a lot of dead leads? Make sure that your sales team are cleaning up their pipelines. You can't gauge whether you'll make quota if there's a lot of junk blocking your view. Qualify the leads, send them to remarket, or put them in the garbage bin.

Bad Leads



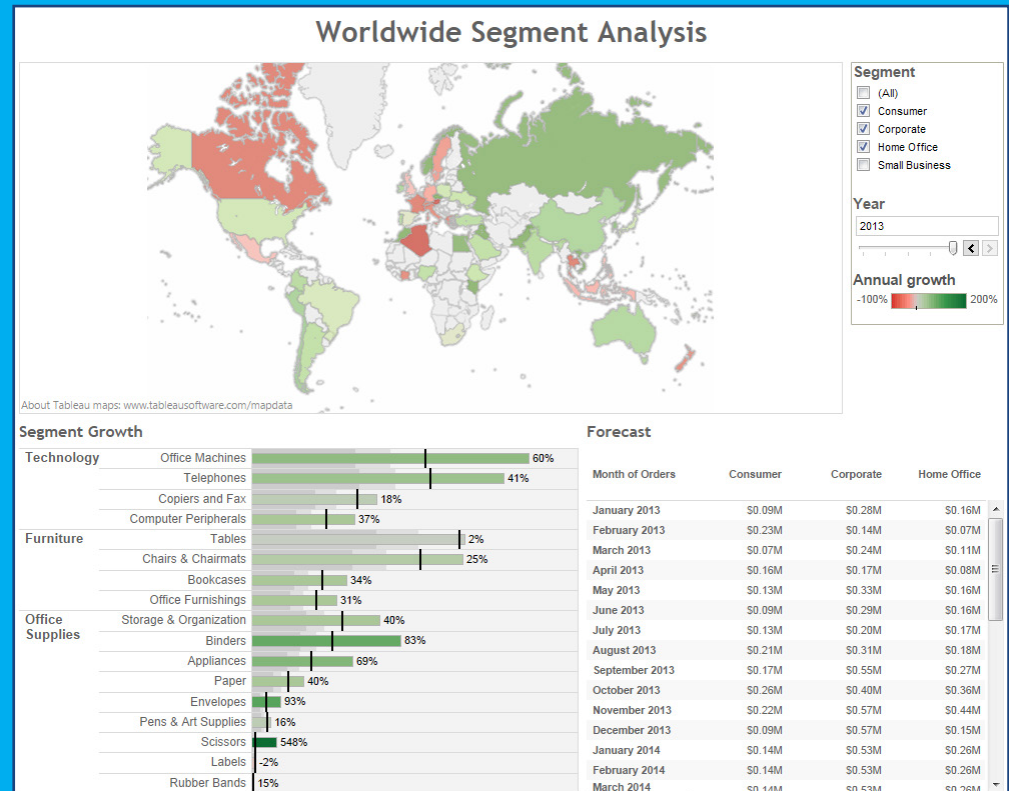
Forecast

No one knows your business as well as you do. But sometimes it's helpful to forecast a baseline to test your own assumptions and estimates.



Make Everyone Your Smartest Analyst

Everyone in your organization has amazing insights. Why reinvent the wheel? Instead, find a way to make those one-off, ad-hoc analyses into repeatable, updatable dashboards — and share them across your organization. Win, win.



About Tableau Software

Tableau Software helps people see and understand data. Tableau helps anyone quickly analyze, visualize and share information. More than 10,000 organizations get rapid results with Tableau in the office and on-the-go.

Tableau has a direct connection to Salesforce that lets you pull data into a fast in-memory data engine, then analyze it and publish it securely. Tableau keeps your data up to date automatically using the Salesforce APIs.

Try it for free or see more examples about Salesforce Analytics at:

tableausoftware.com/solutions/salesforce-analytics

