



O Tableau segundo a Tableau: análise para o setor de vendas



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Sales Consultant Latam

Temas de hoje

O contexto do Tableau

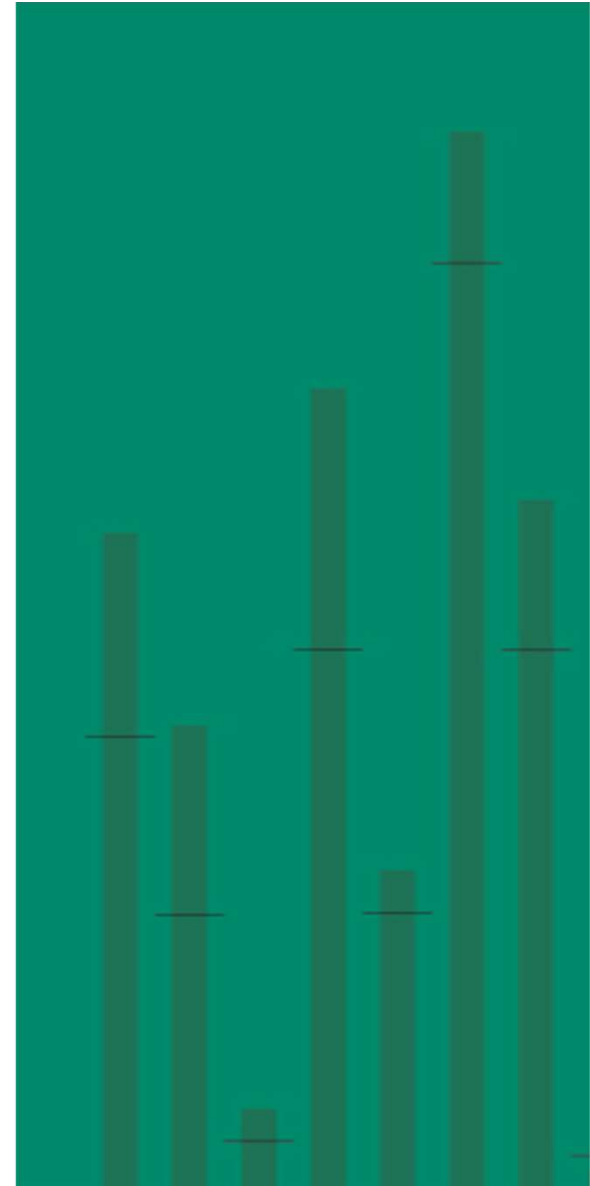
- Sobre a plataforma de análise do Tableau
- Uma breve demonstração de análise de vendas

Como a nossa equipe de vendas usa o Tableau

- Valor da análise para sales ops, líderes de vendas e vendedores
- Nossos painéis mais conhecidos

Recursos para ajudar voce a começar

- Como gerar um grande impacto com rapidez
- Saiba mais e acesse recursos de análise avançada



O contexto do Tableau





Ajudamos as pessoas a ver e a entender os dados

Clientes da Tableau

Comunicação, m dia e tecnologia



Serviços financeiros



Serviços



Setor público



Varejo e bens de consumo



Saúde e ciências biológicas



Setor industrial



Energia e recursos



Viagens e transporte



Capacitação, adoção e valor contínuo

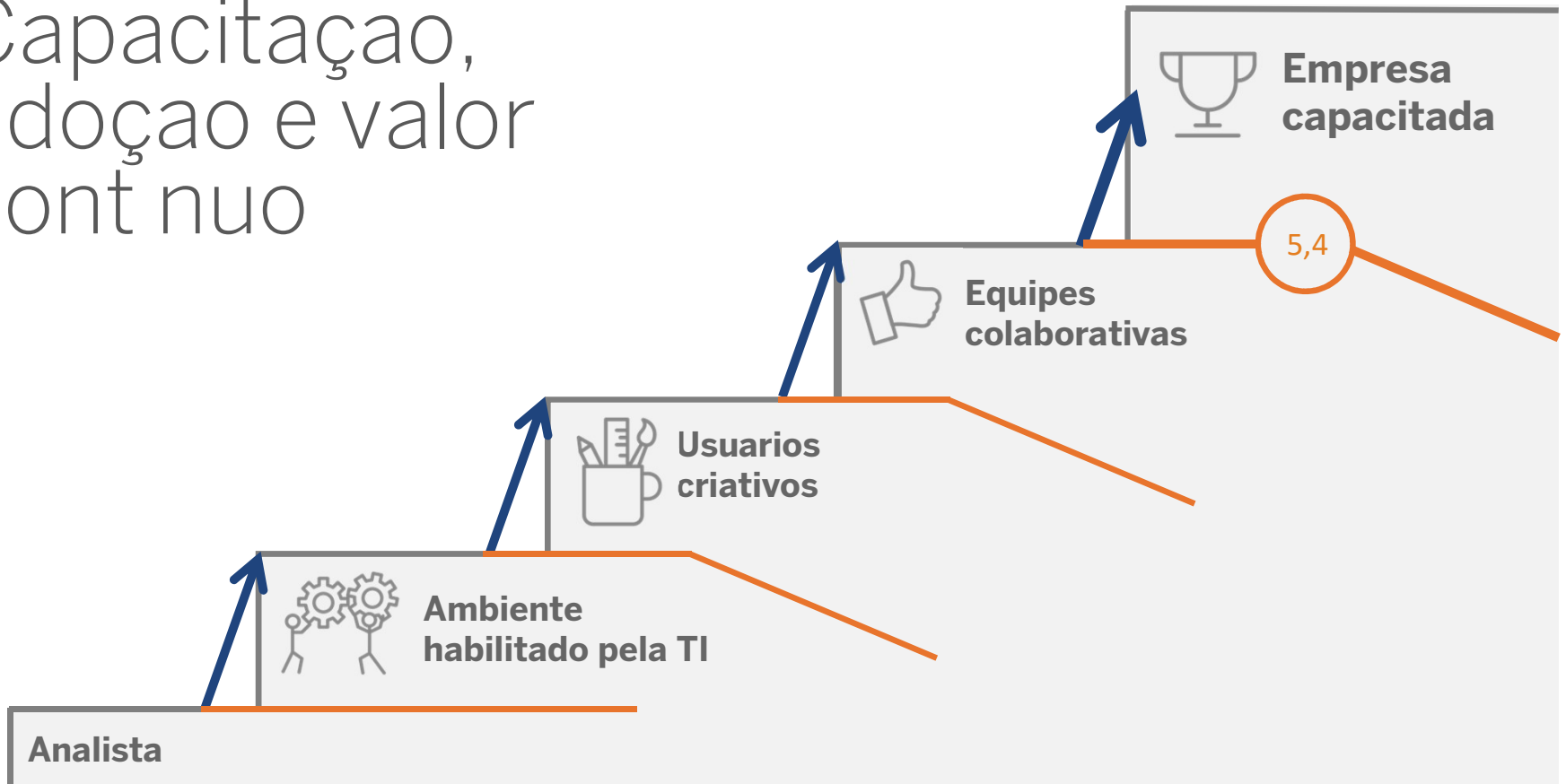




Tableau para analise no setor de vendas



Analises de contas estrategicas

Large Deals

Salesforce Data

Click here to learn more about Tableau for Sales Analytics

Amount: \$335K \$763K

■ Closed Won
 ■ Solution
 ■ Qualify
 ■ Commit
 ■ Discover

Closed Large Deals | Click below for account history

Tellus Eu Augue Incorporated: \$663K Kevin Gibson Services: MOL Standard Closed Date: 9/29/2014	Gravida Inc.: \$598K Joe Ford Software: MOL Premium Closed Date: 8/26/2014	Consequat Dolor Vitae Inc.: \$427K Jason Stoltz Software: MOL Standard Closed Date: 12/27/2013	KMA Power: \$408K Eric Barnes Software: MOL Standard Closed Date: 11/1/2013	Vitae Semper Company: \$394K Fred Jenkins Software: MOL Standard Closed Date: 9/26/2014
Arcu Ac Orci Incorporated: \$462K	Fred Jenkins Software: MOL Mobile Closed Date: 9/26/2014	Eu LLP: \$360K Eric Barnes Software: MOL Standard Closed Date:	Dignissim Magna Ltd: \$346K David Ward Software: MOL Standard	
Pulvinar Arcu Ltd: \$605K Maria Porter Software: MOL Standard Closed Date: 10/2/2013	Euismod Et Foundation: \$448K Eric Barnes Software: MOL Mobile Closed Date: 3/26/2015			

Upcoming Large Deals | Click below for account history

Neque Et Foundation: \$444K Jesse Alexander Software: MOL Premium Solution Stage Expected Close Date: 6/29/2015	Mus Proin Ltd: \$355K Elissa Sanders Software: MOL Standard Solution Stage Expected Close Date: 6/3/2015	Tortor Institute: \$492K Eric Barnes Software: MOL Premium Commit Stage Expected Close Date: 7/1/2015	Quis Diam PC: \$342K Fred Jenkins Software: MOL Standard Discover Stage Expected Close Date: 8/12/2015
Minuteman Cafe: \$521K Eric Barnes Software: MOL Standard Quality Stage Expected Close Date: 6/4/2015			

Account History - Transactions

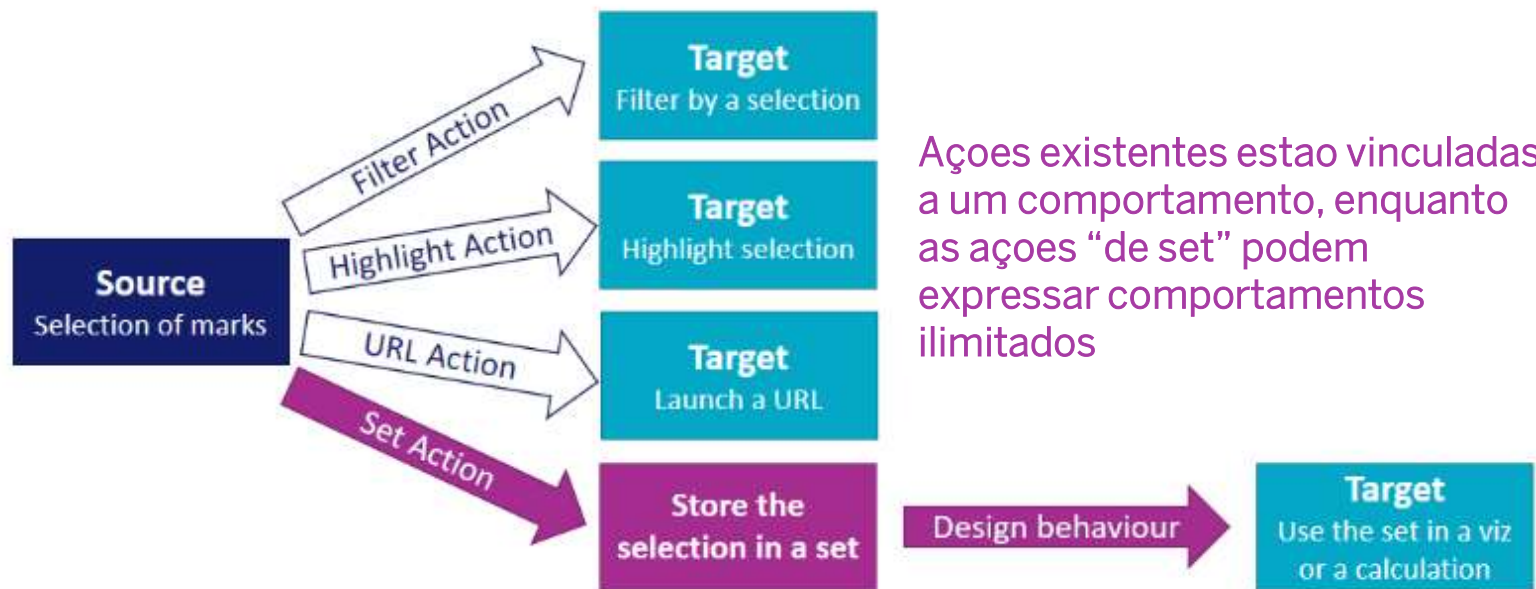


Account History - Running Total



https://public.tableau.com/profile/tableau.for.sales.analytics#!/vizhome/ExecutiveSalesforce_10_01_5/LargeDeals

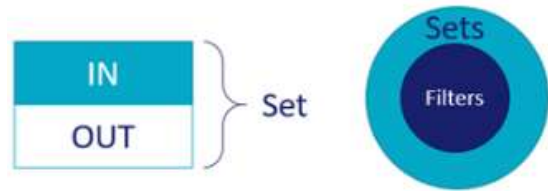
Set Actions



Ações existentes estão vinculadas a um comportamento, enquanto as ações “de set” podem expressar comportamentos ilimitados

<https://www.tableau.com/about/blog/2018/11/8-ways-bring-powerful-new-comparisons-viz-audiences-set-actions-97207>

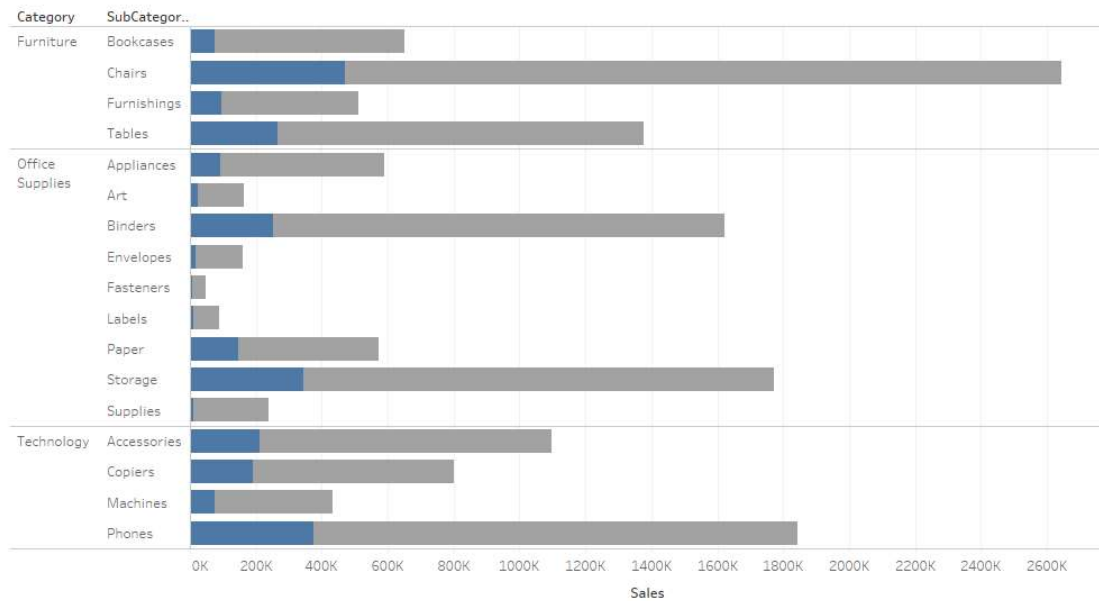
Set Actions -> Proportional Brushing



Head



Bars



O Tableau no departamento financeiro da Tableau



Como a nossa organização de vendas usa o Tableau



+



Como o nosso sales ops usa o Tableau



Melhorar o desempenho da equipe de vendas

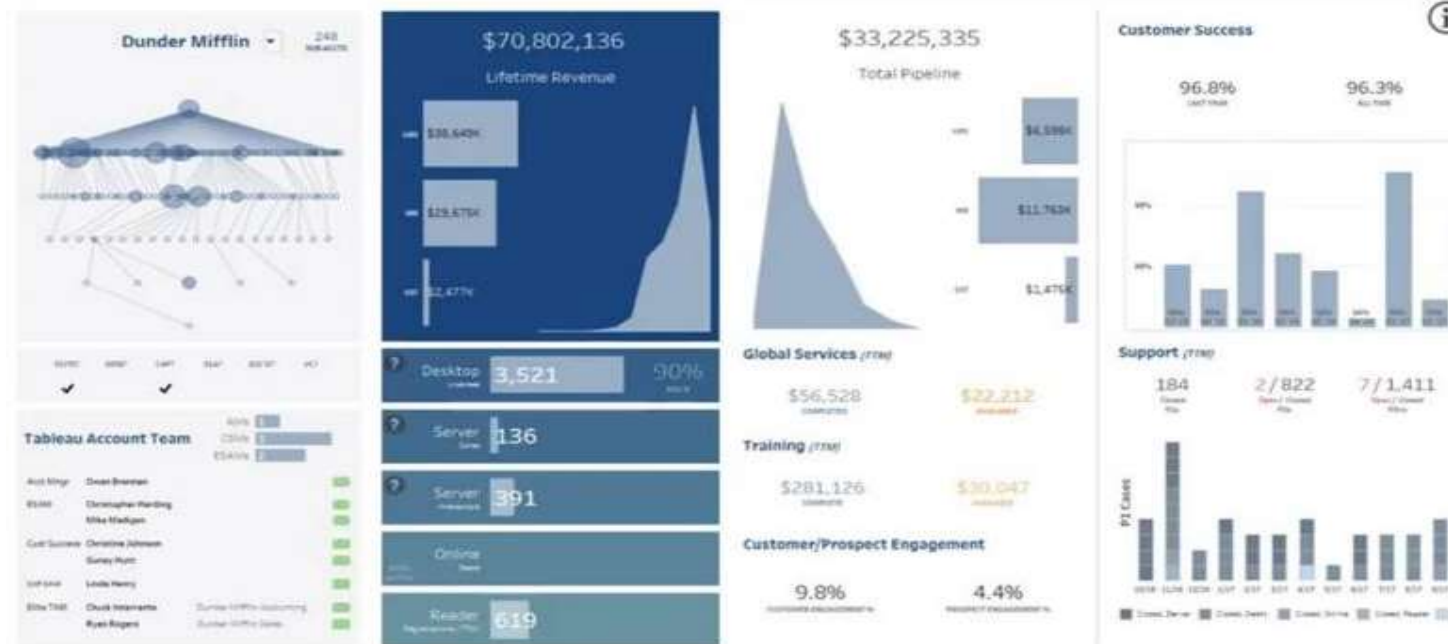


Fornecer recursos de autoatendimento



Oferecer análise avançada

Analises de contas estrategicas



<https://public.tableau.com/profile/tableau.for.sales.analytics#!/vizhome/AccountManagement-360DegreeCustomerView/StrategicEnterpriseAccountProfile>



https://www.youtube.com/watch?v=pcws4J9D_Hg

Atingimento da Cota

Sales Quota Attainment Dashboard

[Click here to learn more about Tableau for Sales Analytics](#)

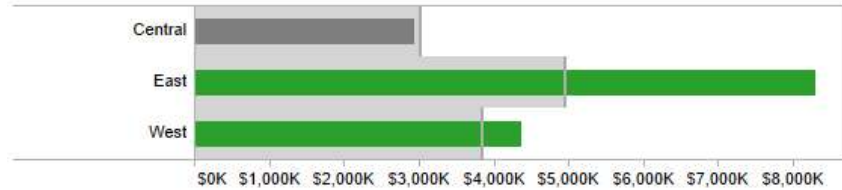
Worldwide



Hit Quota

- No
- Yes

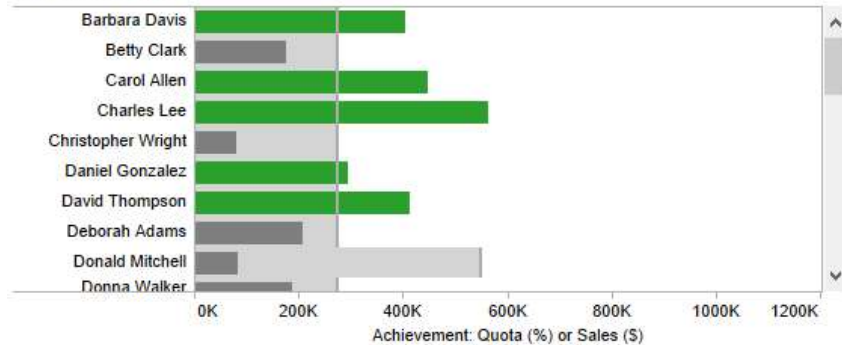
Regional Total (click to see salespeople in region)



Stats- All

# of Sales People	41
# Hitting Quota	27
% Hitting Quota	65.9%
% of Sales by Quota Hitters	86.6%
Quota \$	\$11,825K
Sales \$	\$15,603K
Avg. Quota	\$275K
Avg. Sales per Person	\$380,558

All Salespeople



Select to View by Quota (%) or Sales (\$)

- %
- \$

Data is up-to-date as of: January 4, 2019



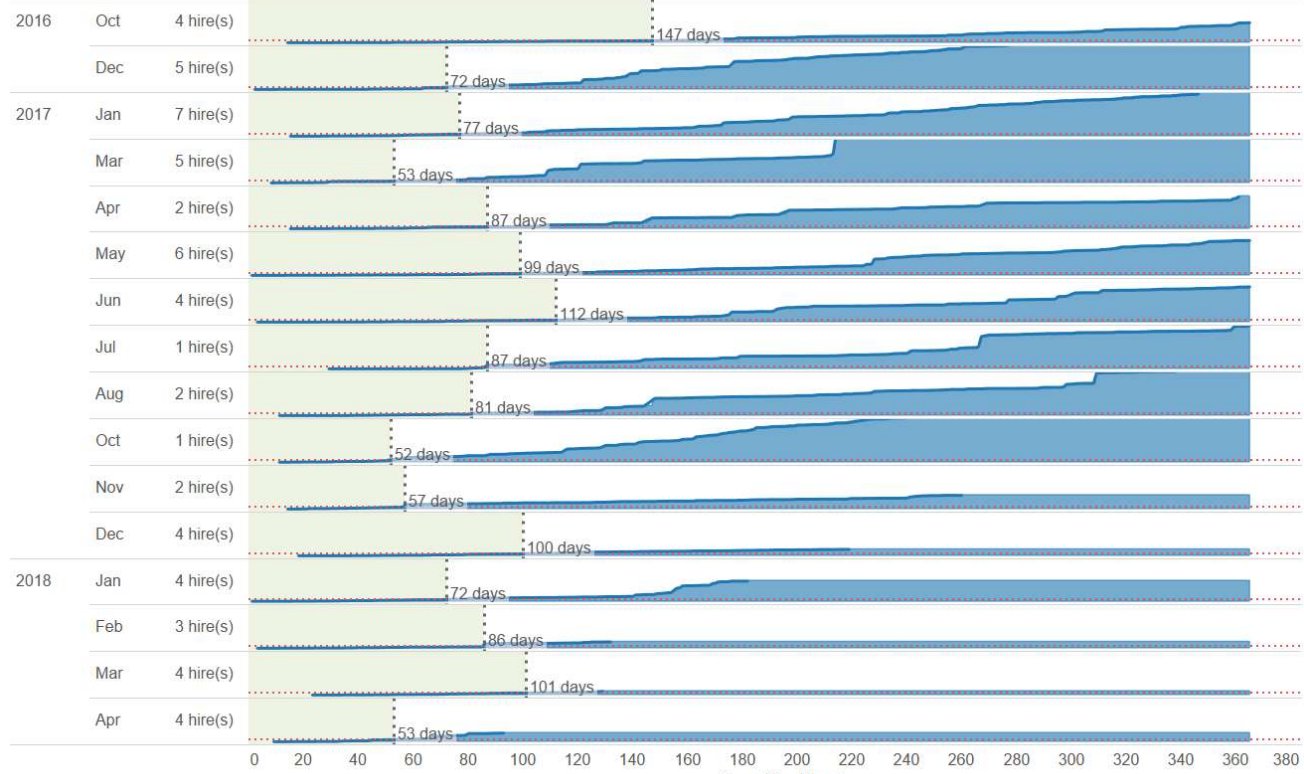
https://public.tableau.com/profile/tableau.for.sales.analytics#!/vizhome/QuotaDashboard_1/QuotaDashboard

Vendas ao longo do tempo

Ramp Time to X Bookings After Hire

Ramp Time to \$350,000 in bookings

(select role and treshold on the right)



<https://public.tableau.com/profile/tableau.for.sales.analytics#!/vizhome/SalesOnboardingAndRampTimeDashboard/SalesRampTimetoBookingsAfterHire>

Como nossos líderes de vendas usam o Tableau

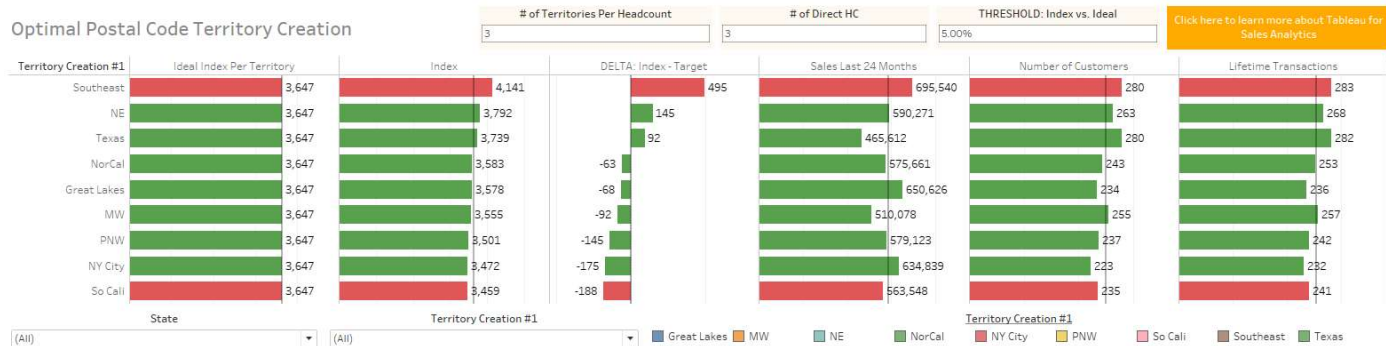


Entendimento
avançado dos
negócios

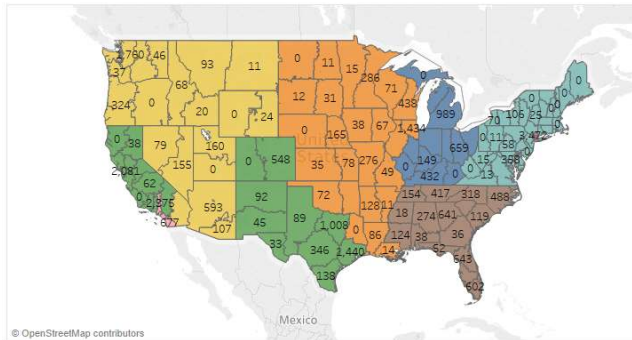


Apoio ao
sucesso do
vendedor

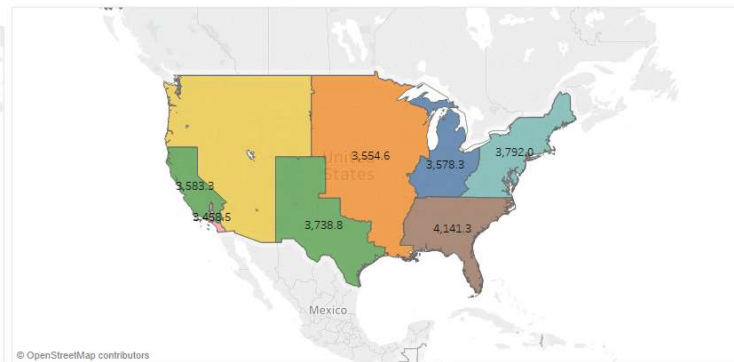
Delimitação dos territórios ideais



MAP: Territory Builder Driver
Ideal Target = 3,647 (+/- 182.3 Points)



MAP: Territory Overview



<https://public.tableau.com/profile/tableau.for.sales.analytics#!/vizhome/SalesOnboardingAndRampTimeDashboard/SalesRampTimetoBookingsAfterHire>

Previsao de vendas

Quarterly Sales Forecast As Of 8/1/2018

Current State of the Business

Filter by region (All)	Mutual Inter..	Discover	Validate	Decide	Select	Commit	Total Open	Closed Won
Amount	3,875,450	1,587,229	11,610,908	29,075,958	1,578,336	25,045,614	72,773,495	215,040,665
Expected Value	1,144,178	446,228	40,532,855	66,798,532	5,706,075	907,238,398	1,021,866,266	75,708,238,704
Number of Transactions	19	6	87	155	6	44	316	470

Step 1: Forecast Business Not Yet Discovered Based on Prior Quarter Results

1

Forecast Unseen Sales "Commit"
12,000,000

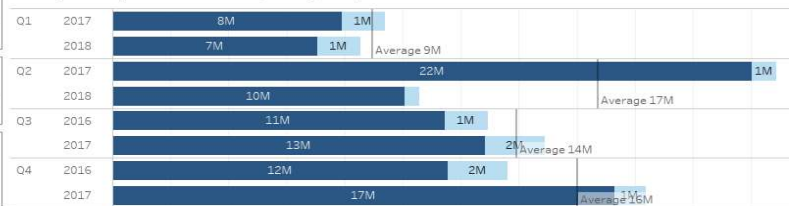
Forecast Unseen Sales "Likely"
14,000,000

Forecast Unseen Sales "Best Cas..
15,000,000

Historical reference

Bookings resulting from deals created on/after day 32 in quarter

Month of Quarter Closed



Step 2: Forecast Existing Transactional and Non-Transactional Pipeline

2

"Transactional" Means Any Deal Less Than...
2,000,000

Use Expected Value for Transactional Business: Deals Below: \$2,000,000

	Mutual Int..	Discover	Validate	Decide	Select	Commit	Total Open
Amount	3,875,450	1,587,229	8,992,914	17,553,434	1,578,336	5,234,103	38,821,465
Expected Value	1,144,178	446,228	39,616,558	32,230,959	5,706,075	34,014,823	113,158,821
Number of Transacti..	19	6	86	154	6	40	310

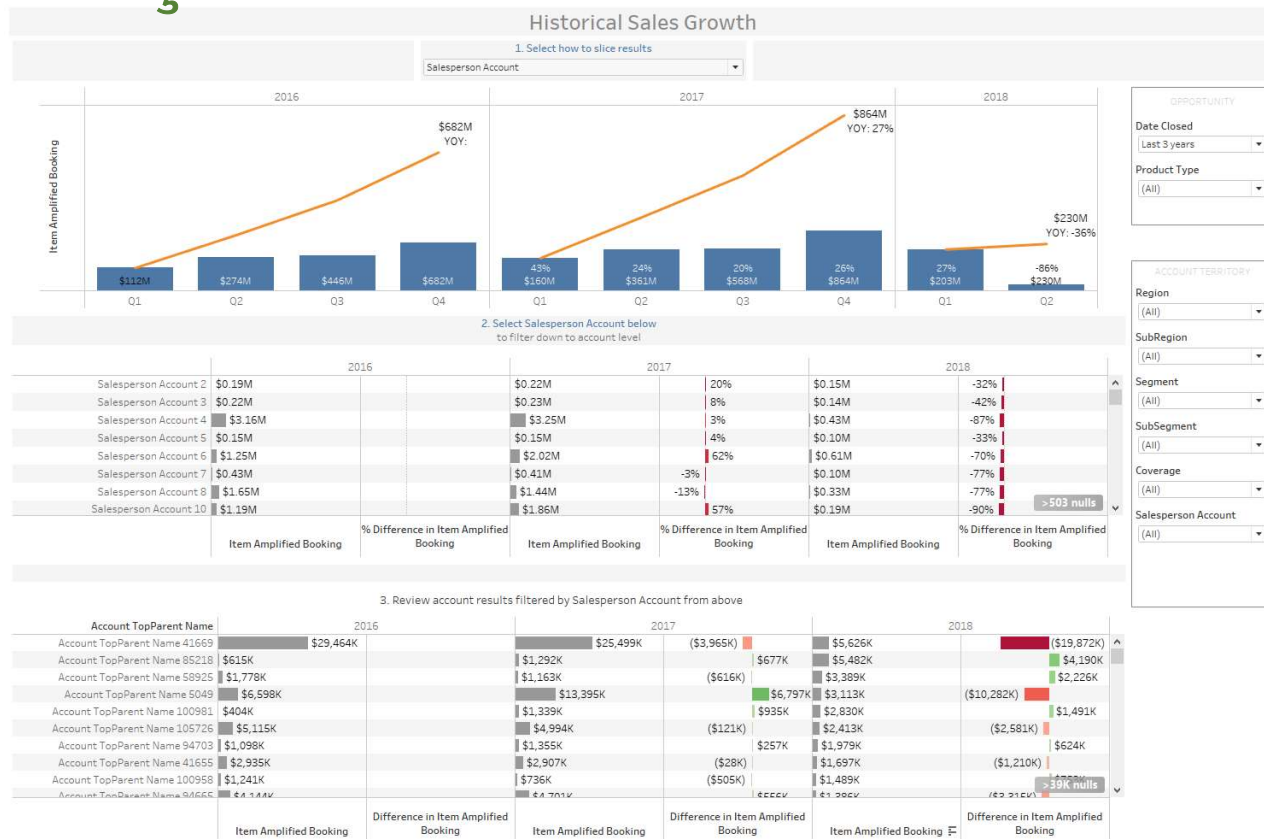
Use Salesperson Forecast for Large Deals: Deals Above \$2,000,000

Opportunity Name	Opportunity Owner ..	Day of Close Date	Commit	Likely F	Best Case
Grand Total			19,811,511	11,522,524	2,617,994
Opportunity - 13160000..	Salesperson - L	September 20, 2018		11,522,524	
Opportunity - 12306000..	Salesperson - O	September 13, 2018			2,617,994
Opportunity - 32663200..	Salesperson - C	August 21, 2018	9,114,074		
Opportunity - 76600000..	Salesperson - E	September 7, 2018	4,251,622		



https://public.tableau.com/pt-br/profile/tableau.for.sales.analytics#!/vizhome/SalesForecastDashboard_2/QuarterlyForecastDashboard

Definição das metas de vendas



OPPORTUNITY

Date Closed
Last 3 years

Product Type
(All)

ACCOUNT TERRITORY

Region
(All)

SubRegion
(All)

Segment
(All)

SubSegment
(All)

Coverage
(All)

Salesperson Account
(All)



<https://public.tableau.com/pt-br/profile/tableau.for.sales.analytics#!/vizhome/SalesGrowthDashboard/GrowthRates>

Gerenciamento do pipeline de vendas

Sales Pipeline Dashboard

Region: (All) Sub Region: (All) Stage Name: (All)

Pipeline by Opportunity Stages

Opportunity Stage	Amplified Booking	Expected Booking	# of Transactions	% of Booking
Mutual Interest	\$4,641M	\$22,435	46%	
Discover	\$6,094M	\$9,024M	1%	
Validate	\$4,036M	\$24,194M	17%	
Decide	\$49,008M	\$29,990M	15%	
Select	\$20,531M	\$5,998M	5%	
Commit	\$14,941M	\$4,172M	5%	
Grand Total	\$321,047M	\$106,818M	33,243	100%

Pipeline by Opportunity Size Buckets

Opportunity Size Bucket	Amplified Booking	Expected Booking	# of Transactions	% of Booking
0-10k	\$3M	\$1M	0.7K	0%
10k-500k	\$2,969M	\$709M	17.7K	1%
500k-1M	\$2,687M	\$569M	7.7K	1%
1M-5M	\$14,176M	\$3,292M	6.5K	4%
5M-100M	\$96,833M	\$29,443M	4.1K	30%
100M+	\$204,578M	\$75,414M	0.6K	64%
Grand Total	\$321,047M	\$106,818M	33.2K	100%

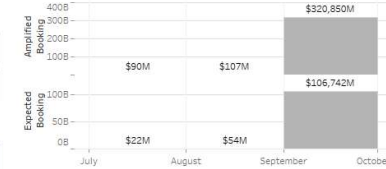
Pipeline by Sales Representative (click on rap to filter KPIs & Timeline)

Sales Representative	Amplified Booking	# of Transactions	% of Amplified Booking
Maya Z. Anderson	\$13,567M	1,057	4.2%
Xena J. Pace	\$11,932M	15	3.7%
Avram B. Hubbard	\$9,553M	56	3.0%
Ulysses H. Castro	\$8,777M	508	2.7%
Willis O. Deleon	\$7,755M	1,341	2.4%
Lester V. Farley	\$7,666M	1,351	2.4%
Damon S. Sampson	\$7,194M	1,344	2.2%
Renea P. Mcgee	\$6,509M	2,175	2.0%
Howard W. Mack	\$5,785M	582	1.8%
Hayden E. Armstrong	\$5,650M	9	1.8%
Evangeline N. Weeks	\$5,457M	17	1.7%
Dexter W. Day	\$4,899M	719	1.5%
Macon K. Watts	\$4,672M	16	1.5%
Dieter C. Carrillo	\$4,598M	847	1.4%
Chandler T. Ware	\$4,499M	33	1.4%
Neve E. McClure	\$4,495M	13	1.4%
Raymond S. Williamson	\$4,274M	1	1.3%

Pipeline KPIs

Primary Competitor	Product Category
% of Amplified Booking: iFan D (32%), eMaker (31%), Electro Ware (34%)	% of Amplified Booking: Software (31%), Cloud Storage (42%)
% of Opportunities: iFan D (36%), eMaker (24%), Electro Ware (36%)	% of Opportunities: Electronics (72%)
New vs. Existing Accounts: New (56%), Existing (39%)	Partner Involvement: Yes (79%), No (21%)
% of Opportunities: New (59%)	% of Opportunities: Yes (60%), No (40%)

Pipeline Timeline



Opportunity next steps: status



Pipeline by Opportunity

Opportunity Description	Date	Amplified Booking	Age of Deal	Days Since Last Activity	Next Step?
odio. Etiam ligula tortor.	9/21	\$9,446M	250 days	2 days	✓
Nullam suscipit, est ac	9/28	\$5,256M	205 days	8 days	✓
Sed nec metus facilisis	9/27	\$4,850M	111 days	1 days	✓
Etiam laoreet, libero et	9/21	\$2,643M	110 days	1 days	✗
lorem, sit amet ultricies	9/29	\$3,806M	111 days	1 days	✗
sit amet risus. Donec	9/27	\$2,404M	12 days	1 days	✓
tellus justo sit amet	9/27	\$1,320M	29 days	8 days	✓
Quisque varius. Nam porttitor	9/27	\$1,172M	82 days	80 days	✗
lectus pede, ultrices a,	9/27	\$1,838M	232 days	28 days	✓
sagittis lobortis mauris. Suspendisse	9/29	\$1,457M	261 days	41 days	✓
nunc est, mollis non,	9/29	\$1,399M	261 days	41 days	✗
Vestibulum accumsan neque et	9/27	\$1,062M	261 days	6 days	✓
in aliquet lobortis, nisi	9/27	\$2,329M	84 days	8 days	✓
Aliquam ornare, libero at	9/27	\$2,325M	82 days	71 days	✗
egret odio. Aliquam vulputate	9/27	\$978M	149 days	1 days	✓
vel lectus. Cum sociis	9/27	\$1,268M	5 days	5 days	✓
mattis. Cras eget nisi	9/27	\$750M	28 days	1 days	✓
tempor lorem, eget mollis	9/28	\$832M	261 days	2 days	✓
Nullam feugiat placerat velit.	9/27	\$1,534M	78 days	2 days	✗
mauris sagittis placerat. Cras	9/27	\$761M	96 days	1 days	✓
lorem, auctor quis, tristique	9/29	\$464M	261 days	80 days	✗

	Mon	Tue	Wed	Thu	Fri	Sat
July		3 \$9M		5 \$9M		
	9 \$2M				13 \$1M	
	16 \$2M	17 \$0M		19 \$1M		
	23 \$0M			26 \$29M	27 \$35M	
			31 \$1M			
August			1 \$0M	2 \$2M		
				9 \$6M		
				16 \$0M	17 \$5M	
				22 \$1M	23 \$1M	25 \$2M
			28 \$1M	29 \$0M	30 \$4M	31 \$86M
September				6 \$108M	7 \$1M	
	10 \$0M	11 \$1M	12 \$17M	13 \$67M	14 \$145M	15 \$0M
	17 \$97M	18 \$772M	19 \$792M	20 \$1,581M	21 \$20,491M	22 \$50M
	24 \$21,465M	25 \$17,480M	26 \$9,827M	27 \$141,229M	28 \$20,749M	29 \$83,851M



<https://public.tableau.com/pt-br/profile/tableau.for.sales.analytics#!/vizhome/SalesPipelineDashbaord/PipelineDash>

Como nossos vendedores usam o Tableau



Obter dados
de vendas
acionáveis



Acompanhar
atividades e
resultados



Melhorar a
eficiência
do fluxo de
trabalho

Acompanhamento de atividades de contas e clientes em potencial



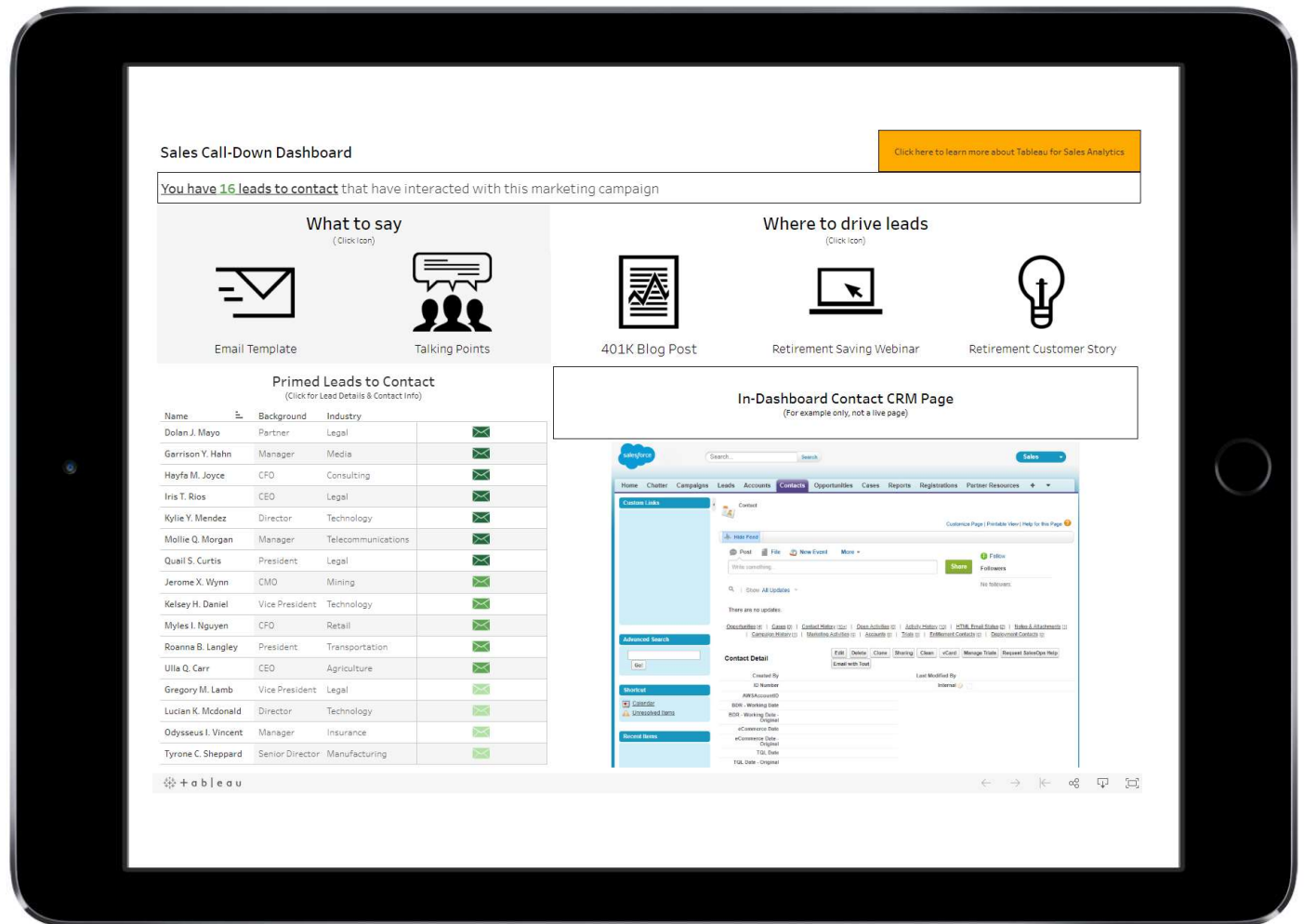
<https://public.tableau.com/pt-br/profile/tableau.for.sales.analytics#!/vizhome/SalesLeadAndAccountActivityTracker/LeadAccountActivityTracking>



Lista de chamada para vendedores



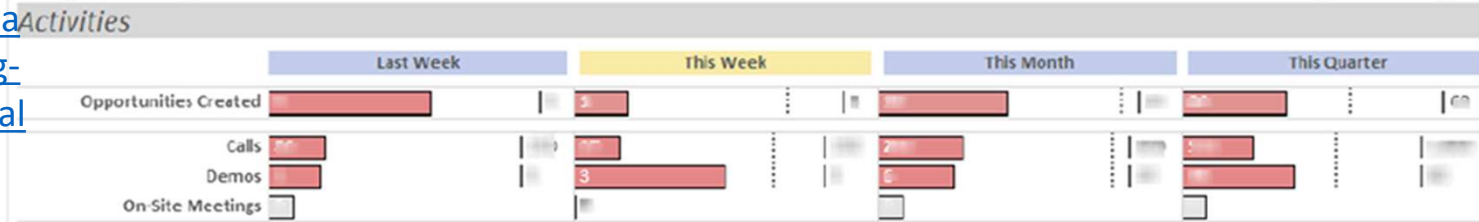
https://public.tableau.com/pt-br/profile/tableau.for.sales.analytics#!/vizhome/Banking-CustomerInsights_2/SalesCall-DownDashboard



Scorecard e rastreador de atividades para vendedores



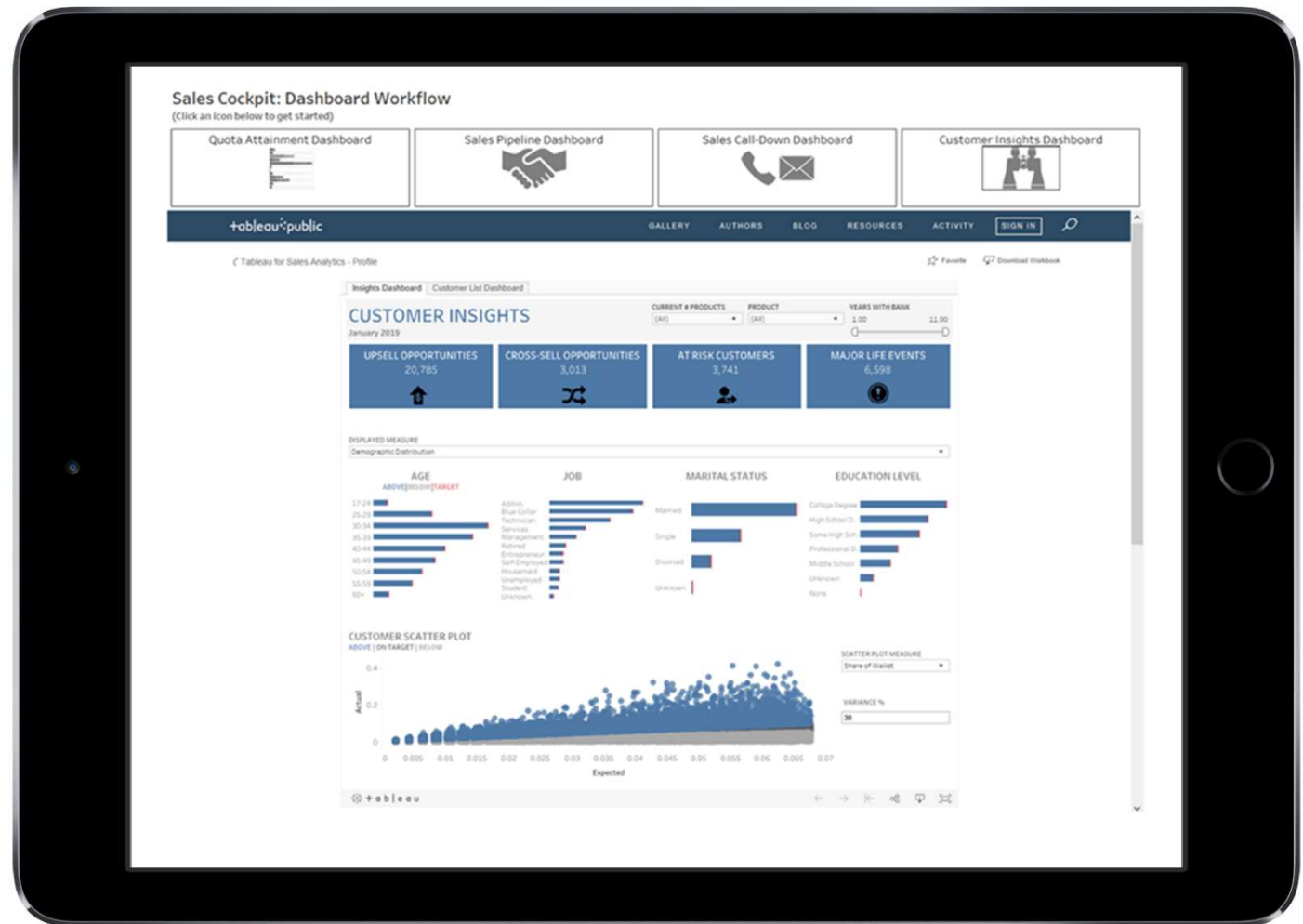
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nalytics#!/vizhome/Banking-
CustomerInsights_2/SalesCal
l-DownDashboard](https://public.tableau.com/profile/tableau.for.sales.analytics#!/vizhome/Banking-CustomerInsights_2/SalesCall-DownDashboard)



Cockpit de vendas



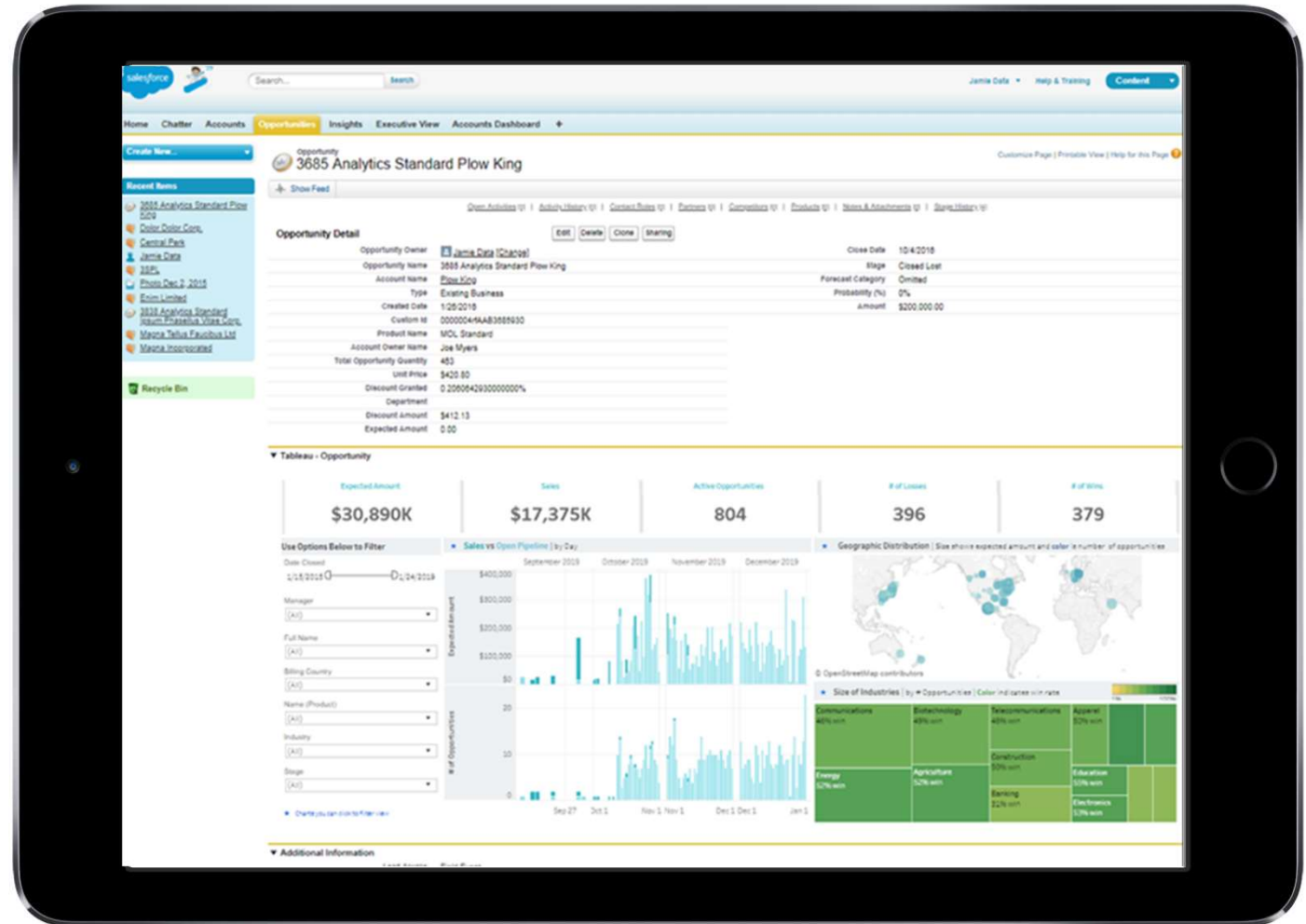
https://public.tableau.com/pt-br/profile/tableau.for.sales.analytics#!/vizhome/Banking-CustomerInsights_1/InsightsDashboard



Analyse incorporada no Salesforce.com



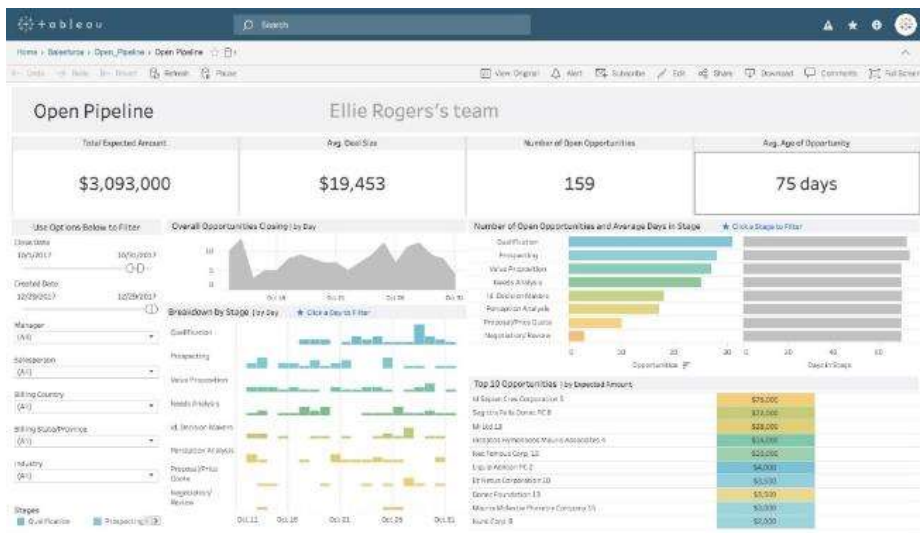
<https://www.tableau.com/pt-br/sfdc-canvas-adapter>



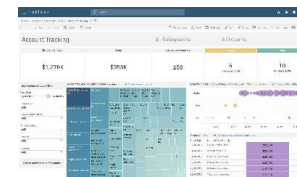
Como começar



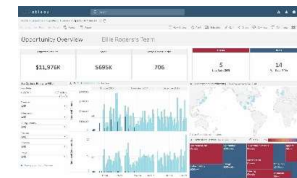
Dashboard Starters para Salesforce



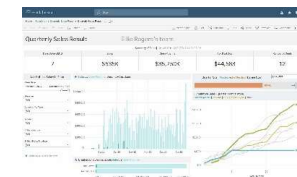
Acompanhamento de contas



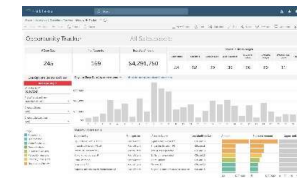
Visão geral das oportunidades



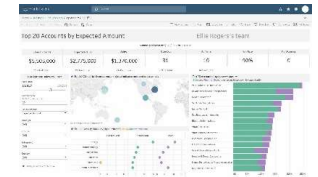
Resultados trimestrais



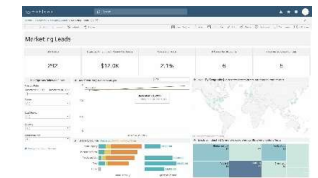
Acompanhamento de oportunidades



Principais contas



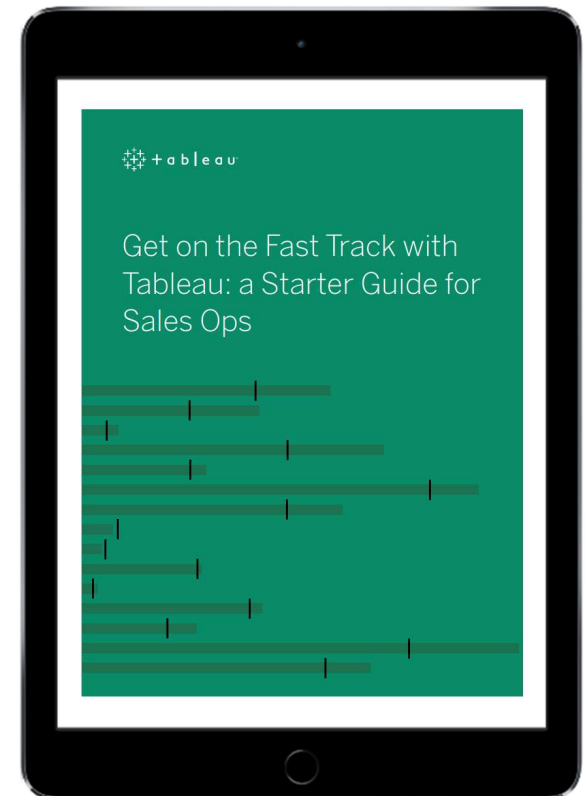
Clientes em potencial de marketing



[Link de avaliação gratuita](#)

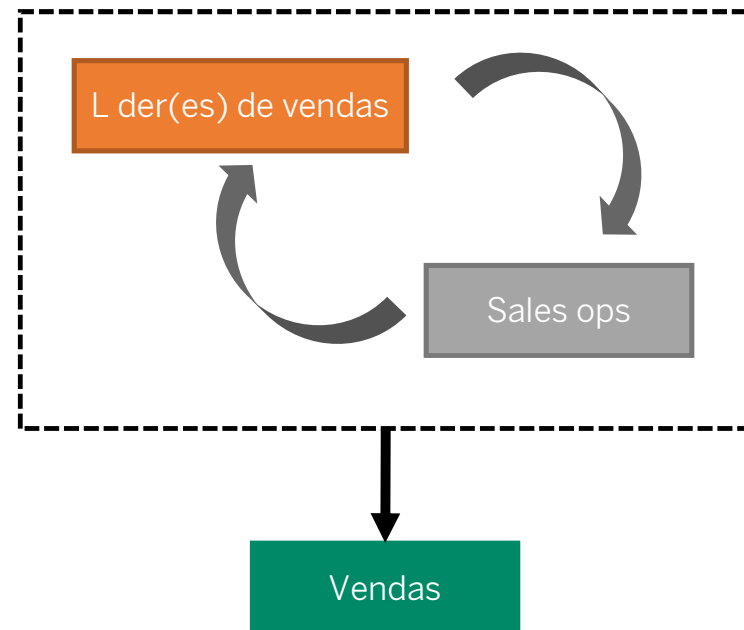
Recursos de analise de vendas

- Whitepaper: [Acelere seu sucesso com o Tableau](#)
- Links para os [painéis de analise de vendas](#) nesta apresentação
- Avaliação gratuita do [Tableau Desktop](#)
- [Treinamento](#) on-line gratuito
- Junte-se a uma [comunidade do Tableau](#) na sua regioao



Componentes essenciais do sucesso

- Compromisso e intervenção ativa da liderança
- Foco nas demandas do cliente
- Iteração rápida
- Adoção orientada pela liderança



Perguntas e respostas

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