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4 Fundamentals of Sales Analytics Success: What Sales Ops Needs to Know

Does your sales team have the data they need to hit their goals? Are you relying on outdated reports from an array of sources to track progress? Are there information gaps because data is scattered in too many places? In the need-it-yesterday world of sales, no one can afford to wait until the end of the quarter or year to discover they've failed to make quota or meet their customers' expectations. Stale or missing information has consequences—consequences all sales organizations want to avoid.

With a clear view into individual and team sales performance it's easier to make decisions, and if necessary, change course to ensure goals are achieved. Sales teams need a platform that brings their data together—from all data sources—to answer complex questions from leadership, customers, vendors, and team members. But for many sales professionals, letting go of familiar routines—including reliance on Salesforce dashboards—is hard.

Simply stated, analytics that are quick, easy, and intuitive are critical. A visual 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 and marketing data is also fundamental to understanding selling scenarios and building competitive advantage without slowing your momentum and progress.

So how quickly can your sales team get up and running with an analytics platform? The answer is very quickly. With features like the newly launched Dashboard Starters in Tableau Online, unified, eye-opening views of data are possible in a matter of minutes—from Salesforce, Oracle Eloqua, Marketo Sales, and more. As you dig in, these are a launchpad into other views of the data depending on what you wish to see.

Put analytics into action

Sales ops are tasked with knowing all the nuances of their organization's sales data, and applying that insight to boost performance. It's not a simple task, but harnessing the power of Tableau can make it all possible. Here are four reasons why.

1. Deeper understanding of data helps sales hit numbers faster

Is your understanding of your business limited to what's in your CRM? And where is your data? In spreadsheets, SQL databases, Hadoop, Salesforce, or other cloud apps? Understanding all sales, marketing, and customer data is essential for discovering insights and making informed decisions. And being able to access data wherever and whenever you need it is just as important.

Your sales systems may not capture all transactions. You may not be able to attribute results to

individuals in a team-selling environment or uncover hidden trends with your existing resources. The ways that sales staff input their data varies, and they're often behind because their primary focus is really on selling. Ultimately, this oversight can cause inaccuracies or misinterpretation in the data.

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 their 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 Online, creating better visibility, collaboration and healthy competition among their team of several hundred members.

By optimizing Tableau as the single source of truth for sales reporting, MillerCoors is spotting opportunities and selling more product.

2. A single source of truth gets your team on the same page

It's challenging to build team alignment if everyone is looking at different numbers and data sources. But the benefits of a single source of truth are undeniable. A single source of truth—created when you have visibility into all of your data—helps managers and individuals see the same big picture and be equally accountable. On top of that, by unifying sales, marketing, and customer engagement data, you can see details, accelerate decision-making, and gain an extra edge on the competition.

Sales leaders face additional challenges adopting a single source of truth because sales data itself is complex. For actionable insights, sales organizations need to be able to analyze key metrics including territories, market-sizing, quotas, customer demographics and engagement, and more. While there are ways to bring disparate data directly into Salesforce, the process is often slow and painful, and doesn't support the kind of rapid analysis many sales leaders demand. A platform that's flexible enough to analyze complex information from multiple places—and aggregate it in one dashboard view—is what's needed to give sales leaders the ability to drive strategic, quick business decisions now and in the future.

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 Server 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, Salesforce.com, and third-party tools. Then, one 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 Server weekly. With the option to track overall sales performance and dig deeper to understand the underlying customer experience, sales 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.

3. Interactive visualizations help you go deeper

As you can see from the examples above, dashboards are important because they allow everyone to see the same data. They are fast 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.

Traditional reports and spreadsheets can't compete with dashboards: they 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 on the dashboard and transform data into actionable insights.

Instead of spending time trying to understand data sets, sales can now focus on closing deals, problem solving and decision making. For Oldcastle, interactivity with Tableau visualizations has transformed their data into powerful knowledge that they use to make quick, but important business decisions to better serve customers.

> **Tracking 78,000 SKUs helps Oldcastle see the full picture and 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 saleforce 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."

4. Dashboards make it easy for your team to collaborate

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-service dashboards, sales managers can use them to run pipeline review meetings and sales leaders can work with finance on next year's strategy. Tableau helps modern sales teams put data at the center of every conversation to support real-time collaboration and strategic decision-making.

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 stock keeping units (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 Server 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. Dashboards can even be embedded directly in your CRM.

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.

A closer look

## See the big picture (and the details) with powerful dashboards

Once your team sees the same data, they can ask their own questions using the dashboards and easily get answers to those questions, instead of referring to different sources that may be inaccurate or incomplete.

Distance to quota

Effectively managing sales teams means understanding trends and knowing where things are headed at

any given time—but gathering all the critical data is difficult, especially when teams are large or widely dispersed. In this dashboard, the distance from the quota can be viewed by product or opportunity type. And historical data provides additional context and a window into future trends. With Tableau, you reduce the guesswork from sales management.
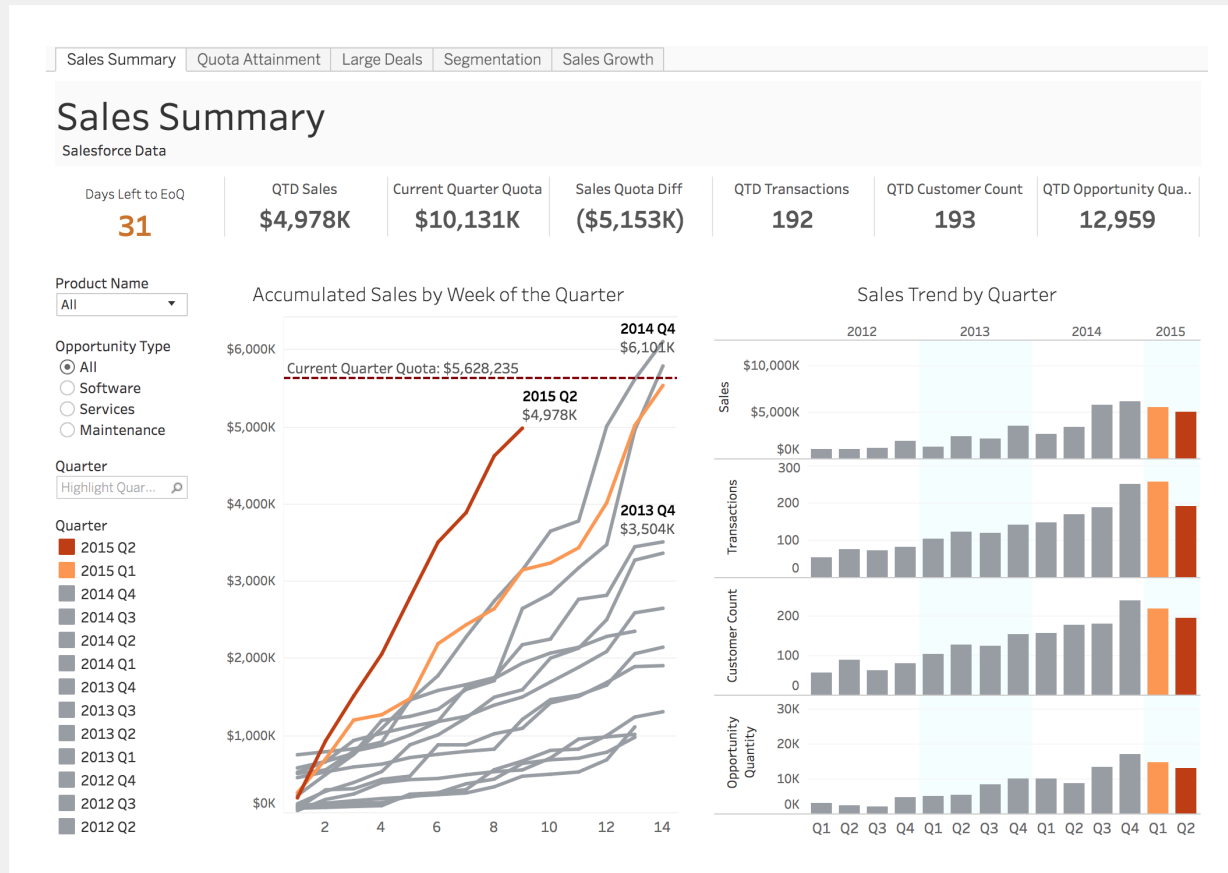
Pipeline and general performance

Understanding historic sales performance is one of the keys to more accurate forecasting. Using Tableau, comparative analysis like year-over-year growth can be done as a single calculation. You can see your performance historically, cumulatively, and for each business group. It's also easy to blend Salesforce data with product data to understand trends and new opportunities by region.
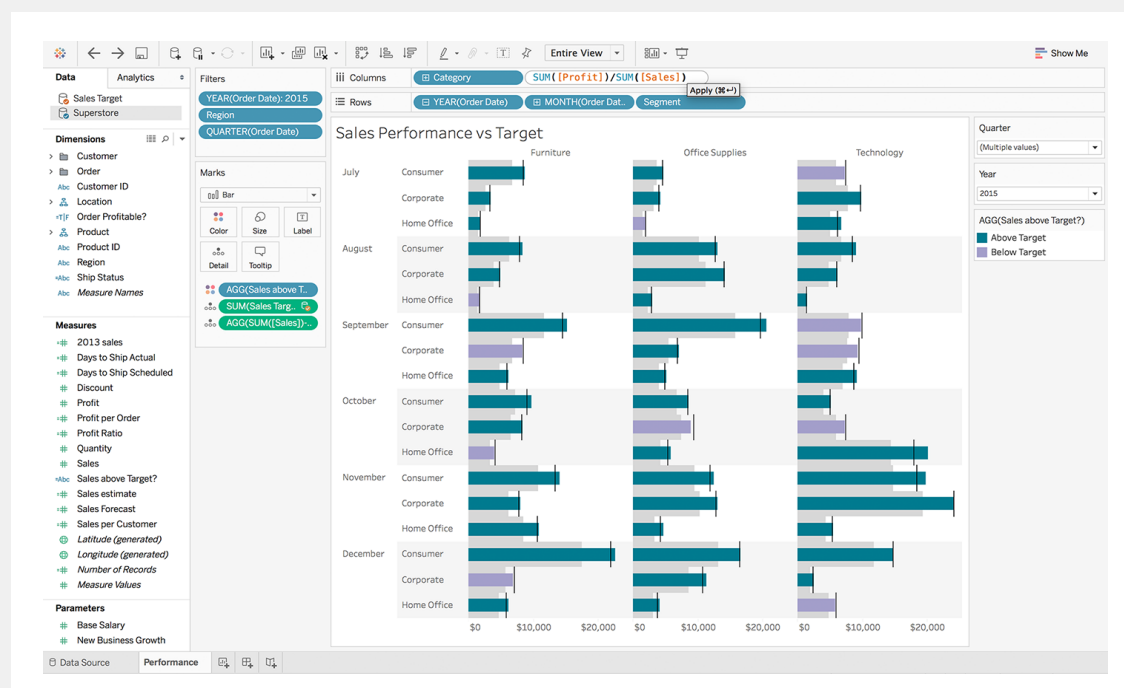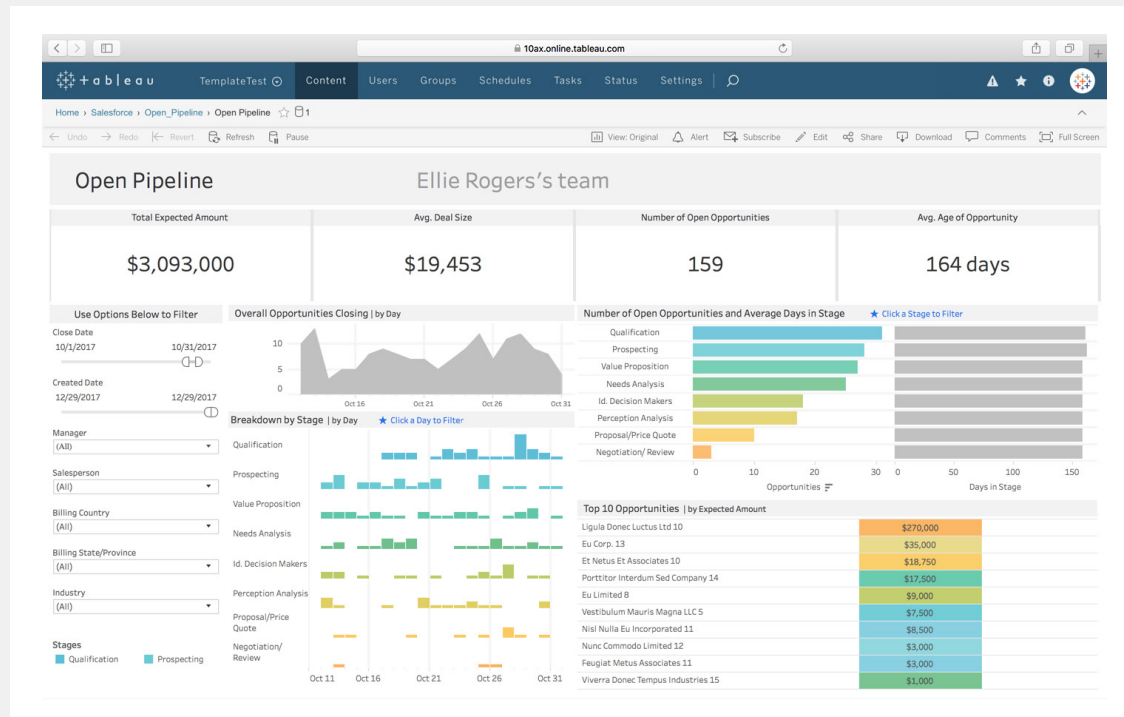
Keep an eye on profitability

Sales doesn't always mean profit. Sales ops is in a unique position to help your team find the right deals to close—deals that lead to net income and positive cash flow for the company—not deals that create unsupportable overhead. This dashboard shows sales and profit by segment, product line, and region, allowing sales leaders to quickly identify and take action to address any unprofitable selling activity.
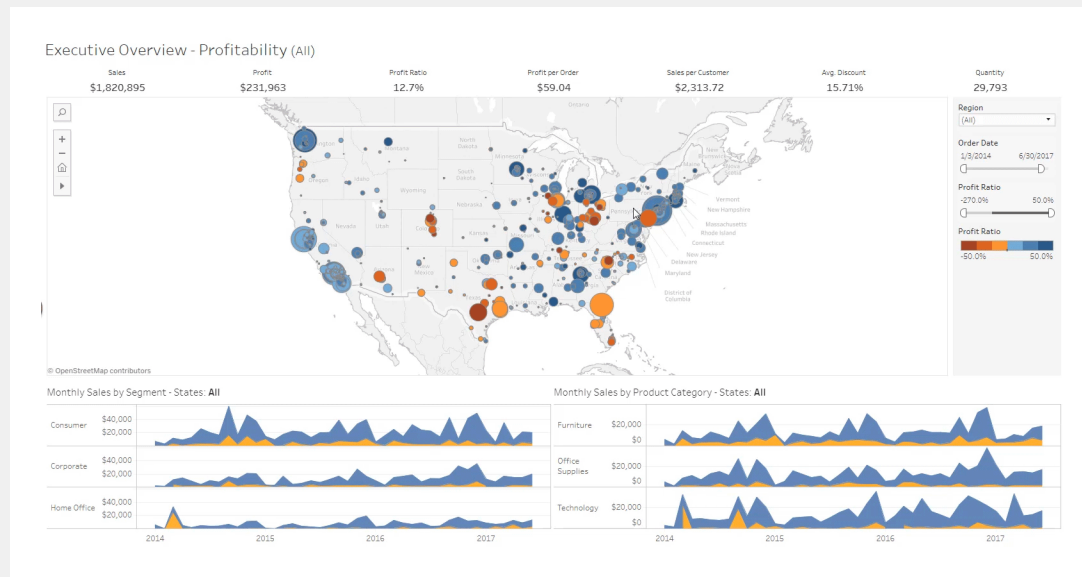
Using visuals to look at seasonal trends gives you the ability to predict future trends, forecast, and plan appropriately. You can also make decisions by applying data for historically slow quarters, summer slowdown, and end-of-year sales explosions. By having the same calendar month's results stacked next to each other, it's easy to see cyclical trends that influence sales going up or down.
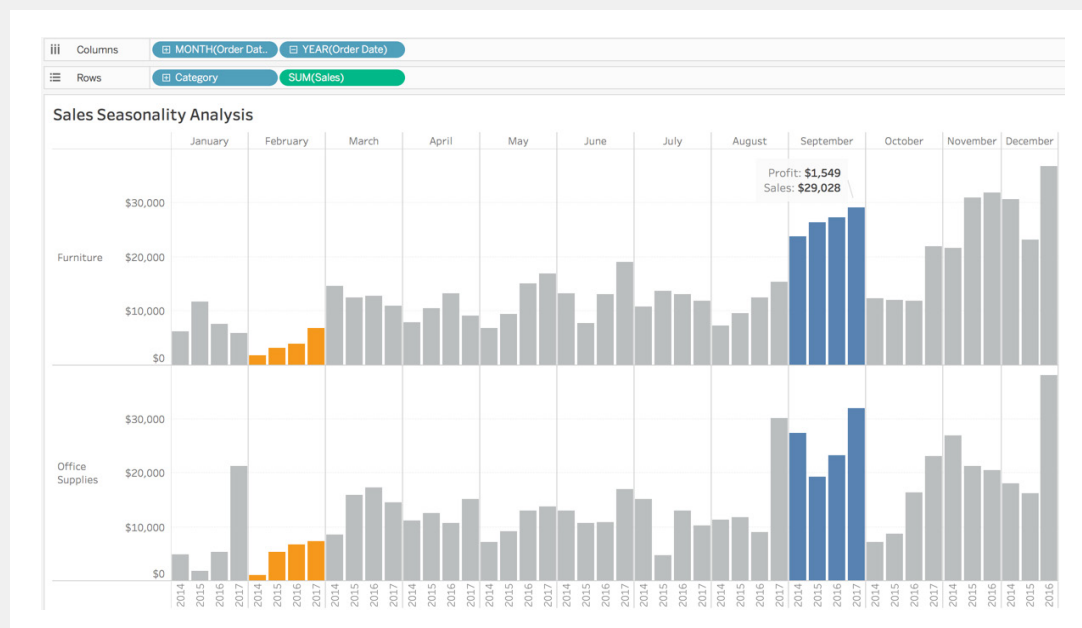
Are you ready to maximize the possibilities of your data?

Sales organizations need a steady stream of actionable data in order to remain competitive, satisfy their customers, and determine where they need to focus their next initiatives. Staying ahead in a dynamic sales environment also means being future-facing. With a data platform that is flexible and powerful enough to analyze all of your sales data, you'll be ready to leverage the potential of emerging technologies such as artificial intelligence, machine learning, and more.

If you're already using sales dashboards, evaluate how your data insights compare with Tableau. We invite you to learn more by following the resource links listed below.

About Tableau

Tableau helps people transform data into actionable insights. Explore with limitless visual analytics. Build dashboards and perform ad hoc analyses in just a few clicks. Share your work with anyone and make an impact on your business. From the individual analyst looking at specific sales performance to the sales executives looking at overall performance in the pipeline and ability to hit targets that meet company goals, people everywhere use Tableau to see and understand their data.

Related Materials

- Sales Ops Starter Kit – Everything you need to get up and running with Tableau for your sales department.

- Tableau's Sales Analytics Solutions Page – A one-stop resource to understand how Tableau helps sales professionals see and understand data.

- MillerCoors Sales Analytics Case Study – This beer brand established one source of truth for sales reporting, increasing visibility to spot opportunities and sell more product.

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