Sales Performance Management

Using Salesforce.com and Tableau 8 Desktop Professional & Server

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Executive Summary

Managing sales performance metrics with data from Salesforce.com, Inc. is possible in Tableau Software, Inc.'s Tableau 8 Professional Edition.

This paper will explain some of the best practices for creating actionable KPI dashboards:

- Understand sales processes, data sources, and field definitions before analyzing data
- Make KPIs actionable, not just informative
- Create a single dashboard of record to create alliance between sales efforts and sales management efforts
- How to close the loop between a Tableau dashboard showing Salesforce.com data and the Salesforce.com data itself

Beyond best practices, some of the technical skills this paper will cover include:

- An overview of how to attain access to Salesforce.com data within Tableau 8
- Using calculated fields to manage filters
- Effective ways of displaying KPI results using colors, labels, and captions
- How to use dashboard actions to create links between Tableau 8 dashboards
- How to create URL actions to allow users to navigate directly to objects in Salesforce.com
- An overview of how table calculations can be leveraged to increase the value of the KPIs

1 How to get Salesforce.com Data?

Tableau connects to Salesforce.com just like any other data source. Simply enter your credentials to connect to your Salesforce.com instance, and choose the table or tables you want to use.

You can then analyze that data right in Tableau to create your dashboard, then publish that dashboard to Tableau Server to share it.

Tableau includes standard connections, sets of tables and pre-defined joins. When using the native reporting in Salesforce.com, a number of tables are actually compiled for you behind the scenes. This is how you see object owner names, record type names, account info on opportunities, etc. As a result, when connecting to native tables through the Tableau Data Connector, it may look unfamiliar to see all the raw tables.

To maintain ease of use, Tableau offers pre-configured joins. For example, the Opportunities connection includes several tables:

- Account
- Account_ Created_By
- Account_Owned_By
- Created_By
- Opportunity
- Owned_By

You can simply connect a standard join and start analyzing data without having to set up the data structure yourself. Tableau includes standard connections for Accounts, Campaigns, Cases, Contacts, Leads, Opportunities, Opportunities and Contacts, Opportunity Items, Service Contracts, and Tasks.

2 You have your data, what now?

Tableau is a wonderful product to help you explore data, but if you are analyzing sales data without some level of prior knowledge, there is the potential to see things incorrectly. Is this because the data is wrong? Not necessarily. The very first step to analyzing sales data is to deeply understand the sales processes in place, what fields are being used – both by whom and for what purpose, and to have an idea of what you are searching for.

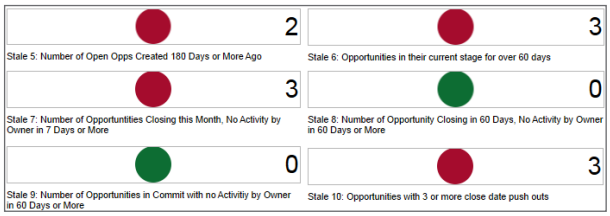
As an analyst, I know what questions people commonly ask because I have been asked them many times. But that does not change the fact that the very first place you should go when taking on a sales performance management project is to the sales leadership team. Key performance indicators (KPIs) are powerful and important, however they can be subject to the law of diminishing marginal returns – more is not always better. It is possible to set hundreds if not thousands of KPIs, but remember that humans, not machines, are performing in accordance with these results. Sales people in particular should not be focusing 90% of their time on performance management KPIs; rather they should be focusing 90% of their time on selling!

Once the most important leadership goals are known, devise a way to solve them with data! This needs to be a simple to use, scalable, and repeatable process for users. Whatever "magic" goes in on the back end should yield a clean and simple front end user interface and experience (UI/UX). My first step is always to create the filters which show only the data I want to see but show ALL the data I want to see as well. This process of querying and query validation is easily the most important aspect and the most time consuming. It is prudent to be attentive to detail. If you do this right, you will save yourself a lot of time down the road.

3 Build, build, build!

This is the fun part! One you know what business problem you are trying to solve and you have the logic built to show the problems, you get to paint the picture! Sure you have used Tableau to do the table joins, probably used the filter shelf and done some preliminary visualization along the way, but now you get to build a UI/UX within Tableau itself!

Remember that KPIs need to drive action. If you show something as bad or "in the red," you need to also clearly show how to get out of the red! I prefer the red/green KPI indicator approach (as shown in Figure 1), green is good, red is bad, and any other colors should be used extremely sparingly. It is also imperative to show what is being measured clearly. If you are going to show a red light, the person looking at it needs to



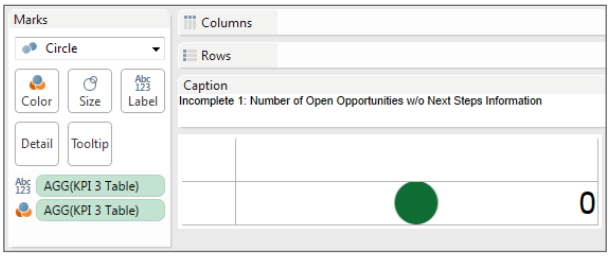
4 understand what is causing that to be red.

Creating the KPI indicators

When working with many different combinations of filters, I find it makes sense to create the filters as True/False calculated fields. This will allow you to quickly drill into each one and helps with the documentation of what is showing. It can be a bit cumbersome to go through a large amount of filters on the filter shelf when you are inheriting anothers work.

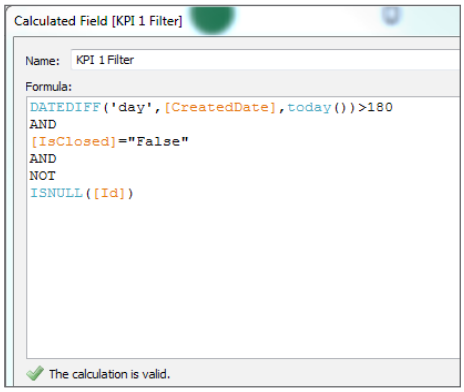
Above you saw six KPIs which are red or green. It is familiar as green is symbolic of good and red of bad. It is also clear where the issues are – if it's in the red, it needs attention. If you have a tiered employee table, you can allow managers to look at their teams, and team members to look at themselves! This allows for a single version of the truth which everybody can manage to.

Let's explore how to create a filter, a KPI indicator, and some useful tips about user interactivenughklyess as shown in Figure 2.

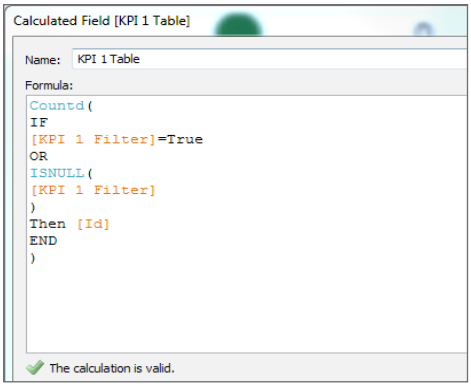


Step 1 – create the filter. This filter will allow you to count the problems! It needs to appear as a true/false statement.

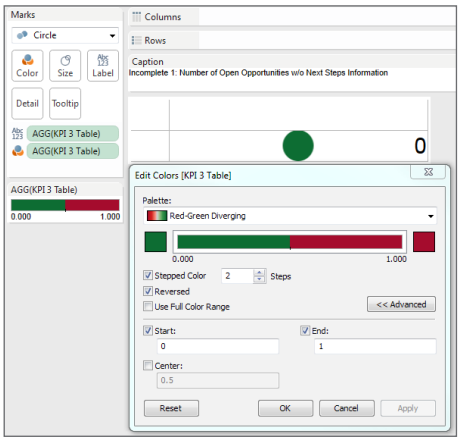
In this example, I have used a calculated field to filter my results as shown in figure 3.



Once the filter is built and you have validated the results being shown are complete and accurate, you want to create the stop light. I have accomplished this with another calculated field – in this example the formula is counting the unique ID's of the filtered results (see figure 4).



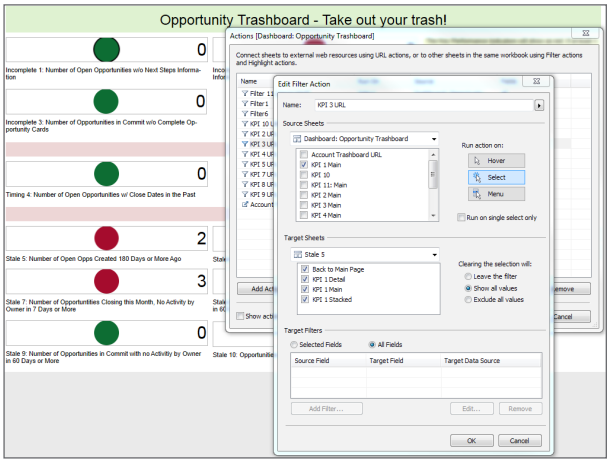
Adjusting the color for a KPI indicator is simple. You will want to take into account if there is an allowable tolerance for errors – is it good enough to be 90% in the green or are you targeting 100%? For this KPI, we are interested in seeing everything; an all or nothing approach. The color shelf settings are shown here in figure 5.



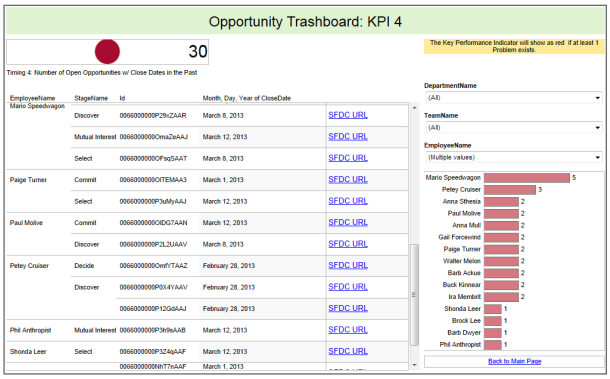
5 How to drive action with a KPI

You have the tool kit now to build this type of dashboard, but information is not enough. It is critical to drive action. If someone needs to change their behavior, show them how to change it. This section will take a look at how we have leveraged Tableau to drive sales performance management through the use of KPIs.

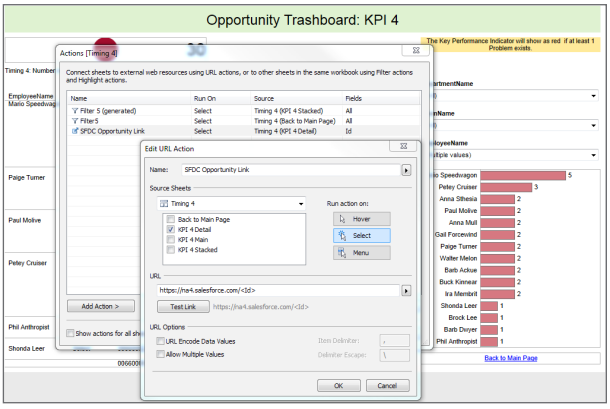
Using dashboard and worksheet actions allows for a table of contents type approach. Click on something, and it will take you somewhere else. For the above example, I have created sub-dashboards for each KPI. When you click on one of the colored circles, it will change your view to a detail page of that KPI. Start by building the dashboards you want to use as the main dashboard as well as the individual landing dashboards. You have some options here as to how they work, I have created mine as shown in Figure 6.



Clicking through to a detail dashboard is an enormous help. Suddenly you can see exactly the same information as you could on the main page, but you also see exactly what makes up the number. If there are fourteen problems, fourteen distinct opportunities are shown. Click on a user name from the drop down menus to drill into specific people. See who the top offenders are based on the stack ranking (this is also clickable as a filter). Figure 7 shows the exact opportunities which are open and were created more than 180 days ago. There is a direct link to SFDC for each opportunity. This simplifies the process of acting on an issue. Remember that Tableau does not overwrite or change data; therefore SFDC is the interface for changing what you see here.



Creating URLs that send the user to SFDC could not be easier. You need to have the object you wish to link to (in this case Opportunity) SFDC ID either in the visualization or on the level of detail shelf. Using the generic URL of your SFDC instance (in this case NA4), you can tack on any ID to this and it becomes the URL to your SFDC object! This is illustrated in Figure 8.



6 Beyond the basics with Tableau and SFDC data

Sometimes it is not enough to put data into columns or charts. When reviewing historical data, it is often important to introduce fields and then to compare the data in one row to another. Running totals for example allow you to see how things are changing over time based on a sort. Window maximum calculations can show the desired result in order to conduct comparisons and find the correct results. These are referred to as Table Calculations in Tableau. Figure 9 shows a crosstab where the last three columns are being calculated off of the rest of the columns! In this case, the arrow indicates the amount of time the opportunity has been in its current stage.

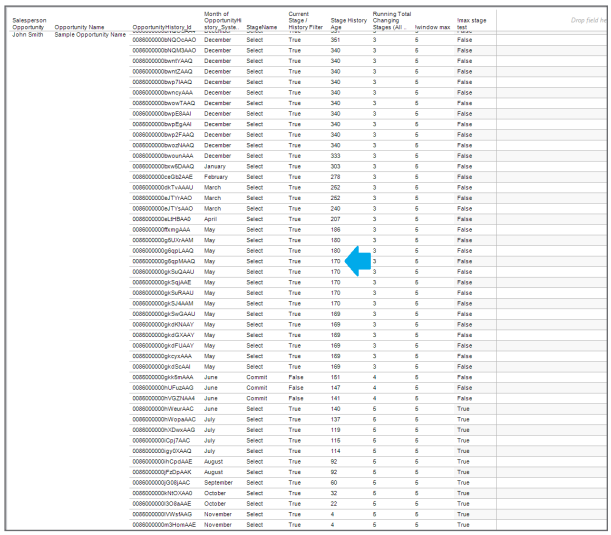


Tableau 8 allows you to “hard code” these table calculations so that the results can be visualized without actually showing the data in a crosstab! This ability allows you to make much more advanced observations about data without cluttering the dashboard; maintaining a better user experience.

Hardcoding table calculations will allow you to move the data shown in the cross tab to the level of detail shelf and clean up the view. Figure 10 shows a before and after of this process.

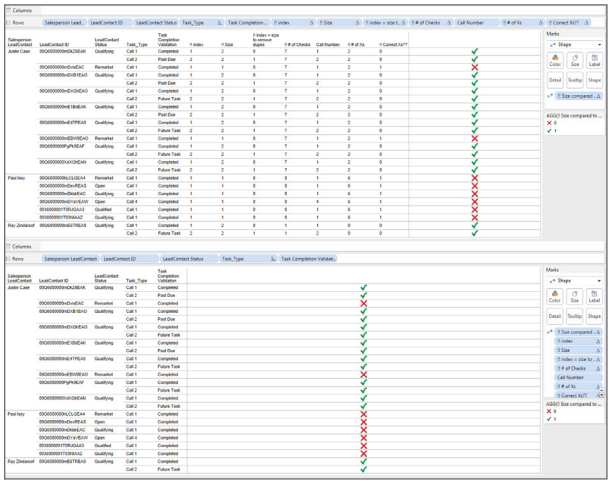
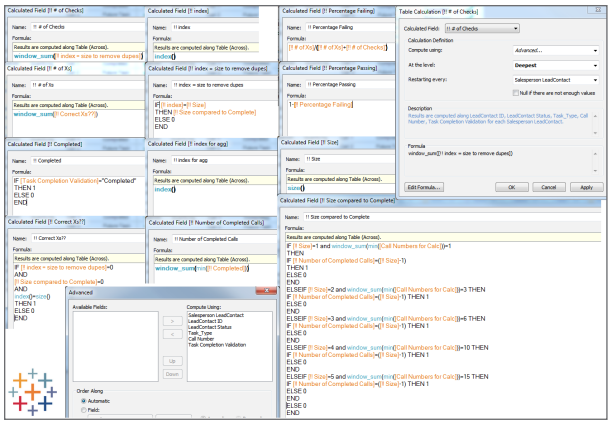


Table calculations allow you to do more with the data. Above we have a series of process steps and the calculations are testing to ensure that they are happening in the correct order and the process is being followed through to completion. Figure 11 shows some of the logic as well an example of hard coding a table calculation.



7 Conclusion

The ability to harness SFDC data into Tableau 8 is an enormous advantage when managing sales performance. Building actionable and important KPI dashboards will allow faster and more complete adoption. If you deliver clear next steps when pointing out an issue increases the likelihood of it being resolved in a timely fashion.

Table calculations give you the ability to further analyze data and increase the power of the tool immensely.

Things get even more exciting with Tableau Professional v8!

Many of the concepts covered are straight forward, but the table calculations component can be not-so-trivial. Tableau Software, Inc. has a great deal of knowledge about how to use Tableau. In addition to our knowledgebase, articles and blogs from the community of users, and the help documentation, there are also professional services as well as product consultants available. Contact your sales representative today to find out what is available!

About Tableau

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