



Get Better Business Visibility: 7 Warning Signs to Avoid

Today, reporting technology is going through a major transformation—from large and expensive applications only accessible to a few trained individuals— to easy-to-use, highly effective web applications, no server required, accessible to any business user. To date, leading on-demand CRM platforms like Salesforce have given you some visibility to manage lead capture, opportunity conversion and marketing campaign data. However, executives and managers still face endless hours mining data and preparing the reports needed to effectively steer the business. If you find yourself trapped by information overload as you pull together your sales and marketing metrics, you may find it is difficult or impossible to quickly get to the right data to support important decisions. If you are looking for better ways to easily and effectively track and measure key sales and marketing trends, run analytics for actionable decisions and you're looking to extend Salesforce reports and dashboards, you can turn this situation around by optimizing how you manage your existing process. For starters, you can understand and avoid the 7 warning signs:

1. **You hope no one asks for data that would be difficult or impossible to produce.** This may include reports for:
 - a. Top 20 accounts by growth percentage over the last year
 - b. Lead conversion percentages for all sales people for the last 12 months.
 - c. Rate of a particular product to all sales over quarter.
 - d. All accounts that produced over \$100,000 in revenue last year but have no open opportunities right now.
 - e. Attachment relationship between sales pipeline and services revenue.

These are all examples of questions that can't be answered with standard reports in Salesforce. Even if you know how to arrive at the answer, it would take you far too long to get there, so you hope that no one is paying attention to metrics you know are the key ones for your industry.

2. **Losing sight of the business activity and focusing too much time on meeting preparation.** Too many sales and marketing executives are spending anywhere from 4-10 hours a week to support recurring status meetings where they must present key sales and marketing data. A typical scenario for those meetings (forecast meetings, sales and marketing updates, staff meetings, project review meetings) is the following: exporting, merging, cleansing data from the Salesforce CRM system into Excel, then cutting and pasting data into Powerpoint—only to repeat the process over and over again as the stale information gets thrown away. Fundamentally, there is an inherent disconnect in this approach because one set of data, processes and tools operates your business and a different set provides status and visibility to the team. With the current model, meeting presentations are tucked away on a personal computer with no team access—or at best team members file a personal copy of stale data.

3. **Running key Sales & Marketing metrics that becomes immediately dated.** Kierkegaard stated that people live life forward, but they understand it backward. If your data is dynamic, shouldn't your sales and marketing analytics? If your standard Powerpoint deck is made of a collection of stale data, failing to understand what is happening in your sales and marketing pipeline in real-time impacts your bottom line.
4. **Real-time changes to your dashboards end up being counter-productive.** If you're using static dashboards, you know all too well that if you make any changes to those dashboards, you often spend more time editing, saving, and rerunning each underlying report than experiencing the benefits of those dashboards. If you are asking yourself, "there has to be a better way of doing this," look to eliminate the continual "busy work" associated with the existing business process.
5. **Running sales reports and then performing calculations in a different format.** Are you often exporting Salesforce data into Excel spreadsheets so you can just perform and run arithmetic, averages, sums and percentages on the data? Or as a marketing professional, are you calculating campaign ROI, CPL, CPS and CPO manually and then re-keying the information into Salesforce? This undesirable method is highly manual, error prone, and time consuming.
6. **Finding it impossible to easily combine and filter data.** Sales people don't have time for special training. Marketing people don't understand "semantic mappings" and "slowly changing dimensions". Salesforce has standard "objects" such as Leads, Opportunities, Accounts, Campaigns, Products, and many more. Even if you've heavily customized Salesforce, you want to easily combine, filter and gain immediate insight into the metrics you care about the most.
7. **Inability to share your reports with people not connected in Salesforce.** For reports and presentations to be useful in your collaborative environment, it needs to be accessible to anyone, anywhere via an online portal.

The **7 Warning Signs** described above are all too common in the sales and marketing profession and impact the health of your sales pipeline and marketing programs. Avoiding them requires a new generation of business productivity tools that dramatically cuts reporting preparation time, offers unprecedented flexibility, is intuitive to use and extends full native integration to Salesforce.

An easy alternative: Installs in 5 mins.

[Sign up for a free evaluation.](#) Carousel provides a set of prepackaged analytics templates and scorecards that enables key sales, marketing and service metrics to be summarized and presented dynamically from Salesforce.com. Carousel provides on-demand business insight during every weekly meeting as well as the ability to securely and easily publish and share data with customers and partners without expensive custom portals. For more information about Carousel, visit: <http://www.dreamfactory.com/solutions/carousel>. If you have any questions, are interested in a free product demo, call us at 1-888-399-DREAM (3732) or visit www.dreamfactory.com.