salesforce wave analytics

Wave App for Sales Guide

Turn insight into performance with the Wave App for Sales.

Account Summary

Alexander Inc [481]

Open
$1,705,957

Closed Won
$1,416,728

Activities Due
2

2

Email   Task
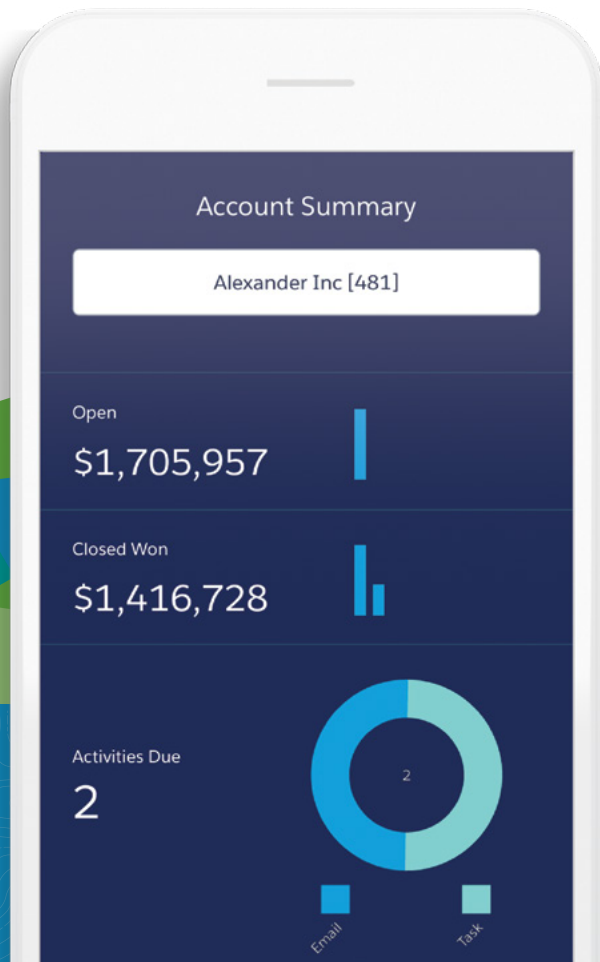
The Wave App for Sales gives everyone in your sales organization the answers they need to make smarter decisions, faster. With pre-designed dashboards built for Sales Cloud data, Sales Managers, Reps, and Ops have the power to dive deep and explore, slicing and dicing data down to the individual record. And because it's natively integrated with Salesforce, you can take action back into Sales Cloud, without ever leaving the app. Everyone on your sales team can interact with their data, get answers, and turn insight into performance.

In this Guide we'll review Wave for Sales dashboards and explain how each person in your sales organization can get the answers they need to make smarter decisions about your customers.

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Wave App for Sales Dashboards

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Introduction

WHAT YOU'LL LEARN

- How to ask new questions, interactively explore your sales data, and uncover insight and trends
- How to get a clear path through your Sales Cloud data on any device
- How to take action back into Salesforce from any Wave for Sales dashboard

WHO THIS GUIDE IS FOR

Your entire sales organization can benefit from Wave for Sales. **Sales Managers** get visibility into performance and pipeline to accelerate deals and coach reps.

Sales Reps can track their performance and identify new opportunities and whitespace.

Sales Ops can spot trends, evaluate opportunities by region, product, and team, analyze historical performances and identify new ways to optimize resources.

Sales Managers

Sales Managers are thinking about a million things at once: Am I going to hit my quota? What is my most current forecast? What happened to my forecast? Do I need to change my forecast? And what's the best way to manage team behavior and coach reps? With Wave for Sales you'll get answers to all your business issues and take care of your reps, too.

SALES MANAGERS SHOULD CHECK OUT THESE CHAPTERS

1. **MANAGER OVERVIEW**

2. **PIPELINE CHANGES**

3. **TEAM PRODUCTIVITY**

4. **QUOTA PROGRESS**

Overview

CHECK THE PULSE OF YOUR BUSINESS

The Sales Manager overview is for first-level managers who, from a role hierarchy perspective, have opportunity owners in subordinate roles. This dashboard gives managers a quick overview on how they are performing for a given time period.

HOW IT CAN HELP YOU SELL MORE:

KNOW THE STATE OF YOUR OVERALL BUSINESS

UNDERSTAND YOUR WIN RATE PERCENT BY DOLLARS

KNOW HOW YOUR BOOKINGS INCREASED COMPARED TO THE SAME PERIOD LAST YEAR

SEE YOUR TOP FIVE CLOSED/WON DEALS

KNOW YOUR TOP FIVE NEW DEALS

SEE THE ACTIVITIES COMPLETED IN THE LAST SEVEN DAYS
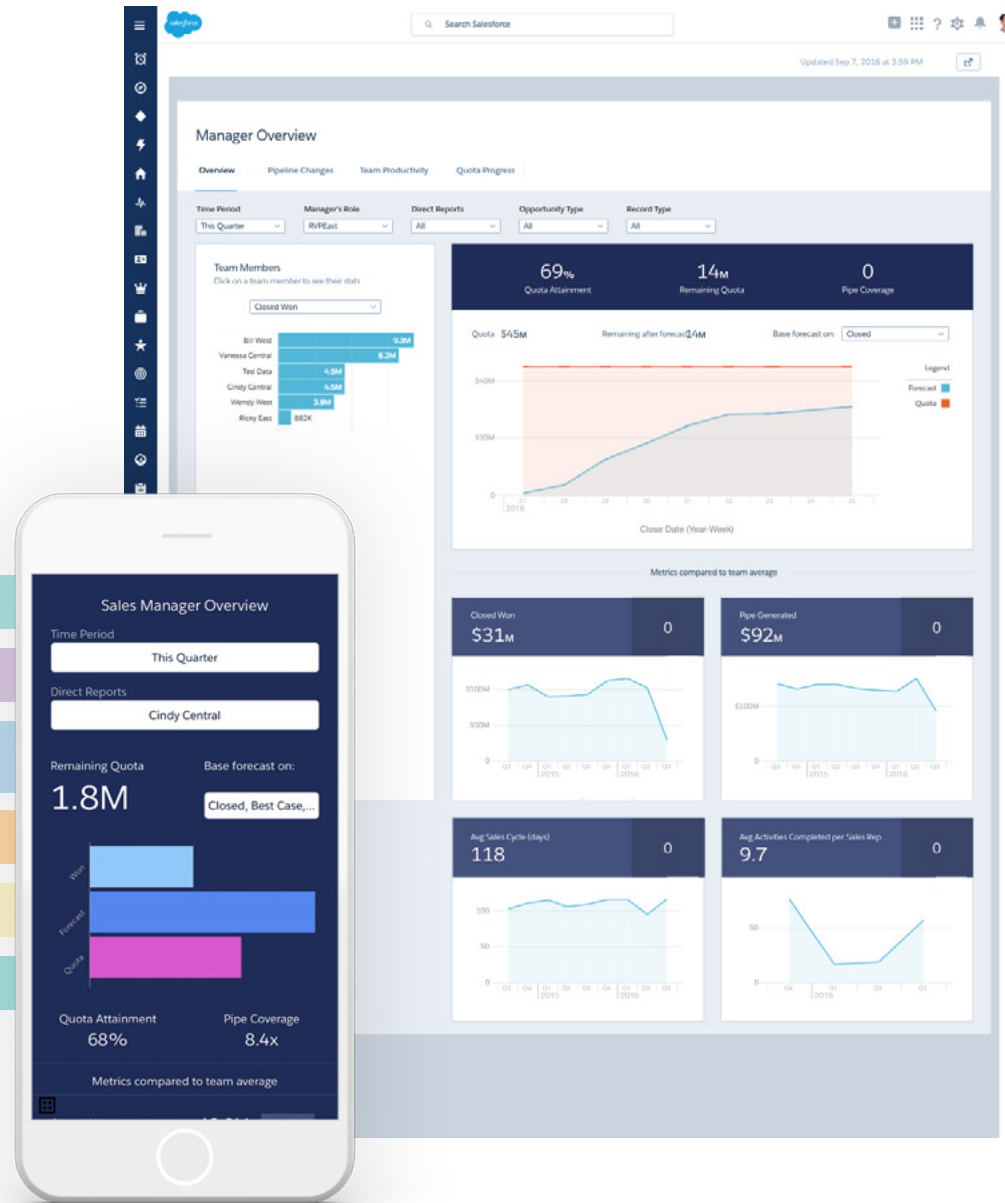
Pipeline Changes

KNOW THE KEY CHANGES TO YOUR PIPELINE

Understanding how your pipeline changes over time has never been easier. This dashboard gives you instant visibility into where your pipe started at the beginning of a period, where you ended up, and how you got there.
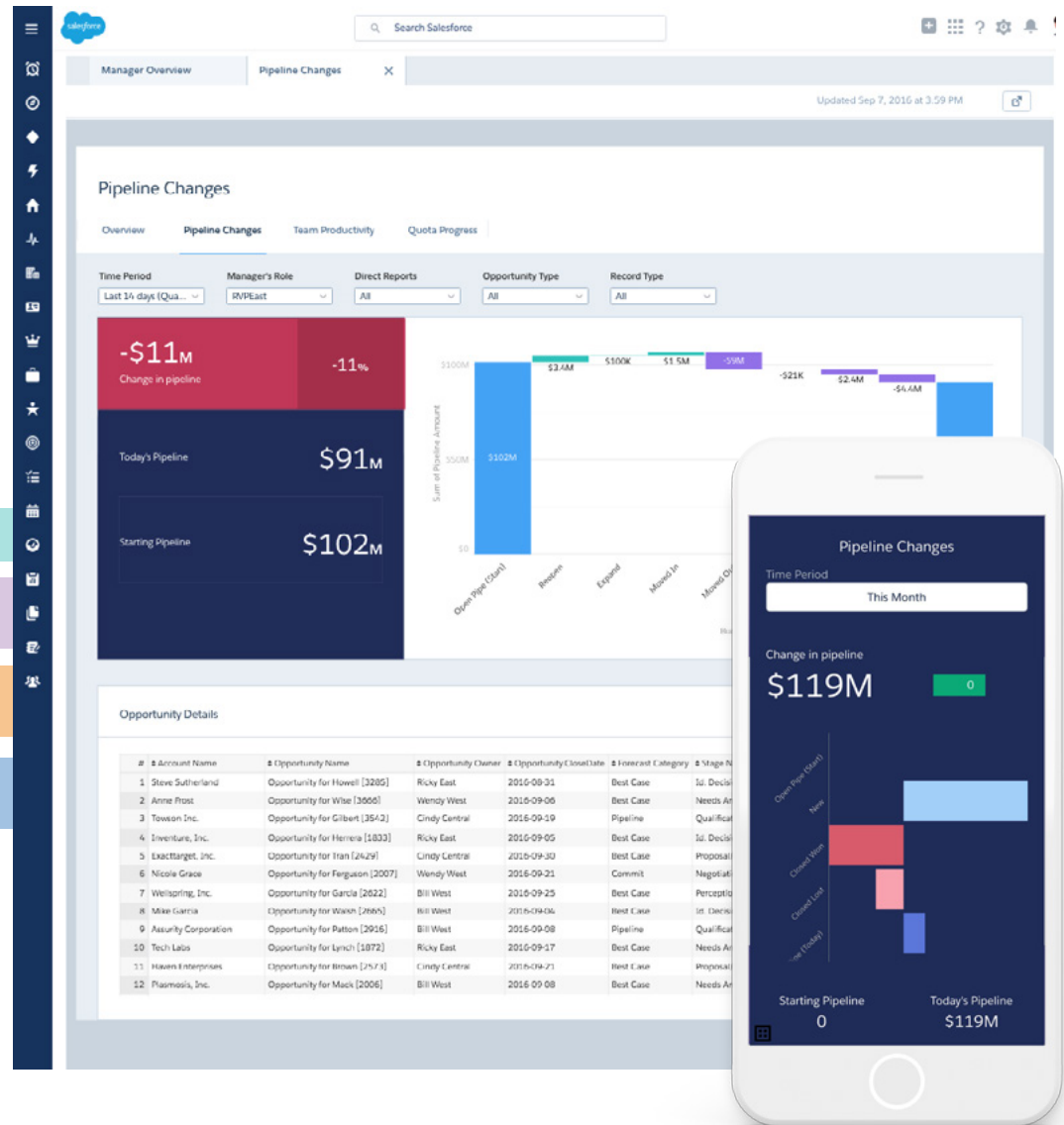
HOW IT CAN HELP YOU SELL MORE:

KNOW WHAT HAS CHANGED IN YOUR OPEN PIPELINE

UNDERSTAND PIPELINE INCREASES
(NEW, RE-OPEN, MOVED IN, EXPAND)

KNOW WHAT CAUSED YOUR PIPELINE DECREASE (CLOSED WON, CLOSED LOST, MOVED OUT, REDUCED)

SEE THE MOVEMENTS IN YOUR OPEN PIPELINE BY GEO/CUSTOMER

Team Productivity

SEE TOP- AND BOTTOM-RANKED PLAYERS ACROSS KEY PERFORMANCE CATEGORIES

Being a manager isn't just about dollars, it's also about people. Get a view across all of the sales reps on your team and see how they stack rank across various key performance categories and time periods. See top- and bottom-ranked players and identify coaching opportunities to make the whole team more productive.
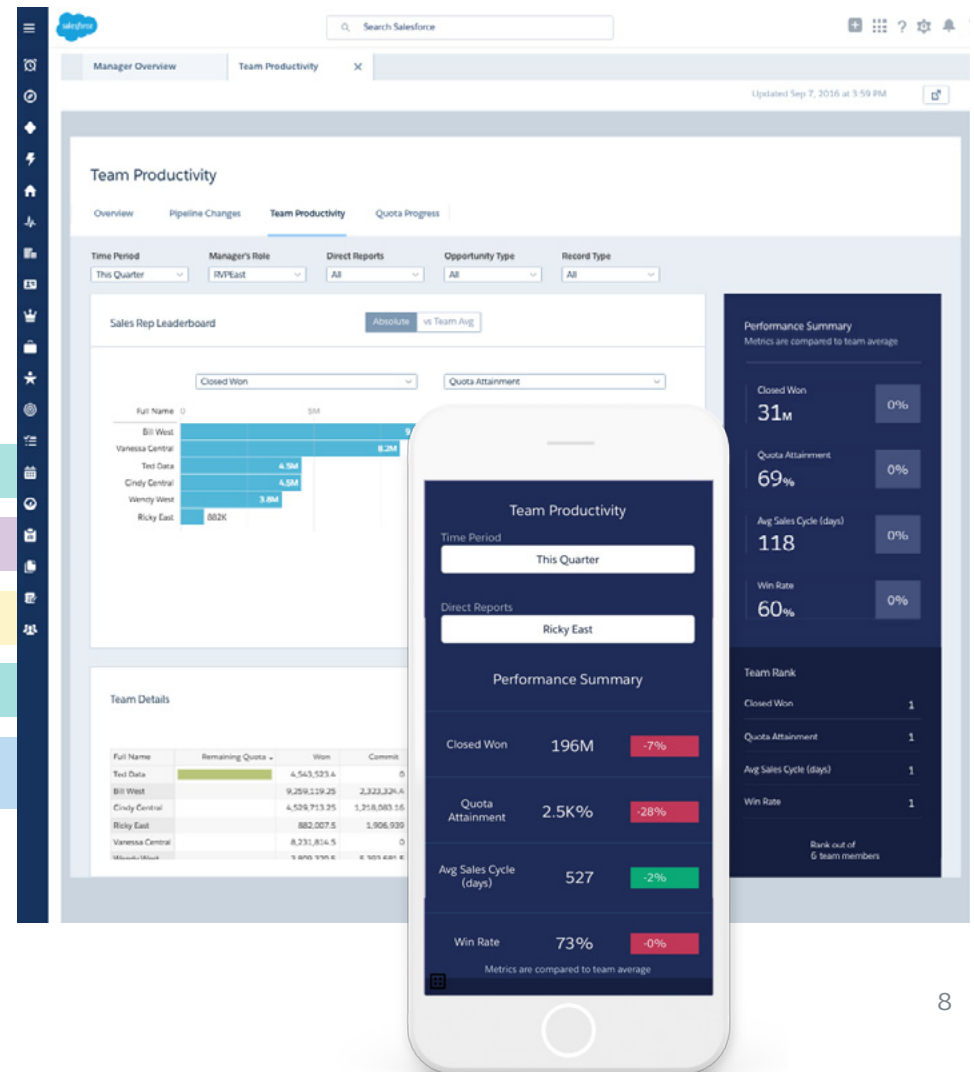
HOW IT CAN HELP YOU SELL MORE:

FIND THE TEAMS AND REPS WINNING THE MOST DEALS

UNCOVER THE TEAMS AND REPS ADDING NEW DEALS TO THE PIPELINE

SEE THE TEAMS AND REPS WITH CLOSING DEALS IN THE PIPELINE

TRACK THE TOP/BOTTOM TEAMS AND REPS ACTIVITIES

KNOW THE TOP/BOTTOM TEAMS AND REPS BY QUOTA ATTAINMENT DOLLARS

Quota Progress

GET AN IN-DEPTH UNDERSTANDING OF HOW YOU'RE TRACKING TO QUOTA

Dive deep into your quota attainment and look at opportunities set to close this quarter for improved forecast accuracy. Look ahead at next month or next quarter by changing the time selector and identify possible opportunities to move up.
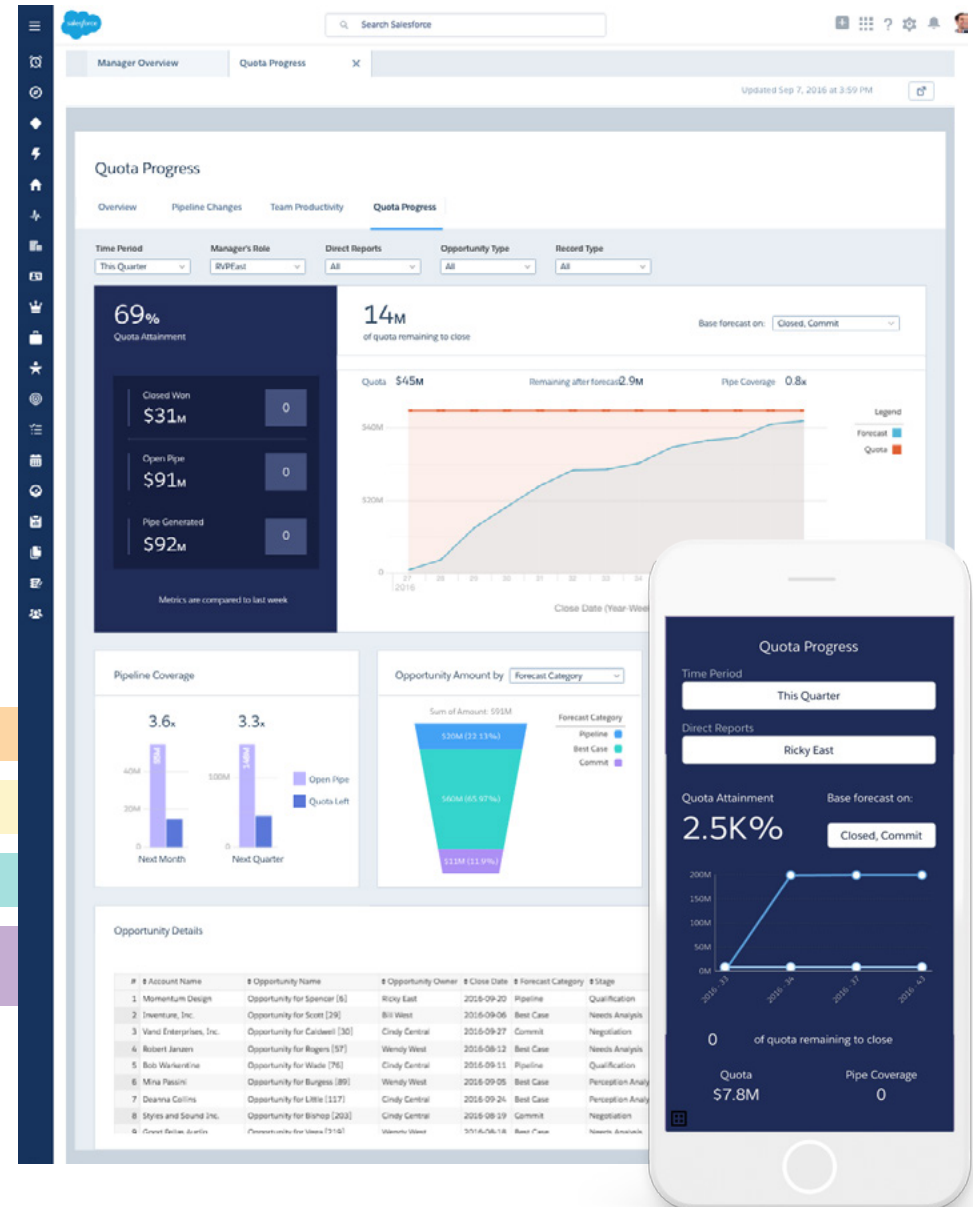
HOW IT CAN HELP YOU SELL MORE:

FIND OUT IF YOUR TEAM HIT ITS QUOTA

IDENTIFY MY REPS FORECASTED TO HIT THEIR QUOTAS

SEE THE TOP OPEN DEALS THIS QUARTER AND NEXT

KNOW THE DEALS MY TEAM SHOULD FOCUS ON TO ENSURE WE HIT OUR QUOTA

Sales Representatives

Sales Reps are totally focused on making quota and need to know where they stand at any given moment. How how am I tracking to quota? What open opportunities do I need to focus on? What are my customers' underlying needs and are they being met today? Wave for Sales gives reps the insights they need to identify new opportunities, close bigger deals and become a trusted advisor to customers.

IF YOU ARE A SALES REP, TAKE A LOOK AT THESE CHAPTERS

5. **SALES REP OVERVIEW**

6. **OPPORTUNITY DISCOVERY**

Overview

QUICKLY IDENTIFY YOUR TOP OPEN DEALS

The Sales Rep overview is for reps that own opportunities and carry a quota. Look at your quota attainment and get instant insight into closed/won opportunities, open pipe, and completed activities for a given timeframe. View your forecast and how you're tracking toward your quota.

HOW IT CAN HELP YOU SELL MORE:

KNOW THE STATE OF YOUR OVERALL BUSINESS

SEE YOUR WIN RATE PERCENT BY DOLLARS

KNOW WHICH BOOKINGS INCREASED COMPARED TO THE SAME PERIOD LAST YEAR

KNOW YOUR TOP CLOSED/WON DEALS AND NEW DEALS

SEE HOW MANY ACTIVITIES HAVE BEEN COMPLETED IN LAST SEVEN DAYS

11
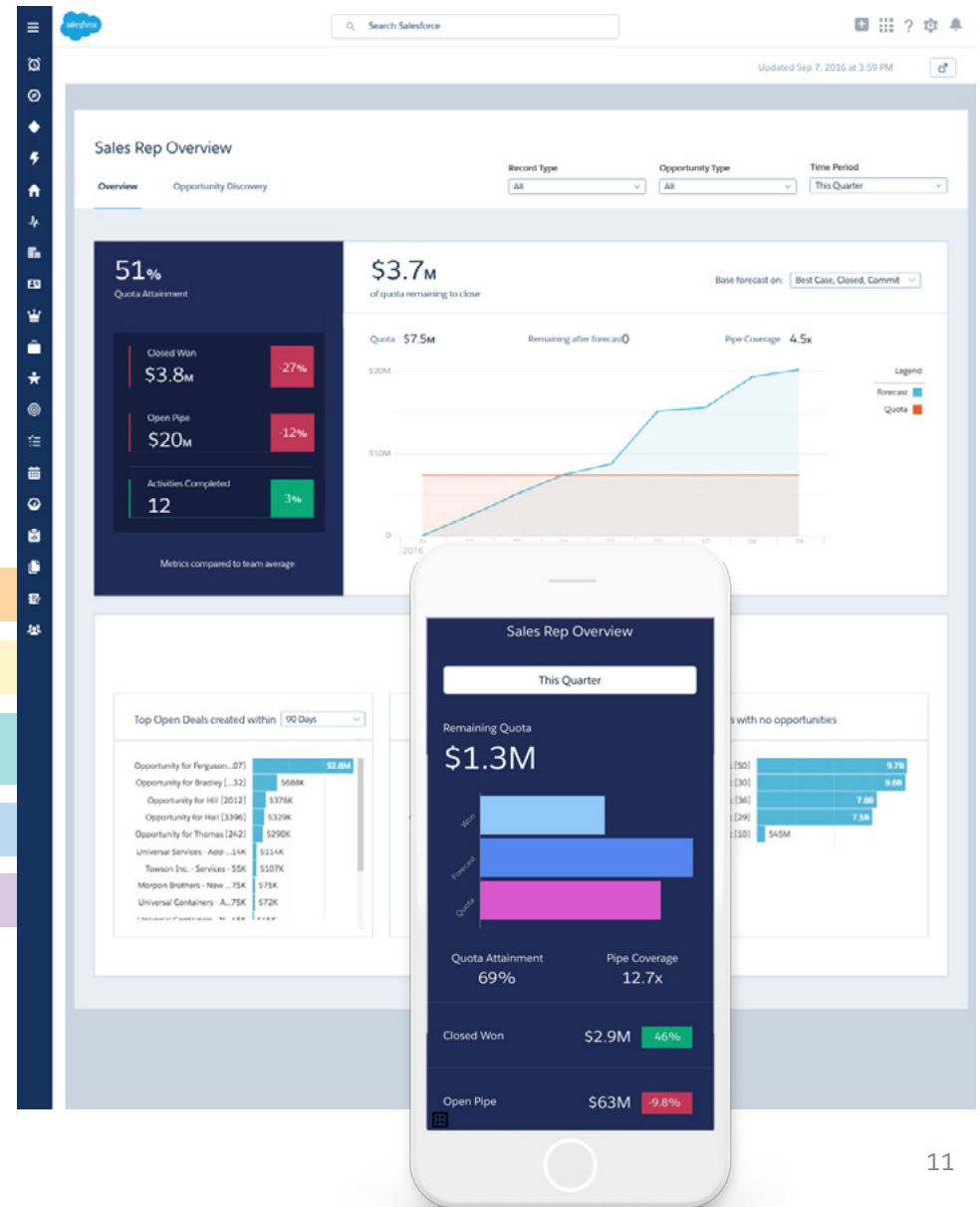
Opportunity Discovery

UNCOVER NEW OPPORTUNITIES, INSTANTLY

Quickly identify whitespace and discover new opportunities.

Slice and dice opportunities and closed/won business by owner, customer, geography, product, and source, then drill into the details to take an action on the Sales Cloud record.

HOW IT CAN HELP YOU SELL MORE:

DIVE INTO THE NEW/EXISTING BUSINESS YOU HAVE CLOSED/WON IN THE LAST WEEK/MONTH/QUARTER/YEARS

SEE AN INCREASE OR DECREASE IN GROWTH BY DIFFERENT PARTS OF THE BUSINESS

INSTANTLY IDENTIFY THE WHITESPACE BY SLICING AND DICING ACROSS KEY ACCOUNT AND DEAL QUALITIES

TAKE ACTION – LIKE LOGGING TASKS – RIGHT ON THE ACCOUNT RECORD FOR IMMEDIATE FOLLOW UP

Sales Operations

Sales operations is critical to a sales team's success. Ops is the strategic advisor, guiding the decisions that drive efficiency and maximize revenue. Ops understands the business from the ground up: what's the sales cycle time and how has that changed? How are the company's products selling across industry, region, segment? Where are the sales team's gaps and how should we think about growing the team and influencing behaviors?

IF YOU ARE IN SALES OPERATIONS, THESE CHAPTERS ARE FOR YOU

7. SALES LEADER OVERVIEW

8. SALES LEADER PIPELINE CHANGES

9. PERFORMANCE BY CUSTOMER

10. PERFORMANCE BY GEO

11. PERFORMANCE BY SOURCE

12. PERFORMANCE BY PRODUCT

Sales Leader Overview

KEEP A WATCHFUL EYE ON PIPELINE HEALTH

The Sales Leader Overview dashboard is designed for sales execs and operations who are level two managers and above. It provides an overview of open pipeline rolled up by role one level below the selected manager role. Because these users need to see more opportunities, they can slice dice by product, customer segment, owner, and geo.

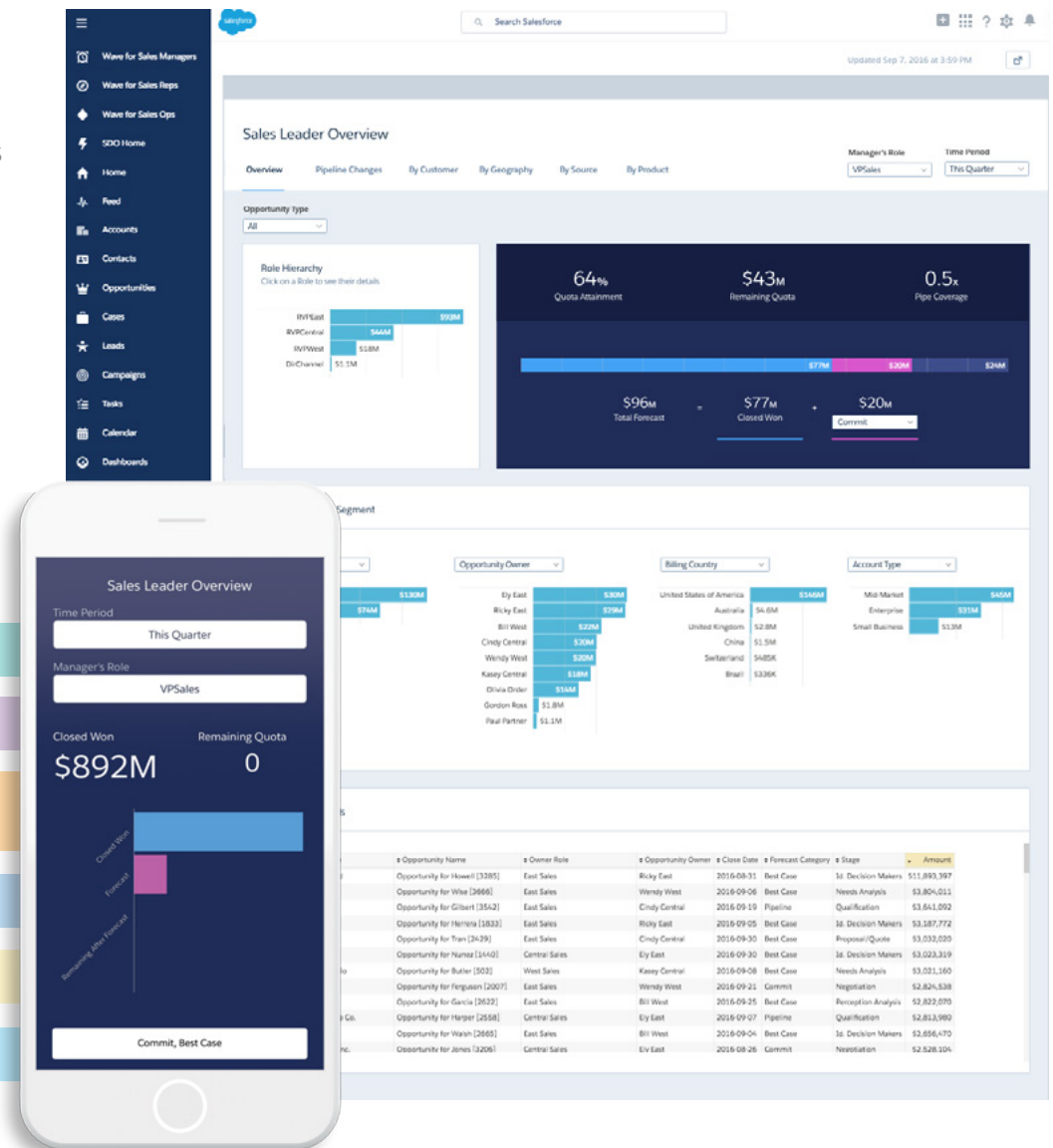## HOW IT CAN HELP YOU SELL MORE:

MONITOR THE STATE OF THE OVERALL BUSINESS

TRACK WIN RATE PERCENT BY DOLLARS

SEE HOW BOOKINGS INCREASED COMPARED TO THE SAME PERIOD LAST YEAR

RANK THE TOP FIVE CLOSED/WON DEALS

KNOW THE TOP FIVE NEW DEALS

REPORT ACTIVITIES COMPLETED IN THE LAST SEVEN DAYS

Sales Leader Pipeline Changes

STAY ON TOP OF KEY PIPELINE CHANGES

The Sales Leader Pipeline Changes dashboard is built for users at the top of the role hierarchy with access to volumes of opportunity records. New filters make it easy for sales execs and operations to drill down further on pipeline details to adjust strategic business direction and deliver better operational support.

HOW IT CAN HELP YOU SELL MORE:

TRACK CLOSED WON/LOST OPPORTUNITIES THAT WERE CLOSED WON OR LOST AFTER THE BEGINNING OF THE SELECTED PERIOD

LOOK INTO OPPORTUNITIES WHERE TOTAL AMOUNT IS LESS THAN IT WAS AT THE START OF THE SELECTED QUARTER

SEE NEW OPPORTUNITIES CREATED AFTER THE START PERIOD

UNDERSTAND PIPELINE CHANGES BY QUARTER

MONITOR ALL OPPORTUNITIES SET TO CLOSE FROM QUARTER START TO NOW

Performance by Customer

GET A CLEAR PICTURE OF YOUR CUSTOMERS AND ACCOUNTS

Optimize your sales strategy by digging into performance by account and opportunity. Quickly see the latest trends across your customers – know what to talk about every time you pick up the phone, and quickly evaluate where there may be new opportunities.
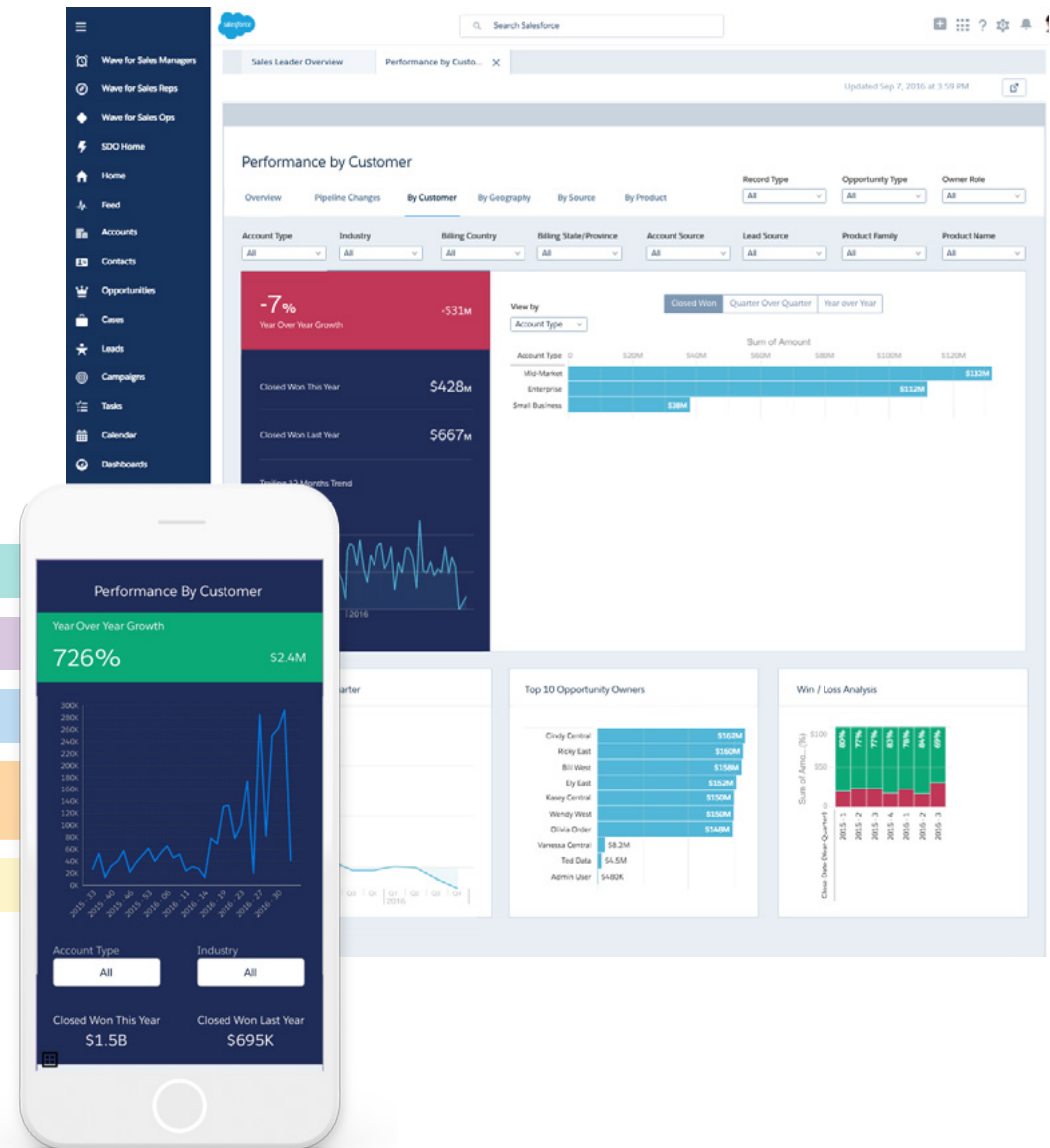
HOW IT CAN HELP YOU SELL MORE:

KNOW HOW MUCH A PARTICULAR ACCOUNT HAS SPENT

SEE THE OPEN OPPORTUNITIES PER CUSTOMER ACCOUNT

UNDERSTAND WHAT STAGE THESE OPEN OPPORTUNITIES ARE IN

KNOW YOUR AVERAGE WIN RATE PERCENTAGE BY DOLLAR PER ACCOUNT

FIND YOUR AVERAGE SALES CYCLE BY CUSTOMER

Performance by Geo

KNOW WHAT PRODUCTS ARE DRIVING THE MOST BUSINESS

Zero in and analyze performance numbers by country or state. Quickly get the details on how your business is performing across every key metric. Slice and dice closed/won business by geography, then drill into the details in the related dashboards.
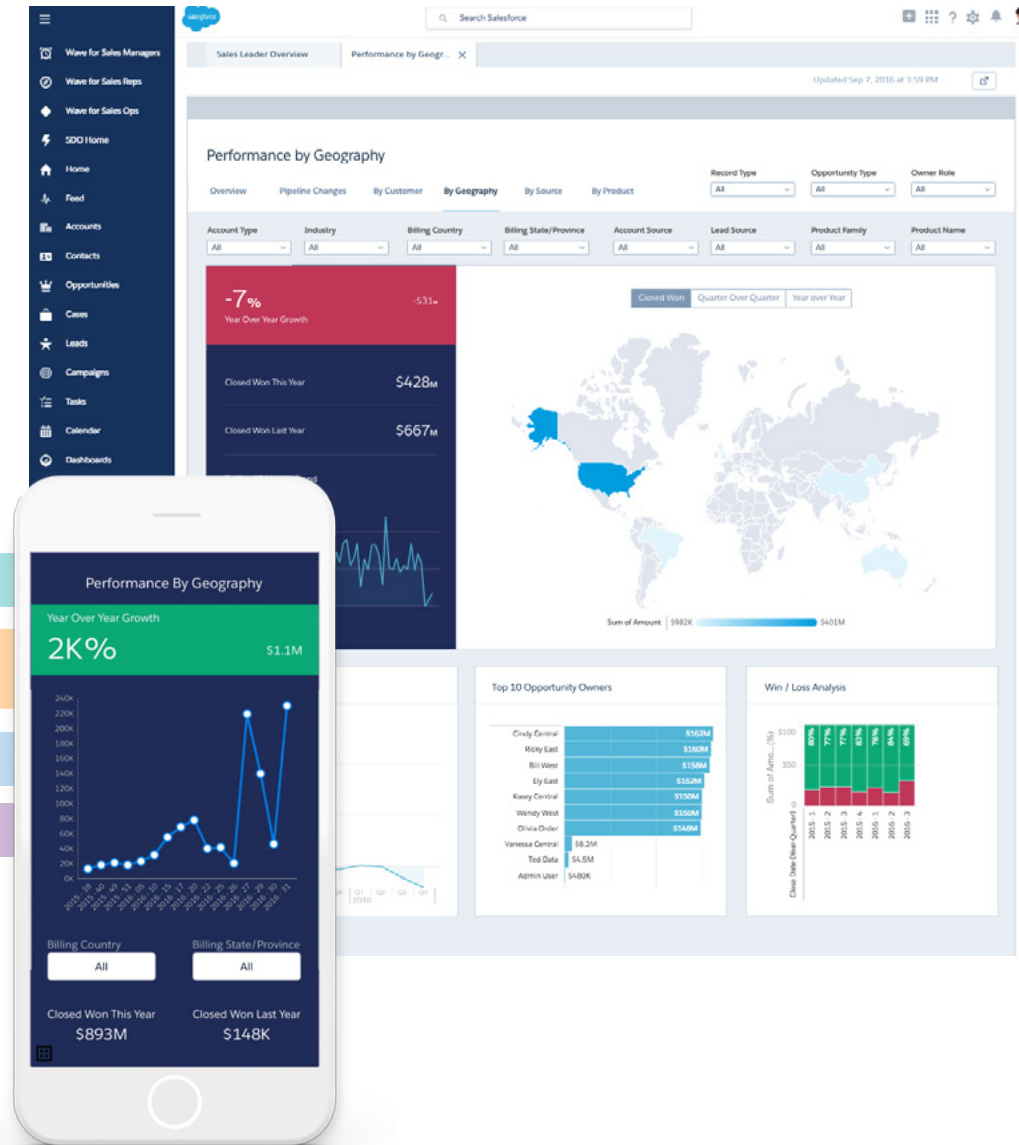
HOW IT CAN HELP YOU SELL MORE:

CHOOSE WORLD MAP OR US MAP

SEE YEAR-OVER-YEAR GROWTH BY AREA; COMPARE THIS YEAR, LAST YEAR/LAST YEAR

SEE TOP SALES REP OPPORTUNITIES BY REGION

GET Q/Q GROWTH TREND AND WON/LOSS ANALYSIS BY GEO

Performance by Source

INSTANTLY UNDERSTAND WHERE DOLLARS ARE COMING FROM

This is the dashboard that every sales ops manager is going to want to share with their marketing team. Understand all of your lead sources and those that are driving closed deals across every rep and segment. Know where to invest to grow the business.
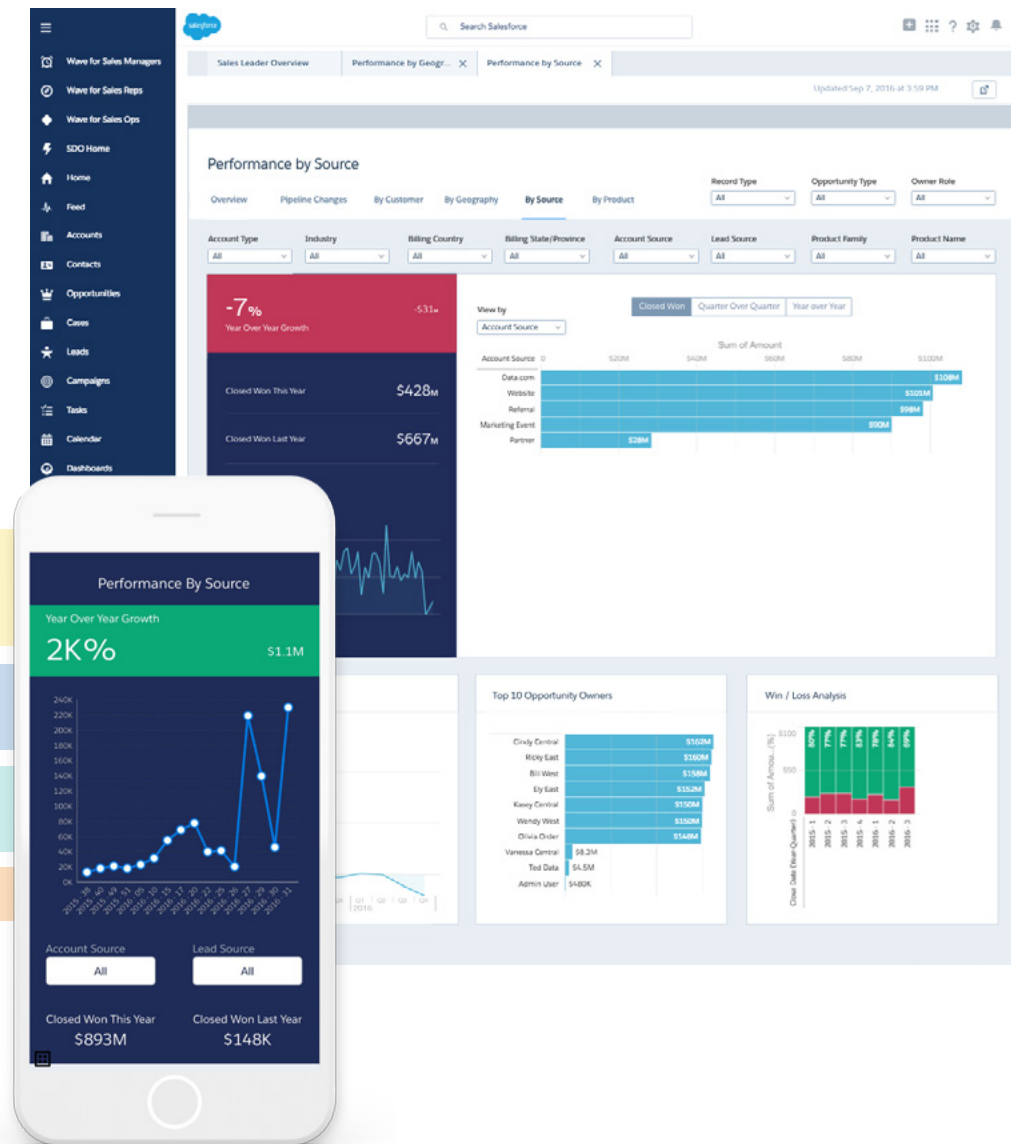
HOW IT CAN HELP YOU SELL MORE:

KNOW HOW MUCH NEW/EXISTING BUSINESS HAS CLOSED/WON IN THE LAST WEEK/MONTH/QUARTER/YEAR BY DIFFERENT MARKETING SOURCES

UNDERSTAND THE MARKETING SOURCES THAT MAKE UP MOST OF YOUR CLOSED/WON BUSINESS

SEE AN INCREASE/DECREASE IN YOY GROWTH BY DIFFERENT MARKETING SOURCES

COMPARE TOP MARKETING SOURCES

Performance by Product

KNOW WHICH PRODUCTS DRIVE THE MOST BUSINESS

Filter for trends by every product and get an in-depth understanding of what products are driving the most business and what products need your attention.

HOW IT CAN HELP YOU SELL MORE:

KNOW HOW MUCH NEW/EXISTING BUSINESS HAS CLOSED/WON IN THE LAST WEEK/MONTH/QUARTER/YEAR BY DIFFERENT PRODUCTS

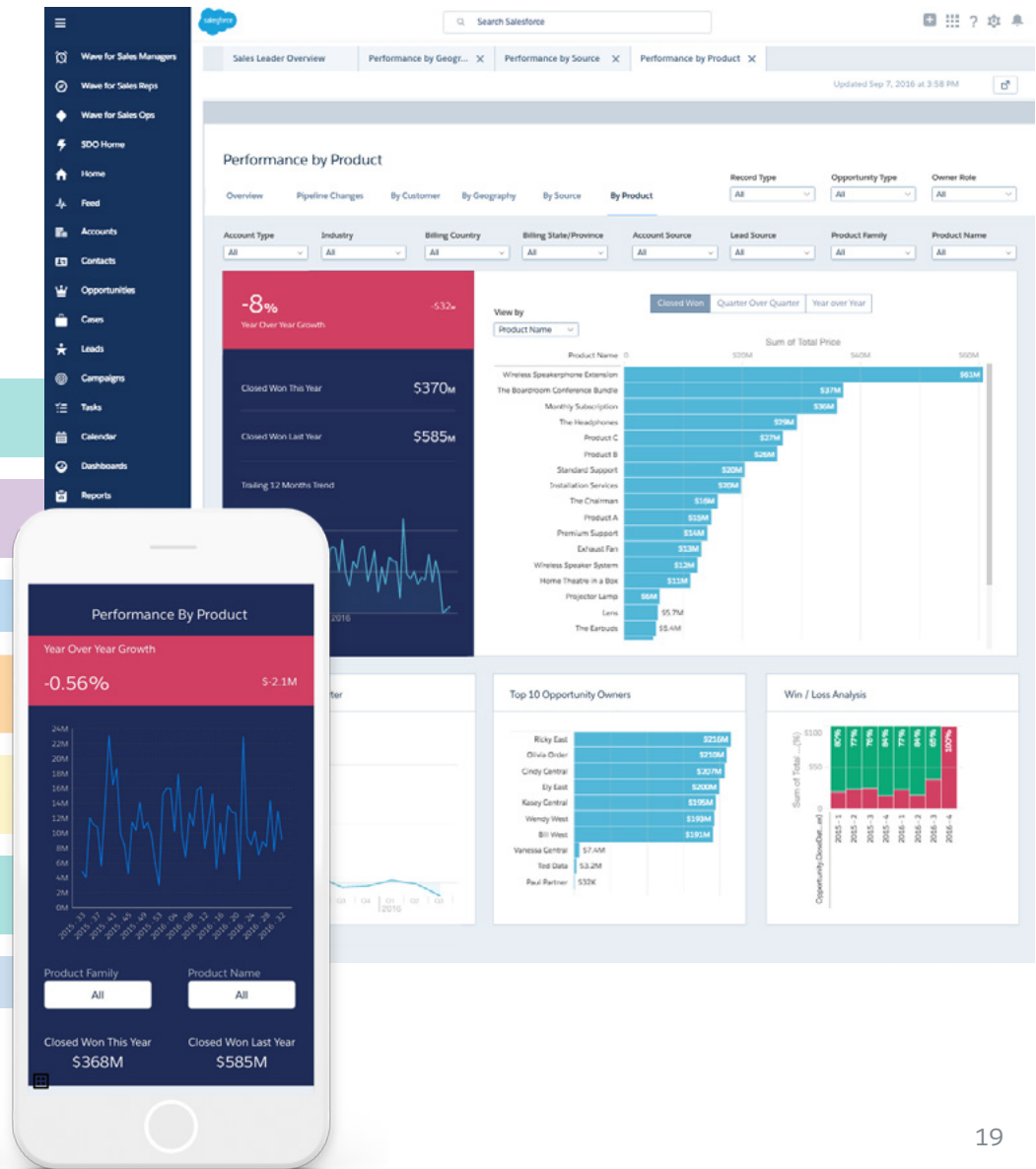SEE WHAT PRODUCTS MAKE UP MOST OF YOUR CLOSED/WON BUSINESS

SEE AN INCREASE/DECREASE IN YOY GROWTH BY PRODUCT

UNDERSTAND WHEN IT IS TIME TO SHIFT THE BOOKINGS MIX ACROSS DIFFERENT PRODUCTS

KNOW THE PRODUCT PORTFOLIO MIX SOLD BY DIFFERENT TEAMS AND PEOPLE

SEE YOUR WIN RATE BY DOLLAR AND ACROSS DIFFERENT PRODUCTS

COMPARE TOP PRODUCTS

Where do you go from here?

With Wave for Sales everyone on the team has the power to dive deep and explore, slicing and dicing data down to the individual record. See data from multiple angles and uncover insights into how deals are moving through the pipeline. Understand key business performance drivers, visualize trends, assign actions, and get fast answers to questions about business results, no matter where their job takes them.

For more detailed information and a free Wave for Sales demo, contact your sales rep. Or go to salesforce.com/analytics.

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THE CUSTOMER SUCCESS PLATFORM