5 simple steps to reports and dashboards

Reports and dashboards show how you performed in the past and what's happening at the moment—they're key to driving success and adoption for any CRM project. The information provided by reports and dashboards is especially important in today's environment, where it's critical to be proactive, rather than reactive, in your approach. You want to be able to spot trends and act on them immediately.

For example, a sales organization wants to know which deals were lost, which competitors are gaining ground, and whether the average time to close is increasing or decreasing. For a customer service organization, it's important to track the average days or time to close and satisfaction. And marketing organizations want to track campaign effectiveness and ROI.

Abstract

To track and improve business performance, you need reports that show trends as well as real-time dashboards for up-to-the minute information about your business. Salesforce CRM makes it easy to create both.

By Leahanne Merritt

To make the most of Salesforce CRM's reporting capabilities, it's important to plan carefully and then follow these 5 proven steps to making reports and dashboards part of *your* business process:

1. Know what keeps your executives up at night
2. Capture the right data
3. Build your reports
4. Build your dashboards
5. Use data to change behavior and drive results

Step #1: Know what keeps your executives up at night

Finding answers to critical business questions and making good decisions is vital to executives—and to their companies' success and competitive position:

- **Ask questions and start at the top –** When designing reports and dashboards, first define what your executives—your CEO; the VPs of Sales, Marketing, Support; and your channels—need to know to run their business. What are their key metrics? What behaviors do they want to encourage?
- **Align metrics with your company vision –** Take your business objectives, determine the metrics that measure those objectives, and map those metrics to the capabilities of Salesforce CRM. For example, if forecasting and tracking large deals are important to the VP of Sales, make sure you understand the key data points that give insight into those tasks and the best frequency for reporting that data. Or if your VP of Marketing needs to track response rates, sales, trials, meetings, or campaign awareness, you need to capture that data at the campaign, campaign member, lead, and opportunity level to return meaningful metrics.

  Tip: Salespeople thrive on competition. If you make it possible to track their progress in relation to their peers, your overall adoption rates will go up.

Best practice

Step #2: Capture the right data

Your reports and dashboards are only as good as the data behind them—planning is the key to capturing and displaying the correct metrics. Identify your sources early. Consider working backwards: plan your reports first and then configure the application by adding custom fields, formulas, and so on.

If your marketing team wants to see campaign effectiveness over time, for example, you'd want to track which campaigns lead to leads, opportunities, and closed/won deals. Every week, you could use snapshot reports on *lead status by campaign* and *opportunity status by campaign* to show how many leads and opportunities were received and converted from each campaign.

- **Manage what you measure** – Pick a limited number of key performance indicators (KPIs) or metrics. A third-party survey of the number of metrics used by CEOs showed that 52 percent use 5–10 metrics to manage their entire business.
- **Limit the number of reports/dashboards** – Focus on those tied to specific business objectives.
- **Develop a clear, concise naming strategy** – That approach will make report and dashboard folders easy to find. Use labels that are meaningful to your users; for example "MW Sales Team," "Premier/Gold Support Analysts," or "Converted Leads for Verticals Team." For dashboard folders, start with the word "Dashboard" (Dashboard – MW Sales Team," "Dashboard – Premier/Gold Support Analysts").
- **Determine security and access** for the report and dashboard folders and give users access based on their job functions or roles.

Step #3: Build your reports

Most customers start with a current report tracked in Excel or Access and use it as a baseline. As you begin to build reports in Salesforce CRM, there are several resources to help you get started.

- **Start with out-of the-box reports**. Salesforce.com offers standard reports across all standard objects. You can use these reports as the basis for your custom reports.
- Understand the three different report types and how they're used:
  - **Tabular reports** are the simplest and fastest way to return your data in a simple list view format. Keep in mind that tabular reports can't be used to create dashboard components.
  - **Summary reports** return your data with subtotals and other summary-level information. Summary reports are great for showing average dollar values for *closed won opportunities by salesperson* or *number of cases by status by support representative*.
  - **Matrix reports** show data summaries against both horizontal and vertical criteria; for example, *total sales per sales rep per year by quarter*.
- Bookmark the Analytics blog on the Salesforce.com Community Web site. Check back on a regular basis (especially prior to each release) for tips, tricks, and use cases for new analytics features and product enhancements.

Step #4: Build your dashboards

When you finish planning after asking all the right questions and building your reports, you're ready to build your dashboards. The key to building dashboards your VPs, managers, and users can't live without is to match the dashboard metrics to a compelling business metric.

- Understand the different dashboard formats and what type of data is best displayed in each format:
  - **Horizontal bar/vertical column charts** are great for showing geographical data, stage or status information, or any data that's part of a single grouping.

- **Pie and donut charts** are useful for displaying data that shows proportions of a total, such as the number of leads by lead source.
- One of the newest chart types, **the funnel**, is best used for showing ordered picklists such as *opportunity stage*, *case status*, or *lead stage*.

  For more information, go to Help & Training and search on chart types.

- Don't reinvent the wheel! Go to the AppExchange, download the free, pre-built dashboards—such as the Lead and Opportunity Management dashboard—created by Force.com Labs, and customize them to meet your business needs. Use these dashboards to track and measure adoption, sales productivity, campaigns, lead generation, and service and support.

Step #5: Use data to drive behavior and produce results

Reports and dashboards are designed to be iterative—it's important to keep them current and relevant. To successfully roll out business metrics, good communication is key. Make it easy for your users to find, view, and access the dashboards relevant to them. Use the schedule refresh feature to ensure your users see the most recent data. And use schedule and email reports and dashboards to remind your users that their business-critical metrics are in Salesforce CRM.

- **Manage from the top down** – Encourage managers to run forecast calls directly from their dashboards. Many customers also have the following mandate for sales: "If it's not in Salesforce, it doesn't exist." This directive proves to be extremely motivating for salespeople.
- **Include adoption and data quality metrics** – Include a dashboard component that tracks faulty data, such as all accounts without an industry, contacts without valid email addresses, or leads with a status of "qualified" that haven't been converted. Again, publishing such metrics can be extremely motivating.
- **Engage your user community** – Don't make the mistake of tracking such metrics only at the executive level—make sure your users see the same metrics on their personal dashboards. What do your users want to see? What will help them do their jobs faster and smarter? Those are the metrics that matter. For example, you could create reports and dashboards that rank salespeople by top deal or top salespeople per quarter.

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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