

#dataforsales

TABLEAU

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2016

Tableau On Tableau: Sales Analytics

Stacey Unck
Sales Readiness Manager

Peter Schmitz
Enterprise Account Manager
Tableau Software

who we are...



Stacey Unck

Commercial Sales 2014-20
Sales Readiness 2016

Peter Schmitz

Commercial Sales 2012-2016
Enterprise Sales 2016


A man with short dark hair, wearing a light blue button-down shirt and a grey vest, is smiling and holding a large white sign with a black border. He is wearing bright green, slatted sunglasses. The background is a red brick wall. The sign he is holding has the text "TABLEAU IS..." in a bold, sans-serif font, and below it, the word "LIFE" in a large, hand-drawn, sketchy font.

TABLEAU IS...

LIFE

what you'll get

how to best collaborate with your sales team:

Learn how sales people think and what motivates them

Ideas for collaboration and iteration to make effective dashboards

what happens when sales people have data freedom:

Liberty and governance for all

Representative made dashboards

a bit more than you expected:

This class will be 70% beginner 30% advanced

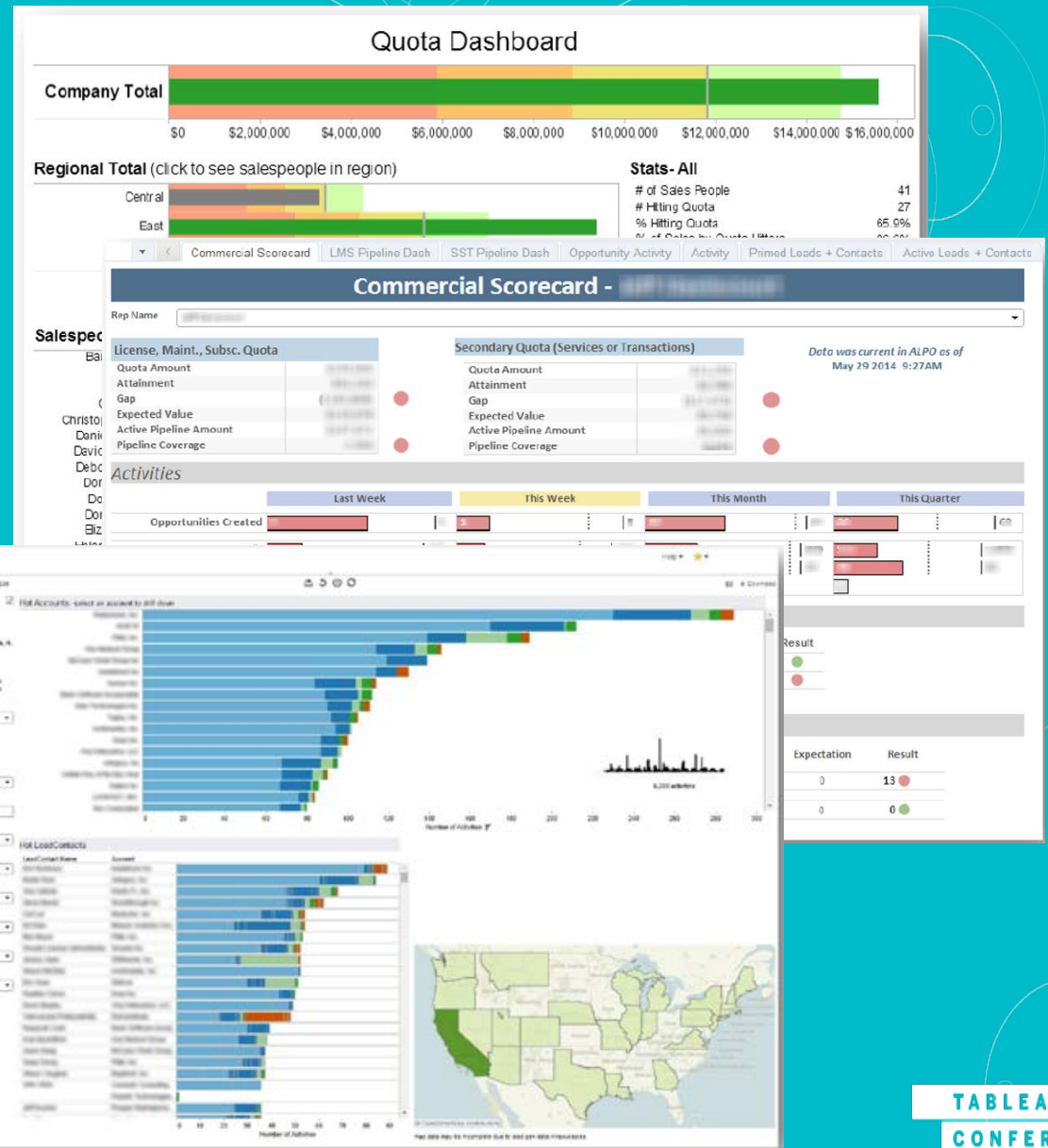
We think you can handle it

To make a sales dashboard, you must think how sales people think...

- What's important?
- What's motivating?

What makes a good sales person?

- Competitive
- Numbers Driven
- Curious





SIMPLICITY

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“COMPANY APPROVED” SALES DASHBOARDS

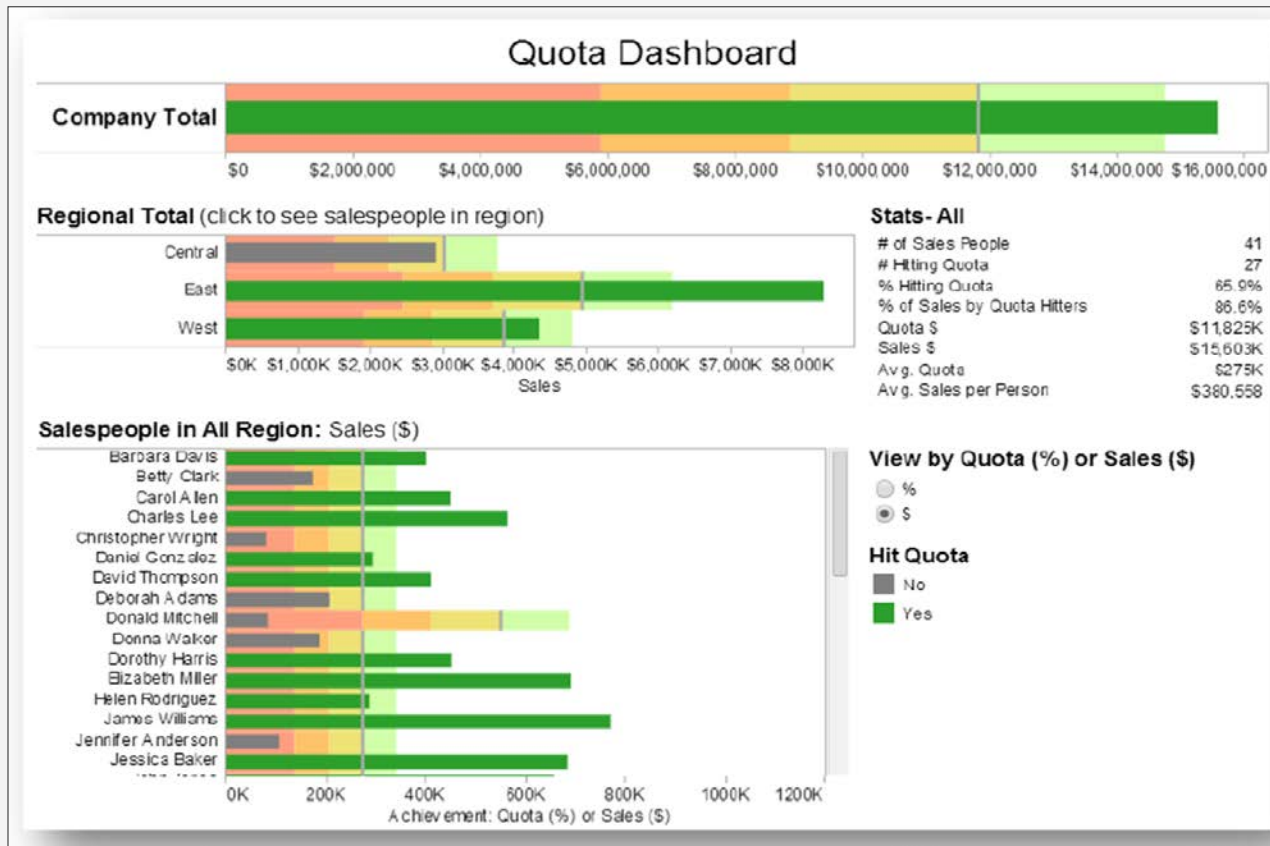
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Demo

Quota Dashboards

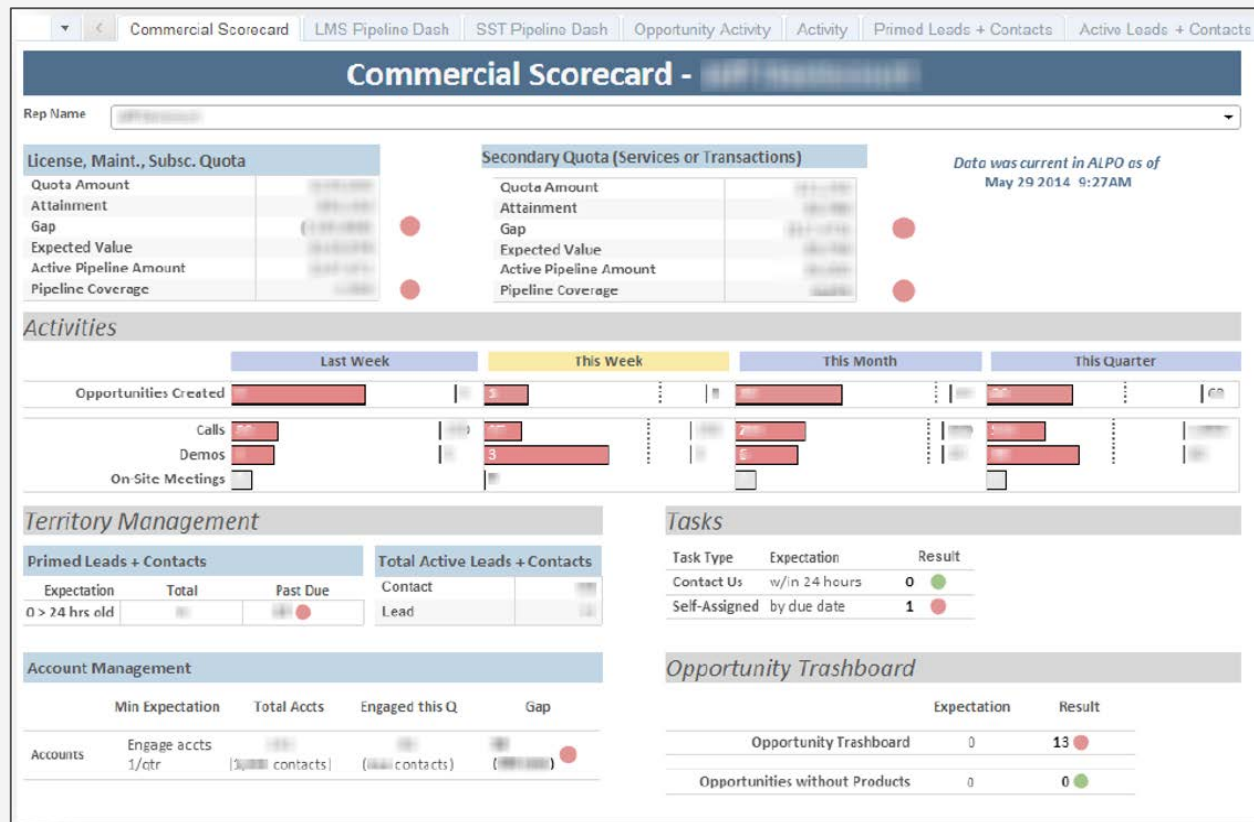


Harness the competitive nature of your sales people

Quota dashboards help reps know who to emulate

Color and space are strong visual queues

Scorecards

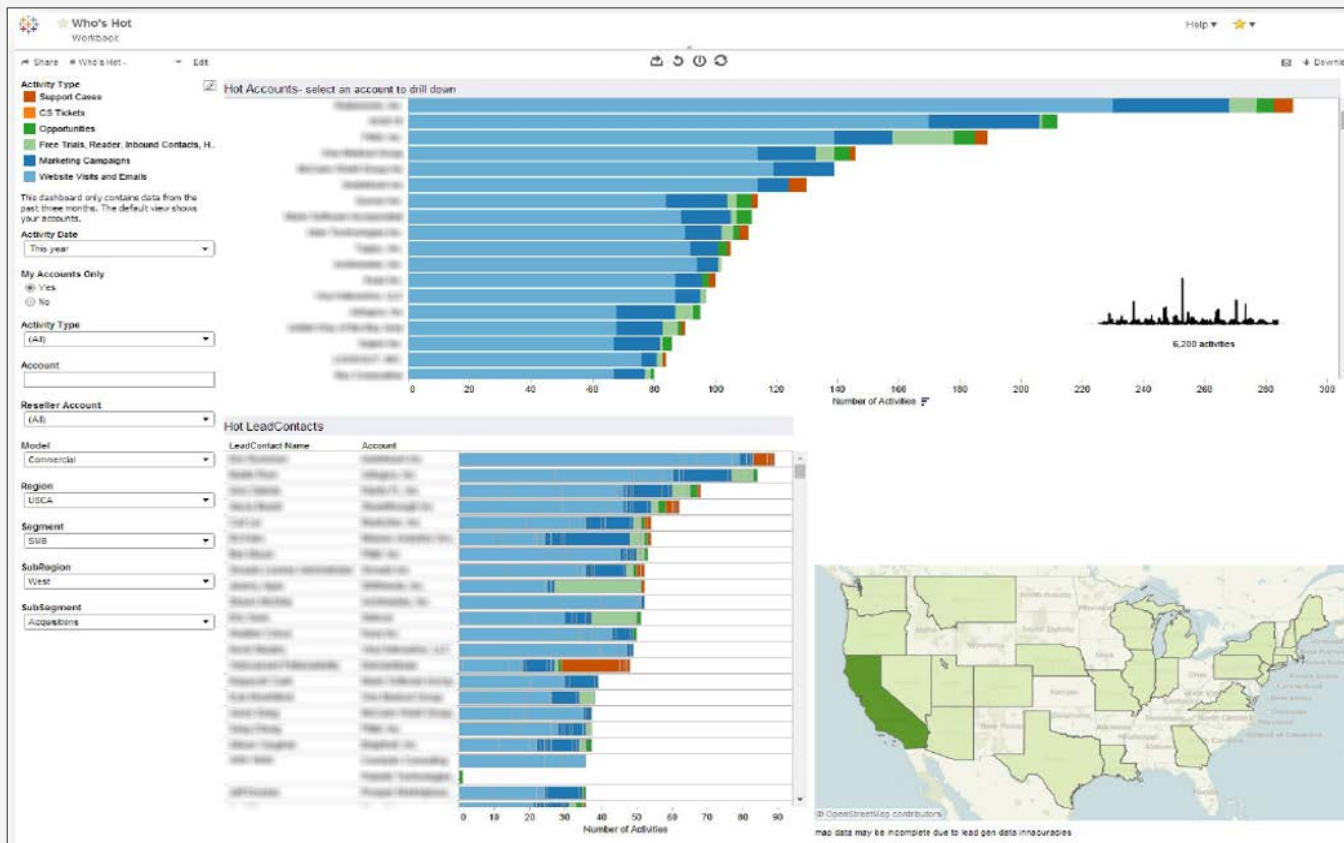


Feed the hunger for information and numbers

Scorecards help reps see where they have gaps in the activities that lead to success

A simple format providing several data points

Who's Hot



Point your team in the right direction

Our Who's Hot dashboard keeps us aware of what customers want to talk to us the most

Allow the important data to rise to the top

Learn from my journey



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A story about data...

The importance of well labeled data...

MMK CE3 and CE5 Territory Analysis

CE3

1. Customers= 91
2. Prospects= 17
 - a. Big Prospects= 5 (Mainly Healthcare)
 - b. Standout Account= Potbelly Sandwiches
3. Core Accounts= 12
 - a. Hasn't Expanded in a while
 - i. AH
 - ii. AG
 - iii. DJE

CE5

1. Customers= 54
2. Prospects= 14
 - a. Standout Account= Carhartt Clothing
3. Core Accounts= 6
 - b. Hasn't Expanded in a while
 - i. L
 - ii. L
 - iii. PQ
4. Medium Growth Accounts= 11

How to enable Self-service effectively and clearly

- Ultimate goal: One source of truth
- Creating a Truman Show Experience w/ Server

5,690 Views 22,226 Data Sources 1,085

	Name	Views: All	Wo
4. Me			
5. Sm			
6. Pos	<input type="checkbox"/> <input type="star"/> <input type="document"/> Technician Data - Support DB ...	1,685,057	83
Spe	<input type="checkbox"/> <input type="star"/> <input type="document"/> Technical Support - Customer Update History ...	1,526,800	76
	<input type="checkbox"/> <input type="star"/> <input type="document"/> Case Master ...	1,104,756	94
	<input type="checkbox"/> <input type="star"/> <input type="document"/> Assets ...	1,016,275	13
	<input type="checkbox"/> <input type="star"/> <input type="document"/> Case Master - Extended ...	708,820	19
	<input type="checkbox"/> <input type="star"/> <input type="document"/> Kudos from Case Closed Survey ...	601,722	21
	<input type="checkbox"/> <input type="star"/> <input type="document"/> DRAFT - Technicians Out - Support DB ...	440,548	28
	<input type="checkbox"/> <input type="star"/> <input type="document"/> Opportunities Pushed Last 7 Days - LMS/SST ...	360,547	13
	<input type="checkbox"/> <input type="star"/> <input type="document"/> ServiceNowTasks ...	190,834	39
	<input type="checkbox"/> <input type="star"/> <input type="document"/> TFS-Defects ...	164,477	58
	<input type="checkbox"/> <input type="star"/> <input type="document"/> Sales Opportunity ...	130,978	593

Sales Opportunity

DATA SOURCE • By Erin Gengo • 130,981 views • ☆ 4 • Extract: Nov 2, 2016, 9:14 AM

Connections 1 Refresh Schedules 1 Connected Workbooks 510 Details

About

The Sales Opportunity Data Source is the one-stop shop for Sales pipeline analysis, including opportunity splits. Not only does it include information on accounts and opportunities, but adds the granularity required to do product level analysis, along with the data needed to roll-up by territory.

See [Sales Opportunity on Community Site](#) for more details.

Project

Tableau Analytics

Owner

Erin Gengo

Tags

Modified

Aug 31, 2016, 4:14 PM

Edit Tags

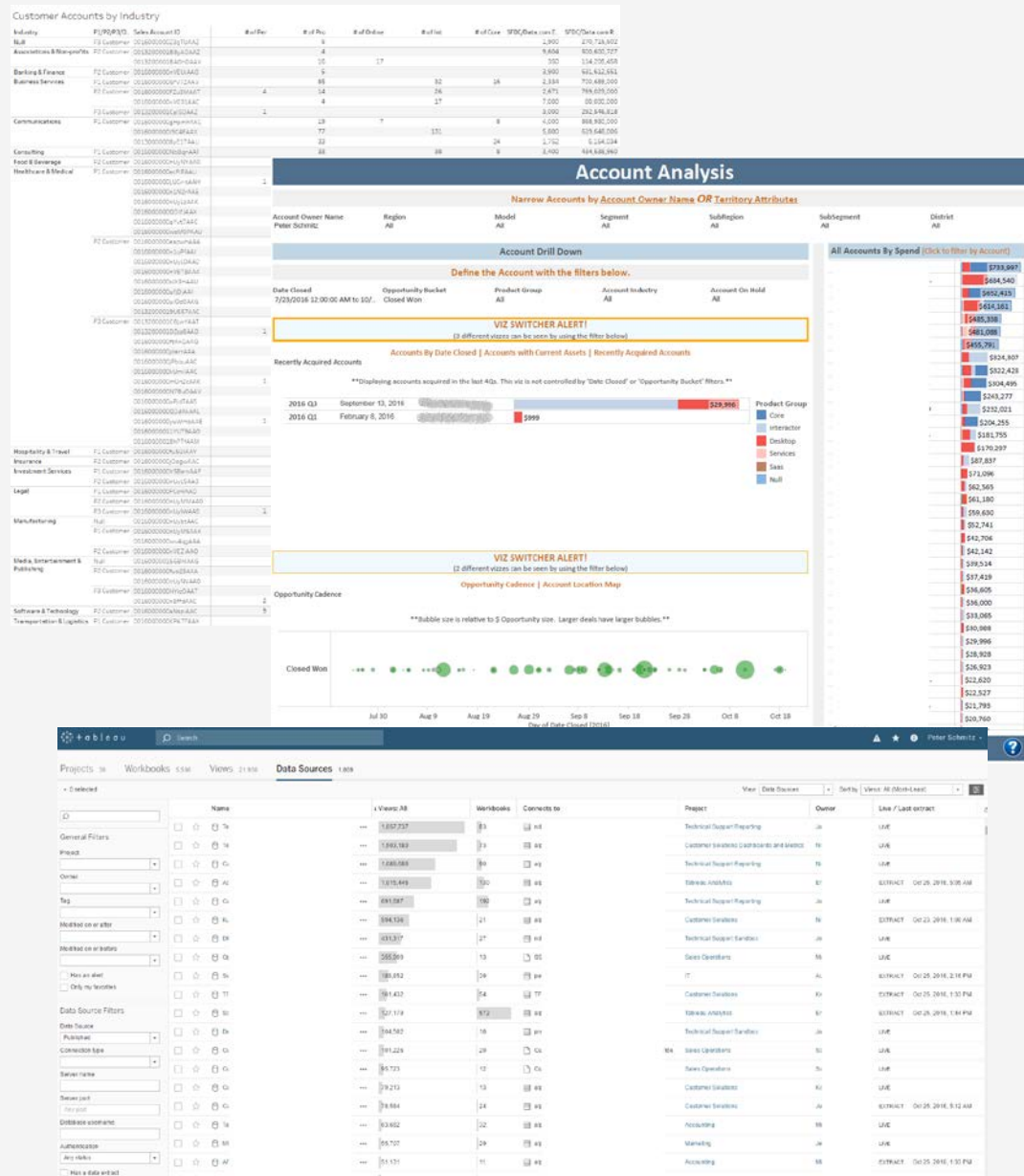
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Drive more effective calls through self-service

Effective calls happen w/ self-service analytics



Making sure your salespeople have access to all of the data they need easily and quickly

- Schedule reoccurring 1x1s and call shadow sessions for feedback
- Server admin views are your best friend
- Develop customer facing views

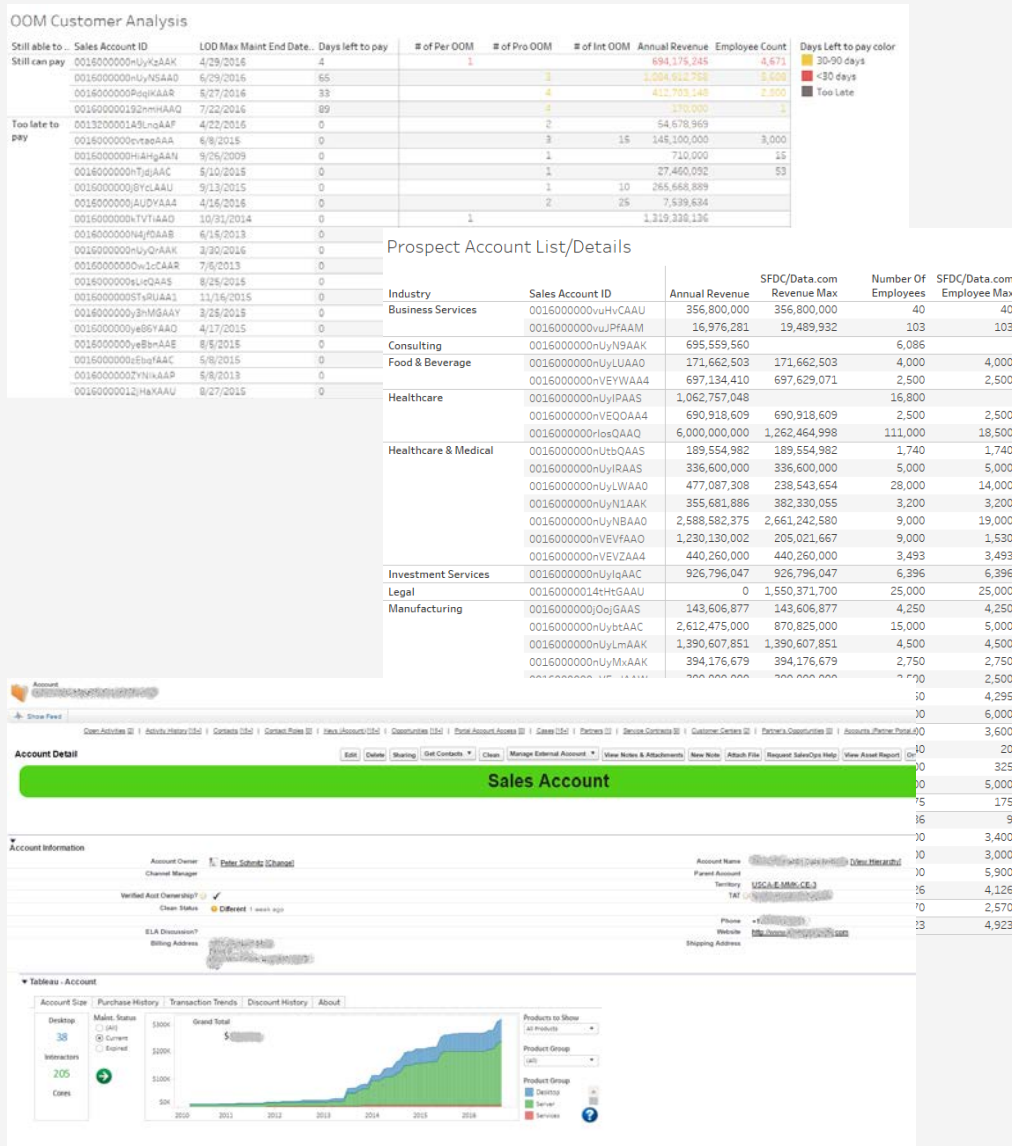
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Identifying Revenue Driving KPIs

Mapping out metrics to measure success



Reps that win, keeping winning and stay motivated

- Put yourself in your rep's shoes
- Discover and Create KPIs that drive revenue
- Show historical views of your data
- Did you know you can embed Tableau in most CRM/ERP platforms?

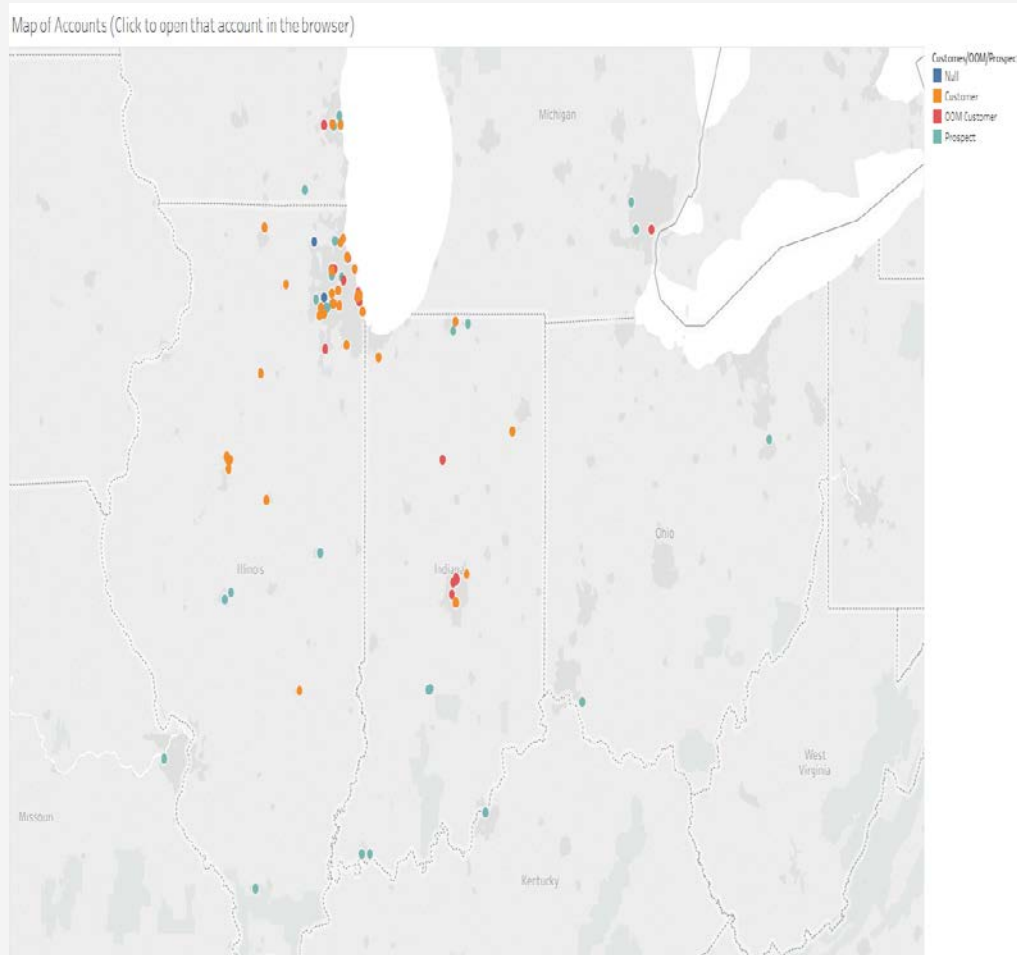
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Customer Onsite Planning

Taking customer onsite visits to the next level



Easier planning and ability to have data driven conversations make for the best customer onsites

- Geo Field Best practices
- Be aware of Territory Layouts
- VPN vs Tableau Online

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Show the whole picture

80,000 foot view of Accounts

[illegible]

Please help us not have 30 Chrome tabs open to research an account

- Account Cliffnotes Dashboard
- Work with your reps to understand how they research accounts
- Look to data outside your organization to help reps create a tailored customer experience

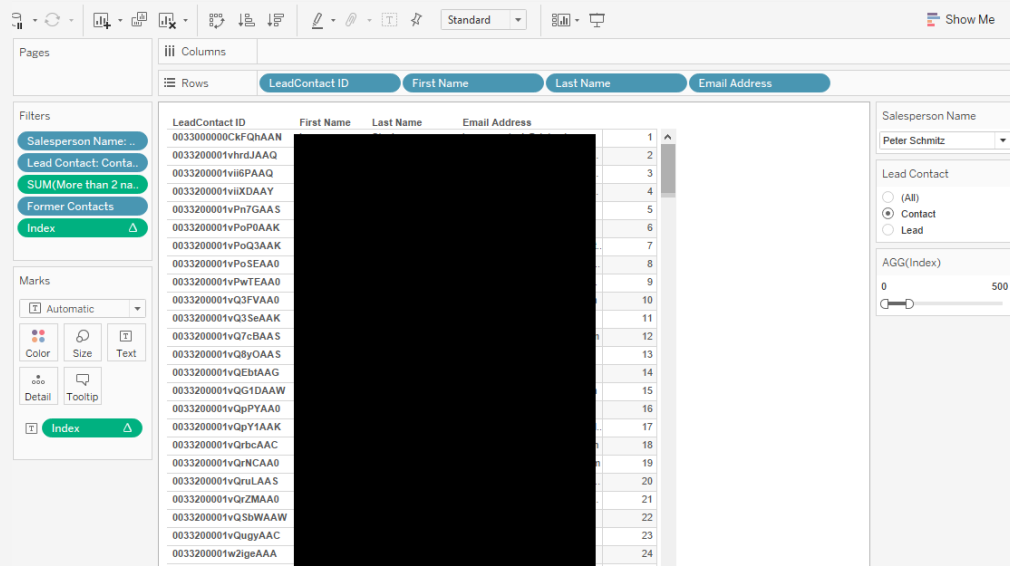
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Thinking Outside of the Box

How to get creative w/ Tableau



The sky is the limit on what you can achieve when self-service is enabled

- Walmart
- SFDC to LinkedIn
- Internal Competitions/Iron Viz events



Thank you so much for attending!

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