

# THE SALES LEADERSHIP GUIDE TO MORE MEANINGFUL REPORTING & FORECASTING IN SALESFORCE



“You can’t scale a truly successful business on hope and make strategic decisions towards sales on gut feeling alone.

The absence of data-driven direction in such an information-rich age can’t be overlooked. How your organization leverages its customer, performance and financial data plays a pivotal role in its ongoing success.

**In this eBook,** we outline a blueprint for smarter reporting in Salesforce, accelerate the steps from the dashboard to action and arm those in sales ops and leadership with the foresight to outstep their competition.



  
Guy Rubin  
CEO, Ebsta

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# LOOKING IN THE RIGHT DIRECTION

Dashboards provide a real-time view of how the figures you measure are moving. They take your numbers, lists and unintelligible data and wrap them in context for businesses to digest.

The metrics you include depend on what you're trying to achieve and the activity and outcomes you think will influence that.

You can see which reps are working on-target to meet their goals, understand which reps are most efficient and identify how specific sales activities impact pipeline.

It's for Sales Ops to constantly refine this to present the most important information in the simplest way to drive action.

Salesforce holds an enormous locker of information with limitless insights into the customers we engage with and the sales process we employ.

In a space that's constantly growing, changing and depreciating, you have to know where to look and have the right tools to understand what you're seeing.

If not, why not? Analytics is the heartbeat of a strong sales operation. It's the means to look backwards, look forward and take action now to deliver better results tomorrow.

Among the fastest scaling businesses to reach \$1bn in profits, almost all will pay tribute to a sleek ability to report, forecast and adapt as they move.

However, you can only manage what you measure and over-exposure to information has the same stagnating effect as having too little to work with.

You have to ask if the data behind the dashboards provide an absolute truth, or if the direction you're providing is leading people in the wrong direction?

WHAT IS THE INFORMATION IN SALESFORCE ACTUALLY TELLING YOU THAT ALLOWS YOUR BUSINESS TO SELL SMARTER?

WHERE ARE THE MARGINAL GAINS ACROSS YOUR SALES OPERATION THAT WILL COLLECTIVELY ACCELERATE REVENUE?

WHAT ARE THE RISKS, OPPORTUNITIES AND ACTIONS THAT ARE TIME-SENSITIVE?

WHAT LEADS ARE GOING COLD, OPPORTUNITIES STALLING, ACCOUNTS BEING NEGLECTED AND REVENUE BEING MISSED?

ARE THE REPORTS YOU'VE BUILT THE RIGHT ONES AND ARE THEY BEING COMMUNICATED INTO ACTION FOR THE RIGHT PEOPLE?



# THE SIX LABORS OF SALESFORCE REPORTING

Hercules had to overcome twelve labors, but businesses only need to overcome half of that to remove the bad habits of reporting in Salesforce.

## 1 UNHEALTHY DATA

*"33% of organizations believe their data is wrong"*  
- Experian

Good reporting and forecasting rely on a continuous diet of quality data. If the information being fed into Salesforce is bad, then the insights being drawn from it will reflect that.

To make real-time decisions to improve your sales operations, you need access to real-time data to build your reports.

That relies on an uninterrupted stream of up-to-date, complete and entirely accurate information going into Salesforce.

If you're making business decisions with the wrong intelligence, you're contaminating any dashboard you try to build.

*Ebsta Inbox opens a window between where reps work and Salesforce to automate data capture and enrich the CRM with 100% accurate activity and records.*



## 2 ADOPTION

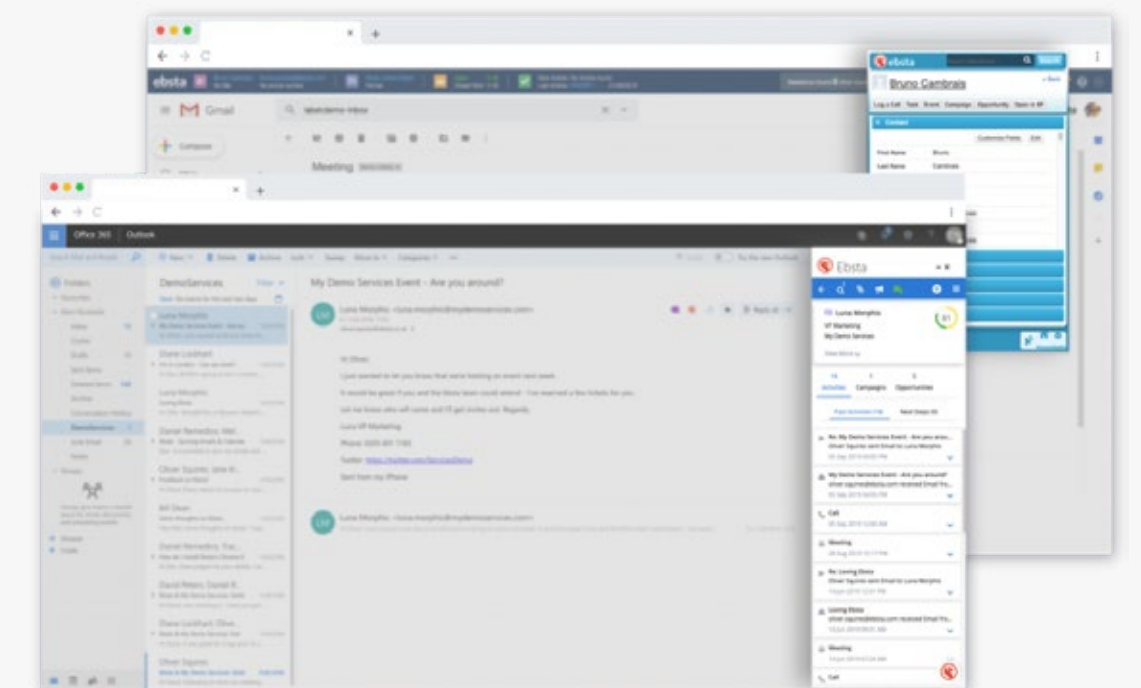
*"50% of organizations distrust their data because of human error"* - Experian

How many of your dashboards are actually used by the people they were built for, or for the reason they were built?

Most sales-minded individuals are more inclined to reach for the phone before they turn to their data. They are hardwired to think "action" before "analysis."

Businesses have to fold adoption into their processes and culture and then drive accountability from both the top and the bottom. Sales and marketing should live within their dashboards and use them to start and support conversations in every call, email and meeting.

Introduce reporting to your team with an explanation of "how" and a reason as to "why". Adoption is reinforced by visible results that delight management and benefit reps.





## 3 KNOWING WHAT TO ASK

How can you identify the answers when you don't know what to ask?

Work backwards from what you're trying to achieve and look at the inputs that actually drive the outputs. When you're able to reverse engineer what you're trying to achieve you can start pulling the levers that turn the dials.

Activity is not a reflection of engagement or a reason for revenue to move. You have to investigate the "why" behind the "what" and where to prioritize your activity around that.

Ebsta goes beyond activity counting to measure the strength of every engagement so that you can truly understand the relationships and actions that drive the revenue.

## 4 TURNING IT INTO ACTION

What process do you have in place to then take the data on dashboards and turn it into actions on the sales floor?

Are your dashboards visible, are they accessible, are they being put in front of your reps every day so that the accountability sits with them? If you can measure it you can display it on a dashboard.

Simple directions with intelligent analytics. Don't overload people with information, but provide clear steps and incremental moves to drive collective strides forward.

## 5 TOO MANY COOKS AND TOO MANY POTS

Tech stacks are growing and our sources of information with it. Having insights cobbled together from multiple spreadsheets and reports will not deliver the insight in the right way, or fast enough.

Break down the data silos by consolidating all the information you need across disparate systems and tools in a single conversation point. You should never have two of the same reports existing simultaneously.

How many people and how clear is it of who's involved in building and managing those reports?

## 6 YOUR SECOND REPORT WILL BE BETTER

Don't expect to get your reporting perfect the first time. It's a cycle of constant iteration that relies on feedback, use and refining that process. Leadership is knowing that you will fail, but knowing when and how to move forward. Some reports will need to be retired and others will need to be altered. Don't be afraid or precious over a bad report.

# IT STARTS AND ENDS WITH DATA

There's an elephant in the room that everybody has grown so accustomed to that nobody wants to ask it to leave.

That elephant is data quality and it's been festering in CRMs since their introduction. Data can be both an organization's biggest ally and its deepest vulnerability.

Salesforce recognizes this and have invested heavily in evolving their platform into a data-driven solution with the acquisitions of companies like Tableau and Datorama. It's moves are paving the way for an AI efficient platform that needs to be built on concrete data.

Businesses haemorrhage money by spending time correcting, cleaning and organizing data and dealing with the consequences of bad decisions made with the wrong intelligence.

Ovum Research put that figure at 30% of total annual revenue, at least. IBM says it costs \$3Trillion a year. Salesforce themselves suggest that it costs businesses \$700bn a year and that 21% of that comes from reps researching incomplete data in the platform.

It's the beast that feeds itself and without the right infrastructure in place, the problem will just continue to have a compounded effect on revenue. You need to get your house in order with a data cleanse and find the means to identify what's accurate, what's not and how to address it.

Human error is recognized as the biggest cause of data inaccuracy, which is why we removed the burden of manual data entry and leveraged automation. Ebsta seamlessly integrates with emails, calendars and telephony systems to automatically enrich and organize records and contacts in the Salesforce platform.

After major data breaches and fallout in recent years trust has become a fundamental part of how data is used. The road to insight has to be transparent and beyond reproach.

*Part of Ebsta's solution is to automatically feed clean, continuous & entirely accurate records and activity into Salesforce. To surface and organize every historical engagement from your inbox and update records & contacts in real-time.*

# ARE THE RIGHT LIGHTS FLASHING ON YOUR DASHBOARD?

The biggest challenge to effective reporting is often not knowing exactly what to report on.

You want to gain a vantage point and an immediate snapshot of how the organization is performing. When the dials are down, you need to know what that means and the necessary action to take.

That's why we've deconstructed the building blocks of great dashboards to allow leadership to step out of the trenches and into the parapet.

Start by having the decision-makers agree on the metrics that matter, what those metrics entail and the expected actions to be taken with those metrics. Invite the right collaboration, secure the relevant buy-in and seal it by documenting the process.

Reporting is no place for subjectivity, so keep it crystal clear with what an MQL, an SQL and all the other ingredients of alphabet soup involved. Standardization is a key component here, so make sure there's a directory or document resource behind what's agreed. You'll thank yourself when you start to scale.

**For every dashboard ask yourself:**

- 🔍 Do we have the data?
- 🔍 Is it accurate?
- 🔍 Where did it come from?
- 🔍 Does it need to be shown?
- 🔍 Who needs to see it?
- 🔍 What action needs to be taken?

## ALIGNMENT FROM THE TOP TO THE BOTTOM

It comes back to having the right eyes on the right information. Sales and marketing might be working to the same overall objective, but they have different roles to play in getting there.

Everyone should have eyes on the north star that the company is moving towards, but departments need their own set of bespoke dashboards that relate to their involvement in that journey.

A high-level visibility of how the company is generating revenue will align and unify the company. The metrics could include your monthly opportunity pipeline, your closed-won deals and the top performers. You could include how that correlates against your wider objectives or benchmark it against previous performance.

## ARE ALL THE PARTS TALKING TO EACH OTHER?

Is there a missing piece from the tech stack that's involved in the sales lifecycle and is the information across those stacks standardized and integrated?

To have your organization run as one you need all the chapters that create a customer's story consolidated into a single, central, narrative.

## THE DEVIL'S IN THE DETAIL

Each team, office, vertical and individual should also have eyes on a dashboard that's related to their activity. The more specific to them, the more likely it is to improve their productivity.

## MAP THE STAGES

Display the leads, opportunities, accounts and any other stage that you see fit to include.

Your dashboard won't tell you why it's progressed, but it will highlight the conversation for you to find out.

**Benchmark the strength of previous activity and outcomes to indicate the forward moves that will [engage with leads](#), opportunities and key accounts.**

## REVISE, ITERATE AND IMPROVE

You're unlikely to deliver the perfect suite of dashboards on your first attempt and they'll never be beyond improvement.

Establish a feedback loop from the people actively using the dashboards and ensure you're able to easily configure the dashboards accordingly.

## A ROUTE TO THE SOURCE

You may want to communicate the headline metrics, but you need to have the ability to drill into where the figures came from and what they mean.

How deep does your analytics go and are you able to unearth the actions that matter and the revenue levers - essentially, what are you learning?

## VISIBLE STEPS FORWARD

How visible, interactive and dynamic are your dashboards for you to collaborate and engage with?

A good dashboard can become the intelligence command centre from which you're able to delegate your directives. That relies on an integrated ability to assign action from within your dashboard and update them on-the-fly.

## IS IT MOBILE AND IS IT FRIENDLY?

The world of work is no longer static or chained to a nine-to-five desk. We're a mobile workforce and our dashboards need to be responsive to that.

Are they accessible, digestible and mobile friendly? Are they easy enough to understand and engaging enough to work with?

## THE TIME IS NOW

There is such a thing as a quick win. Think about what those look like and consider creating notifications and alerts to respond to them with speed.

**A key selling point of Ebsta Team is the [deeper level of analytics](#) it provides to Salesforce reporting & forecasting. It allows you to go beyond activity to understand the strength of each engagement.**



# EBSTA ENGAGEMENT SCORE

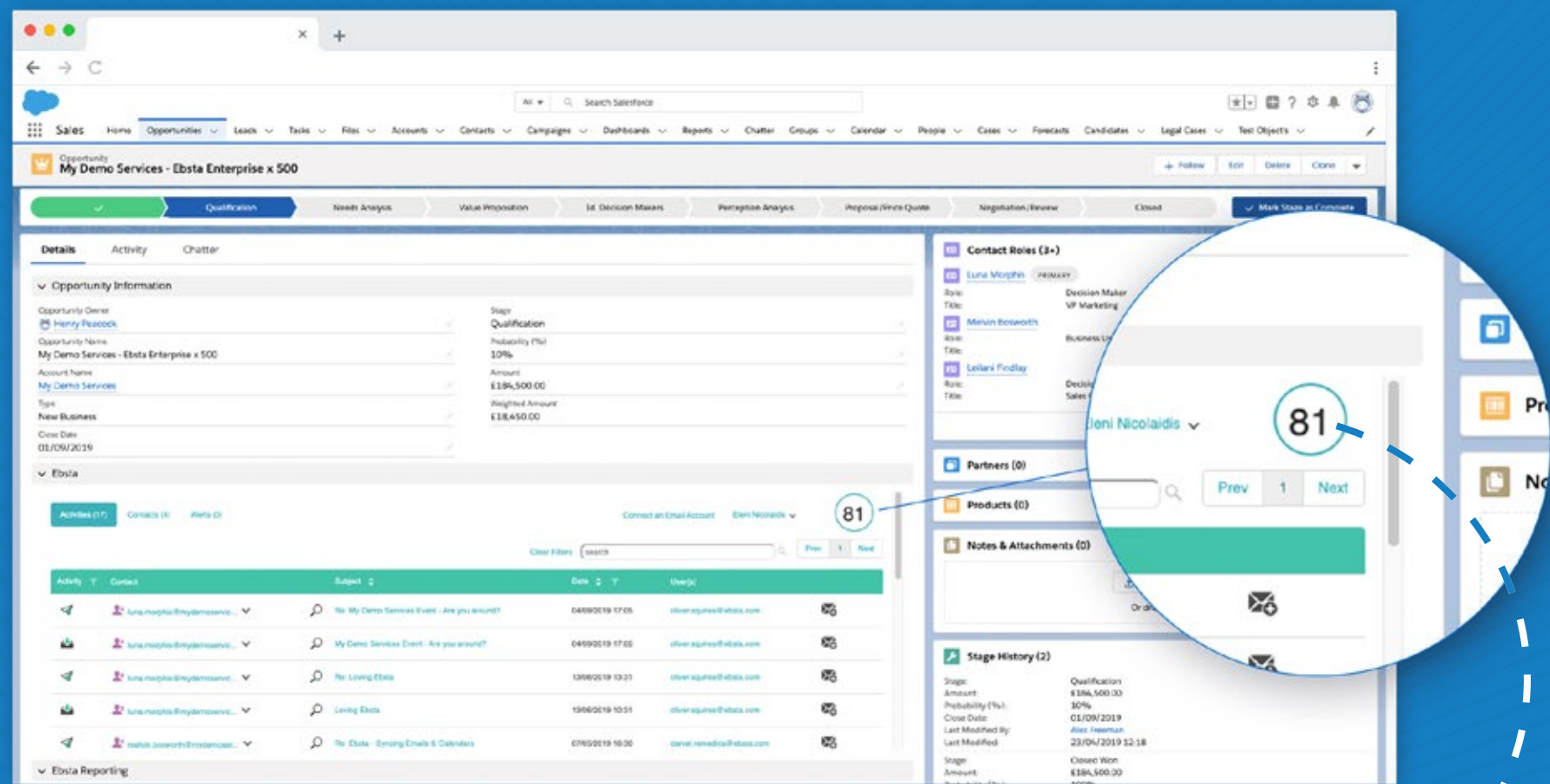
The role of the CRM has evolved to reflect how customers have moved to the heart of every sales cycle.

Their experience, relationship and lifetime value - whether it's in b2b or b2c - are more important in the sales process than the features, functionality and price of a product.

Good relationships are built on meaningful, contextual, personalized engagements that are driven from a much deeper understanding of the customer.

The role of Salesforce will be to inform sales enablement, measure customer engagement and drive lifetime value with each customer. However, that success rests on the quality of information, in its entirety, and the speed at which it travels through Salesforce to actionable insight.

Ebsta goes past logging activity to crunch every email, calendar and call and automatically measure the strength of that engagement against every lead, contact, account, opportunity and custom object.



Engagement Score

## OUR SCORE THEN ADDS A MUCH NEEDED DEGREE OF REPORTING TO SALESFORCE THAT PROVIDES INSIGHT INTO TRUE CUSTOMER ENGAGEMENT.

- 📍 Ebsta looks beyond last activity to know which type of activity
- 📍 Ebsta communicates the type of activity, with who and how it was received
- 📍 Ebsta provides context around the activity that's already occurred
- 📍 Ebsta clearly catalogues the total activity and when they occurred
- 📍 Ebsta indicates the right action to take to drive engagement

## IMMEDIATELY VISIBLE IN SALESFORCE, IT SERVES AS A REAL-TIME BAROMETER OF EVERY RELATIONSHIP ACROSS YOUR BUSINESS AND PROVIDES:

- 📍 Foresight to identify risk
- 📍 Visibility into the hot leads that may be turning cold
- 📍 Attention to the opportunities that are stalling
- 📍 A warning to where key accounts are being neglected
- 📍 Highlights the activity to prioritize to progress each sales cycle
- 📍 And provides a benchmark of activity to drive engagement

Knowing which reps hold the strongest relationships and the strength of every engagement means you can move your revenue forward with real insight.

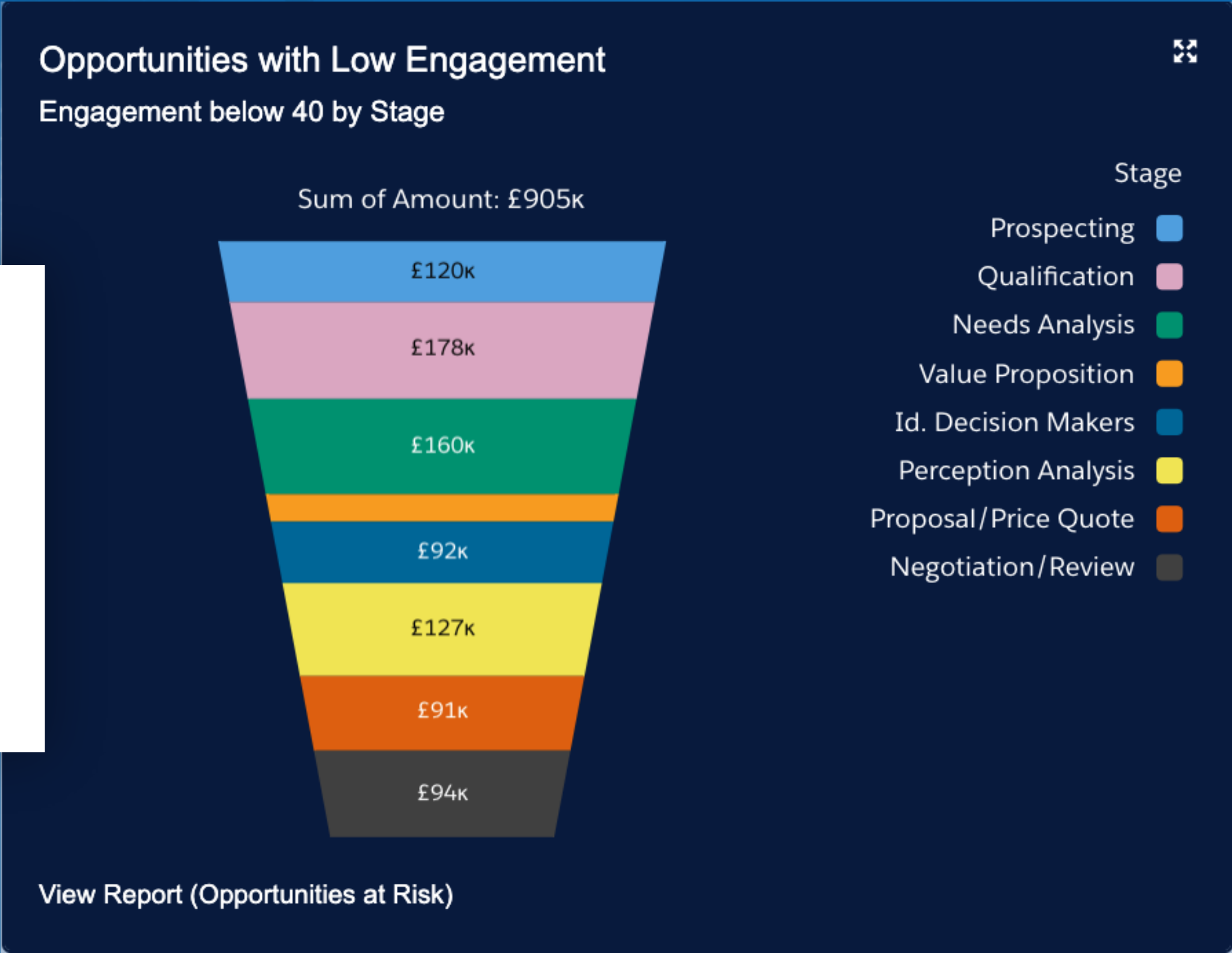
It allows businesses to put data behind every sales decision so that you can move faster, together, with the right actions against the right relationships.



# DASHBOARDS WITH MEANING

## FILTERING

Ebsta helps remove the opportunities that are unlikely to close, so that you only have eyes on the relationships that are at significant risk or prime for closing.





# DASHBOARDS WITH MEANING



## FOCUSSING:

The average b2b sales cycle involves multiple people across an extended period. Ebsta goes further than showing how engaged each opportunity is, to deconstruct the engagement you have with each person and their role. It means that you can make sure the right decision makers are involved at the right time to close a deal.

# DASHBOARDS WITH MEANING

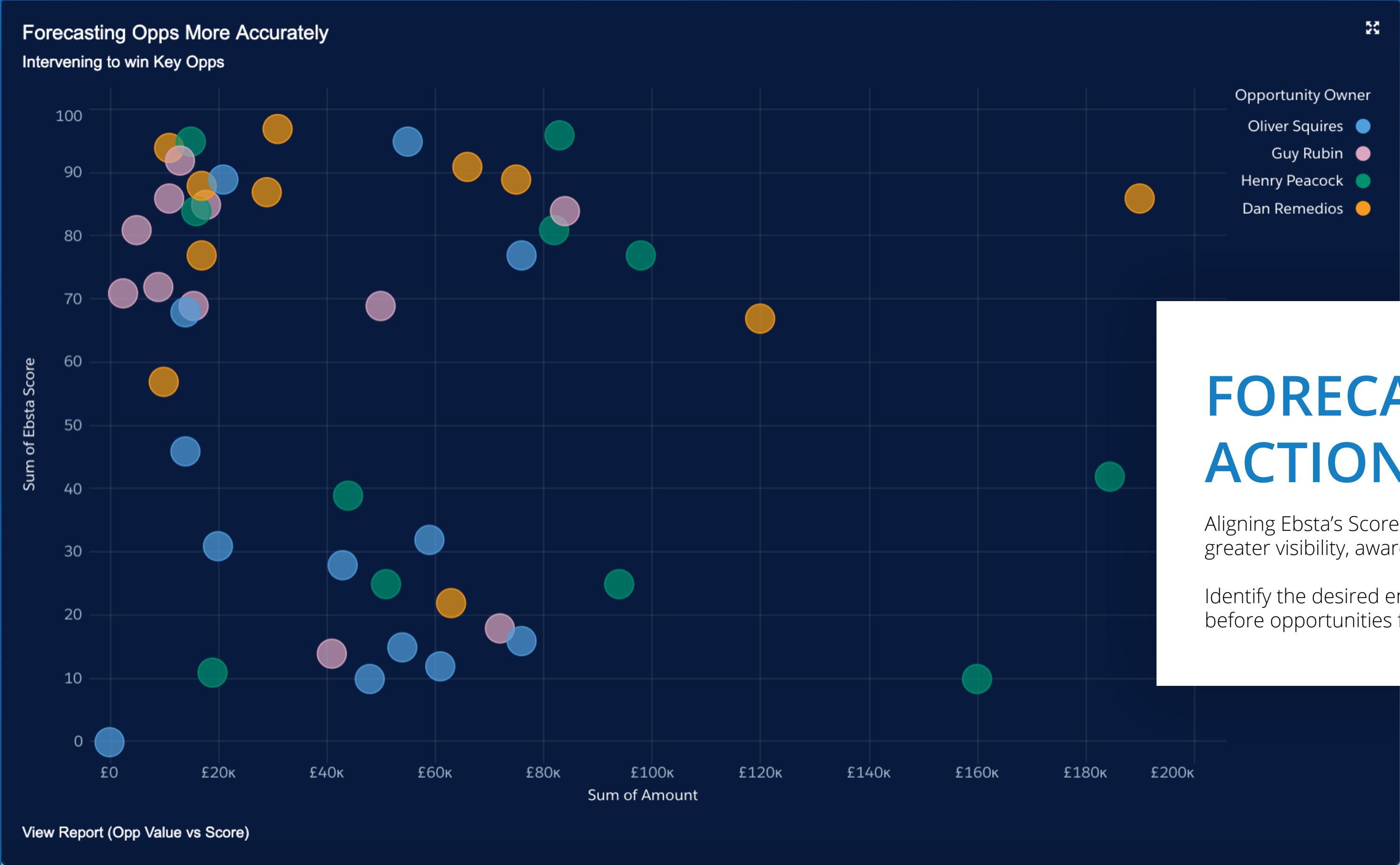


## BENCHMARKING

Ebsta digests the score of every opportunity once it closes and uses historic data to benchmark what successful engagement looks like moving forward.



# DASHBOARDS WITH MEANING



## FORECASTING & ACTIONABLE INSIGHTS

Aligning Ebsta's Score against your activity and key metrics gives you far greater visibility, awareness and foresight to make smarter moves.

Identify the desired engagement and move with speed to intervene before opportunities fall through, leads go cold or customers churn.



# ACTIONABLE REPORTING FORWARD

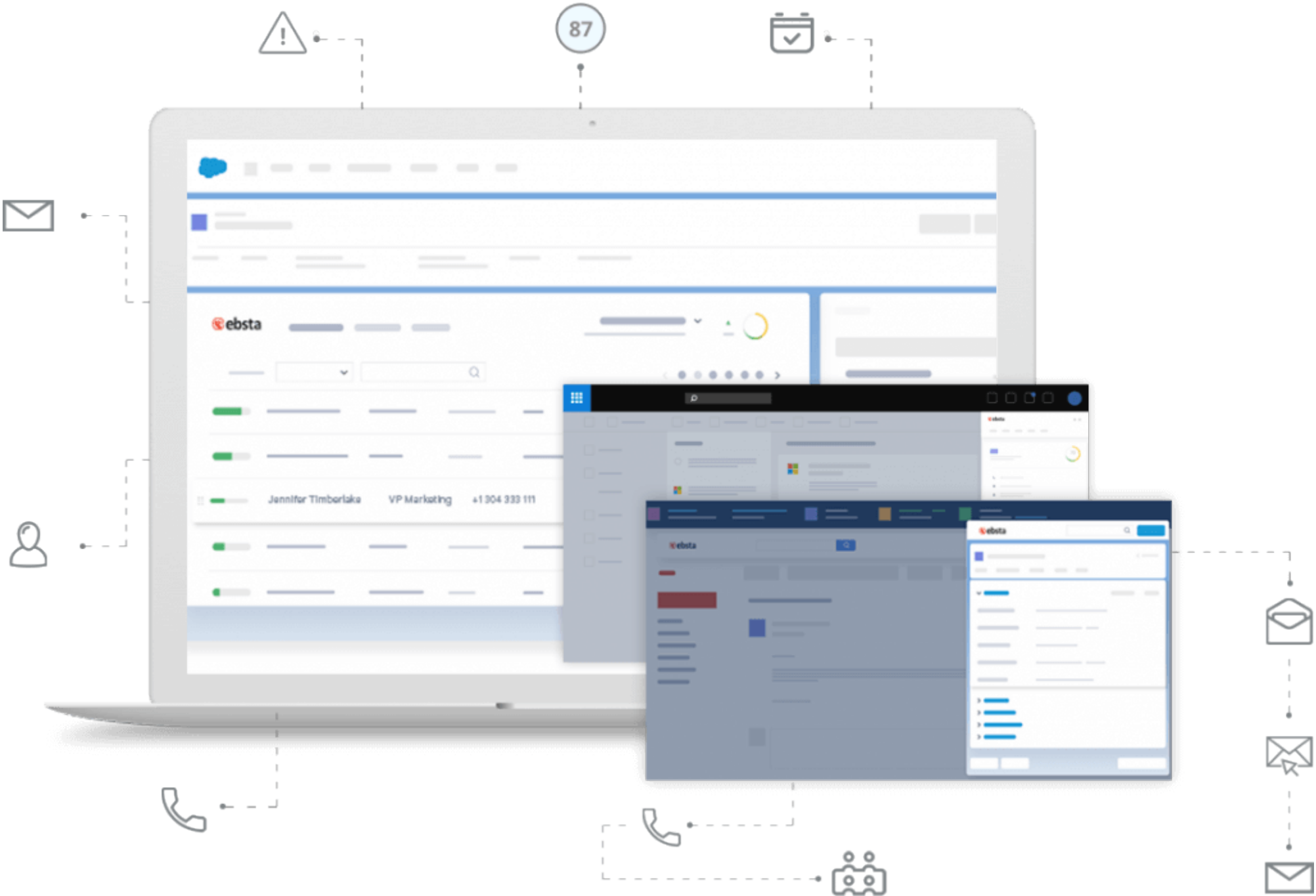
The idea of reporting often means reviewing something that's happened. However, access to real-time insights means we're actually looking ahead more than we look back.

You can't change the past and you can't predict the future with a finger in the air. Poor visibility, incomplete data and bad habits mean your forecasts are prone to inaccuracies and your revenue decisions carry risk.

If you're recording revenue growth, but can't reverse engineer where that's come from, then how will you understand where it's going?

Reports are just the figures that start the conversations to understand why people are buying your product, the key accounts that could churn, opportunities that could disappear and leads that will turn cold. It's how businesses understand the "why" behind the "what".

Those accelerating ahead with Salesforce understand that the way we sell has changed. Sales leadership need a way of identifying, measuring and improving the right relationships with every customer and the levers to revenue.



## Add A Deeper Level To Your Salesforce Reporting

*Improved Visibility    Actionable Insights    Meaningful Dashboards*  
*Clear Direction    Speed To Action*

See Ebsta In Action



www.ebsta.com