



Tableau on Tableau: Sales Analytics

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Julien Lannelongue

Account Manager
Senior Manager, Commercial Sales



Agenda

Notre Plateforme

- La plateforme Tableau
- Introduction aux Analyses commerciales

Comment nous utilisons Tableau chez Tableau

- Valeur de nos analyses pour Sales Operation, Managers et vendeurs
- Nos Tableaux de bord les plus utilises

Ressources pour vous aider a demarrer

- Comment avoir un gros impact rapidement
- Comment apprendre et exemples d'analyses avancees





Nous aidons les utilisateurs à voir et comprendre leurs données

tableau

Nos clients

Communications, Media & Technology



Financial Services



Services



Public Sector



Retail & Consumer Goods



Healthcare & Life Sciences



Manufacturing

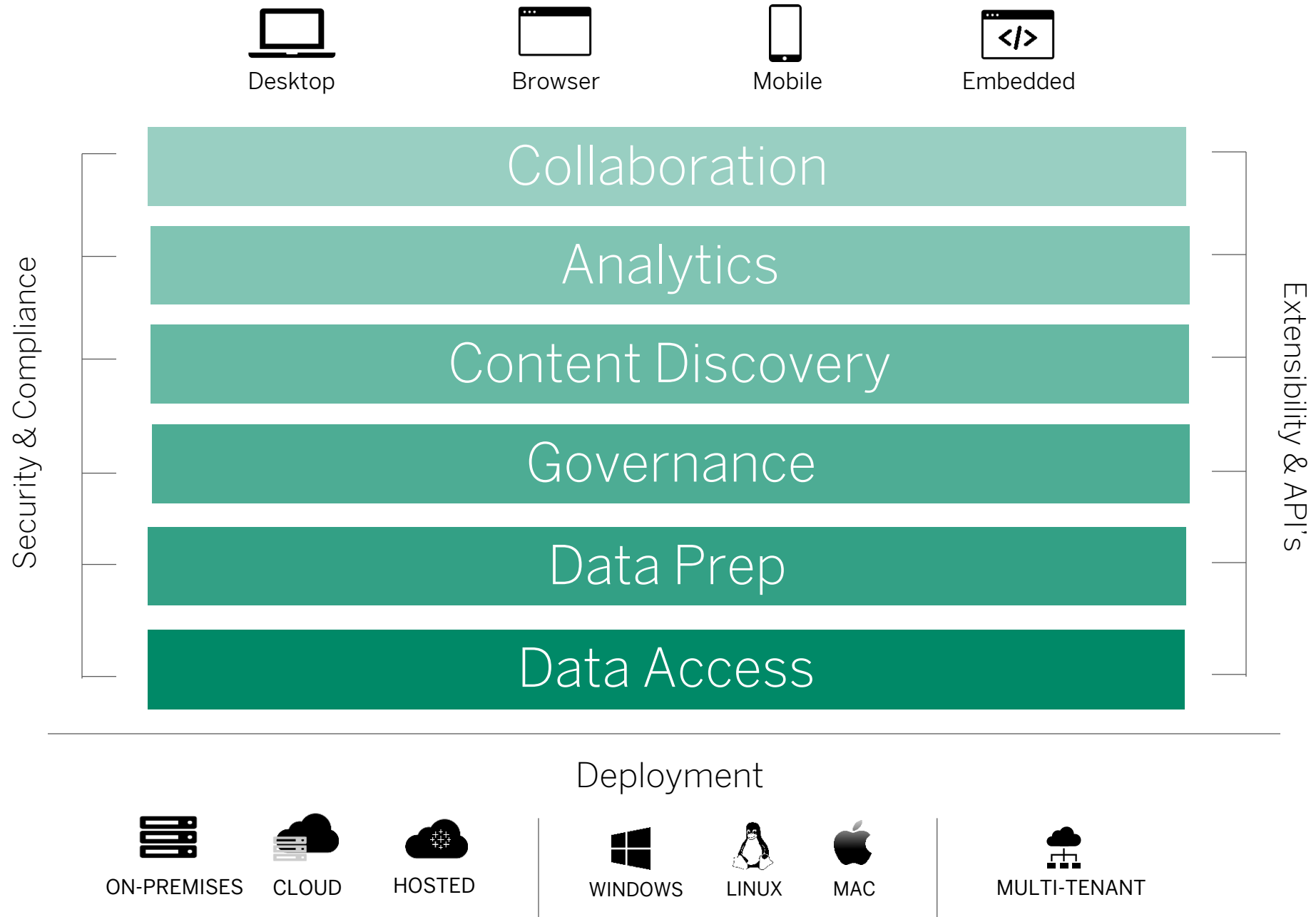


Energy & Resources

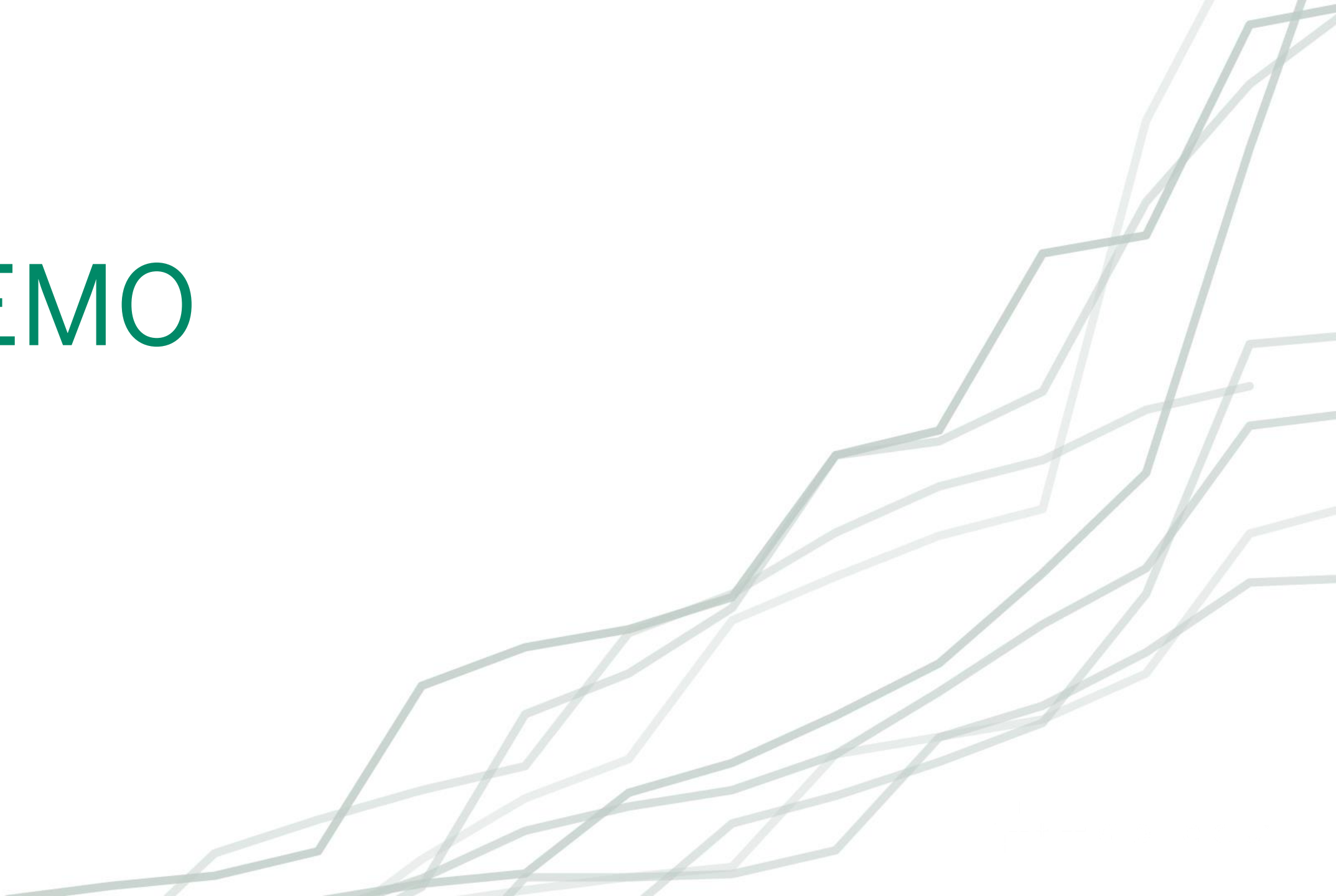


Travel & Transportation





DEMO



Large Deals

Salesforce Data

[Click here to learn more about Tableau for Sales Analytics](#)

[Dashboard](#)

Amount \$335K  \$763K

Closed Won Solution Qualify Commit Discover

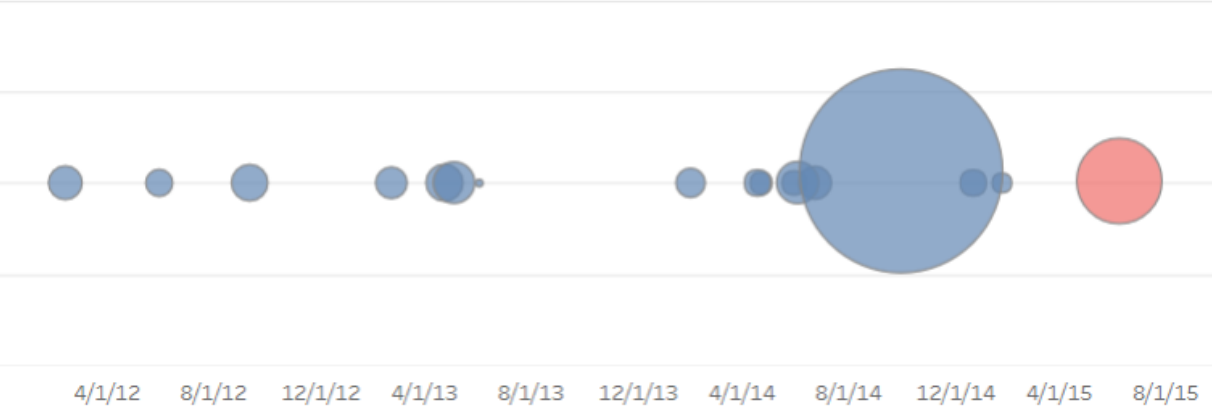
Closed Large Deals | [Click below for account history](#)

Tellus Eu Augue Incorporated: \$663K Kevin Gibson Services: MOL Standard Closed Date: 9/29/2014	Arcu Ac Orci Incorporated: \$462K Fred Jenkins Software: MOL Mobile Closed Date: 9/26/2014	KMA Power: \$408K Eric Barnes Software: MOL Standard Closed Date: 11/1/2013	Vitae Semper Company: \$394K Fred Jenkins Software: MOL Standard Closed Date: 9/26/2014
Pulvinar Arcu Ltd: \$605K Maria Porter Software: MOL Standard Closed Date: 10/2/2013	Euismod Et Foundation: \$448K Eric Barnes Software: MOL Mobile Closed Date: 3/26/2015	Eu LLP: \$360K Eric Barnes Software: MOL Standard	
Gravida Inc.: \$598K Joe Ford Software: MOL Premium Closed Date: 8/26/2014	Consequat Dolor Vitae Inc.: \$427K Jason Stoltz Software: MOL Standard Closed Date: 12/27/2013	Dignissim Magna Ltd: \$346K David Ward Software: MOL Standard	

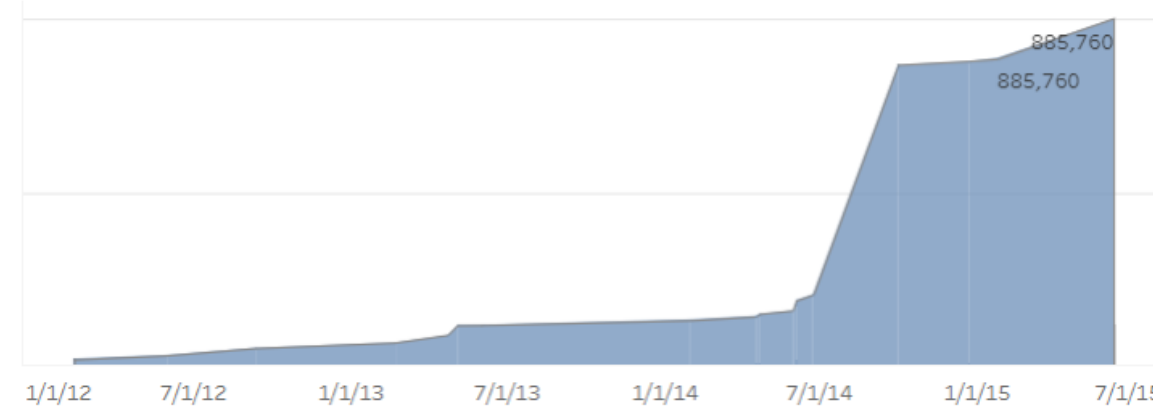
Upcoming Large Deals | [Click below for account history](#)

Neque Et Foundation: \$444K Jesse Alexander Software: MOL Premium Solution Stage Expected Close Date: 6/29/2015	Mus Proin Ltd: \$355K Elissa Sanders Software: MOL Standard Solution Stage Expected Close Date: 6/3/2015	Tortor Institute: \$492K Eric Barnes Software: MOL Premium Commit Stage Expected Close Date: 7/1/2015
Minuteman Cafe: \$521K Eric Barnes Software: MOL Standard Qualify Stage Expected Close Date: 6/4/2015		Quis Diam PC: \$342K Fred Jenkins Software: MOL Standard Discover Stage Expected Close Date: 8/12/2015

Account History - Transactions



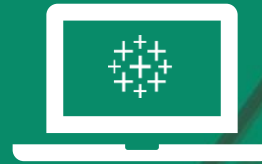
Account History - Running Total



Comment notre equipe commerciale utilise Tableau



+



Challenges les plus courants

- Les analyses sont lentes et non a jour quand nous en avons besoin
- Tout le monde a ses propres chiffres et personne n'a les memes
- Les Managers doivent reagir, prendre des decisions basees sur l'instinct et non sur des donnees
- Le temps passe a faire des analyses par les equipes n'est pas passe a vendre
- Les donnees utiles ne sont pas partagees dans un environnement securise avec les equipes

Comment Tableau est utilise par Sales Operation



Mettre à disposition
des ressources Self
Service

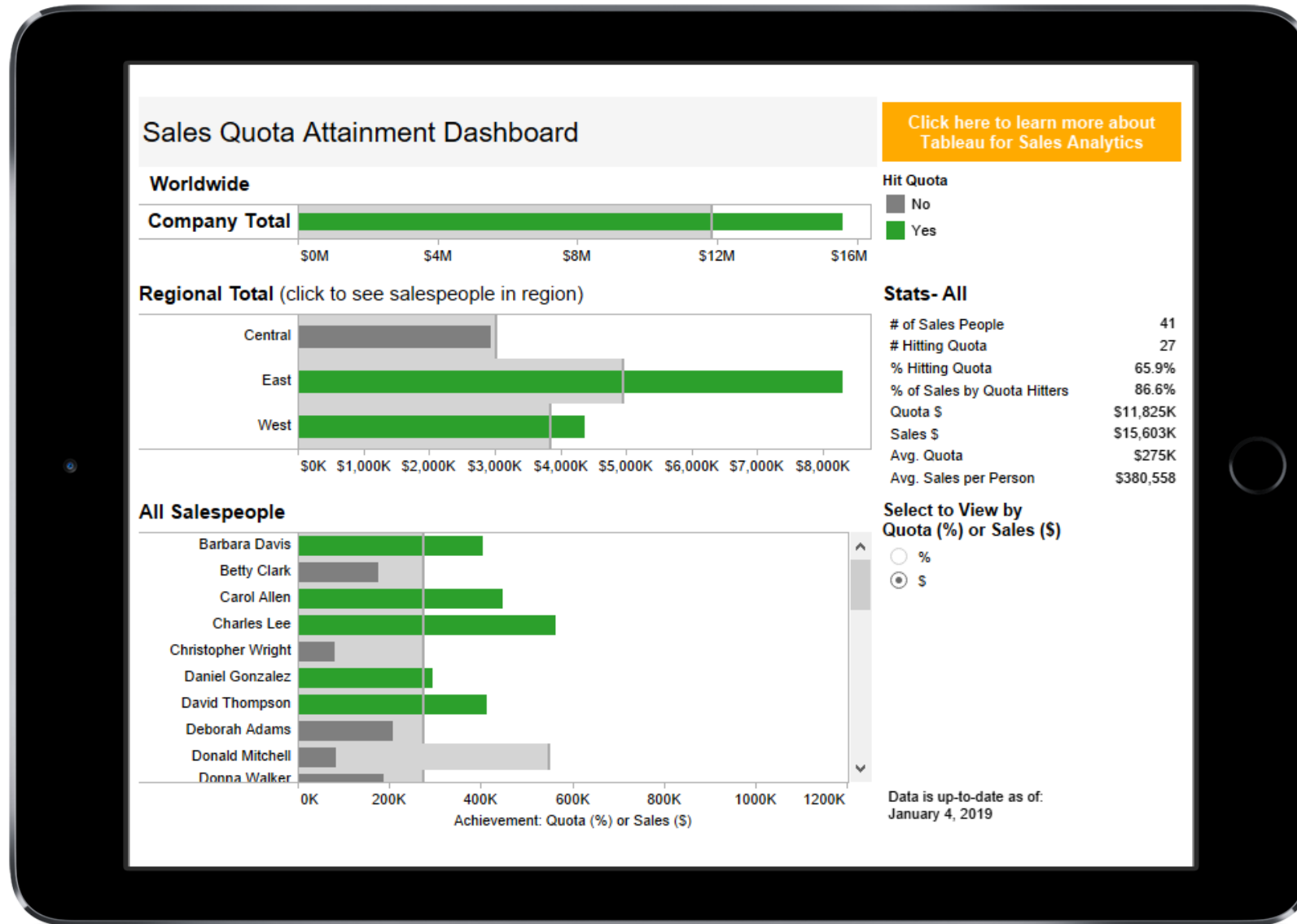


Améliorer la performance
de l'équipe



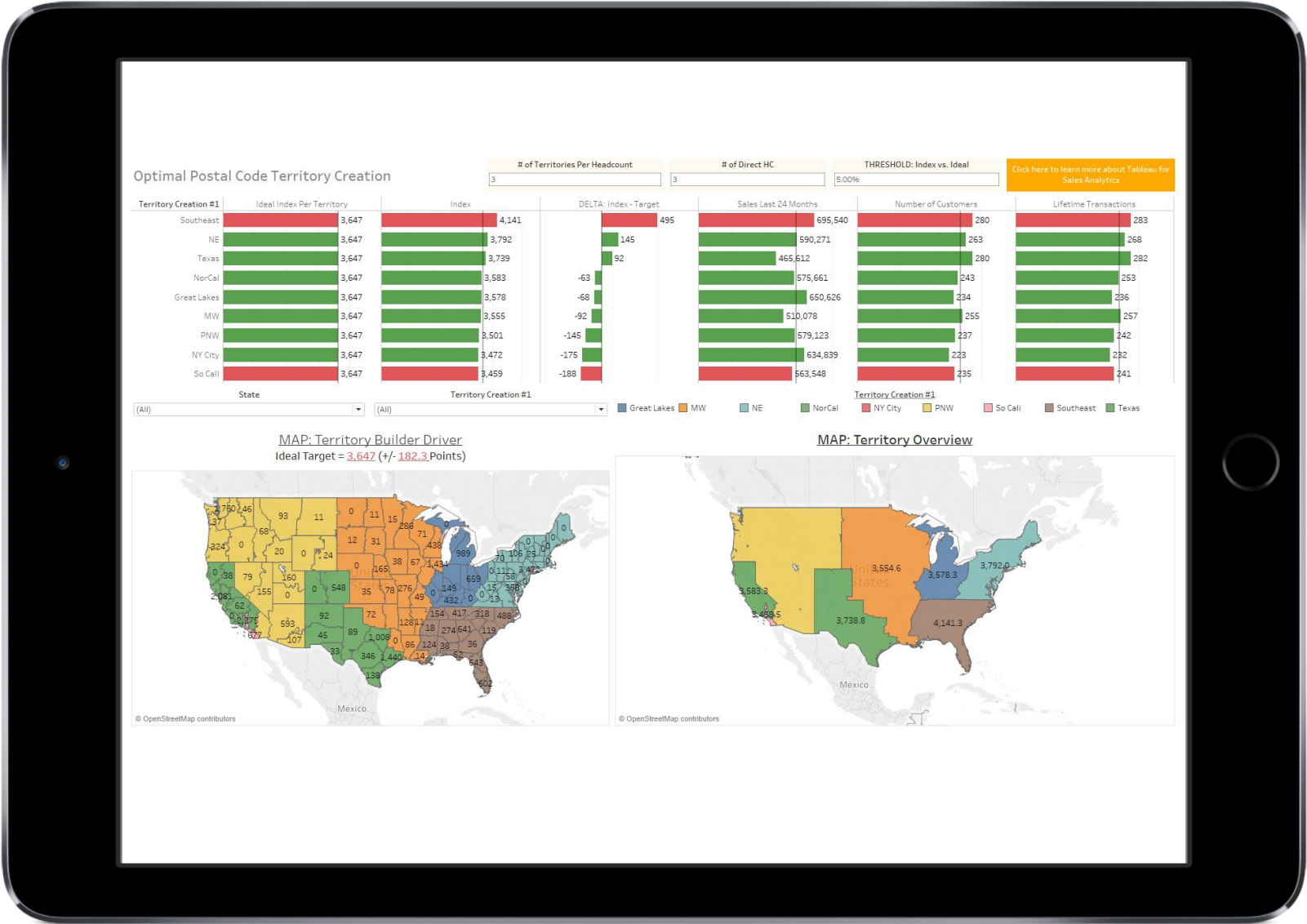
Créer des Analyses
avancées

Quota Attainment



[Link to Dashboard](#)

Optimal Territory Creation



Comment Tableau est utilise par les Managers

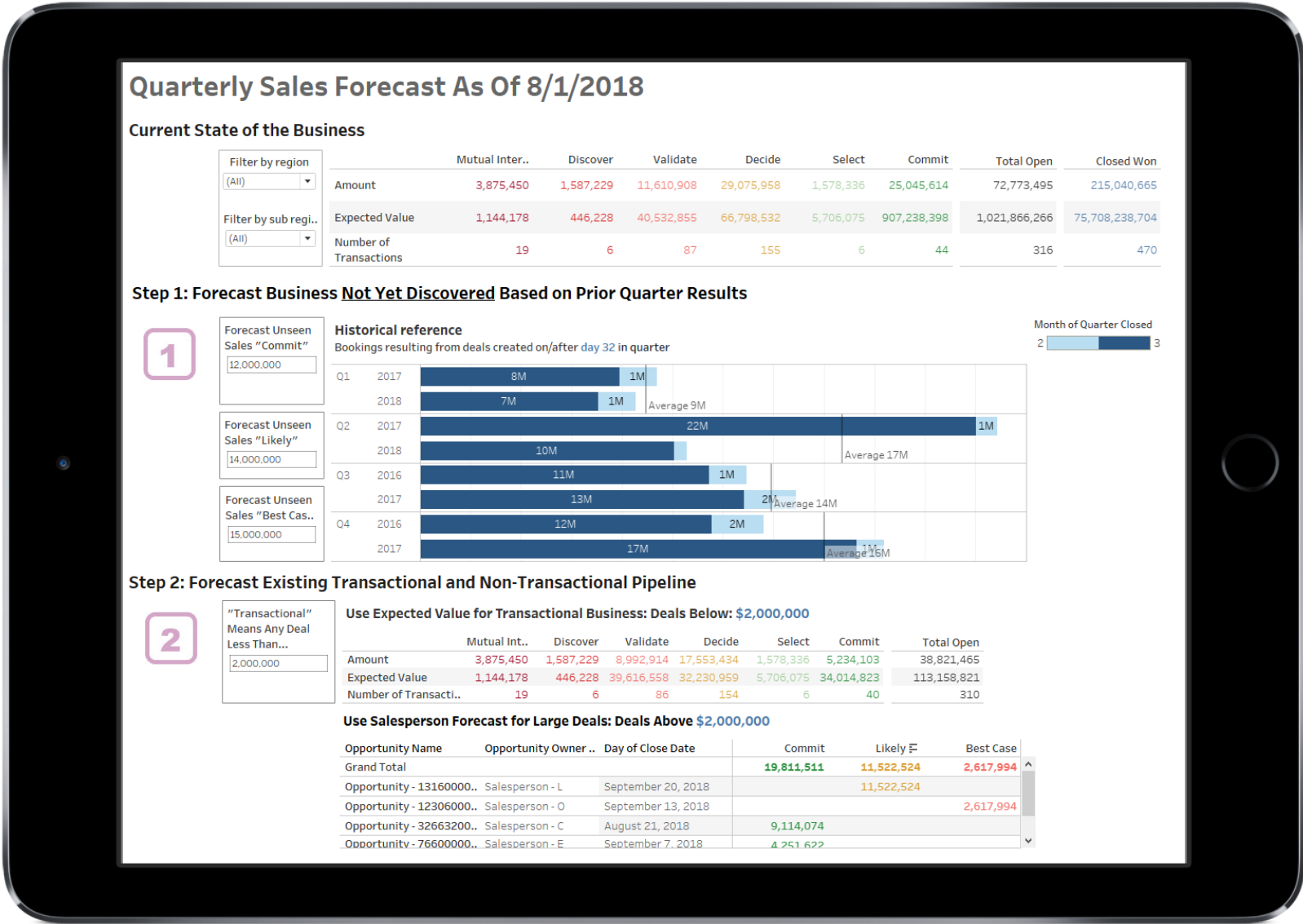


Meilleur comprehension
du business de nos equipes

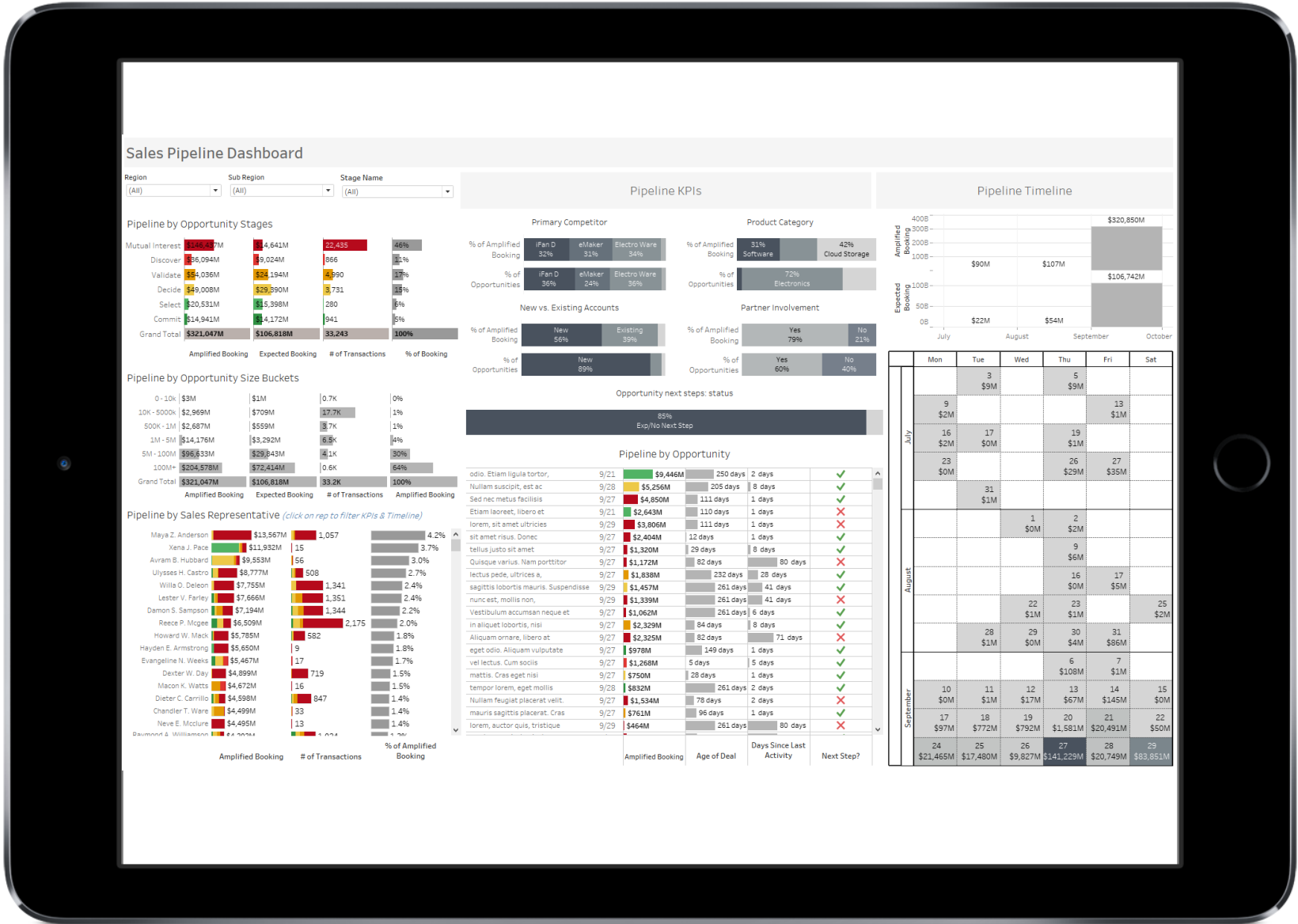


Meilleur support pour
le succes de nos vendeurs

Sales Forecasting

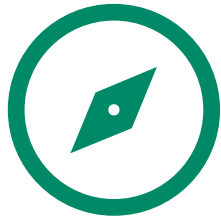


Sales Pipeline Management



[Link to Dashboard](#)
[Sales Spotlight Webisode](#)

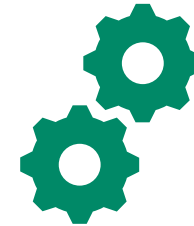
Comment Tableau est utilise par les vendeurs



Avoir des donnees
utilisables

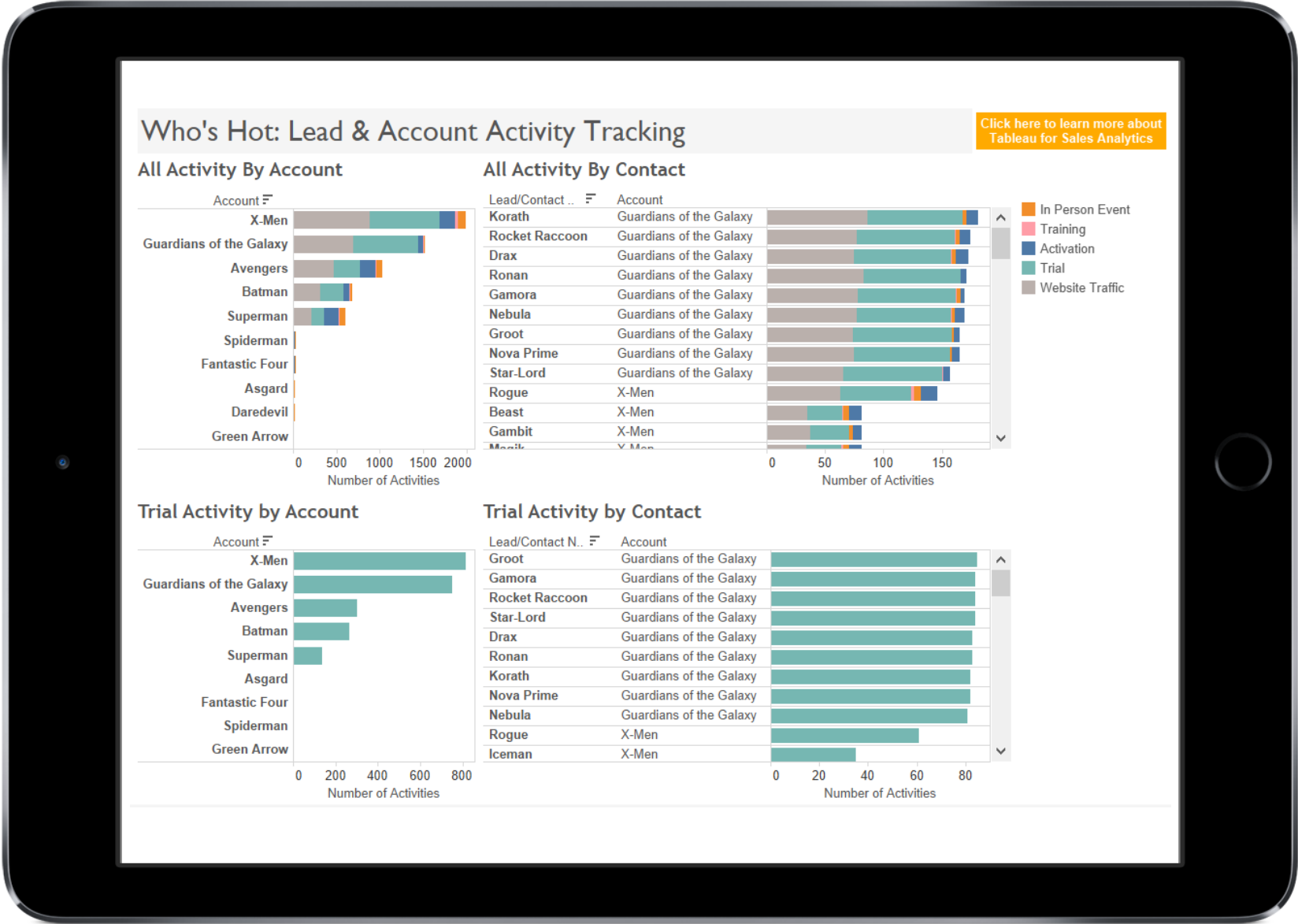


Suivre
l'activite et
les resultats



Ameliorer l'efficacite
du workflow

Lead & account activity tracking



Seller Call-Down List

Sales Call-Down Dashboard

You have 16 leads to contact that have interacted with this marketing campaign

What to say

(Click icon)

Email Template

Talking Points

Where to drive leads

(Click icon)

401K Blog Post

Retirement Saving Webinar

Retirement Customer Story

Primed Leads to Contact

(Click for Lead Details & Contact Info)

Name	Background	Industry	
Dolan J. Mayo	Partner	Legal	✓
Garrison Y. Hahn	Manager	Media	✓
Hayfa M. Joyce	CFO	Consulting	✓
Iris T. Rios	CEO	Legal	✓
Kylie Y. Mendez	Director	Technology	✓
Mollie Q. Morgan	Manager	Telecommunications	✓
Quail S. Curtis	President	Legal	✓
Jerome X. Wynn	CMO	Mining	✓
Kelsey H. Daniel	Vice President	Technology	✓
Myles I. Nguyen	CFO	Retail	✓
Roanna B. Langley	President	Transportation	✓
Ulla Q. Carr	CEO	Agriculture	✓
Gregory M. Lamb	Vice President	Legal	✓
Lucian K. McDonald	Director	Technology	✓
Odysseus I. Vincent	Manager	Insurance	✓
Tyrone C. Sheppard	Senior Director	Manufacturing	✓

In-Dashboard Contact CRM Page

(For example only, not a live page)

salesforce

Search

Sales

Home Chatter Campaigns Leads Accounts Contacts Opportunities Cases Reports Registrations Partner Resources

Custom Links

Contact

Customize Page | Printable View | Help for this Page

Post File New Event More

Write something

Share

Followers

No followers

There are no updates.

Advanced Search

Go

Shortcut

Calendar

Unresolved Items

Recent Items

Contact Detail

Created By

ID Number

AWSSAccountID

BDR - Working Date

BDR - Working Date - Original

eCommerce Date

eCommerce Date - Original

TGL Date

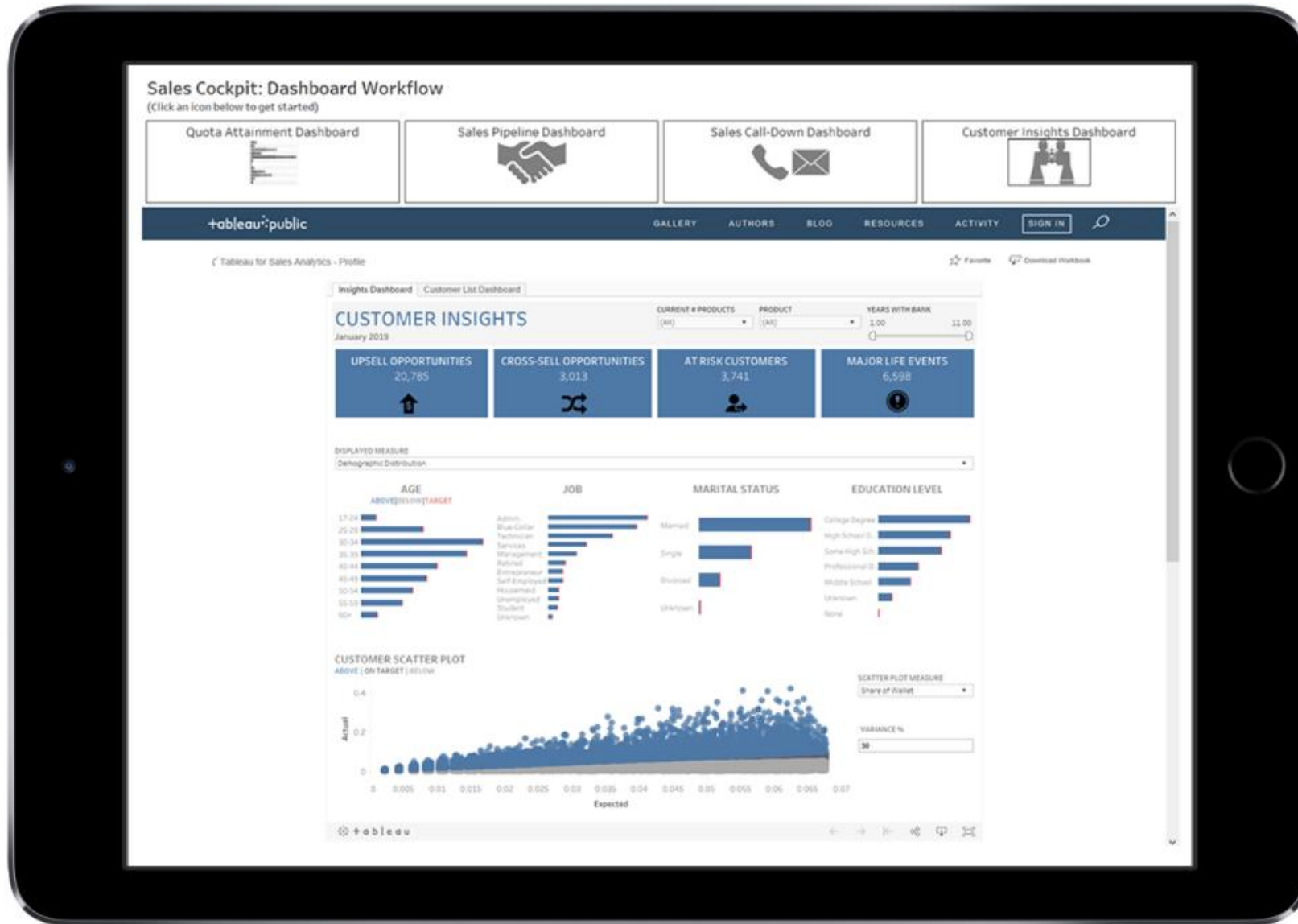
TGL Date - Original

[Link to Dashboard](#)

Seller Scorecard & Activity Tracker



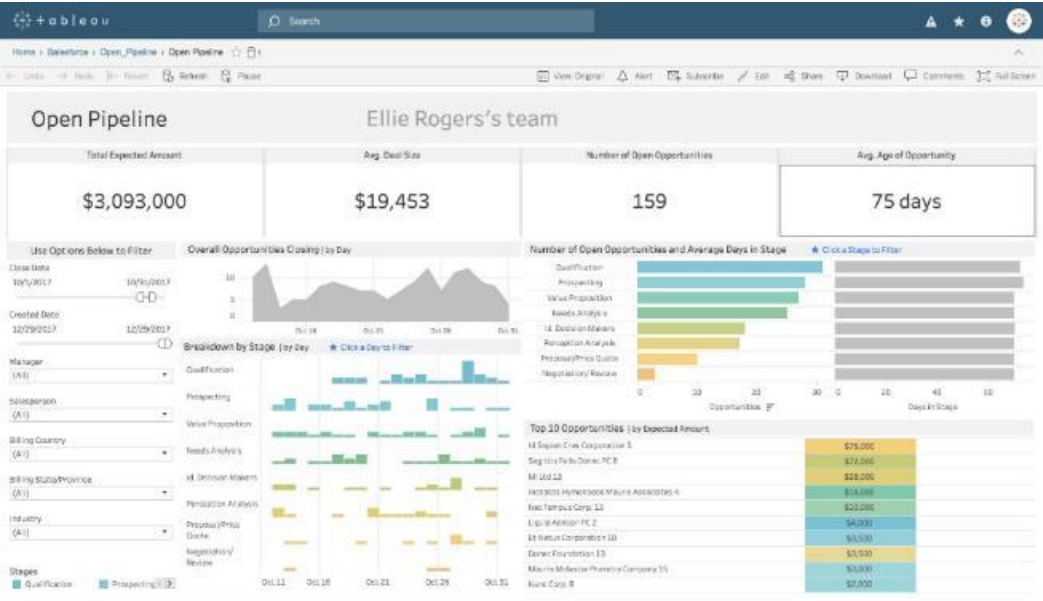
Sales Cockpit



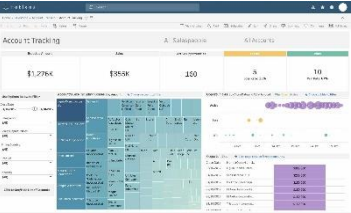
Comment bien
demarrer



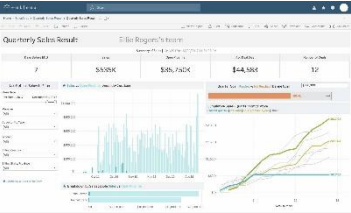
Salesforce Dashboard Starters



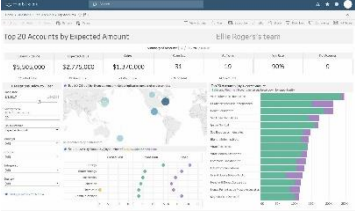
Account Tracking



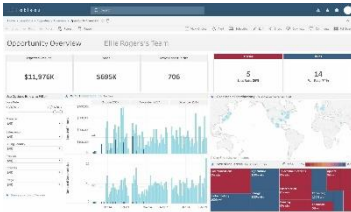
Quarterly Results



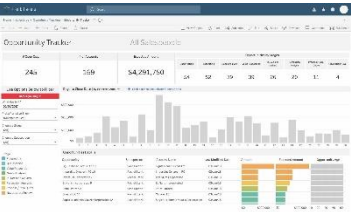
Top Accounts



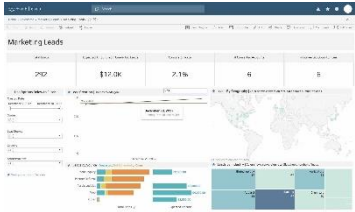
Opportunity Overview



Opportunity Tracking



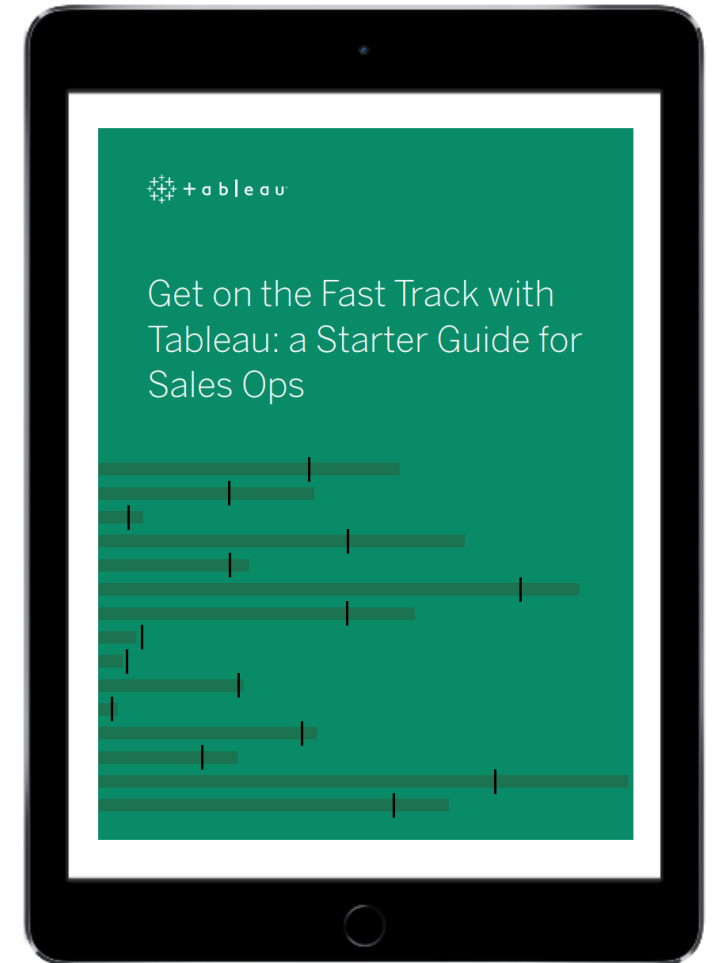
Marketing Leads



Free Trial

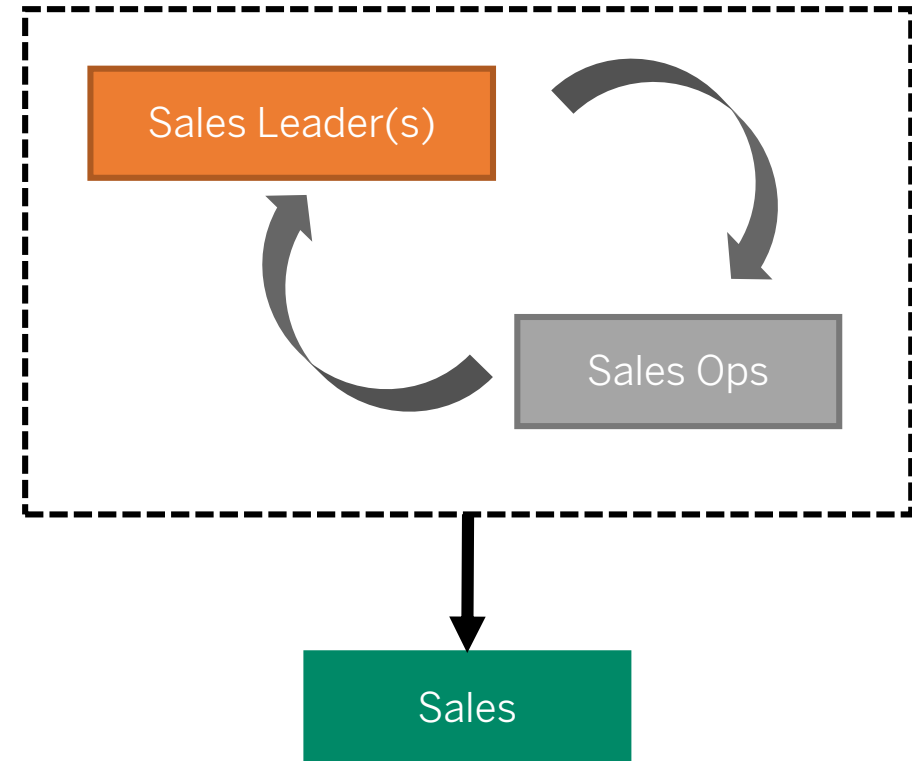
Ressources Sales analytics

- Livre Blanc : [Maîtrisez rapidement Tableau : le Guide de démarrage](#)
- Liens vers [Sales Analytics Dashboards](#)
- Version d'essai de [Tableau Desktop](#)
- Formation en ligne : [training](#)
- Rejoindre notre [Tableau Community](#)



Cles du succes

- Push du leadership et actif dans le processus
- Focus sur ce que veulent les utilisateurs
- Iteration rapide
- Leadership conduit l'adoption



Q&A

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