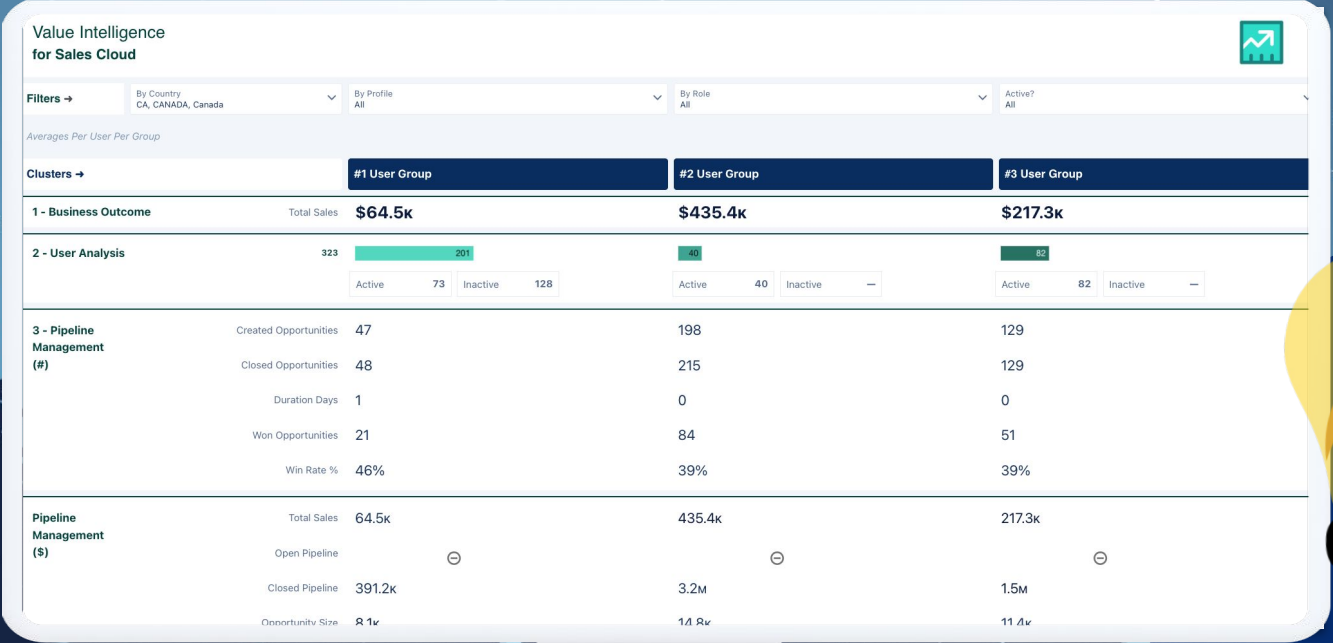


Free.
Employee Built



Unlock Seller Insights with Value Intelligence for Sales Cloud



*Salesforce Labs are free, open source solutions built by Salesforce employees. All solutions are provided “as is.” Please refer to the Terms and Conditions outlined in the listing.



Framework for Analyzing User Effectiveness

Pipeline Management

Standard Opportunity Metrics



Included Metrics:

Opportunity Detail
Win / Loss
Pipe Gen
Velocity

Customer Relationships

Standard Engagement Metrics



Included Metrics:

Leads
Contacts
Tasks
Events
Emails
Calls

User Demographics

Standard User Dimensions



Included Metrics:

Role
Profile
Geography
By Active Status

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Connect Usage Data to Business Results

Key Features

- 1 Runs within Salesforce Trust Boundary
- 2 Delivered as a Simple Templated App
- 3 Adapt the Recipes to your Specific Needs

Value Intelligence
for Sales Cloud

Filters →

By Country
All

By Profile
All

By Role
All

Active?
Active

Averages Per User Per Group

Clusters →

#1 User Group

#2 User Group

#3 User Group

1 - Business Outcome

Total Sales

\$79.4k

\$459.6k

\$256.1k

2 - User Analysis

2,187

760

Active760Inactive—

217

1,210

Active1.2kInactive—

3 - Pipeline Management (#)

Created Opportunities

58

157

140

Closed Opportunities

62

162

144

Duration Days

1

0

0

Won Opportunities

28

61

64

Win Rate %

49%

38%

44%

Pipeline Management (\$)

Total Sales

79.4k

459.6k

256.1k

Open Pipeline

⊖

⊖

⊖

Closed Pipeline

408.1k

3.0M

1.3M

Opportunity Size

6.6k

18.4k

9.1k

Won Size

2.9k

7.5k

4.0k

[illegible]

Uncovering Insights with Value Intelligence

Value Intelligence for Sales Cloud

Filters →

By Country
UNITED STATES, United States, United States

By Profile
All

By Role
All

Active?
All

4 - User Engagement

Leads Created

311

No
Activity

-

-

Leads Converted

259

-

↑ Lead

122

of Contacts

⊖

⊖

⊖

of Emails

-

-

↑ Tasks

-

of Calls

-

-

-

of Events

-

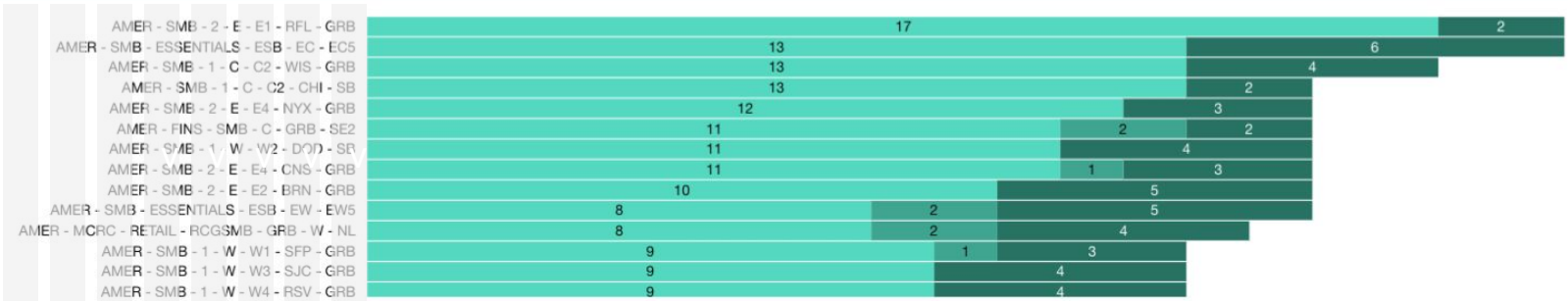
-

-

Averages Per User Per Group

5 - User Breakdown

by Role



% by Country

United States of America

49.79%

41.31%

United States

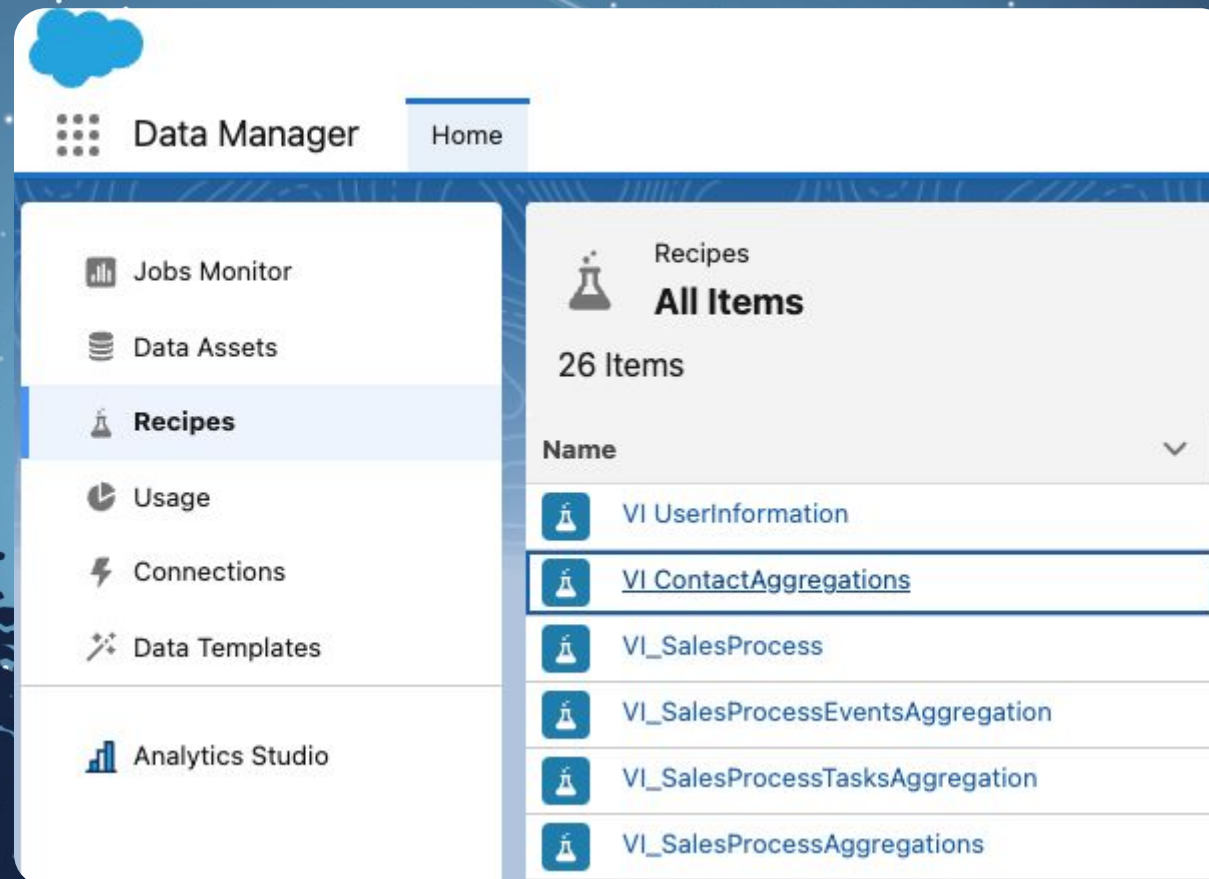
100%

TOP %



Where can I make changes to Recipes?

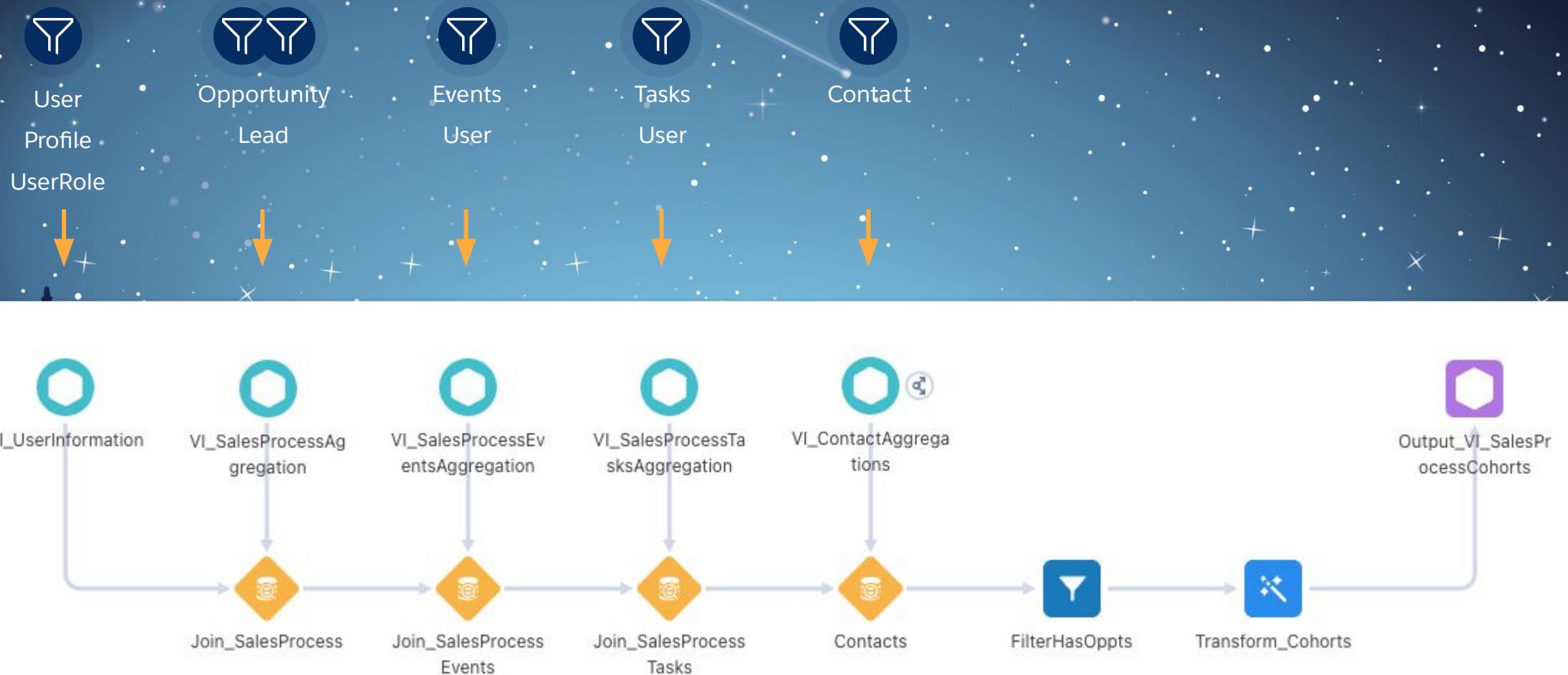
Analytics Studio > Data Manager > Recipes





Data Recipe Structure

Single recipes that focus on sales objects that are ultimately aggregated

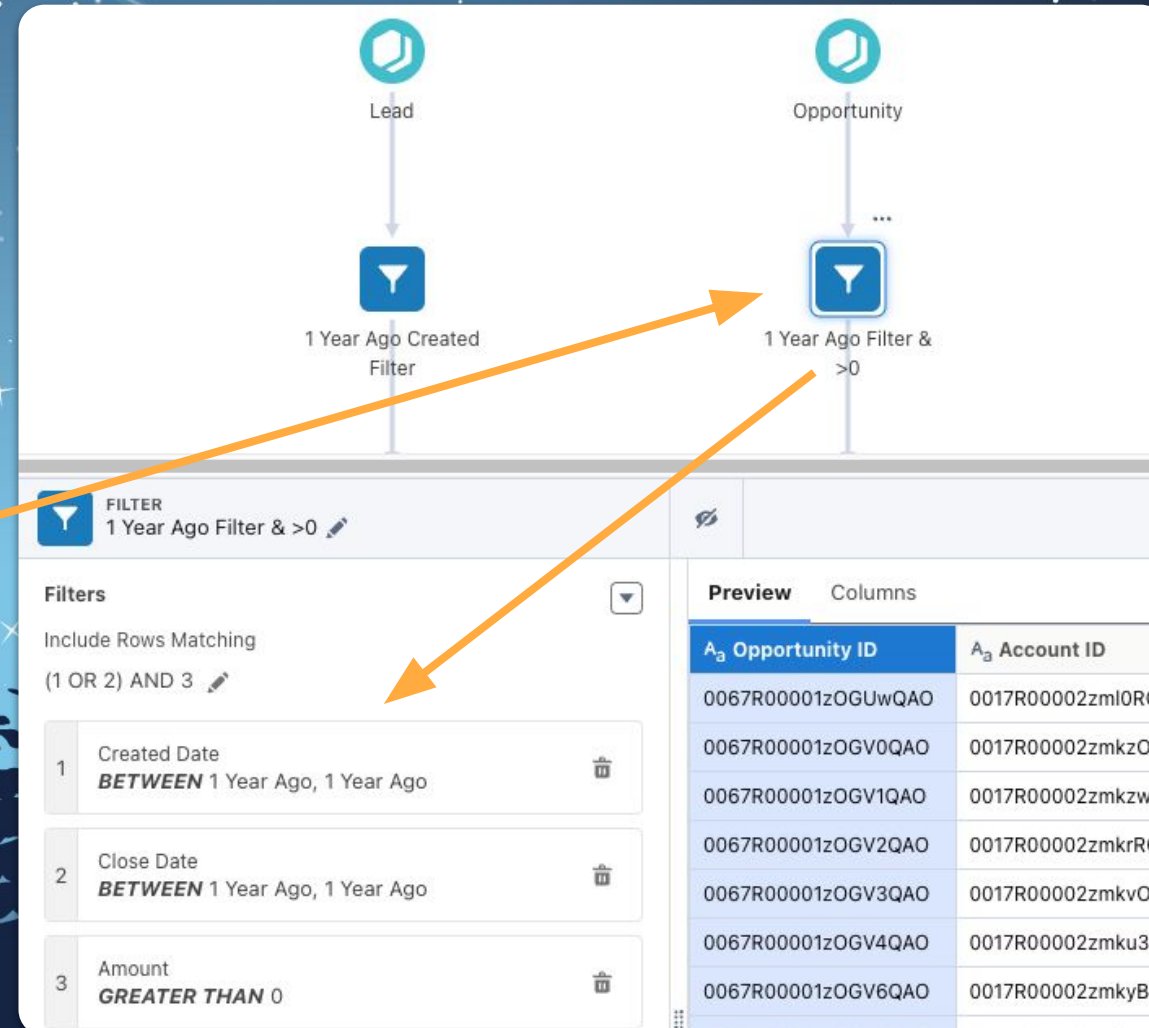


Selecting A Time Period

Focus the analysis on a time period that requires isolation



*All Filter Dates must be the same across all recipes!

The screenshot displays a data analysis workflow. At the top, a 'Lead' icon connects to a '1 Year Ago Created Filter' icon, which then connects to a '1 Year Ago Filter & >0' icon. Below this, a 'FILTER' section shows a list of filters:

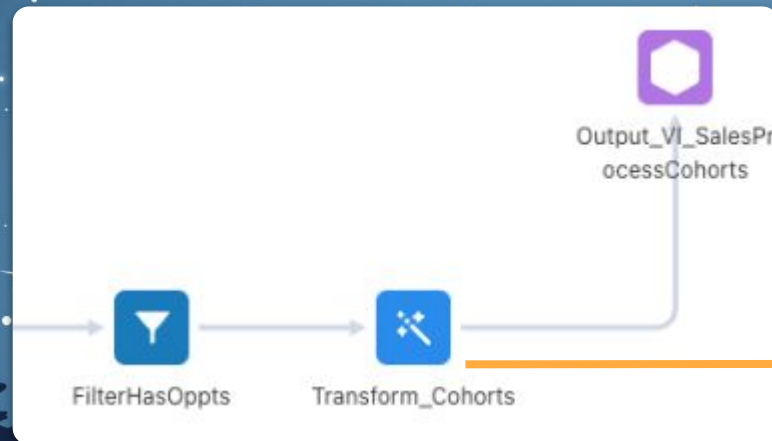
- 1 Created Date **BETWEEN** 1 Year Ago, 1 Year Ago
- 2 Close Date **BETWEEN** 1 Year Ago, 1 Year Ago
- 3 Amount **GREATER THAN** 0

To the right, a 'Preview' table shows the following data:

A ₃ Opportunity ID	A ₃ Account ID
0067R00001zOGUwQAO	0017R00002zml0RQA
0067R00001zOGV0QAO	0017R00002zmkzOQ
0067R00001zOGV1QAO	0017R00002zmkzwQ
0067R00001zOGV2QAO	0017R00002zmkrRQA
0067R00001zOGV3QAO	0017R00002zmkvOQ
0067R00001zOGV4QAO	0017R00002zmku3Q
0067R00001zOGV6QAO	0017R00002zmkyBQ

Selecting Criteria for K-Means Clustering

Remove dimensions or measures that you believe are not significant to a Sales User's performance, or, add your own!



TRANSFORM
Transform_Cohorts

[Remove All](#)

Columns Used to Determine Clusters (Minimum: 2)

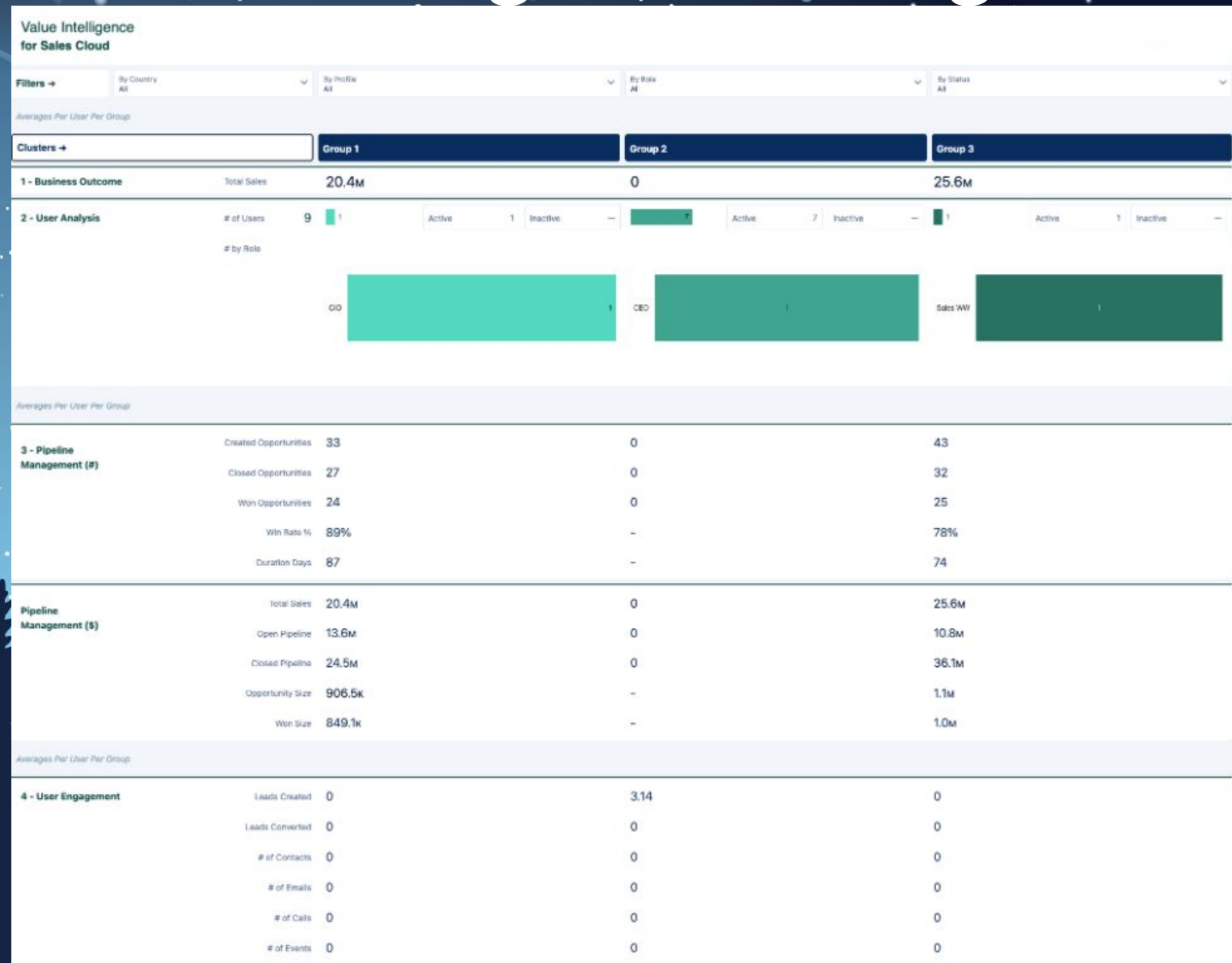
Search columns...

# Main.OpptClosedCount	×
# Main.LeadsCreatedTotal	×
# Main.OpptWonCount	×
# Main.OpptClosedSumAmount	×
# Main.OpptCreatedLeadCount	×
# Main.OpptCreatedTotal	×
# Main.OpptPushCountTotal	×

Let's jump in to the Value Intelligence Package!



Cut through the noise and zero in on what truly matters. Achieve alignment between user behaviors and business success, ensuring every action drives impactful results.



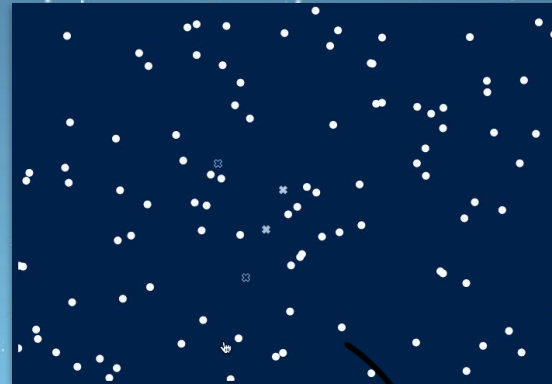


Measure the impact of Salesforce usage on business value with data

01 RUN TEMPLATE

02 CLUSTER COHORTS

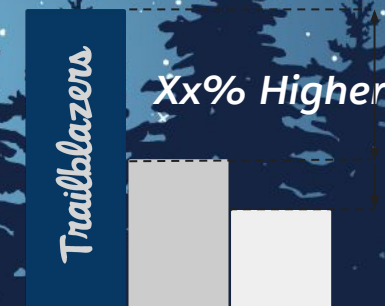
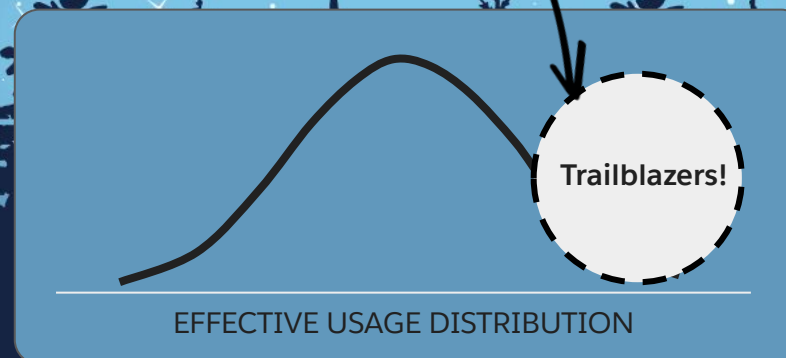
03 COMPARE PERFORMANCE



Typical Trailblazers Behaviors

- Log more *opportunities*
- *Convert* more leads
- Leverage more *email*
- Create more *tasks*
- Shorter *deal durations*

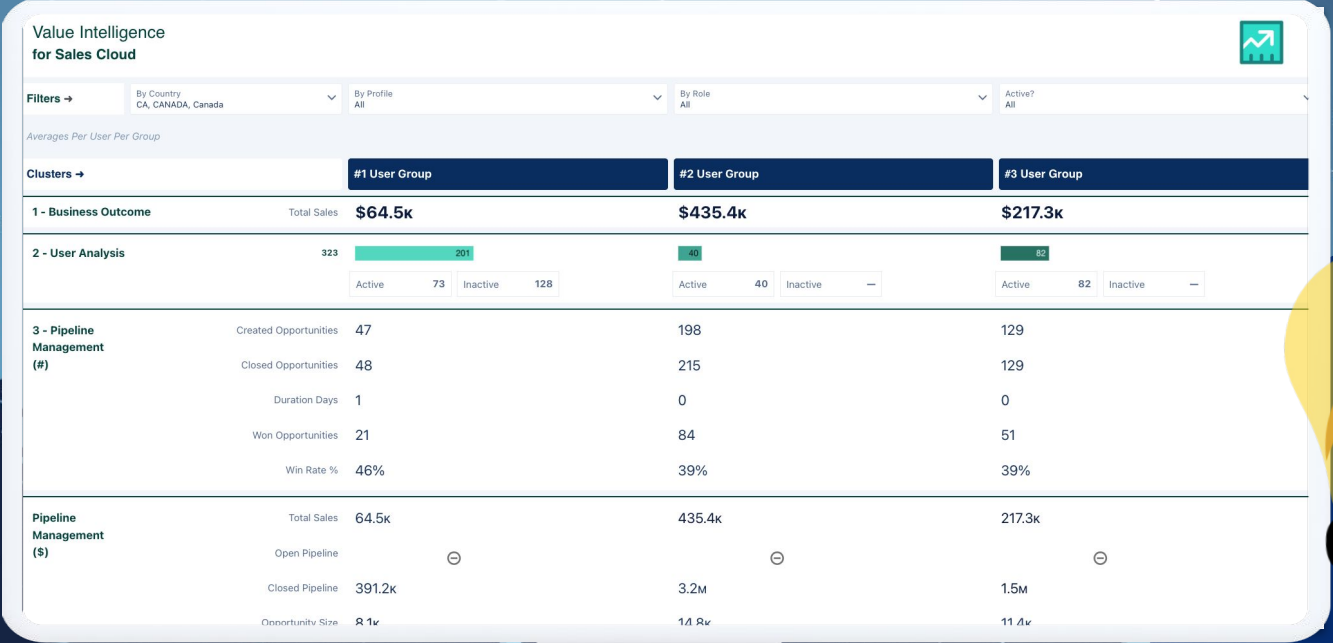
Trailblazers = Higher Performers



Free.
Employee Built



THANK YOU!



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