



SALESFORCE ADOPTION DASHBOARD OVERVIEW

Great user adoption doesn't just happen!

The Salesforce Adoption Dashboards provide visibility to relevant user login history and trending, the adoption of key features such as accounts, opportunities & contacts, and the use of critical sales and marketing productivity enhancers. Although their focus is not to depict data quality, there are several reports (ex. Leads / Contacts / Accounts without key information populated) that are also an indicator of data quality, in addition to feature adoption. Please refer to the [Data Quality Analysis Dashboards](#) package on the AppExchange as a starting point for assessing the quality of your organizations Salesforce data.

This package can be leveraged with other AppExchange Adoption Dashboard packages and can also be customized to track the specific metrics that are important to your organization. Either way, it's a great starting point for kicking your companies' adoption into high gear.

GETTING SETUP

The Salesforce Adoption Dashboard package is located on the [AppExchange](#). Follow the procedures documented by Salesforce.com to download and install this package into your Salesforce.com instance.

INCLUDED COMPONENTS

42 reports, 6 custom fields, 3 Dashboards, 1 Dashboard Folder and 1 Report Folder that focus on identifying whether users are regularly logging in and using key features in Salesforce. Downloading this app creates a "Salesforce Adoption Dashboards" Dashboard folder and a "DB – Adoption" Report folder with their associated reports and dashboards.

The following table depicts the **Folder**, **Reports** and **Descriptions** of the reports in this package. **Included are 3 Dashboards and 42 Reports**

1 – User Adoption (Logins) DASHBOARD

	Folder	Report Name	Description
1.1:	DB - Adoption	DB-Adoption: Active User LOGINS	# of Active Users that have logged in the last 14 days
1.2:	DB - Adoption	DB-Adoption: Active USERS	# of Active Users
1.3:	DB - Adoption	DB-Adoption: LOGIN by DEPARTMENT	# of active users logging in the last 14 days by department
1.4:	DB - Adoption	DB-Adoption: LOGIN by REGION	# of active users logging in the last 14 days by region
1.5:	DB - Adoption	DB-Adoption: LOGIN by ROLE	Active user logins by role within the last 14 days
1.6:	DB - Adoption	DB-Adoption: LOGIN Wall of FAME	# of active users logging in during the last 14 days
1.7:	DB - Adoption	DB-Adoption: LOGIN Wall of SHAME	# of active users not logging in the last 14 days by role

2 – Key Feature Adoption DASHBOARD

	Folder	Report Name	Description
2.1:	DB - Adoption	DB-Adoption: ACCOUNTS w/o Fields Pop	Show me how many accounts do not have key fields populated
2.2:	DB - Adoption	DB-Adoption: ACTIVITIES Wall of FAME	Top 5 - Users with the most activities created in the last 30 days
2.3:	DB - Adoption	DB-Adoption: ACTIVITIES Wall of SHAME	Bottom 5 - Users with the least activities in the last 30 days
2.4:	DB - Adoption	DB-Adoption: CONTACTS w/o Key Fields	Contact WITHOUT key fields are populated
2.5:	DB - Adoption	DB-Adoption: Count of ALL ACCOUNTS	Count of all accounts in Salesforce
2.6:	DB - Adoption	DB-Adoption: Count of ALL CONTACTS	How many contacts are there in Salesforce
2.7:	DB - Adoption	DB-Adoption: Last Run REPORTS	When is the last time reports were run
2.8:	DB - Adoption	DB-Adoption: Neglected CUSTOMERS	# of customer accounts with no activities in the last 60 days

2.9:	DB - Adoption	DB-Adoption: Neglected PROSPECTS	# of prospect accounts with no activities in the last 60 days
2.10:	DB - Adoption	DB-Adoption: New ACCOUNTS Last 30 Days	New accounts created in the last 30 days
2.11:	DB - Adoption	DB-Adoption: New ACCOUNTS Trend	New accounts created over the last 6 months
2.12:	DB – Adoption	DB-Adoption: New ACTIVITIES last 30 Days	New Activities created in the last 30 days
2.13:	DB – Adoption	DB-Adoption: New ACTIVITIES Trend	Activities created in the last 6 months
2.14:	DB - Adoption	DB-Adoption: New CONTACTS Last 30 Days	New contacts created in the last 30 days
2.15:	DB - Adoption	DB-Adoption: New CONTACTS Trend	New contacts created in the last 180 days

3 – Sales & Marketing Adoption DASHBOARD

	Folder	Report Name	Description
3.1:	DB - Adoption	DB-Adoption: CAMPAIGNS by Status	Status of all campaigns on a monthly basis
3.2:	DB - Adoption	DB-Adoption: CAMPAIGNS Created Last 365	All Campaigns in Salesforce created in the last 365 days
3.3:	DB - Adoption	DB-Adoption: CAMPAIGNS Last 30 Days	New campaigns created in the last 30 Days
3.4:	DB - Adoption	DB-Adoption: Count of LEADS	Count of all PROSPECTS/LEADS in Salesforce
3.5:	DB - Adoption	DB-Adoption: Count of OPPTYs	Count of all opportunities
3.6:	DB - Adoption	DB-Adoption: Count of OPPTYs last 365	Opportunities Created in the last 365 days
3.7:	DB - Adoption	DB-Adoption: LEAD Abandonment	Leads that have not been acted upon
3.8:	DB - Adoption	DB-Adoption: LEAD Funnel Load Rate	The number of leads entering the funnel on a monthly basis
3.9:	DB - Adoption	DB-Adoption: LEADS Converted Last 365	Leads converted in the last 365 days
3.10:	DB - Adoption	DB-Adoption: LEADS w/o Fields Populated	Prospects with key fields populated
3.11:	DB - Adoption	DB-Adoption: MASS EMAILS Created	The number of mass emails created
3.12:	DB - Adoption	DB-Adoption: Neglected OPPTYs	Open Opportunities set to close in the next 90 days with no activity in the last 30 days.
3.13:	DB - Adoption	DB-Adoption: New LEADS Last 30 Days	New leads created in the last 30 Days
3.14:	DB - Adoption	DB-Adoption: New LEADS Trend	New leads created over the last 180 days
3.15:	DB - Adoption	DB-Adoption: New OPPORTUNITIES last 30	New opportunities created in the last 30 days
3.16:	DB - Adoption	DB-Adoption: OPPORTUNITIES Trend	New Opportunities create in the last 6 months
3.17:	DB - Adoption	DB-Adoption: OPPORTUNITY Trend/Owner	Opportunities trending by Opportunity owner
3.18:	DB - Adoption	DB-Adoption: OPPTYs by STAGE entered	Opportunities by the stage they are first entered
3.19:	DB - Adoption	DB-Adoption: OPPTYs w/No Opp Product	Opportunities that don't have opportunity products and STAGE > Needs Analysis
3.20:	DB - Adoption	DB-Adoption: OPPTYs w/o Fields Populated	Open opportunities without key fields populated

6 Custom Fields

The following custom fields have been added to either represent a critical piece of custom data that is used in one of the dashboards or to account for potential field conflicts created by installing this application into an org where the previous version of the Adoption Dashboard is installed. In either case, you can remove any of the fields with the understanding that the related Report(s)/Dashboard(s) will not work. You also have the option of renaming the fields, to be consistent with your naming conventions, or re-pointing the reports to an existing field in your org that stores the same information.

The following table depicts the **Custom Field** name, **Related Object** and **Report(s) Where it is Used** for each of the custom fields in this package

Custom Field	Related Object	Report(s) Where it is Used
DB Activity Type	Activity	DB-Adoption: New ACTIVITIES Trend
DB Campaign Tactic	Campaign	DB-Adoption: CAMPAIGNS by Status DB-Adoption: CAMPAIGNS Created Last 365 DB-Adoption: CAMPAIGNS Last 30 Days

DB Competitor	Opportunity	DB-Adoption: Count of OPPTYS DB-Adoption: OPPTYS w/o Fields Populated
DB Created Date Without Time	Lead	DB-Adoption: New LEADS Trend
DB Lead Age	Lead	DB-Adoption: LEAD Abandonment
DB Region	User	DB-Adoption: LOGIN by REGION

THINGS YOU MIGHT LIKE TO CHANGE

1. The Dashboard will default with a Running User of the user that downloaded the AppExchange package.
2. It is recommended that the Running User for the Dashboard be one that has the "View All Data" privilege such as the System Administrator
3. By Default, the reports and dashboards are visible to all users. You may want to make them visible to a select set of users
4. Change the name of the custom fields to be consistent with your naming conventions or customize the reports that use the custom fields to fields in your org that store similar information.
5. You may want to uninstall the previous Adoption Dashboard package if it is not used

SUPPORT

This is an unsupported application