# Best Practice:
## Clean Your Room Dashboards

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# Clean Your Room!

- Remember when you were 10 years old? You wanted to go out to play, but first mom said "Clean Your Room!"

- The "CYR" metaphor translates nicely to the business world
  - Before you can request _____, your manager asks "Did you clean your room?"

- The "CYR" Dashboard represents "The Stick" in the "Carrot and Stick" Idiom, you do not want to find yourself on this dashbaord.

# Dashboard Columns

- Stuck & Stale

  - Opportunities that have been "pushed" multiple times and the worst offenders

  - Opportunities that have been stuck in the same stage for multiple months and the worst offenders

- Reality Check

  - Opportunities missing "key" data or no activity in the past X days, yet are still targeted to close very soon

- Missing Pieces

  - Opportunities without Next Steps, Executive Sponsorship, Partners or Competitors
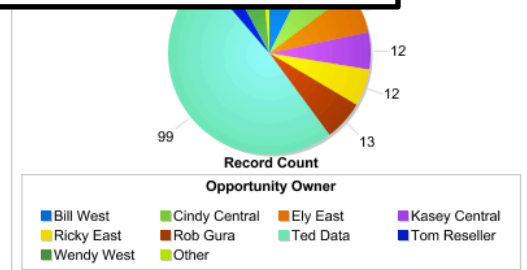
# Visualizations



**Stuck & Stale**

| Too Many Pushes | |
|---|---|
| **Opportunity Owner** | **Record Count** |
| Rob Gura | 2 |
| Jamie Preston | 1 |

*Deals Pushed more than 3X*

| Groundhod Day | |
|---|---|
| **Opportunity Name** | **Sum of PushCount** |
| Advanced Interconnections Corp - 130K | 5 |
| Advanced Interconnections Corp - 80K | 4 |
| Red Studio Designs - 60K | 4 |

*Top 10 Most Pushed Deals*

Record Count
Opportunity Owner

- Bill West
- Ricky East
- Wendy West
- Cindy Central
- Rob Gura
- Other
- Ely East
- Ted Data
- Kasey Central
- Tom Reseller

| Stale Opportunities | |
|---|---|
| **Opportunity Owner** | **Record Count** |
| Ted Data | 99 |
| Bill West | 15 |
| Cindy Central | 15 |

**Reality Check**

| Close this month w/o Activity Last 7 | |
|---|---|
| **Opportunity Owner** | **Record Count** |
| Ely East | 2 |
| Cindy Central | 1 |
| Ricky East | 1 |
| Wendy West | 1 |

| Accounts w/o Activity Last 60 | |
|---|---|
| **Account Owner** | **Record Count** |
| Ely East | 4 |
| Ricky East | 4 |
| Wendy West | 4 |
| Bill West | 3 |
| Cindy Central | 3 |
| Kasey Central | 3 |
| Rob Gura | 2 |
| Jonathan Vallejo | 1 |
| Tom Reseller | 1 |
| Vance Channel | 1 |

**Missing Pieces**

| Optys > $10K w/o Next Steps | |
|---|---|
| **Opportunity Owner** | **Record Count** |
| Ely East | 3 |
| Rob Gura | 3 |
| Ricky East | 2 |
| Barry Bronze | 1 |
| Cindy Central | |
| Jamie P | |
| Sean Si | |
| Tom Re | |

| Opportunity Owner | Record Count |
|---|---|
| Ted Data | 82 |
| Ely East | 17 |
| Kasey Central | 15 |
| Cindy Central | 13 |
| Ricky East | 13 |
| Rob Gura | 8 |
| Tom Reseller | 6 |
| Bill West | 4 |
| Barry Bronze | 1 |
| Jamie Preston | 1 |
| Sean Silver | 1 |

**Counters:**
Higher is worse

**Chatter Photos:**
You do not want to see yourself here

**Colors:**
Yellow-Orange-**RED**

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# Underlying Report: Push Counts

- Pre-Work: Add a number field to the opportunity (PushCount), and trigger, to calculate and display the number of "pushes".

  - For our purposes, a "push" means moving the opportunity to a future month

  - Example of this trigger can be found here. Please note EE/UE required

- Report Type: Opportunities

- Standard Filters:

  - **Show**: My Team's Opportunities, **Opportunity Status**: Open

  - **Probability**: All, **Date Field**: Close Date, **Range**: Current and Next FY

- Custom Filter

  - For our purposes, we want count the number of Optys per Rep that have pushed more than 3X (PushCount > 3)

- Fields:

  - Account Name, Opportunity Name, Amount, Close Date, Owner, PushCount, plus whatever other fields you need to display

  - Group by: Opportunity Owner

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# Dashboard Component: Push Counts

- DB Component 1: Too Many Pushes

  - Component Type: Table (Display the Owner and Record Count)

  - Formatting Tab: Sort Rows by Value Descending

  - Set the conditional highlighting to yellow, orange and red, with breakpoints of 1 and 5 (higher count = more red)

  - On the dashboard properties, set header to "Too Many Pushes" and footer to "Deals pushed more than 3X"

# Dashboard Component: Push Counts

- DB Component 2: Groundhog Day
    - Underlying Report is similar to the Too Many Pushes by Rep report
        - Same fields and filters
        - However, group by Opportunity Name and Sum the PushCount
        - Add a Bar Chart, showing optys vs. Push Counts
    - Component Type: Table (Display Opty Name and Sum of PushCount)
    - Formatting Tab:
        - Sort Rows by Value Descending
        - Same conditional highlighting as the "Too Many Pushes" component
        - Maximum Values Displayed: 10
    - On the dashboard properties, set header to "Groundhog Day" and footer to "Top 10 Most Pushed Deals"



| Groundhod Day | |
|---|---|
| **Opportunity Name** | **Sum of PushCount** |
| Advanced Interconnections Corp - 130K | 5 |
| Advanced Interconnections Corp - 80K | 4 |
| Red Studio Designs - 60K | 4 |
| *Top 10 Most Pushed Deals* | |

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# Underlying Report: Stuck Opportunities

- Underlying Report is similar to the Too Many Pushes by Rep report

  - Standard Filters:

    - Show: My Team's Opportunities, Opportunity Status: Open

    - Probability: All, Date Field: Close Date, Range: Current and Next FY

  - Custom Filter: **Stage Duration** greater than **60**



- Group by Opportunity Owner Add a Pie Chart; **Values**: Record Count, **Wedges**: Opportunity Owner

- Formatting tab: Show Labels, Show Values and Enable Hovers

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# Dashboard Component: Stuck In Stage

- DB Component 3: Opty Stuck in Stage > 60 days

  - Add the report to your dashboard

  - Select the option to "Use chart as defined in source report"

  - On the dashboard properties, set
    header to "Opty Stuck in Stage > 60 days"
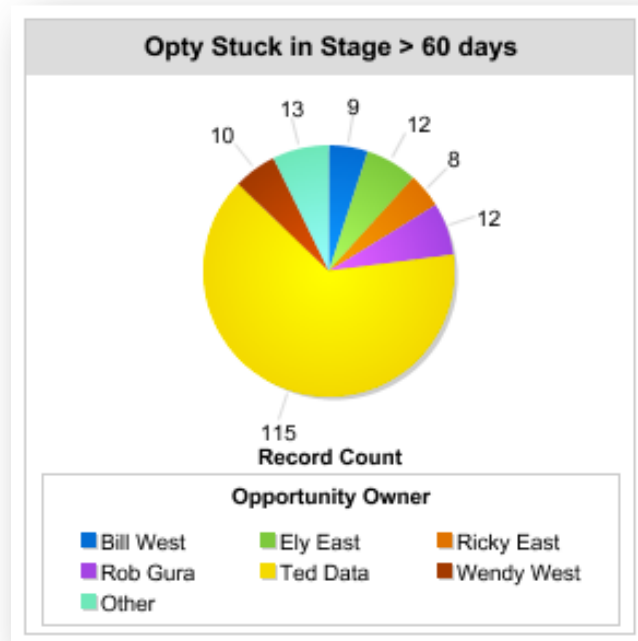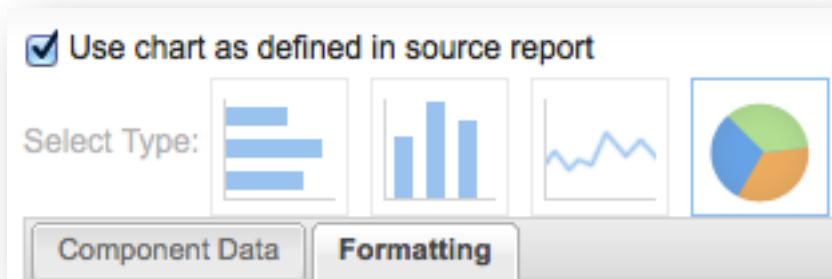
# Dashboard Component: Stale Opportunities

- DB Component 4: Stale Opportunities

  - Underlying Report is similar to the Stuck Opportunities report

    - Same fields, Filter: **Age** greater than **180**

  - Component Type: Table (Display Owner and Record Count)

  - Formatting Tab:

    - Sort Rows by Value Descending

    - Conditional Highlighting: Yellow/Orange/Red w/ 5 and 10 as breakpoints

  - On the dashboard properties, set header to "Stale Opportunities" and footer to "Age > 180 Days"

| Stale Opportunities | |
| --- | --- |
| **Opportunity Owner** | **Record Count** |
| Ted Data | 99 |
| Bill West | 15 |
| Cindy Central | 15 |
| Ely East | 14 |
| Rob Gura | 13 |
| Wendy West | 13 |
| Kasey Central | 12 |
| Ricky East | 12 |
| Tom Reseller | 7 |
| Barry Bronze | 1 |

Age > 180 Days

# Dashboard Component: Reality Check

- DB Component 5: Close This Month w/o Recent Activity

  - Underlying Report is similar to the Stuck Opportunities report

    - Same fields, Filters:

      - **Close Date** Range **This Month**

      - **Last Activity** less than **LAST 7 DAYS**

  - Component Type: Table (Display Owner and Record Count)

  - Formatting Tab:

    - Sort Rows by Value Descending

    - Conditional Highlighting: Yellow/Orange/Red w/ 3 and 5 as breakpoints

  - On the dashboard properties, set title to "Reality Check" and header to "Close This Month w/o Activity Last 7"



**Close this month w/o Activity Last 7**

| Opportunity Owner | Record Count |
|---|---|
| Ely East | 2 |
| Cindy Central | 1 |
| Ricky East | 1 |
| Wendy West | 1 |

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# Dashboard Component: Reality Check

- DB Component 6: Accounts with no Activity L60D
  - Underlying Report based on Accounts
  - Fields: Account Name, Owner, Last Activity
  - Filter: **Last Activity** < **LAST 60 DAYS**
  - Group By: Account Owner
  - Component Type: Table (Display Owner and Record Count)
  - Formatting Tab:
    - Sort Rows by Value Descending
    - Conditional Highlighting: Yellow/Orange/Red w/ 3 and 5 as breakpoints
  - On the dashboard properties, set header to "Accounts w/o Activity Last 60"



**Account w/o Activity Last 60**

| Account Owner | Record Count |
|---|---|
| Ely East | 4 |
| Ricky East | 4 |
| Wendy West | 4 |
| Bill West | 3 |
| Cindy Central | 3 |
| Kasey Central | 3 |
| Rob Gura | 2 |
| Jonathan Vallejo | 1 |
| Tom Reseller | 1 |
| Vance Channel | 1 |

# Dashboard Component: Missing Pieces

- DB Component 7: Big Deals missing Next Steps

  - Underlying Report is similar to the Stuck Opportunities report

    - Same fields, Filters:

      - **Close Date** Range **Current and Next FY**

      - **Amount** greater than **10,000**

      - **Next Steps** equals **""**

  - Component Type: Table (Display Owner and Record Count)

  - Formatting Tab:

    - Sort Rows by Value Descending

    - Conditional Highlighting: Yellow/Orange/Red w/ 3 and 5 as breakpoints

  - On the dashboard properties, set title to "Missing Pieces" header to "Big Deals missing Next Steps"



Opps >$10K without "Next Steps"

| Opportunity Owner | Record Count |
| --- | --- |
| Aaron Stine | 2 |
| Brent Franks | 2 |
| Nick Quattlebaum | 2 |
| Curtis Lee | 1 |
| Keith Dlott | 1 |

# Dashboard Component: Missing Pieces

- DB Component 8: Big Deals missing Competitor

  - Underlying Report is similar to the Stuck Opportunities report

    - Same fields, Filters:

      - **Close Date** Range **Current and Next FY**

      - **Amount** greater than **10,000**

      - **Competitor** equals **""**

  - Component Type: Table (Display Owner and Record Count)

  - Formatting Tab:

    - Sort Rows by Value Descending

    - Conditional Highlighting: Yellow/Orange/Red w/ 3 and 5 as breakpoints

  - On the dashboard properties, set title to "Missing Pieces" header to "Big Deals missing Competitor"

| Opps >$10K without "Next Steps" | |
| --- | --- |
| **Opportunity Owner** | **Record Count** |
| Aaron Stine | 2 |
| Brent Franks | 2 |
| Nick Quattlebaum | 2 |
| Curtis Lee | 1 |
| Keith Dlott | 1 |

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# Additional Customizations

- Depending on your org's customizations, you may want to detail additional "missing pieces"

  - Missing pieces might be any field that is not (technically) required, yet represents a significant data point

- Depending on the size and number of users in your org, you may need to adjust the scope of the reports

  - From "All Opportunities"

  - To "My Team's Opportunities"
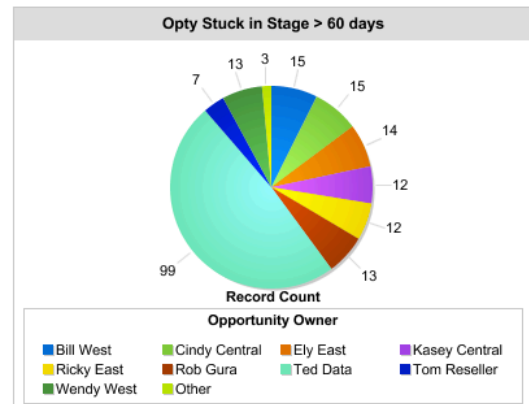
# Putting it all together

## Stuck & Stale

### Too Many Pushes

| Opportunity Owner | Record Count |
|---|---|
| Rob Gura | 2 |
| Jamie Preston | 1 |

*Deals Pushed more than 3X*

### Groundhod Day

| Opportunity Name | Sum of PushCount |
|---|---|
| Advanced Interconnections Corp - 130K | 5 |
| Advanced Interconnections Corp - 80K | 4 |
| Red Studio Designs - 60K | 4 |

*Top 10 Most Pushed Deals*

### Opty Stuck in Stage > 60 days



Record Count — Opportunity Owner: Bill West, Cindy Central, Ely East, Kasey Central, Ricky East, Rob Gura, Ted Data, Tom Reseller, Wendy West, Other

### Stale Opportunities

| Opportunity Owner | Record Count |
|---|---|
| Ted Data | 99 |
| Bill West | 15 |
| Cindy Central | 15 |

## Reality Check

### Close this month w/o Activity Last 7

| Opportunity Owner | Record Count |
|---|---|
| Ely East | 2 |
| Cindy Central | 1 |
| Ricky East | 1 |
| Wendy West | 1 |

### Accounts w/o Activity Last 60

| Account Owner | Record Count |
|---|---|
| Ely East | 4 |
| Ricky East | 4 |
| Wendy West | 4 |
| Bill West | 3 |
| Cindy Central | 3 |
| Kasey Central | 3 |
| Rob Gura | 2 |
| Jonathan Vallejo | 1 |
| Tom Reseller | 1 |
| Vance Channel | 1 |

## Missing Pieces

### Optys > $10K w/o Next Steps

| Opportunity Owner | Record Count |
|---|---|
| Ely East | 3 |
| Rob Gura | 3 |
| Ricky East | 2 |
| Barry Bronze | 1 |
| Cindy Central | 1 |
| Jamie Preston | 1 |
| Sean Silver | 1 |
| Tom Reseller | 1 |

### Optys > $10K w/o Competitor

| Opportunity Owner | Record Count |
|---|---|
| Ted Data | 82 |
| Ely East | 17 |
| Kasey Central | 15 |
| Cindy Central | 13 |
| Ricky East | 13 |
| Rob Gura | 8 |
| Tom Reseller | 6 |
| Bill West | 4 |
| Barry Bronze | 1 |
| Jamie Preston | 1 |
| Sean Silver | 1 |

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# Thank You