Opportunity Accountability Customization Guide

With the Opportunity Accountability dashboard your sales team will be able to stay on top of every deal. This dashboard was modeled after a 4 month sales cycle. You may want to edit it to more closely reflect your sales cycle. Also, this dashboard leverages the Opportunity Push Counter application from the AppExchange. If you've already installed this application, you will need to uninstall it. In addition, the Opportunity Accountability dashboard includes two custom fields: competitor(s) and push counter. If you already have these fields in your account, you will need to rename them before you can install this application.

Setting Up the Opportunity Accountability Dashboard:

Included in the package are two custom fields: competitor(s) and push counter. To add the fields,

1. Navigate to the administration set-up in the upper right- hand corner.
2. Go to App Setup l Customize l Opportunities l Page Layouts
3. Edit the appropriate page layout
4. Find the competitor(s) and push counter fields, and drag and drop them onto the page.

How To Use The Dashboard:

Sales Managers (and Reps) should use this dashboard to help adoption and pinpoint problem areas so the right people are focused. Following are brief descriptions of each section:

- **I Think We Need To Talk –** When deals are continually pushed out, there are still dollars in the pipeline, which could potentially inflate the pipeline and then fall out. These reports help you track which deals have been pushed out more than three times and which deals have the most pushes.
- **Stuck And Stale** – Stuck opportunities are ones that have been in the same stage for 60 days. These opportunities are at risk of not closing on time as they have been in the same stage for half of the sale cycle. Again, depending on the length of your sales cycle, you may want to change the time. Stale opportunities are ones that are 180 days old or 60 days over the 4 month sales cycle. These could represent opportunities that are not really qualified or opportunities that may have fallen through the cracks.
- **Are These Really Closing On Time?** – A typical sales cycle at salesforce.com is about 4 months. We created these reports to look at deals that are half-way (60 days) from closing to make sure everyone is on top of their deals. At Salesforce, it takes a lot of hand holding to get deals closed on time. Opportunities that are closing in 60 days and haven't had an activity in 60 days are likely not to close on time.

- **Territory Coverage** – At Salesforce, we always hear Reps complaining about their territory or asking for a better one. Under the territory coverage section, you can see which Reps haven't reached out to their accounts in the last 60 days. So when a rep comes to you asking for a better territory, you have the data to see whether or not they're actively working their territory.

- Missing Information – At Salesforce, we've learned that tracking additional information on opportunities is helpful in understanding how qualified a deal really is and the likelihood of it closing on time. Next steps is a field salesforce.com Sales Reps use to summarize the next steps of an opportunity. Salesforce.com Sales Managers use this field to guide discussion during meetings. You can also include a date stamp field for the next steps field so you can be sure that it is always up-to-date. These reports are intended to highlight deals that might be missing valuable information and serve as a data quality check-point. Also note that for the component titled "Opps w/out a Decision Maker," the report will return contact roles on the opportunity that are not equal to Decision Maker, Economic Decision Maker and Executive Sponsor. If there are multiple contacts but none are identified as the roles listed above, the report will list the opportunity multiple times.

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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