

Salesforce | Embed of Einstein Analytics Dashboards



PROBLEM STATEMENT

Salesforce requested to embed EA Dashboards within lightning for their Customer Success Group For Reps.

Salesforce requested the ability to see their customers at a 360 degrees view, including sales + service + early warning system insights, each with 5 KPI's and a total of 17 Objects and 11 datasets. We also needed to be able to drill into each of these KPIs.

Salesforce wanted to allow executives to view their whole customer base with these KPIs.

SOLUTION

Search Discovery standardized reports + methodology and defined data manipulation criteria across the business. Then we created 11 datasets and 7 dashboards as well as a lightning embed page.

We created an overview dashboard for the executive view with 3 children dashboards to drill into insight categories. We made an additional 3 dashboards to embed within lightning for a Company Object record (parent to Account). These dashboards allowed Reps to quickly visualize how each KPI for that Company trended over time by any dimension or filter subset.

BUSINESS IMPACT

The Salesforce Executive Team is now able to see their business as a whole and define trends across all of their KPI's on one page.

They are able to then drill into any Region, Country, Industry and many other features.

The Salesforce Reps are able to increase their knowledge of any Company at any time to understand the history of an account very quickly and make more effective decisions for supporting and selling to their customers.

