

## Sales Performance Management

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In the latest breakthrough from the IBM Cognos Innovation Center for Performance Management, the IBM Cognos Sales Performance Management Blueprint for salesforce.com will accelerate sales performance management. In this demonstration you will see how the blueprint, which integrates with salesforce.com, can help you view and monitor your sales performance.

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IBM Cognos performance blueprints help companies align corporate objectives with operating plans so they can operate more profitably and efficiently. Performance blueprints are pre-defined data, process and policy models developed to help you improve planning, budgeting, forecasting and analysis.

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Conditions in the marketplace can change on a dime. The ability to perform analysis on sales data in real time is critical in order to get the best results from potential adjustments. Importantly, performing sales analysis without specialized tools makes for a slow and cumbersome exercise, crunching numbers and relying on outdated data. The result is that any adjustments made will have a much lower probability of success.

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To support the sales planning and forecasting processes sales organizations need full visibility of historical sales data and real-time pipeline. The Sales Performance Management for salesforce.com blueprint is the tool that gives them this ability from day one. It uses sales performance management to link sales and marketing data from salesforce.com with key metrics and best practices to simplify sales performance analysis.

Sales performance management is an integrated framework that enables organizations to plan and model sales and strategies, and ensure timely execution of sales initiatives while ensuring that both floor line sales people and decision makers have visibility into performance.

The blueprint is a sales analytics dashboard application that includes the different perspectives necessary to meet performance visibility requirements. It provides salesforce.com customer relationship management clients with the vision of how IBM Cognos software can help them evolve their simple sales force automation solution to a sales performance management system. Using this system they can plan and model effectively while continuously monitoring their business and use actionable intelligence to make necessary adjustments.

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The key component of this blueprint is the performance analytics dashboard, a multiple page dashboard with pre-built report content. It addresses the key metrics and

perspectives in sales analysis by providing a multi-dimensional view of the organization's pipeline; trending and multi-dimensional analysis of historical revenue; a comparison of forecast data from salesforce.com and goals data coming from external data sources.

Another component is a pre-built, extensible, dimensional and relational model mapped to key salesforce.com data elements that can use live or cached data for reporting, and salesforce.com navigation integration.

There are also report objects from the dashboard pages that can be incorporated into salesforce.com navigation.

[demo slide]

Now we will give a brief demonstration of how the Sales Performance for salesforce.com Blueprint can help you gain greater visibility into supply chain performance.

The Sales Performance Management Blueprint provides a simple to use tabbed navigation with access to these portal pages.

The Pipeline dashboard allows for a multi-dimensional view of the organization's pipeline. The key report on this page is the Summary table which provides a high level view of the sales manager's quarterly pipeline by sales stage.

The sub-tabs allow for additional perspectives while keeping a simple navigational scheme.

Parameters allow the user to filter data. Selecting Geography USA updates all objects on the page with the filtered data.

The Revenue dashboard allows for trending and multi-dimensional analysis of the organization's historical revenue. Once again we have filter parameters for all objects in this dashboard page.

This page provides key revenue metrics to the Sales Manager. Overall Revenue by Geography and Quarter; top 5 reports; and revenue trends.

The 'Goals and Forecast Analysis' page highlights the comparison between the forecast data from salesforce.com and data from an external data source. The key report is the main table which provides a comparison of the different forecast metrics to the quarterly goal.

A great feature of this page is the ability to drill down and view forecast data at a lower level. Drilling into the US region we see all of the metrics that contribute to the US region.

The 'Closed to Date and Forecast Analysis' page gives the user the ability to analyze data across several dimensions in either crosstab or bar chart formats. When drilling down the context is maintained across all charts or crosstabs displayed.

Utility Dashboards consists of three sub tabs; 'Report Navigator', which allows users to execute specific report objects; 'Live versus Cached', and Salesforce.com Data Load Status.

The Sales Performance Management for salesforce.com Blueprint provides flexible and powerful model development based on IBM Cognos 8 business intelligence to support the development and execution of the annual sales plan.

It combines salesforce.com data and data from external sources and can be displayed in salesforce.com navigation. The analysis of different salesforce.com objects is multi-dimensional and helps drive organic growth and salesforce.com user adoption.

For a full list of IBM Cognos Performance Blueprints available for other functional areas of your organization, please visit the IBM Cognos Innovation Center at [www.ibm.com/cognos/innovation-center](http://www.ibm.com/cognos/innovation-center).

Thank you for your interest in this blueprint..