



**SENTURUS**

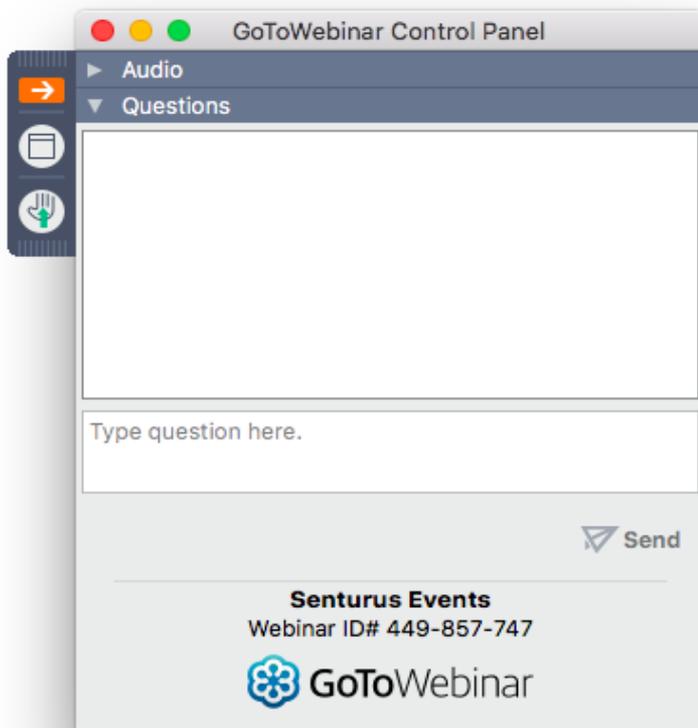
# FINISHING WHAT THEY STARTED

**A Deep Dive into Tableau Dashboard Starters  
for Salesforce**



# GoToWebinar Control Panel

Click arrow to restore full control panel



Submit questions here

# Presentation Slide Deck

[www.senturus.com/resources/](http://www.senturus.com/resources/)

## RESOURCE LIBRARY

Welcome to our extensive, free library of past webinars, demos, whitepapers, presentations and helpful hints. Use the topic boxes to the right to filter through and easily locate content. We are constantly adding new materials, so please check back often to see our latest content. Enjoy!

SEARCH RESOURCES

SORT BY

RESOURCE TITLE	TYPE	GO
CATCH UP ON THE WEEKLY WIND DOWN	 TRAINING	→
IBM SOFTWARE LICENSING: TIPS TO SAFEGUARD YOUR BOTTOM LINE Save Money, Reduce Risk and Maintain Compliance	 BUSINESS STRATEGY	→
REVVING TABLEAU SERVER PERFORMANCE Performance Degradation Causes and Cures	 TIPS & TRICKS	→

# Agenda

---

- Introductions
- Tableau Dashboard Starters overview
- What's missing?
- What is needed to finish?
- Demo: how to make Dashboard Starters work with your Salesforce cloud data
- How to make Dashboard Starters work with a database of Salesforce data
- Beta program invitation
- Senturus overview
- Additional resources
- Q&A

# Introducing...Today's Presenters

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**Greg Herrera**  
President and Co-Founder  
Senturus, Inc.



**Monica Van Loon**  
Solutions Architect  
Senturus, Inc.



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## **TABLEAU'S DASHBOARD STARTERS**

Functional Overview of the Dashboard Starters for Salesforce Data

# Dashboard Starters - Open Pipeline

## Open Pipeline

Ellie Rogers's team

Total Expected Amount

\$12,907,000

Avg. Deal Size

\$16,484

Number of Open Opportunities

783

Avg. Age of Opportunity

223 days

### Use Options Below to Filter

Close Date  
9/25/2017 to 1/9/2018

Created Date of Opportunities  
11/8/2017 to 12/29/2017

Manager  
All

Salesperson  
All

Billing Country  
All

Billing State/Province  
All

Industry  
All

### Stages

- Prospecting
- Qualification
- Needs Analysis
- Value Proposition
- Id. Decision Make..
- Perception Analy
- Proposal/Price Q.
- Negotiation/ Rev
- Negotiation/ Review

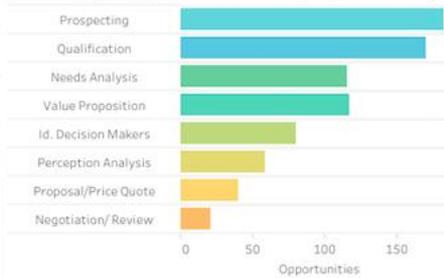
### Overall Opportunities Closing | by Day



### Breakdown by Stage | by Day



### Number of Open Opportunities and Average Days in Each Stage



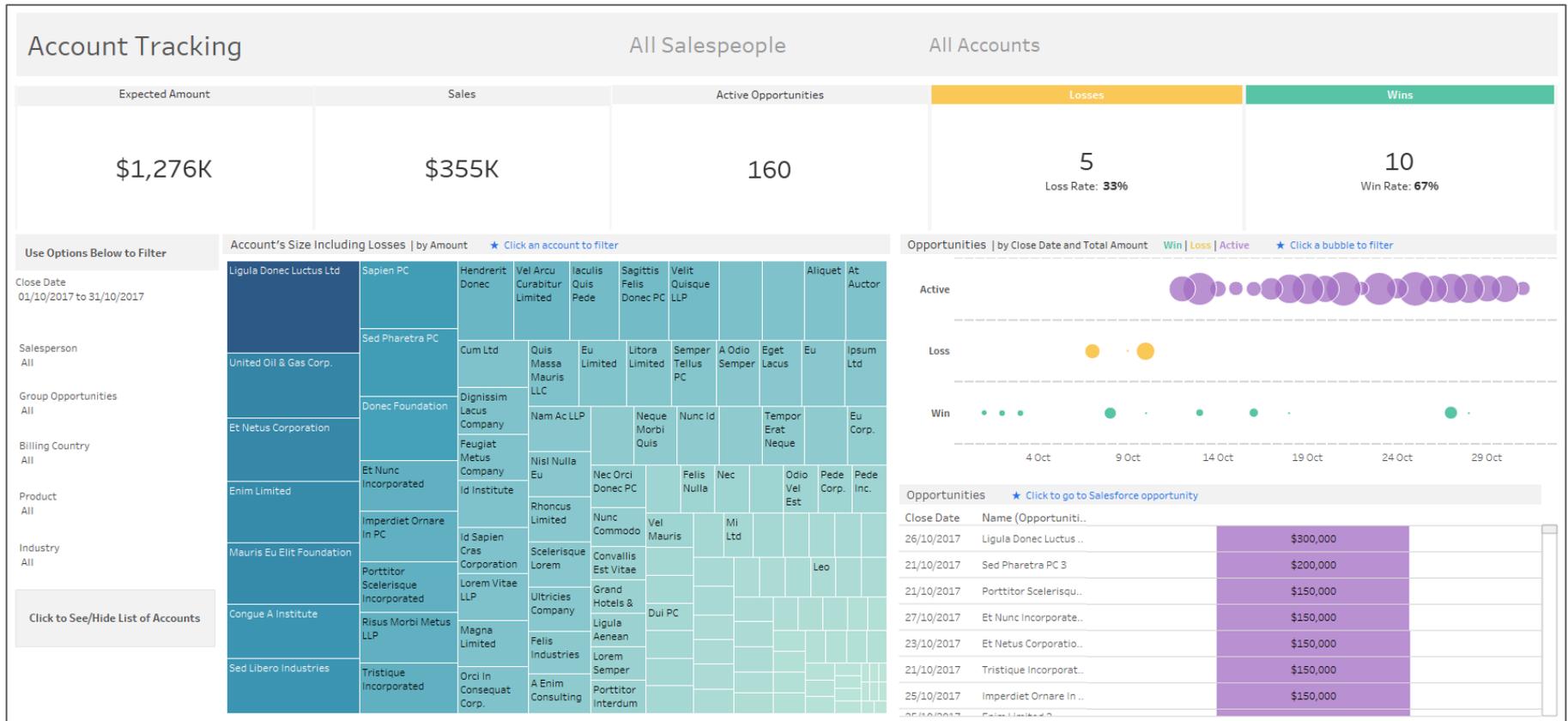
### ★ Click a Stage to Filter



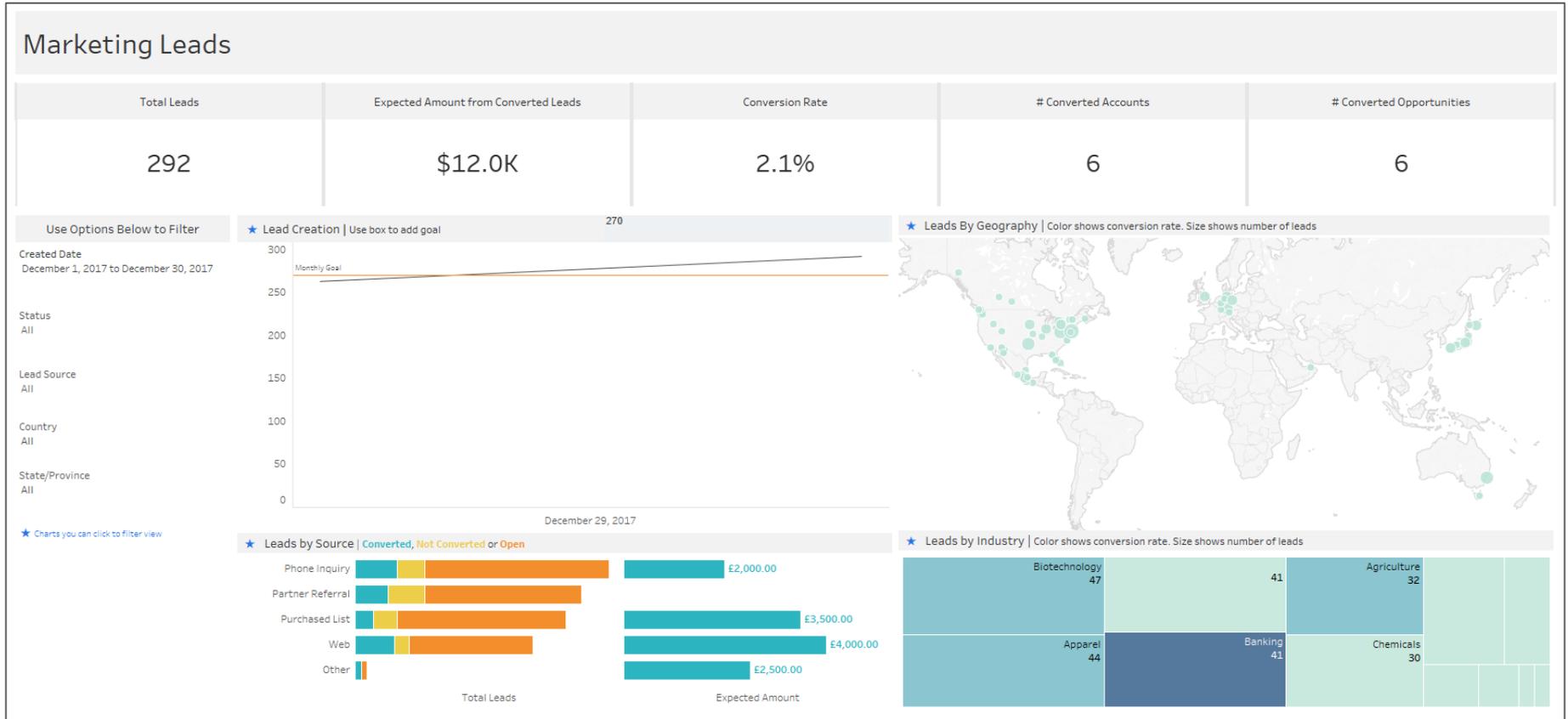
### Top 10 Opportunities | by Expected Amount

Ligula Donec Luctus Ltd 10	\$270,000
Feugiat PC 15	\$240,000
Imperdiet Ornare In PC 10	\$135,000
Interdum Corporation 7	\$135,000
Et Nunc Incorporated 9	\$112,500
Augue Ac Ipsum PC 1	\$112,500
Vitae Aliquam Eros LLC 11	\$108,000
Eu Limited 14	\$105,000
Hendrerit Id Ante Limited 8	\$105,000
Lacus Pede Sagittis Corp. 7	\$90,000

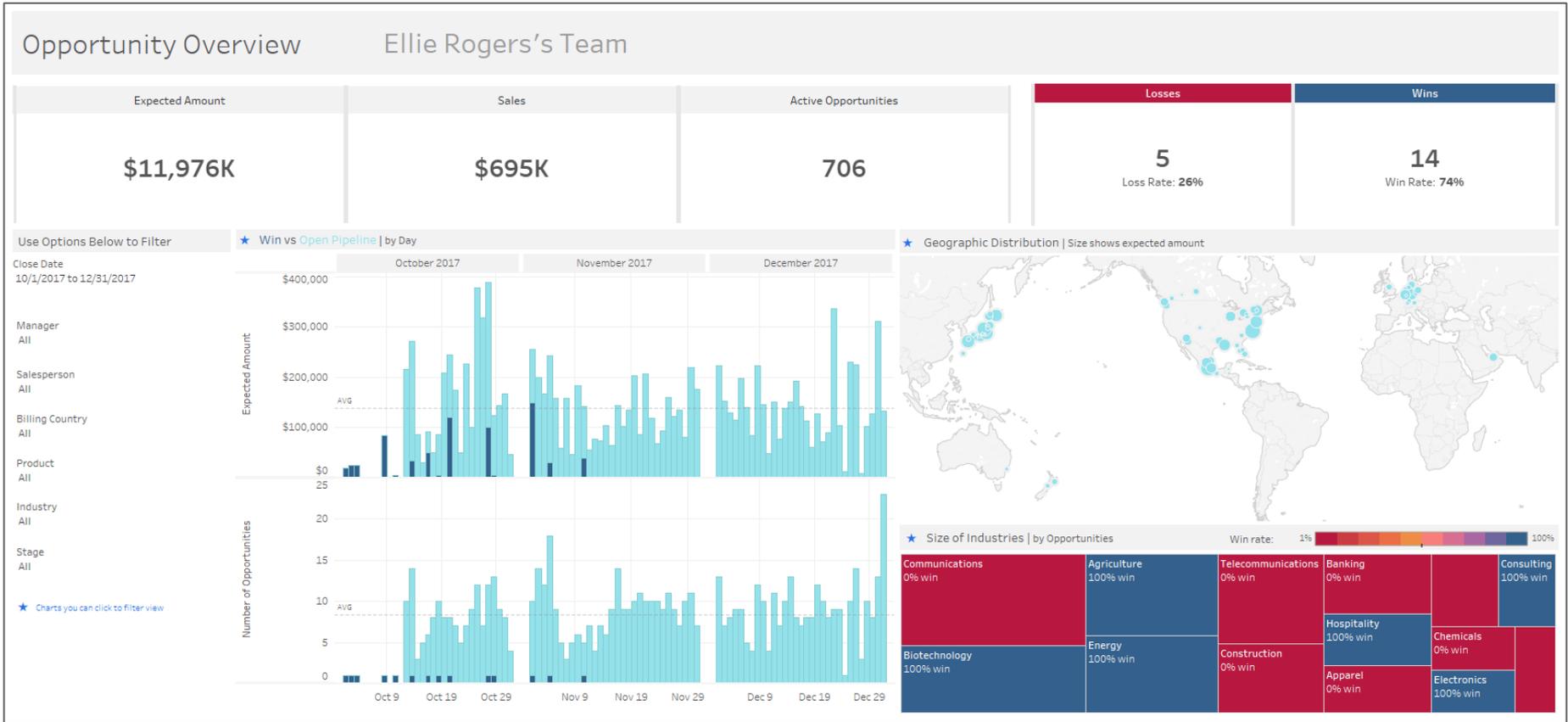
# Dashboard Starters - Account Tracking



# Dashboard Starters - Marketing Leads



# Dashboard Starters - Opportunity Overview



# Dashboard Starters - Quarterly Sales Result

## Quarterly Sales Result

Ellie Rogers's team

Summary of Sales | 10/1/2017 to 12/29/2017 11:31:28 PM

Days Before EOQ	Sales	Open Pipeline	Avg Deal Size	Number of Deals
90	\$535K	\$35,750K	\$44,583	12

Use Options Below to Filter

★ Sales vs Open Pipeline | Amount by Close Date

Close Date  
October 1, 2017 to December 31, 2017  
and Null values

Manager  
All

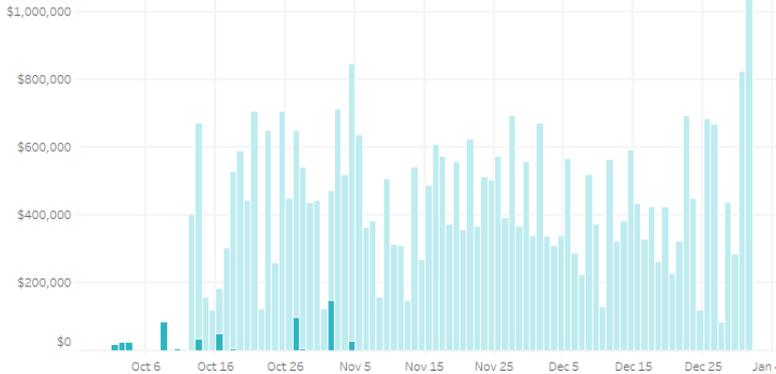
Opportunity Type  
All

Product  
All

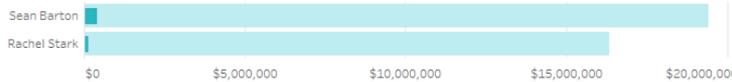
Billing Country  
All

Billing State/Province  
All

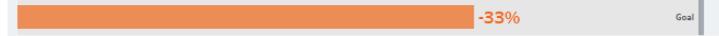
★ Charts you can click to filter view



★ Breakdown by Salespeople Sales vs Open Pipeline

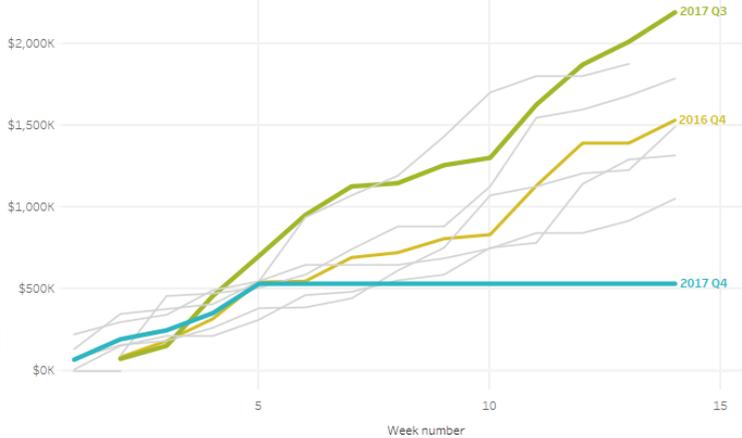


Quarter Goal | Reached vs Not Reached | Define Goal \$800,000

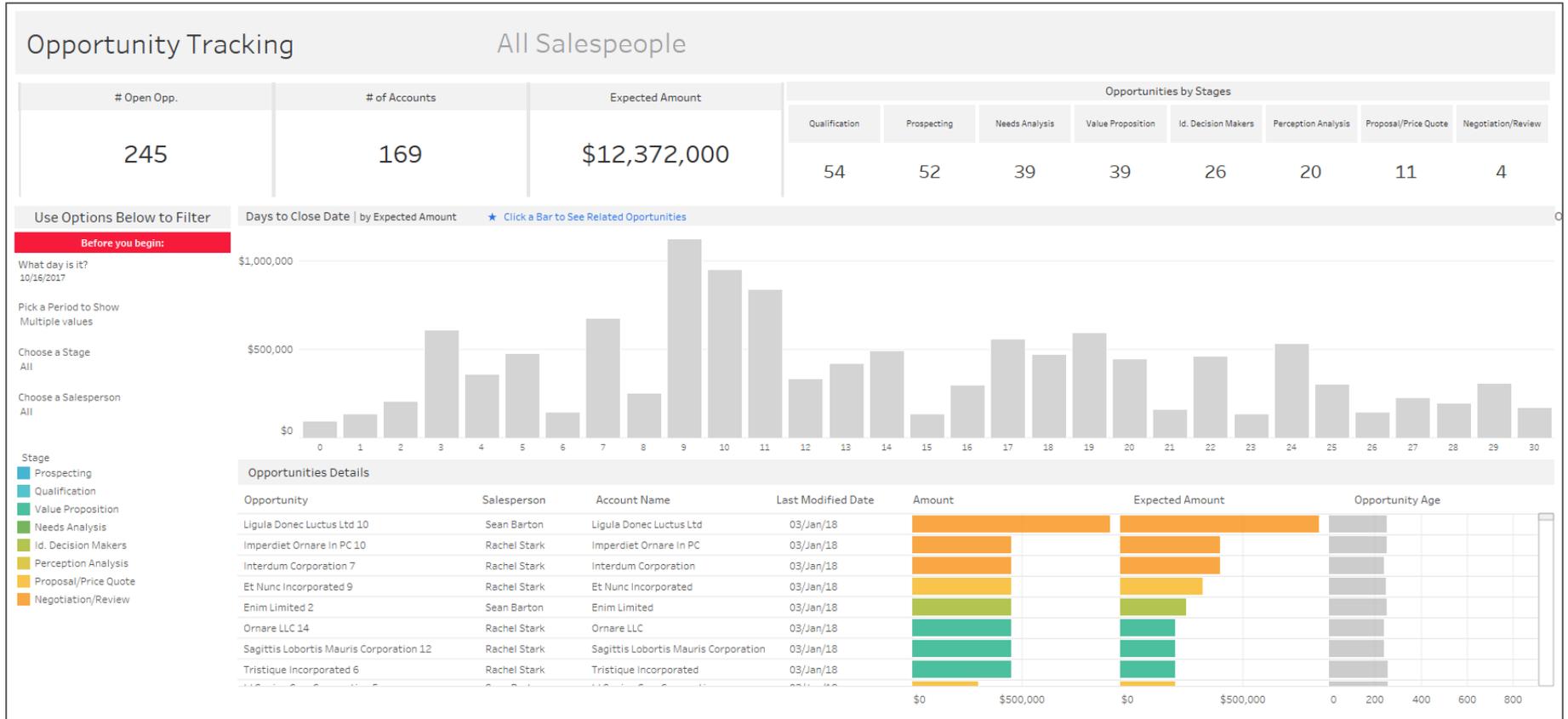


Cumulative Sales - Quarter Comparative

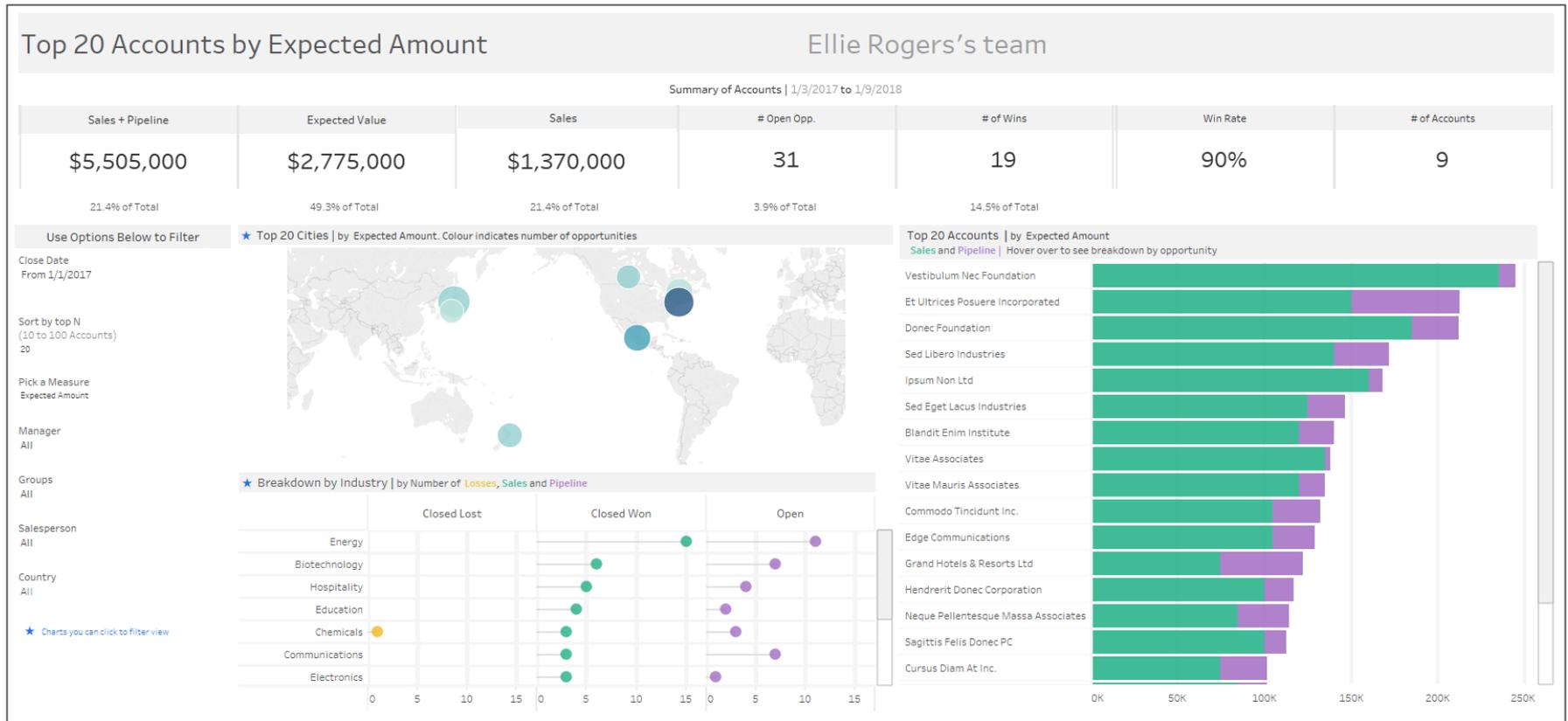
Current quarter | Previous | This Q previous year | Other



# Dashboard Starters - Opportunity Tracking



# Dashboard Starters - Top Accounts





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## **WHAT'S MISSING?**

Revenue Attribution

Sales Bandwidth Optimization

Forecast Accuracy

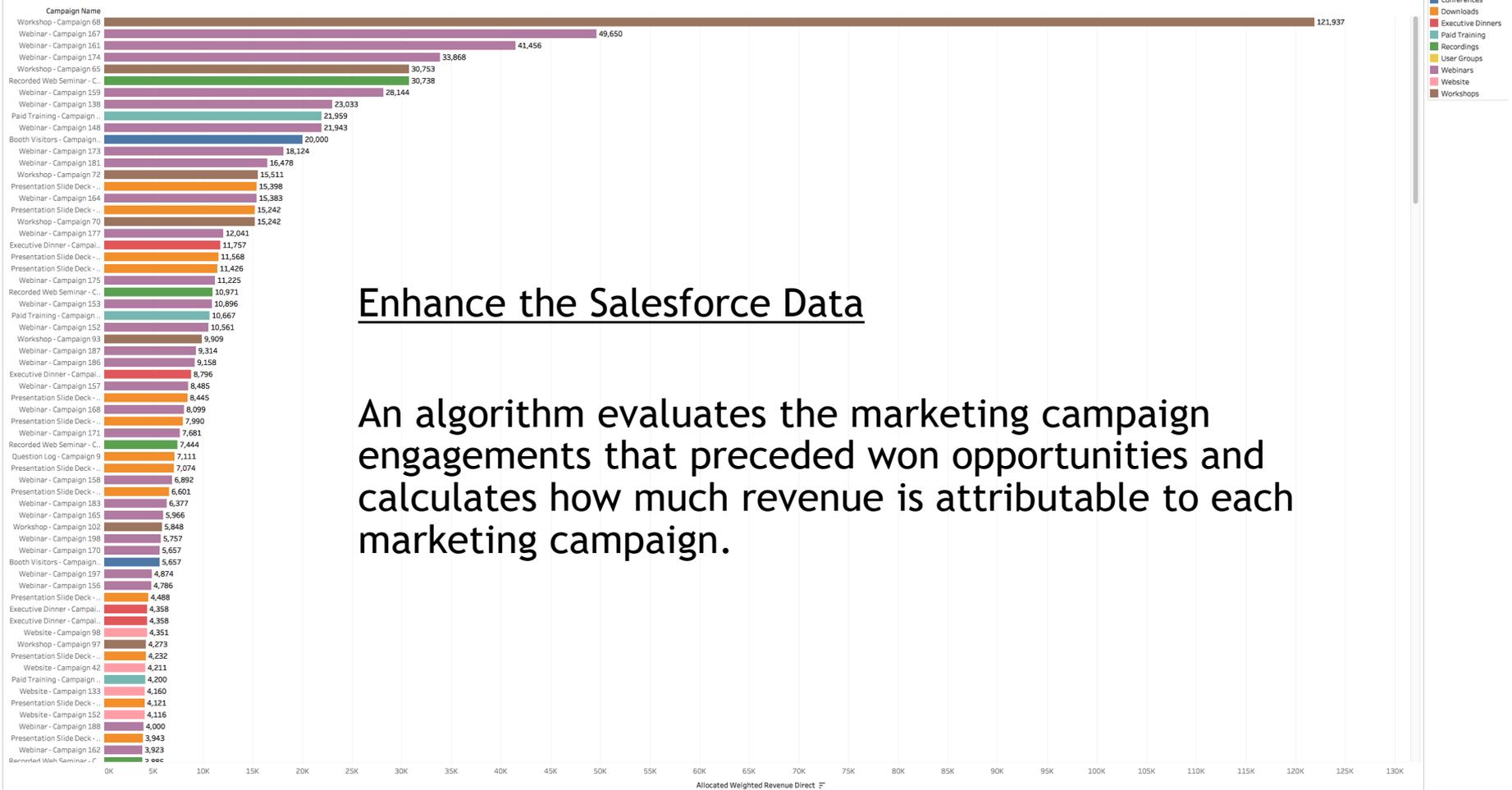
Pipeline Growth

Campaign Effectiveness

More...

# Which Marketing Campaigns are the Best Revenue Drivers?

Revenue per Marketing Campaign

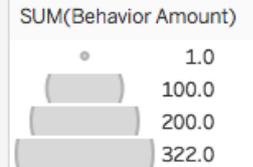


## Enhance the Salesforce Data

An algorithm evaluates the marketing campaign engagements that preceded won opportunities and calculates how much revenue is attributable to each marketing campaign.

# Account Prioritization Based on Behavior

## Account Behavior Last 7 Weeks



# How Much of Our Pipeline Do We Win?

Baseline Snapshot Date  
8/1/2017

Timeframe to Closed W...  
365

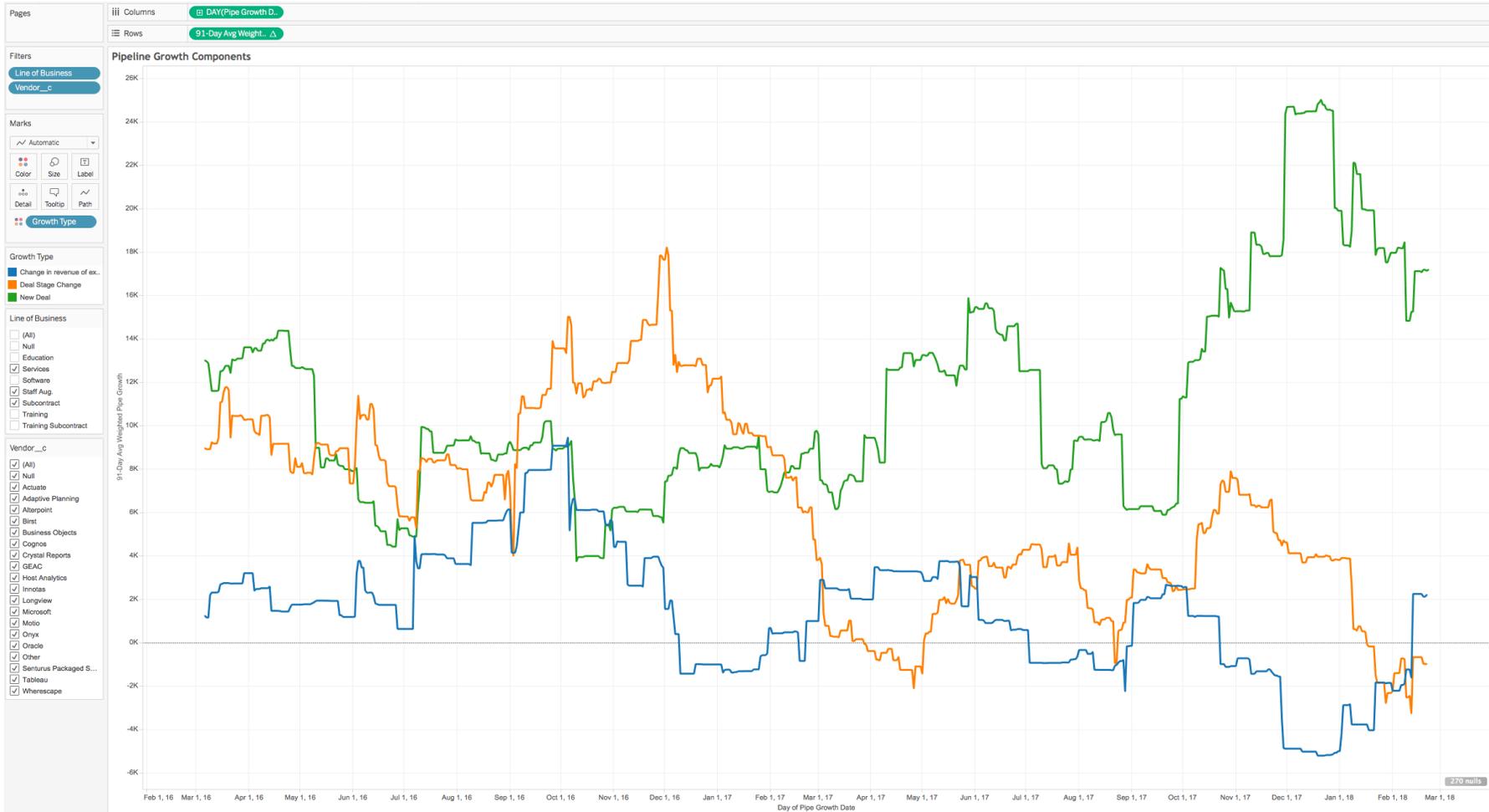
Historical StageName

- (All)
- Closing
- Dead
- Early
- Middle
- New in Tim...
- Qualificati...
- Strong
- Suspect

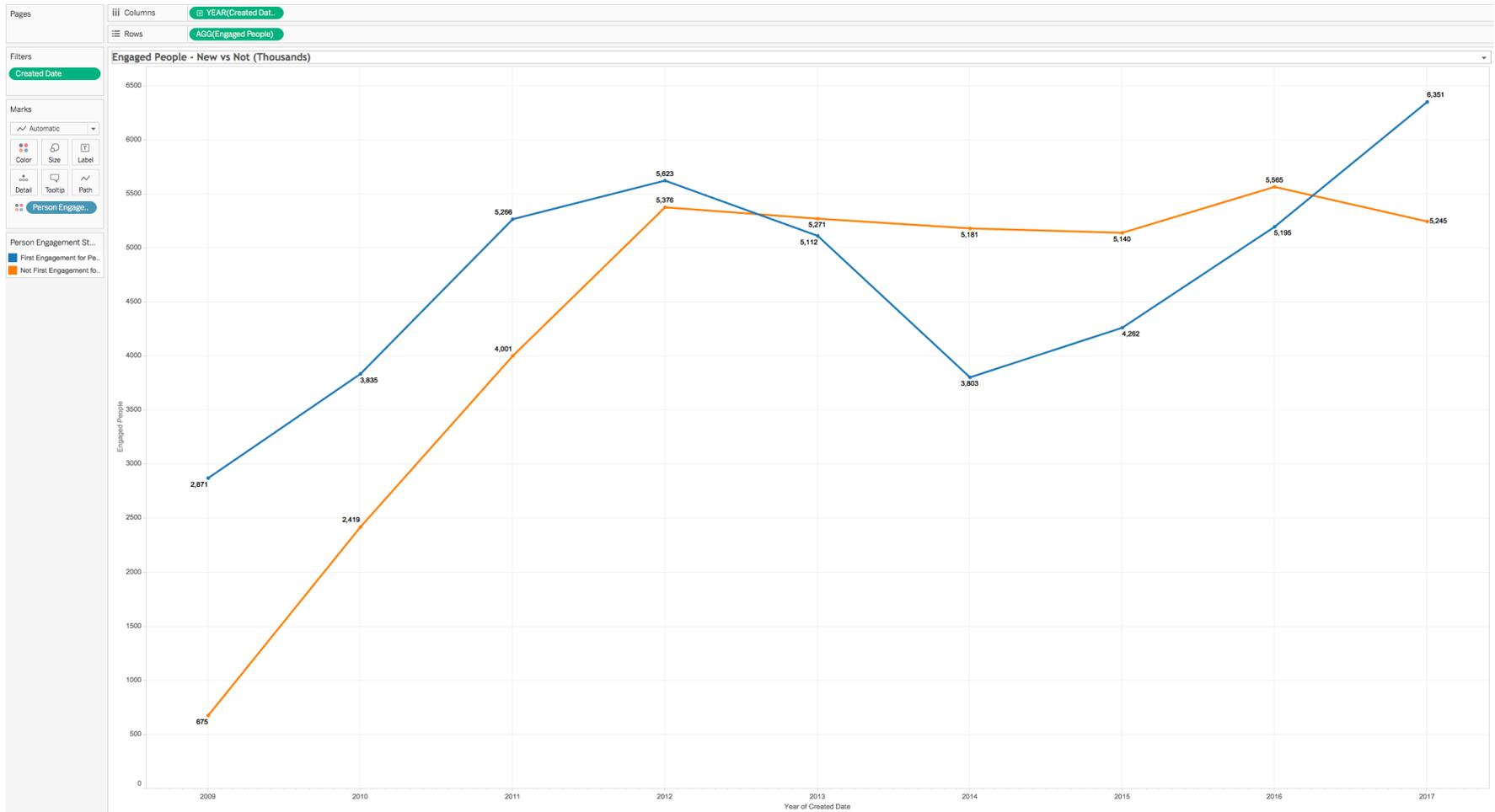
Win Rates within Timeframe : Next 365 days from 8/1/2017 Baseline

Historical StageName	Projected Amount as of Baseline Date	Actual Amount Converted to Won in Timeframe	% Amount Won in Timeframe
Suspect	34,920	0	0%
Qualification	36,000	0	0%
Early	370,231	14,320	4%
Middle	852,467	323,523	38%
Strong	323,276	381,587	118%
Closing	7,600	7,600	100%
<b>Grand Total</b>	<b>1,624,494</b>	<b>727,030</b>	<b>45%</b>

# What's the Trend in Each Component of Pipeline Growth?



# Are We Gaining New Prospects or Recycling?



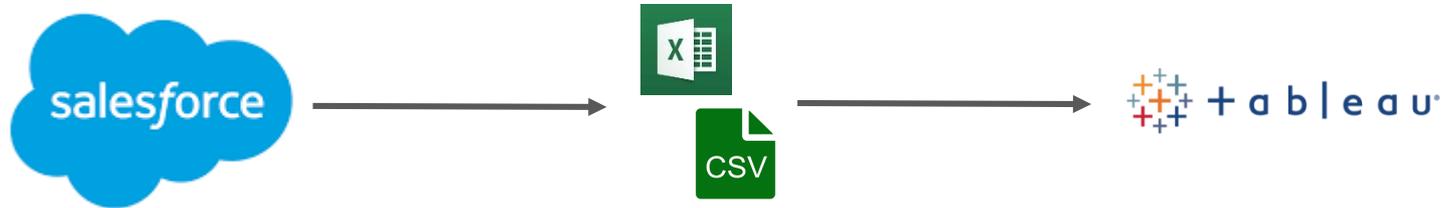


## **TABLEAU AND SALESFORCE OVERVIEW**

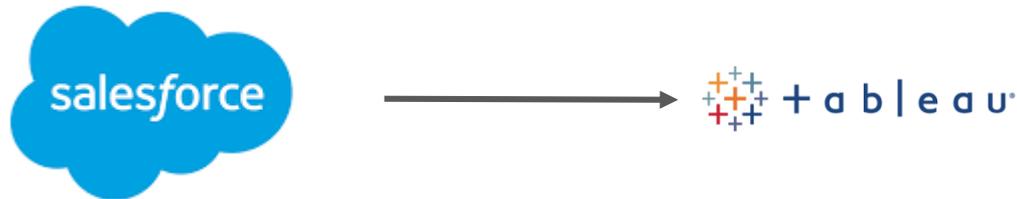
- How to Surface Salesforce Data in Tableau
- Downloading Salesforce Dashboard Starters
- Helpful Information About the Starters

# Methods to Surface Salesforce Data in Tableau

1. Manually extract data from Salesforce into flat files, pull into Tableau



2. Utilize Tableau's direct connections to Salesforce Cloud

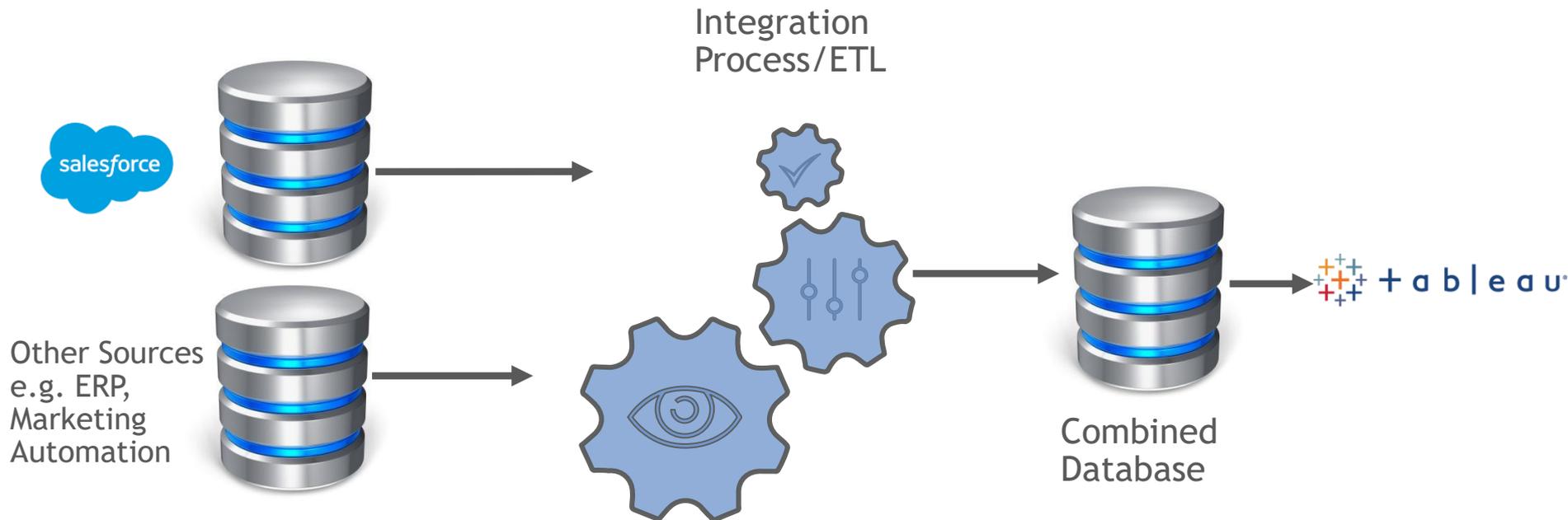


3. Connect Tableau to a replica database of Salesforce data that you control



# Methods to Surface Salesforce Data in Tableau (continued)

## 4. Connect Tableau to an *integrated* database that you control



# Poll

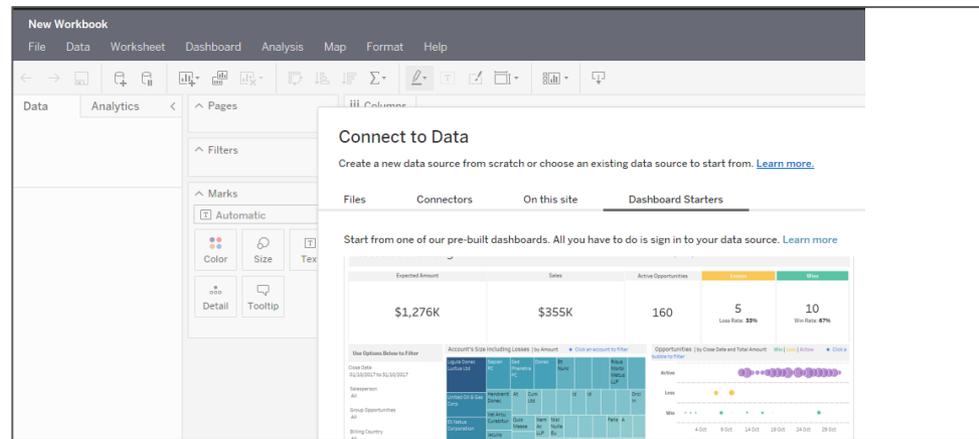
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How are you using Tableau and Salesforce?

- Already using Tableau with a database of Salesforce data
- Using Tableau's Cloud Connector for Salesforce
- Running Excel/CSV reports from Salesforce for use in Tableau
- New to both Tableau and Salesforce
- None of the above

# How to Obtain Dashboard Starters for Salesforce

1. Access Dashboard Starters from Tableau Online when you create a new workbook:



2. Download them from:  
<https://www.tableau.com/products/dashboard-starters-downloads>

*Note: Dashboard Starters on Tableau Online are updated more frequently.*

# Overview - Tableau's Dashboard Starters

## What You Need to Know

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- By default Salesforce Dashboard Starters use Tableau's direct connection to Salesforce cloud.
- Dashboard Starters are available with the Creator license in Tableau Online or you can download them.
- The data is not real-time. Dashboard Starters work off of Tableau extracts.
- You will want to modify the Dashboard Starters to include selections of your custom fields.
- Dashboard Starters can be modified to work with a local replica of your Salesforce database.
  - This is required to address the missing capabilities.



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**DEMO 1:**

**OPEN PIPELINE - DASHBOARD STARTER**

How to Avoid Gotchas and Make It Work  
With Your Salesforce Cloud Data

# Dashboard Starters - Open Pipeline

## Open Pipeline

Ellie Rogers's team

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All

Salesperson  
All

Billing Country  
All

Billing State/Province  
All

Industry  
All

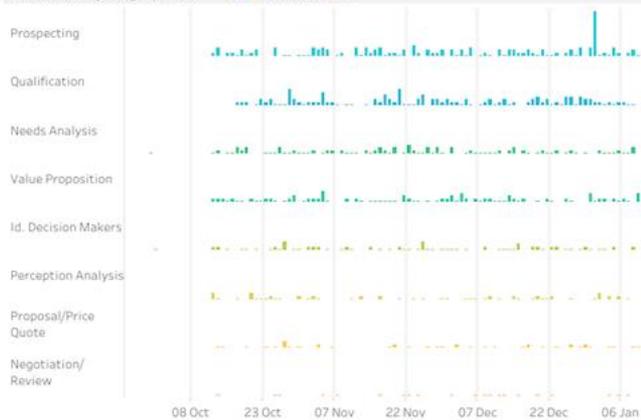
### Stages

- Prospecting
- Qualification
- Needs Analysis
- Value Proposition
- Id. Decision Make..
- Perception Analy
- Proposal/Price Q.
- Negotiation/ Rev

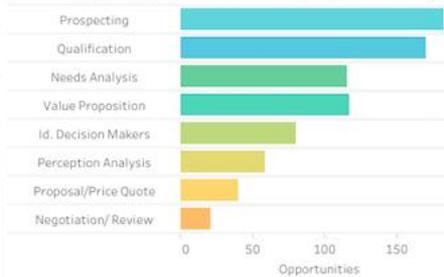
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### Breakdown by Stage | by Day



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Augue Ac Ipsum PC 1	\$112,500
Vitae Aliquam Eros LLC 11	\$108,000
Eu Limited 14	\$105,000
Hendrerit Id Ante Limited 8	\$105,000
Lacus Pede Sagittis Corp. 7	\$90,000



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## **HOW TO GET A SALESFORCE REPORTING DATABASE**

[Sign Up for Our Beta Program](#)

# Filling a Need

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- Many important analytical capabilities are not available when connecting Tableau directly to the Salesforce Cloud
- The primary limitation is that the Salesforce Cloud data is organized to robustly support a CRM application - it is not organized for analytics
- Pulling the Salesforce Cloud data into a reporting database creates the foundation required for robust analytics - specifically an enhanced data model that is analysis-ready
- Senturus has built a solution that includes
  - Pre-built Tableau Dashboards with the Salesforce visibility decision-makers need
  - A tool that replicates Salesforce Cloud data into a reporting database -- and keeps it refreshed
  - Pre-built extensions to the database that optimize the data for robust analytics and decision-making

# Setting up Replication: Step 1 ID for Secure Data

## Analytics Connector for Salesforce

### Organization Information - Step 1 of 3

What is the name of your organization?

What time zone do you want to see your data shown in?

Which version of the Analytics Connector do you want to use?

- Fully Hosted:** Database and integration application are hosted and managed by Senturus.
- On Premises:** Integration Application is installed and managed on a machine your organization supplies. Data is stored in a database your organization creates and maintains.

Next ->

# Setting up Replication: Step 2 - Logon to Salesforce

---

## Analytics Connector for Salesforce

### Salesforce Access - Step 2 of 3

**We need to be granted access to your Salesforce data to import it into a hosted database**

A separate database has been created for your organization. You can destroy this database and all associated backups at any time.

[Connect to Salesforce](#)

# Setting up Replication: Step 3 - Confirm with Salesforce



Allow Access?

Senturus Integration is asking to:

- Access your basic information
- Access and manage your data
- Perform requests on your behalf at any time

Do you want to allow access for  
rooney@senturus.com? (Not you?)

Deny

Allow

To revoke access at any time, go to your personal settings.

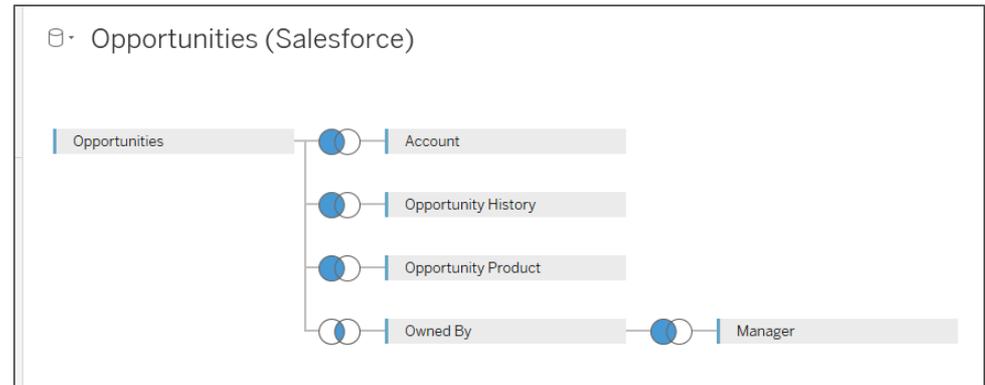


## **OPEN PIPELINE - DASHBOARD STARTER**

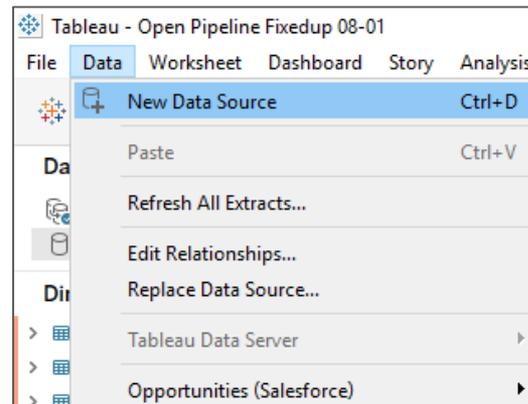
How to Make the Dashboard Starters Work  
with an Integrated Salesforce Reporting  
Database

# Getting Dashboard Starters to Work with a Database (part 1)

1. Create a new Tableau data source using your reporting database (match the joins used in Dashboard Starter)

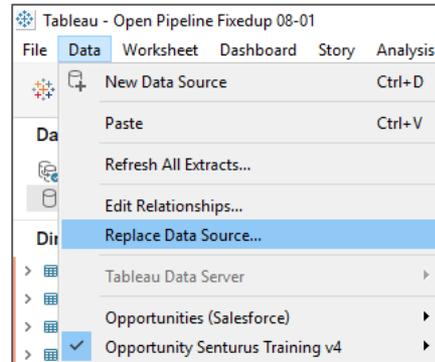


2. Go to Starter - Add that as a New Data Source



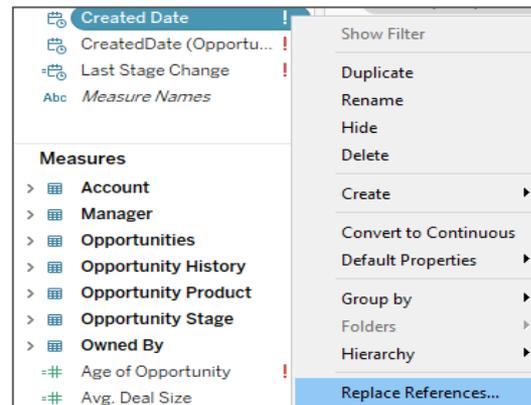
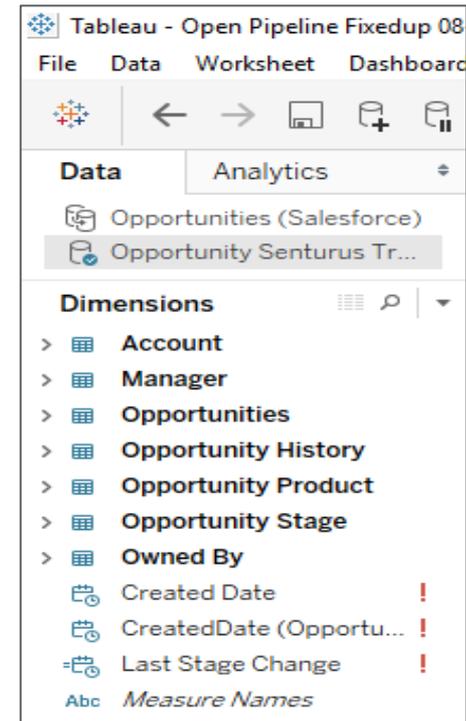
# Getting Dashboard Starters to work with a Database (part 2)

## 3. Replace Data Source

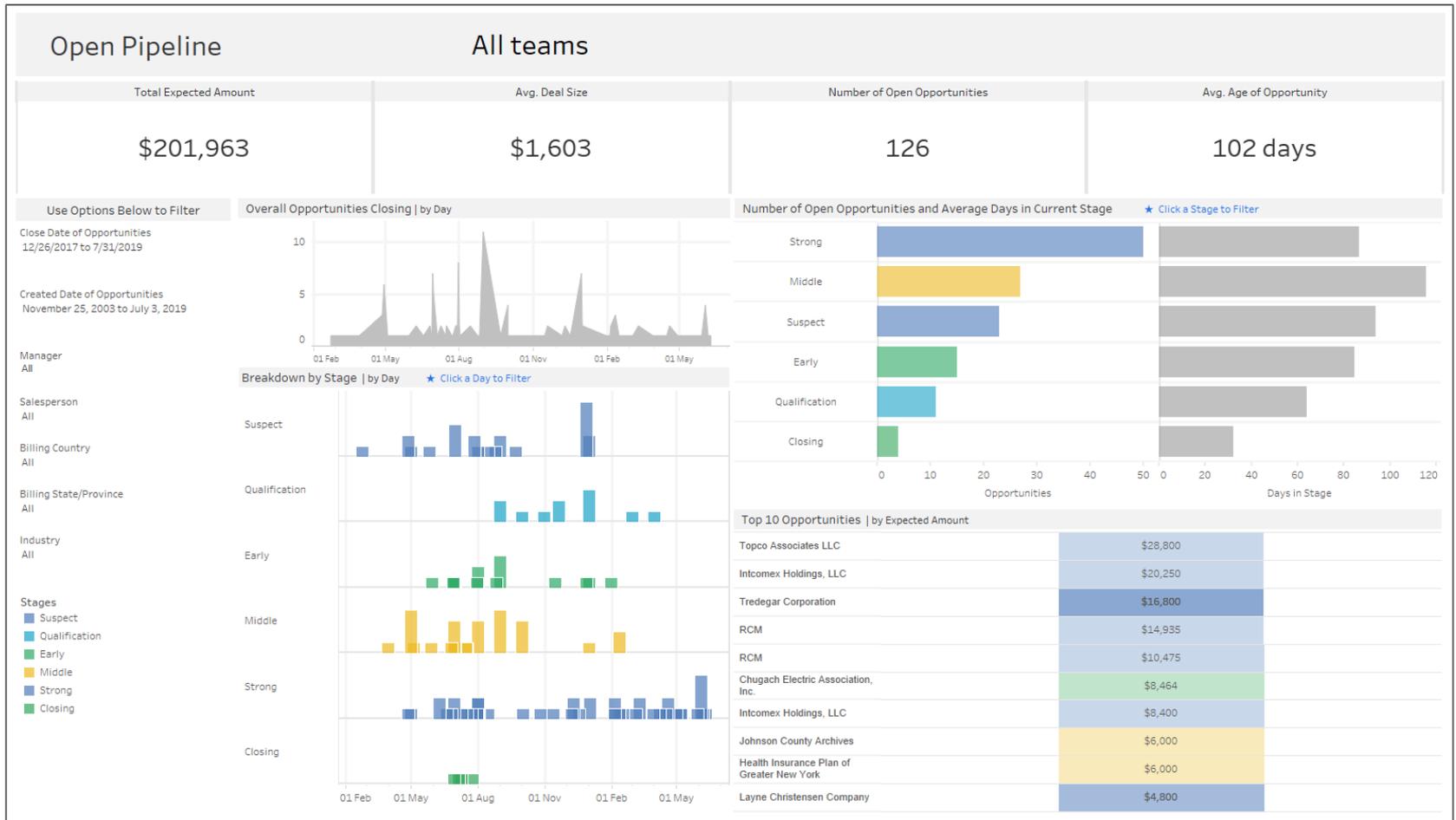


## 4. Look for Dimensions and Measures with a red !

## 5. Right click on red dimensions or measures to replace references to the database field names



# Results



# Tableau Dashboard Starters - Summary

Pros	Cons
1. They provide a great gallery of visualization capabilities on Salesforce data	1. Many Key Performance Indicators (KPI's) are missing
2. Salesforce data is pre-joined which makes it easy to create new worksheets	2. They use Tableau's Salesforce cloud connector technique, which has limitations
3. They use Universal Time Coordinated (UTC) Dates	3. The UTC Dates will not exactly match Salesforce Cloud reports
4. They have embedded calculated fields that are useful and can be reused	4. Performance can be slow, especially when refreshing extracts
5. They use great features like viz in a tooltip, and URL actions to launch Salesforce screens	5. They are limited to snapshots; trend analysis is very limited



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## **SUMMARY**

Bringing It All Together

# Summary

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- Leverage the Tableau Dashboard Starters to quickly build Salesforce visualizations
- Build on their foundation - add your custom fields and groupings where appropriate
- Apply the benefits toward a Salesforce reporting database that delivers crucial functionality not available from just the Salesforce Cloud tables
- Don't stop at just sales and marketing
  - Customer behavior data exists in several systems including order entry and customer support

# Salesforce and Tableau Resources

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- [Use Tableau to Get to the Gold Hidden in Salesforce](#) (webinar recording)
- [Salesforce Dashboard Starters: 18 Lessons Learned](#) (blog)
- [How to Get Around the Extract Limitations in Tableau Dashboard Starters](#) (blog)
- [Embedding Tableau in Salesforce Dashboards](#) (webinar recording)
- [Unlocking Salesforce and Marketo Value with Tableau](#) (webinar recording)
- [Surface Better Insight from Your Sales Pipeline Data](#) (webinar recording)



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**NEXT STEPS**

# 1 - Join Our Enhanced Reporting Beta Program

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- We are looking for beta partners to validate and test our new tool that:
  1. Makes a replica of your Salesforce Cloud database
  2. Enhances the data with the “missing” capabilities such as pipeline growth, conversion rates and marketing analysis
  3. Provides pre-built Tableau Dashboards with the enhanced capabilities that are not possible with the direct data connection to Salesforce Cloud
- Organizations that already have a replica database can install the enhancements-only package. We need enhancements-only beta partners as well.
- Sign up with a note in the chat window or via email ([info@senturus.com](mailto:info@senturus.com)).

## 2 - Embed Tableau Visualizations into Salesforce

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Senturus will install Tableau Sparkler

- Installation of Sparkler on Tomcat Application Server
- Secure Configuration of Sparkler (Tomcat) and Tableau Server
- Configuration of Trusted Tickets Authentication between Tableau Server and Sparkler
- Configuration of Salesforce to use the Sparkler application, included Visualforce pages and Salesforce tabs
- Configuration of included Tableau Dashboard (Accounts Dashboard, Accounts and Opportunities) for use on Tableau Server
- \$4995

**Recorded Webinar: Embedding Tableau in Salesforce Dashboards**

<http://www.senturus.com/resources/embedding-tableau-in-salesforce-dashboards/>



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**WHO WE ARE**

Business Analytics Experts

# Bridging the Gap Between Data & Decision Making



# 1200+ Clients, 2000+ Projects, 17+ Years



SEPHORA



KELLY-MOORE  
PAINTS™



FREMONT BANK



CRC  
HEALTH GROUP



NETGEAR®  
Connect with Innovation™

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Genentech  
A Member of the Roche Group



National  
Semiconductor

KORBEL®  
CALIFORNIA CHAMPAGNE



lisi AEROSPACE



MEYER®



Abbott



BIO-RAD

TriNet  
Ambitions realized™



shutterfly

PENTAIR



# Upcoming Events

[www.senturus.com/events](http://www.senturus.com/events)



## USE POWER BI WITH TRUSTED COGNOS DATA

SENTURUS ANALYTICS CONNECTOR NOW AVAILABLE FOR TABLEAU AND POWER BI

Thursday, September 13, 2018 - 11am PT (2pm ET) - 60 minutes



## THE WEEKLY WIND DOWN

OUR TRAINERS SHARE THEIR FAVORITE TIPS

Every Friday - 11 am - 30 minutes



## TABLEAU LIKE A PRO IN HALF A DAY

FREE BEGINNER WORKSHOP IN PALO ALTO, CA

Wednesday, August 29, 2018 - 8:30am-12:30pm - 4hrs



## USING TABLEAU TO VISUALIZE SALESFORCE DATA

FREE, DASHBOARD-IN-A-DAY WORKSHOP IN PALO ALTO, CA

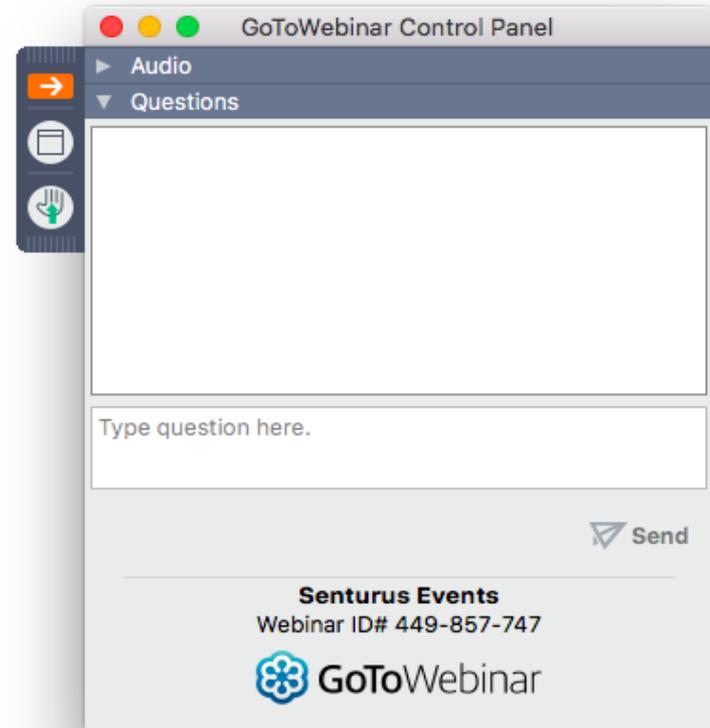
Wednesday, August 29, 2018 - 1:00pm - 4:30pm - 3.5 hours

# Q&A

If your question or issue is broader than what can be answered today, contact us at

[info@senturus.com](mailto:info@senturus.com)

and we will set up a free consultation.



# Thank You!

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Greg Herrera  
Monica Van Loon

[www.senturus.com](http://www.senturus.com)

888 601 6010



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