# informatica

# How to Unlock the Power of Salesforce Analytics Cloud

What to look for in a cloud integration solution
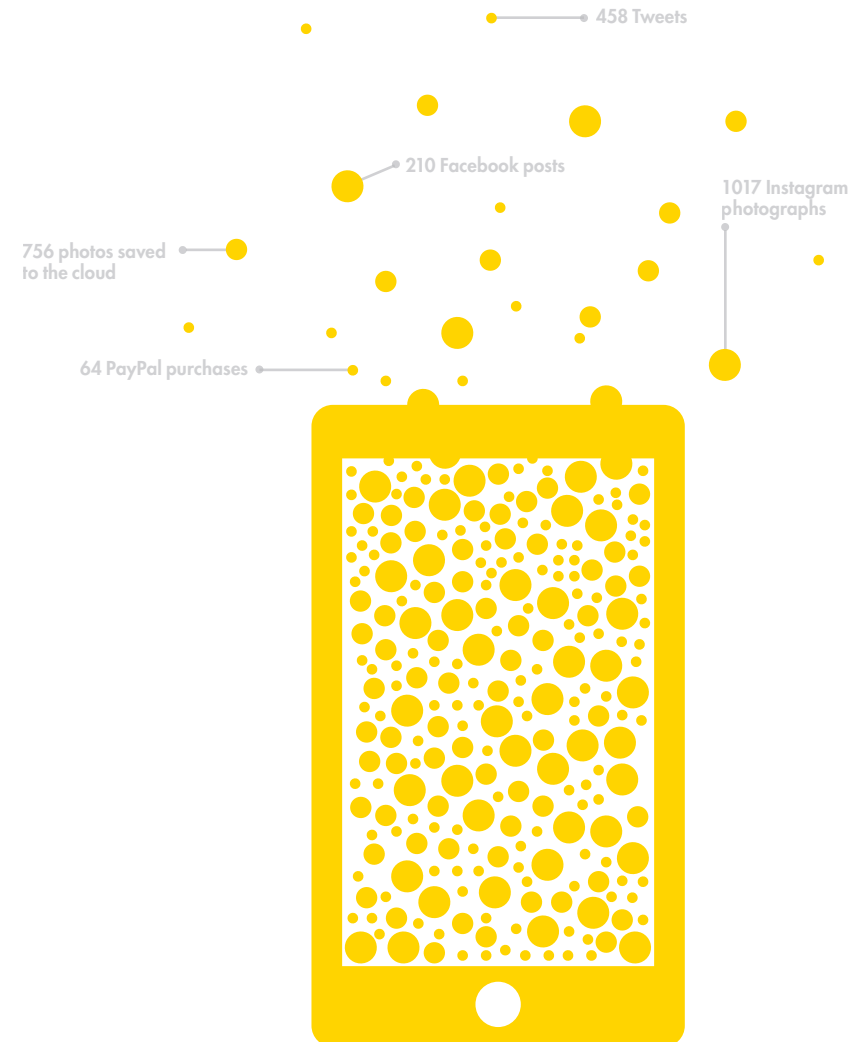to get the most from your customer analytics

# Introduction

We live in an era in which data is overflowing from every device and application with which we interact. This data tsunami presents a significant opportunity for ambitious enterprises. After all, when virtually every one of our customers' interactions is captured as a data point, we can learn more than ever before about our customers.

To truly understand customer motivations and desires, companies need to measure and analyze these interaction data points by correlating, aggregating, and synthesizing data from numerous systems, including back-office applications, databases, and cloud applications.

Traditional business intelligence (BI) applications take time to configure and consist of a complex user interface that is hard to navigate for regular line-of-business users.

These traditional BI solutions impede business users' attempts to gain more insights from their SaaS applications, which are increasingly becoming the systems of record for mission-critical business data.

458 Tweets

210 Facebook posts

1017 Instagram photographs

756 photos saved to the cloud

64 PayPal purchases

# Introduction

Cloud analytics applications such as Salesforce Analytics Cloud make it easier for business users to access and analyze data points.

**These applications are generally used in scenarios such as:**

**Creating a 360-degree view of a customer** to understand purchase preferences, demographics, and market segments like never before.

**Measuring customer satisfaction accurately** to identify the top candidates for an upsell, as well as customers most at risk for churning.

**Gaining visibility into sales performance metrics** to identify the key causal factors that slow the sales pipeline.

**Using a central Salesforce org** as the master hub in multi-org scenarios.

But integrating Salesforce Analytics Cloud with back-end systems that store product and customer transaction data requires the right cloud integration solution.

In this eBook, we'll outline four keys to unlocking the power of Salesforce Analytics Cloud and what to look for in a cloud integration solution to get the most from your analytics efforts.
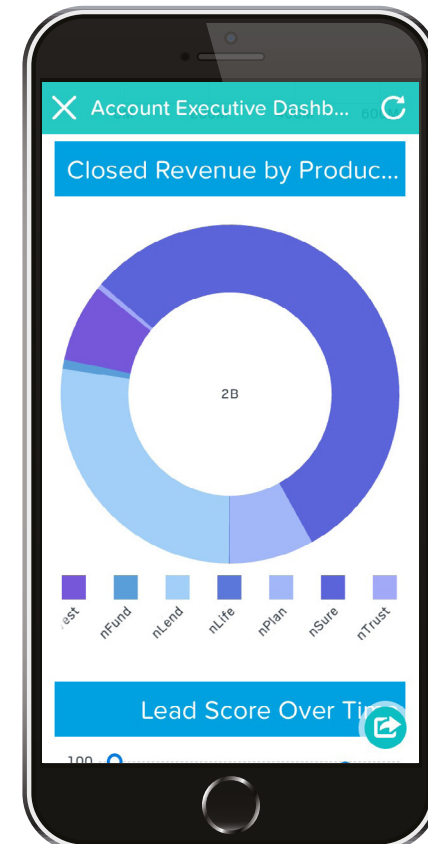
# Using Salesforce Analytics Cloud

# Using Salesforce Analytics Cloud

Salesforce Analytics Cloud is a mobile-first app that enables users to learn more about their data through dynamic visualizations. Users can measure, group, filter, view, and share insights easily, and with its self-service capabilities, business users can quickly build comprehensive reports. And because Salesforce Analytics Cloud is designed for use across mobile devices, users can easily gain insights from their data on the go.

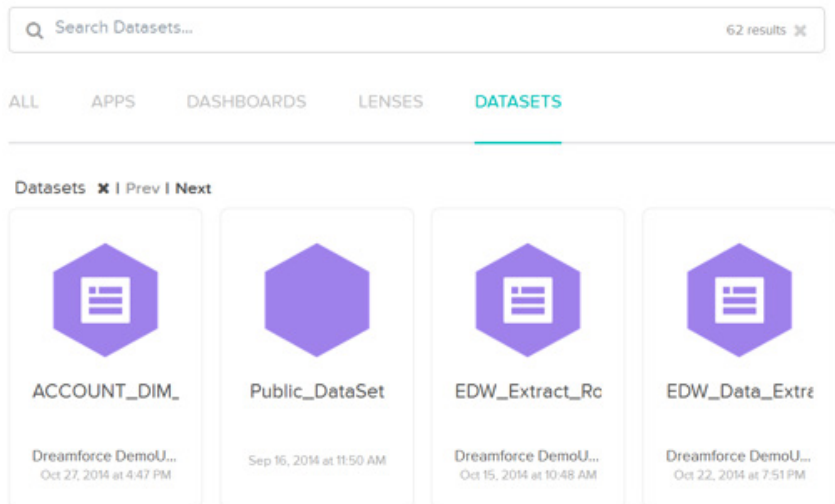# Storing and visualizing data



Fig.1: Datasets are high-performance data stores that use massively parallel processing capabilities to ingest and parse data at great speeds. Once all the required data is in a Dataset, Salesforce Analytics Cloud's Wave technology uses a high-speed, search-based query index to navigate through this data.
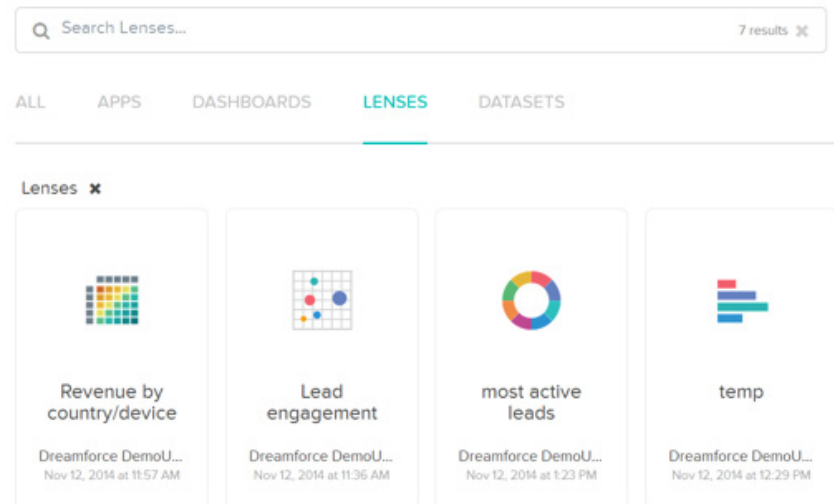
Fig.2: Lenses are interactive tools with a dynamic visualization engine that helps users gain insights across multiple dimensions and helps users learn as they go.

# Creating a 360-degree view of a customer

# Creating a 360-degree view of a customer

For many business users, the first step toward building Salesforce Analytics Cloud capabilities is to obtain a 360-degree view of the customer. Accomplishing this requires access to master data information contained in back-office ERP systems. These ERP systems contain massive volumes of data ranging from prices to transactions and order histories. Companies may have different business units use different ERP systems.

For instance, the ERP systems located at corporate headquarters may run on SAP or Oracle E-Business, while other business units or subsidiaries may have turned to a SaaS ERP solution such as NetSuite.

These ERP systems contain master identification numbers for every product SKU and its associated list price and cost, every customer account and its subsidiaries, as well as every product ever sold to each customer.

This data around customer purchase history, demographics, relationships, and preferences gives companies the ability to gain great insights into their most profitable and loyal customers, as well as identify trends for new market segments they can pursue.

ID NO: 10234856778

Buying segment

Address

Reviews

Purchase history

Wish list

Relationship

Age

Gender
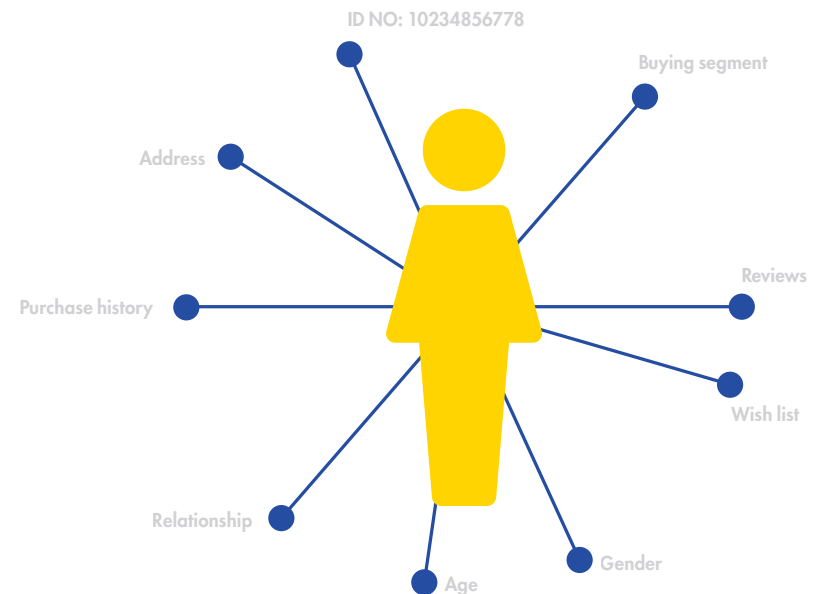
# If you want a complete view of your customer, look for a cloud integration solution that:

- Features robust batch processing capabilities.

- Features advanced mapping functionality for aggregations, joins, and other transformations.

- Includes native connectivity to SAP, Oracle E-Business, NetSuite, and other ERP systems.

# Measuring customer satisfaction accurately

2/5

66%
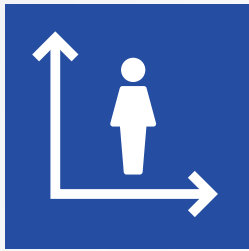
79%

# Measuring customer satisfaction accurately

Companies with large enterprise customers have a lot of opportunity to upsell into their existing customer base. However, doing so requires a metrics-driven approach that measures customer satisfaction accurately so sales reps can better prioritize which customers to target for new opportunities.

Measuring customer satisfaction is also important in creating an early warning system that notifies the customer success team of potentially unhappy customers, especially those that fall into the enterprise segment.

Creating Lenses in Salesforce Analytics Cloud to view customer satisfaction scores and customer engagement metrics would be quite challenging due to the variety of formats of this data, as well as the complex calculations needed to come up with the scores.

Product usage data may be stored in multiple data warehouses such as Teradata, Netezza, and Oracle, while customer support information may be kept in Salesforce's Service Cloud.

Business analysts typically only need to analyze a subset of this data, but extracting the data they need can be complex and time-consuming, especially from data warehouses.

Salesforce Analytics Cloud Datasets prove useful for storing these data subsets so business analysts can use the self-service data discovery, exploration, and visualization capabilities of Lenses.

TERADATA

NETEZZA

ORACLE

SALESFORCE SERVICE CLOUD
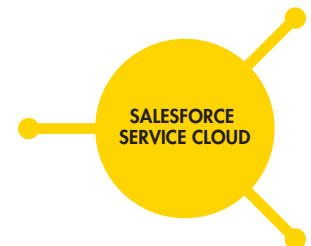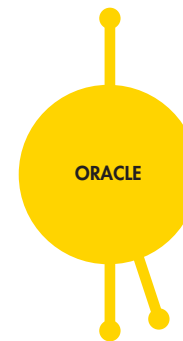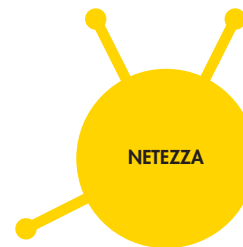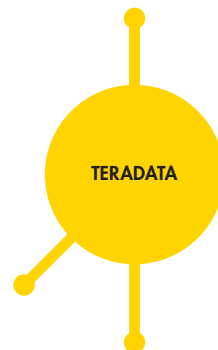
# If you have one or more data warehouses in your company and you need to measure customer satisfaction accurately, then look for a cloud integration solution that:

- Features robust batch processing capabilities to quickly move data into Salesforce Analytics Cloud Datasets.

- Can easily aggregate product usage data from data warehouses and customer support data from Service Cloud and put only relevant information into a Dataset to minimize processing times.

- Features advanced mapping functionality for aggregations, joins, and other transformations.

# Gaining visibility into sales performance metrics
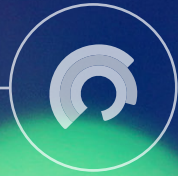
# Gaining visibility into sales performance metrics

Gaining visibility into sales performance metrics requires conducting advanced analysis of data contained within Salesforce's Sales Cloud. Many sales departments within companies specifically have their own IT staff comprising business analysts, who spend much of their time trying to get data prepared for analysis. They make significant requests of IT resources to join, aggregate, and enrich data, thereby delaying the creation of dashboards for sales leadership.

Days outstanding for opportunities, average deal closing time, percentage of deals lost, sales stages with the most issues, average upsell amount, and number of touches needed to close are all complex metrics.

Business analysts need to calculate these metrics and put the results into Salesforce Analytics Cloud for consumption. Only after those calculations are in Salesforce Analytics Cloud can the process of creating dashboards for stakeholders to visualize the different sales performance metrics actually begin.

Because of the many data preparation steps required, business analysts need to analyze a sample of the data to create initial prototypes of the reports and dashboards.

This step helps ensure that the business is involved upfront in how the data will appear in the Salesforce Analytics dashboards.

**Average Deal Size by Rep (Territory A)**
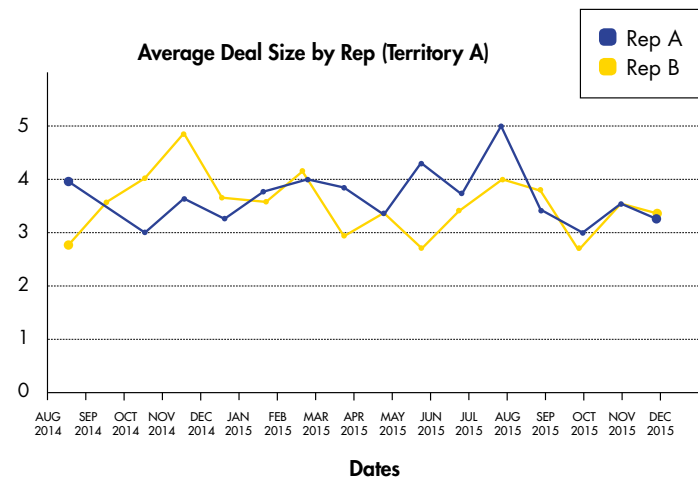
● Rep A
● Rep B

# If your company requires you to provide detailed metrics on sales performance, you need a cloud integration and data preparation solution that:

- Allows you to perform trial runs of different views such as wins and losses to see if the results look correct.

- Features advanced mapping functionality for aggregations, joins, and other transformations.

- Standardizes and validates data quickly.

# Multi-org analytics in Salesforce

Many businesses have multiple instances of Salesforce existing each in their own right. For instance, different product teams or business units may choose to maintain these siloed instances to cater to their own unique business processes or buyer. With this kind of infrastructure, obtaining a 360-degree view of a customer becomes quite difficult.

There are different approaches to managing multiple orgs but the approach most conducive to performing analytics is to use one of the Salesforce instances as a global reporting hub and use the Analytics Cloud app within that instance.

This approach gives companies a single customer view of all their interactions across multiple Salesforce orgs, thereby allowing them to maximize customer lifetime value.

The global reporting hub approach makes it necessary to periodically upload data from other Salesforce instances into one global org. With this approach, the global org acts as a master hub for all the customer data. With data from multiple orgs, dashboards and lenses will always be working with the most current version of the truth.

# If your company has multiple Salesforce orgs and needs to use Salesforce Analytics Cloud, make sure you have a cloud data management solution that:

○ Enables you to reference the data via a lookup so that the dashboards in the primary org always have fresh data.

○ Allows you have an hierarchal view of all your Salesforce orgs across the company.

○ Have up-to-date data for all your departmental dashboards.

# Next steps

Don't miss out on the power of Salesforce Analytics Cloud. The Informatica Cloud Trial allows you to quickly and reliably import data into Salesforce Wave Analytics from on-premise enterprise systems or other cloud applications. Leverage the power of this award-winning platform free for 30 days and explore the newest frontier in cloud analytics.