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MParDreamin' 2022

Salesforce Reporting for Marketing Admins: How to Get Started

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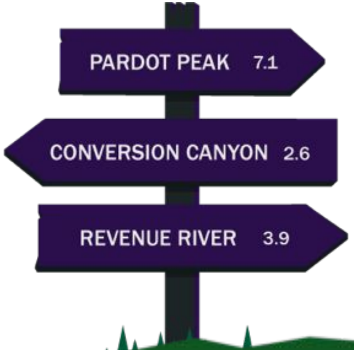

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Session Goal

In this session we will walk through quick reporting basics you can use to empower marketing and sales teams to follow up with prospects and measure performance at the same time.

We will cover:

- Reports
- Dashboards
- List Views

Agenda

1. Salesforce Data & Relationships Basics
2. Reports & Dashboards 101
3. List Views
4. Demos & Resources

Data and Relationships

It’s the data model for me 💁‍♀️

A data model is a way that data is stored in a table or database, so that it is logical and easy to understand.

The entire Excel sheet is the **Object**

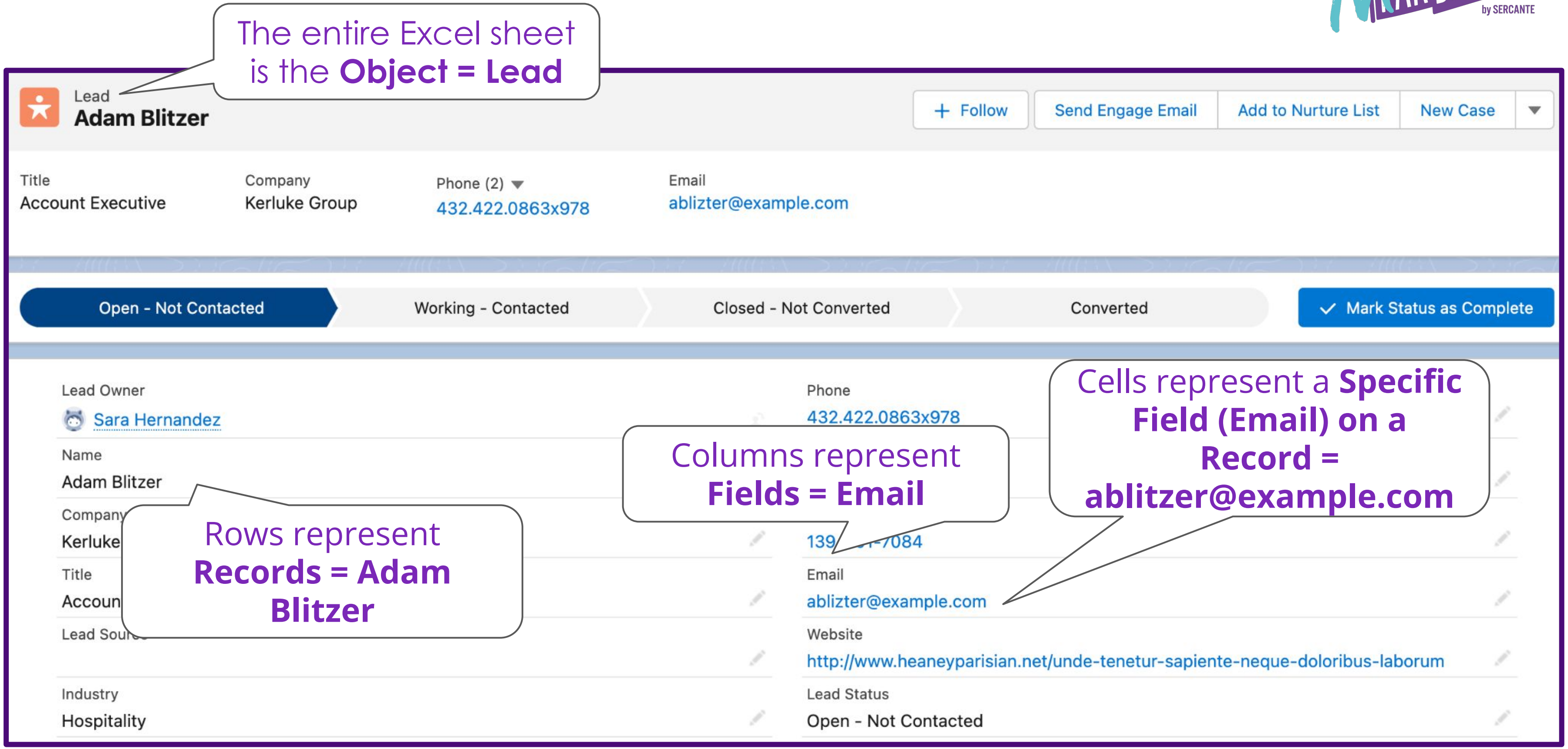
Columns represent **Fields**

Rows represent **Records**

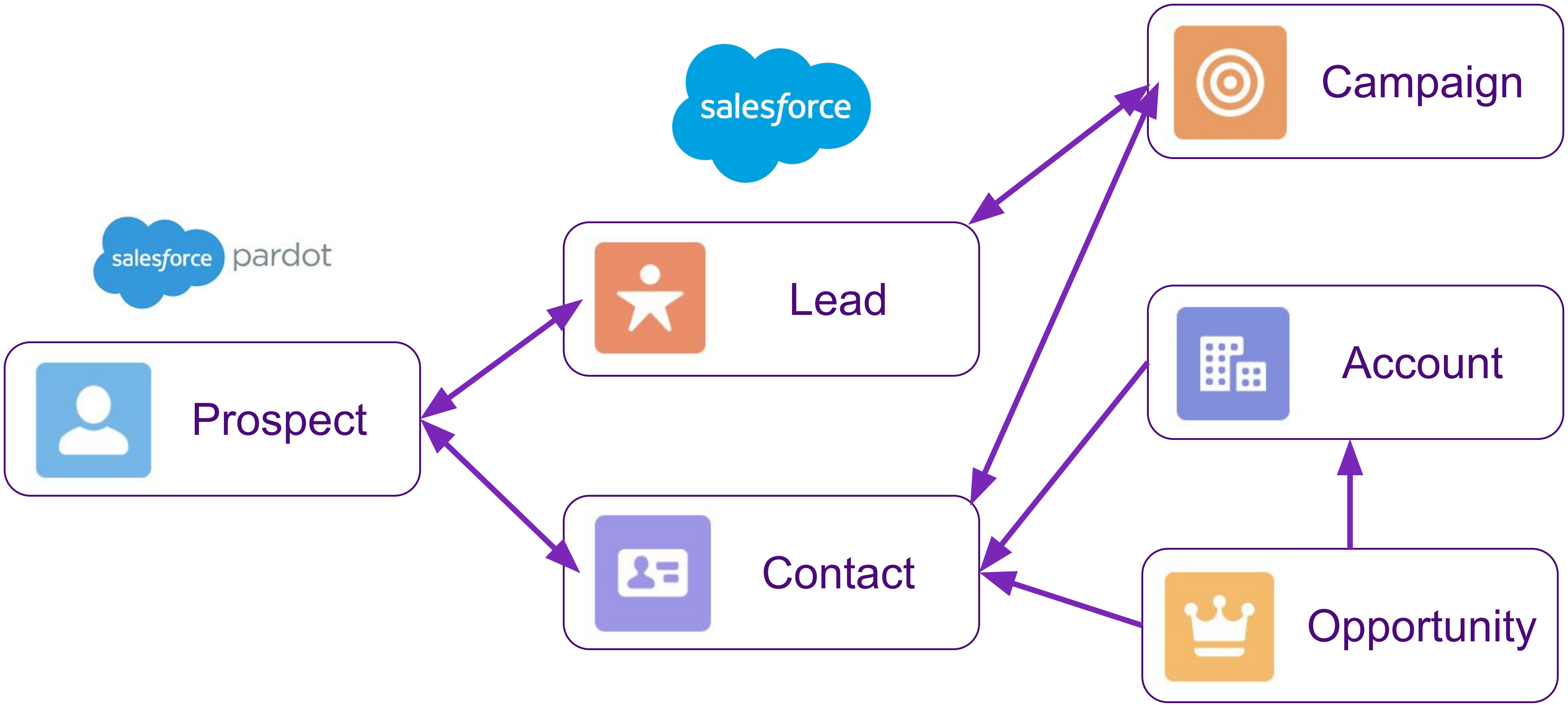
Cells represent a **Specific Field on a Record**

Country	Salesperson	Order Date	OrderID	Units
United Kingdom	Allan Webb	12/6/2016	10392	1
Canada	Jason Randolph	4/28/2019	10487	1
ed States	Cassie Goodman	6/1/2019	10582	18
n	Daniela Morales	8/3/2019	10677	16
ited States	Cassie Goodman	10/15/2019	10772	10
United Kingdom	Allan Webb	11/2/2019	10867	7
United States	Cassie Goodman	1/20/2020	10962	11
France	Darius Trevino	3/10/2020	11057	12
Canada	Jason Randolph	5/1/2020	11152	19

The Salesforce Data Model



The Salesforce Data Model



Data and Relationships

You know what they say…
garbage in, garbage out.

We've got to keep it clean.

Or else…

Tips For Keeping Your House Clean

1

Align On What Matters To Leadership

Focus on segmentation data that you need and how it will be used by your team

Work with your team to decide what data they need in their reports and how regular does it need to be updated

2

Decide On The Minimum Required Information

If your processes for sales and marketing require it for all prospects, then you need it, so make it required

If you don't need it for a core function don't ask for it or use an alternative way of collecting it like progressive profiling or enriching tool

3

Make It Easy For Users & Prospects

Ensure it is easy to input data into your Account Engagement forms and into Salesforce

Use picklist when possible and keep an eye on miscellaneous values

Be consistent with the way Prospect input their data

4

Enforce requirements

Use Javascript on your forms to ensure you collect the data needed before submission

Create validation rules to validate data upon entry into Salesforce to prevent saving of records without the minimum information required

5

Ingest, Process and Refine Data Consistently

Turn to external services to append missing data (Clearbit/ZoomInfo)

Clean against a known list using ProspectUpdater

Leverage Engagement Studios for regular clean up & processing

Poll Time

Have you built Salesforce reports before?

Tips For Keeping Your House Clean

1. Align On What Matters
   - What segmentation data do you need and how will it be used?
   - What data do you need in your reports and how regular does it need to be updated?

2. Decide what is the absolute minimum required information
   - If your processes for sales and marketing require it for all prospects, then you need it, so make it required.
   - If you don't need it for a core function don't ask for it or use an alternative way of collecting it like progressive profiling or enriching tool.

3. Make it easy on Users and Prospects
   - Ensure it is easy to input data into your forms; use picklist when possible.

4. Enforce requirements
   - Create rule to **validate data** upon entry into Salesforce or use Javascript on your forms to ensure you collect the data needed before submission.

5. Ingest, Process and Refine Data Consistently
   - Turn to external enhancement services to append missing data (Clearbit, RingLead, ZoomInfo) or clean against a known list using ProspectUpdate by Sercante Labs

Reports & Dashboards 101

Salesforce Reporting Glossary

- Report - A report returns a set of records that meets certain criteria, and displays it in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart

- Report Format - A report format decides how you want to use the data to tell a story. Either aggregate data, compare different variables, or compare multiple reports together.

- Report Type - A report type defines the set of records and fields available to a report based on the relationships between a primary object and its related objects. Reports display only records that meet the criteria defined in the report type.

- Filters - Additional criteria applied to a report to limit and refine results.

- Dashboard - A dashboard shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages.

Report Formats

Report Format	Description
Tabular	Tabular reports are the simplest and fastest way to look at data. Similar to a spreadsheet, they consist simply of an ordered set of fields in columns, with each matching record listed in a row. Tabular reports are best for creating lists of records or a list with a single grand total.
Summary	Summary reports are similar to tabular reports, but also allow users to group rows of data, view subtotals, and create charts. Use this type for a report to show subtotals based on the value of a particular field or when you want to create a hierarchical list, such as all opportunities for your team, subtotaled by Stage and Owner.
Matrix	Matrix reports are similar to summary reports but allow you to group and summarize data by both rows and columns. Similar to a Pivot table. Use this type for comparing related totals, especially if you have large amounts of data to summarize and you need to compare values in several different fields, or you want to look at data by date and by product, person, or geography.
Joined	Joined reports let you create multiple report blocks that provide different views of your data. Each block acts like a “sub-report,” with its own fields, columns, sorting, and filtering. A joined report can even contain data from different report types.

Report Formats

Tabular
You are making a list of something

Summary
You are comparing x and y to find some sort of relationship

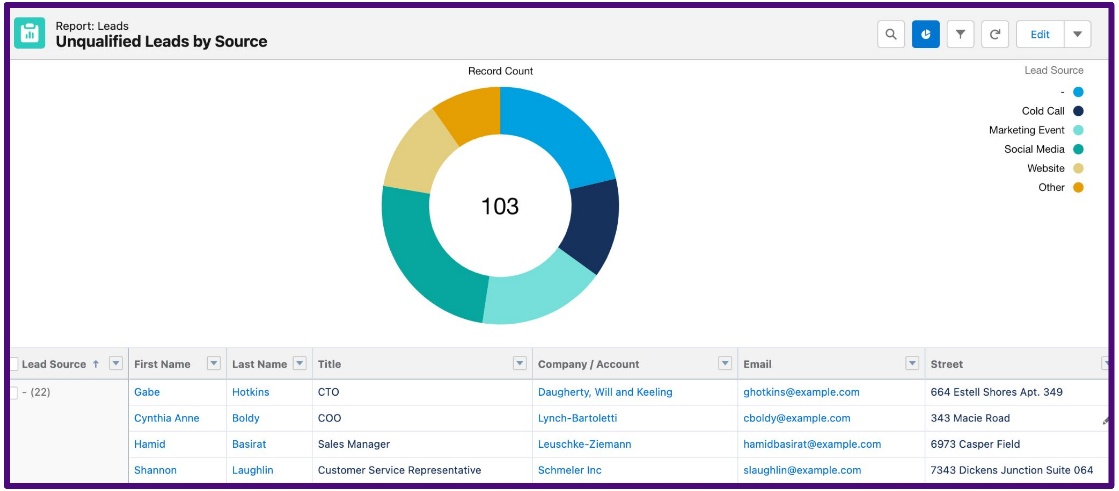
Matrix
You are comparing up to 4 variables (2x2) to find some sort of relationship

Joined
You are comparing two separate reports in one view; data is not dependent in each other

PARDOT PEAK 7.1
CONVERSION CANYON 2.6
REVENUE RIVER 3.9

Report Examples

- New Leads Today
- User Adoption
- Campaign Performance
- Lead Conversion
- Engaged Leads & Contacts
- Account Performance
- Top Accounts



Dashboard Examples

- Executive Summary
- Campaign Performance
- Return on Investment
- Sales Performance
- Benchmark Tracking

Planning For Reports

Why We Use Reports and Dashboards

- ❑ We love making strategic decisions based on facts/data and personal experience > Emotions and hunches
- ❑ We love seeing what is working (and what isn't)
- ❑ You can create customized views for different people
- ❑ It helps us visualize the data without starting at tables in Excel
- ❑ Plus they're pretty to look at (or they can be)

So...What Should We Report On?

These are the primary, must-have reports for all marketing teams.

- **New Leads by Source**
    - Identify where the leads are coming from and understand why

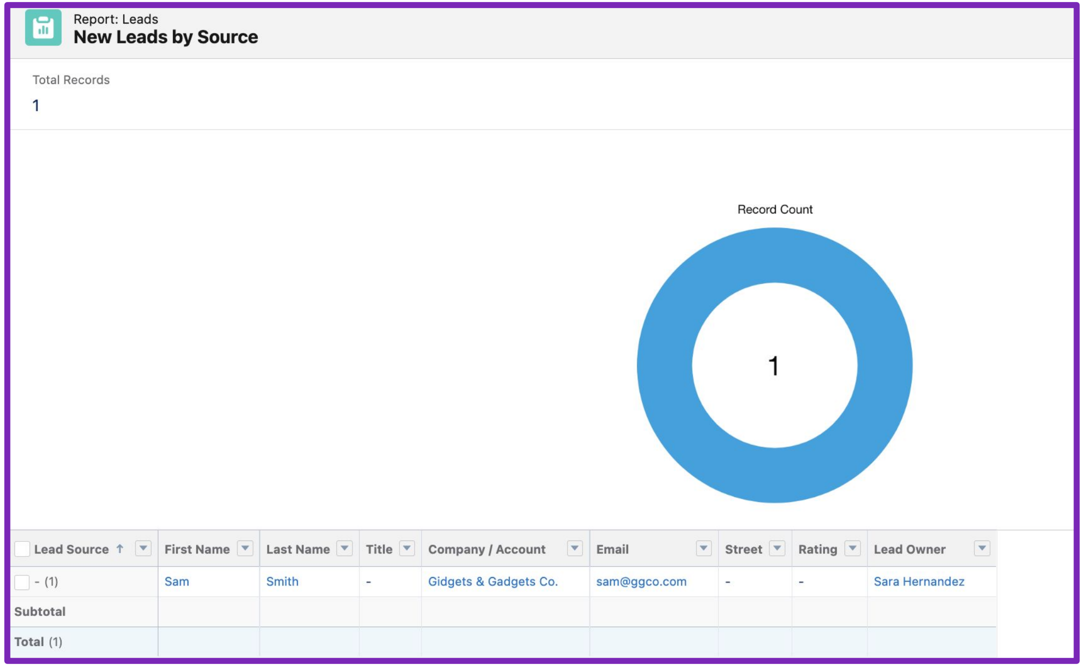
- **Qualified/Unqualified Leads by Source**
    - Align with Sales and create feedback loops to understand your customer and target personas to deliver the best Leads to your team

- **Campaign Influence**
    - Understand what stage of the lifecycle a prospect engaged the most

- **Engagement History for Marketing Assets**
    - View which assets are helping drive inbound traffic and what needs to be discontinued or renewed

New Leads by Source

View new leads and which inbound Source is generating the most volume. Use the filter Created Date is Last 30 Days (or more relevant time frame for your business). Group by Source.

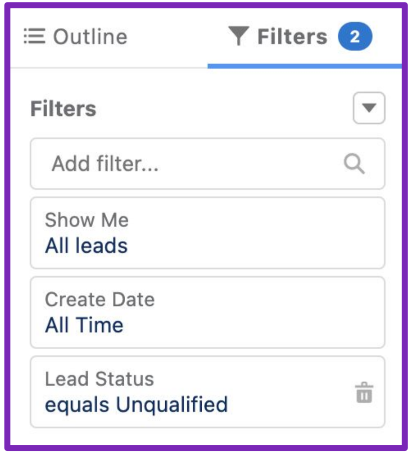


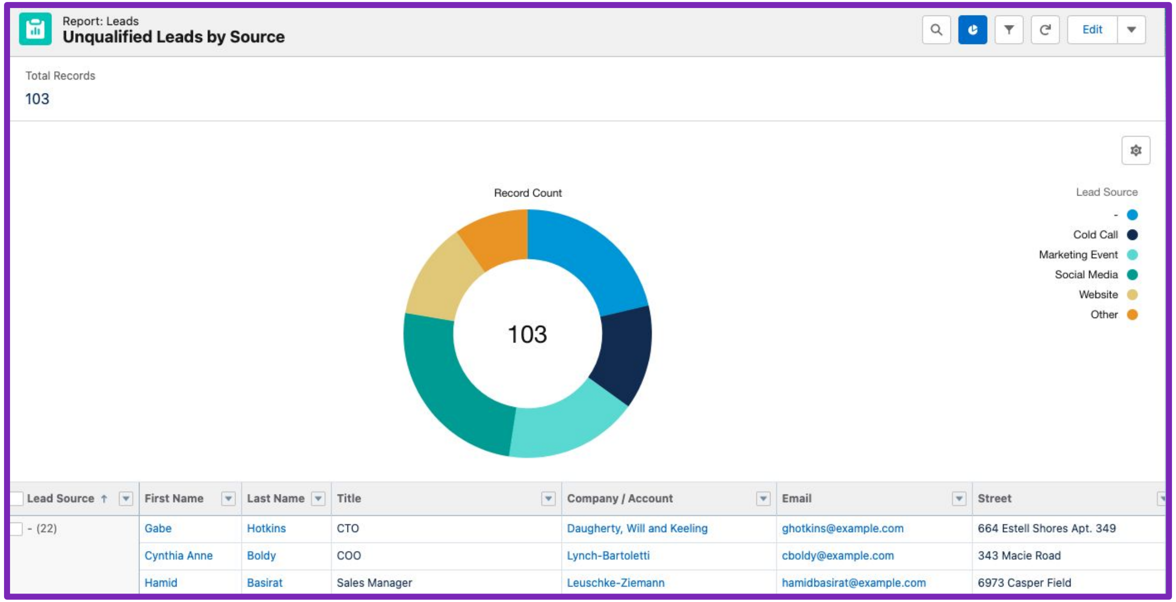
Lead Source ↑	First Name	Last Name	Title	Company / Account	Email	Street	Rating	Lead Owner
- (1)	Sam	Smith	-	Gidgets & Gadgets Co.	sam@ggco.com	-	-	Sara Hernandez
Subtotal								
Total (1)								

Unqualified Leads by Source

Let's add a layer to that last report. Sometimes Leads are marked unqualified by sales after the handoff. Could there be a trend in a specific inbound Source?

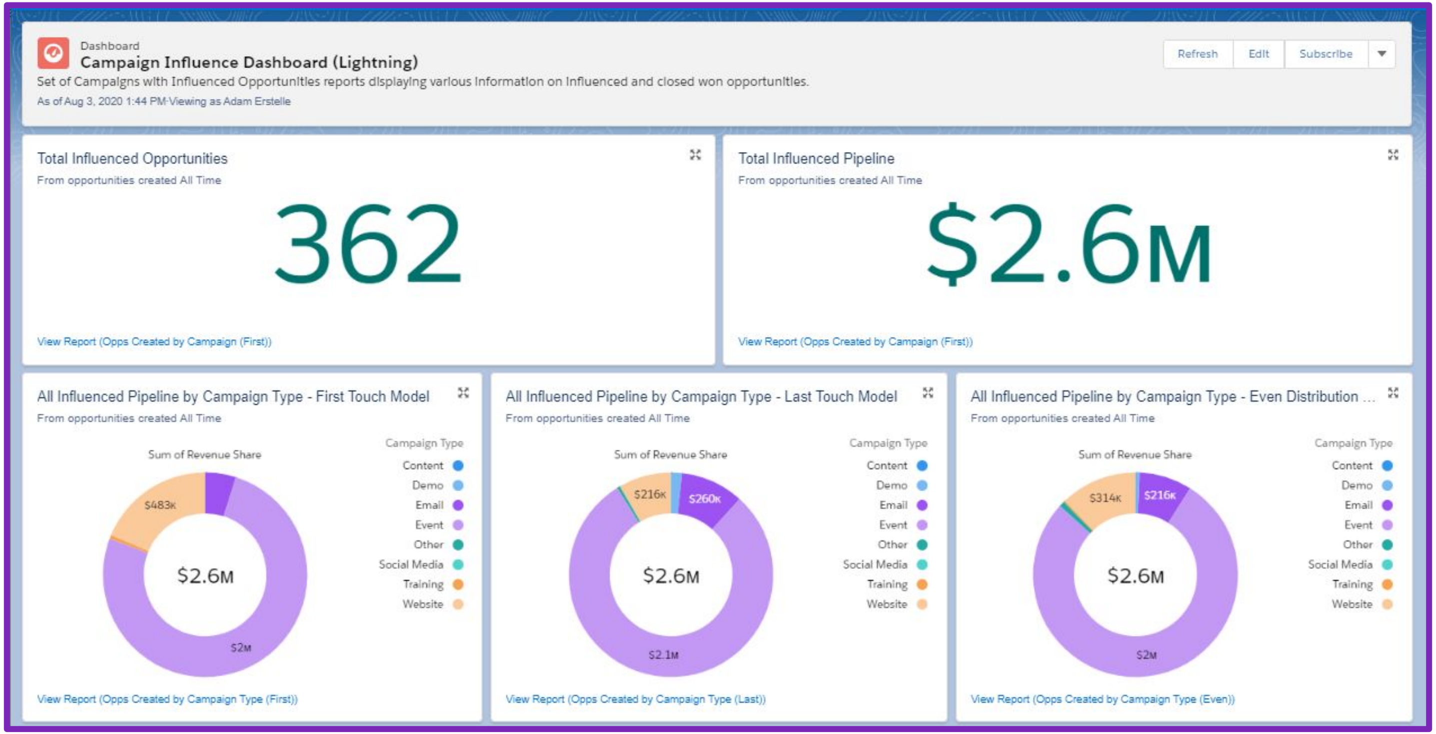
Create a new Leads report. This time filter by Leads with Status 'Unqualified' and created All Time.





Campaign Influence

Use campaign influence reporting to see where marketing is providing a helping hand on the deal and where we are interacting with Leads



Engagement History Reports

If you haven't enabled these already, there are a few steps we need to take.

1. Log in to your Salesforce instance
2. Navigate to Setup
3. Search for 'Report Types' in your Quick Find search bar
4. Click on 'New Custom Report Type' and fill in all required fields

These are the included reports:

- Engagement Metrics on Campaigns
- Engagement Metrics on Landing Pages
- Engagement Metrics on List Emails
- Engagement Metrics on Marketing Forms
- Engagement Metrics on Marketing Links

Engagement History Reports

Use connected campaigns and Salesforce reporting to get Pardot asset data in Salesforce. The most common request is Email send data.

Report: Engagement Metrics on List Emails
New Report

Add Chart | Edit

Total Records	Average Unique Click Through R...	Maximum Unique Opt Outs
299	15.80%	289

	Name ↑	Unique Click Through Rate	Click To Open Ratio	Total Opens	Total Emails Delivered in Campaign	Unique Email Clicks in Campaign
1	[illegible]	2.50%	5.00%	101	40	1
2	[illegible]	100.00%	100.00%	1	1	1
3	[illegible]	39.53%	75.56%	159	153,414	5,064
4	[illegible]	30.47%	70.91%	149	153,414	5,064
5	[illegible]	42.11%	72.73%	14	94,932	3,801
6	[illegible]	38.75%	79.49%	82	94,932	3,801
7	[illegible]	40.91%	75.00%	24	73,359	1,965
8	[illegible]	40.00%	72.73%	55	73,359	1,965
9	[illegible]	84.44%	100.00%	56	76	62
10	[illegible]	100.00%	100.00%	3	2	2
11	[illegible]	100.00%	100.00%	9	76	62

Use Data To Cut Through The Noise

Your dashboards should tell a story. Ask yourself these questions before you start building them out:

- Who is audience for this report?
- Should everyone in the organization be able to see this report?
- What decisions will the person seeing this report want to make?
- Are we comparing or summarizing a dataset?
- Is this report for long-term or short-term data reference?
- How do would the target audience for this report want to slice the data?
- Is there anything I can do to allow them to self-serve and reduce friction?
- Are there reports already built that could be tweaked to support the business needs?
- Does this report answer the question being asked clearly?

Access Matters

If you as a User cannot interact with an Object in Sales Cloud or you don't have access to the folder where the Report or Dashboard is hosted, you will not be able to see it or the data will be filtered off and you won't get the whole story.

Let's Build

Dashboards!

Now that we have our foundation, let's build a dashboard.

This dashboard will be for our executive leadership team. They love numbers, and they don't have time for a deep dive on all the things. Only the need-to-know for this group.

- Leads generated in the last 90 days
- Highest lead generation source
- Overall email, form, and landing page performance
- ROI

Executive Summary Dashboard

List Views for Sales

The Handoff

It's a tale as old as time. Marketing generates leads. Sales doesn't follow up with them and they stay in the Salesforce leads abyss.

Why?

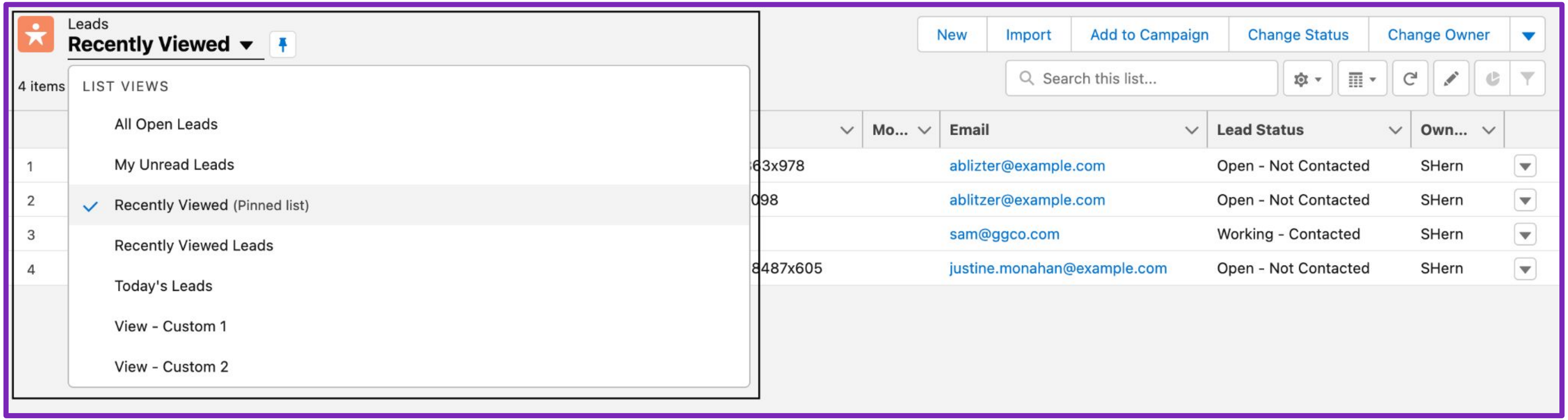
Lack of awareness

Don't trust them

Aren't qualified

What is a List View?

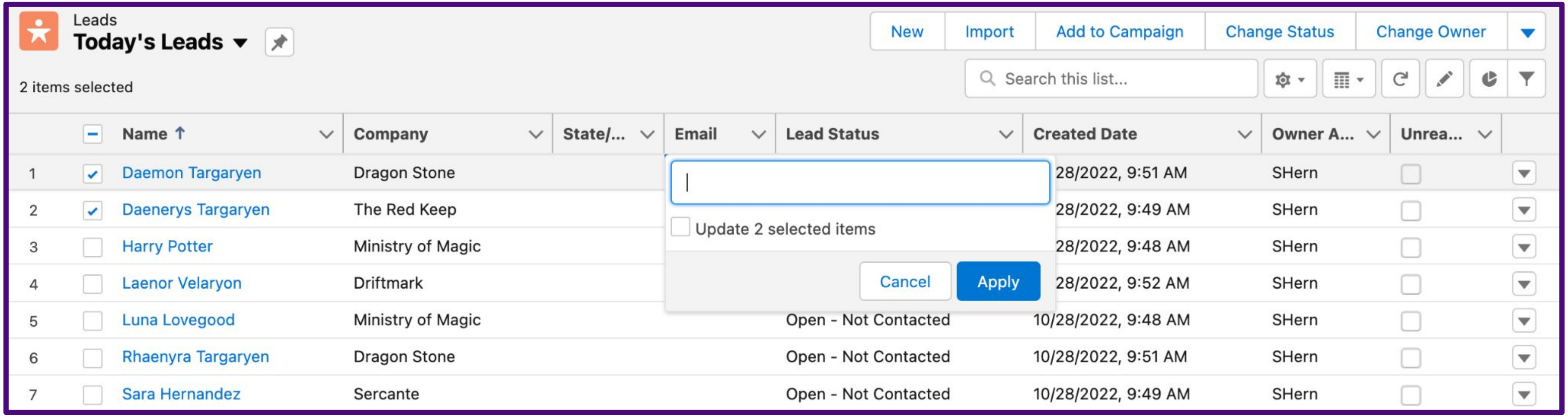
It’s a customized view on any given object in Salesforce. You define the criteria, Salesforce populates the list.



An Actionable Report

Different from a report, our sales team can select which list they want to view right from the object search layout screen.

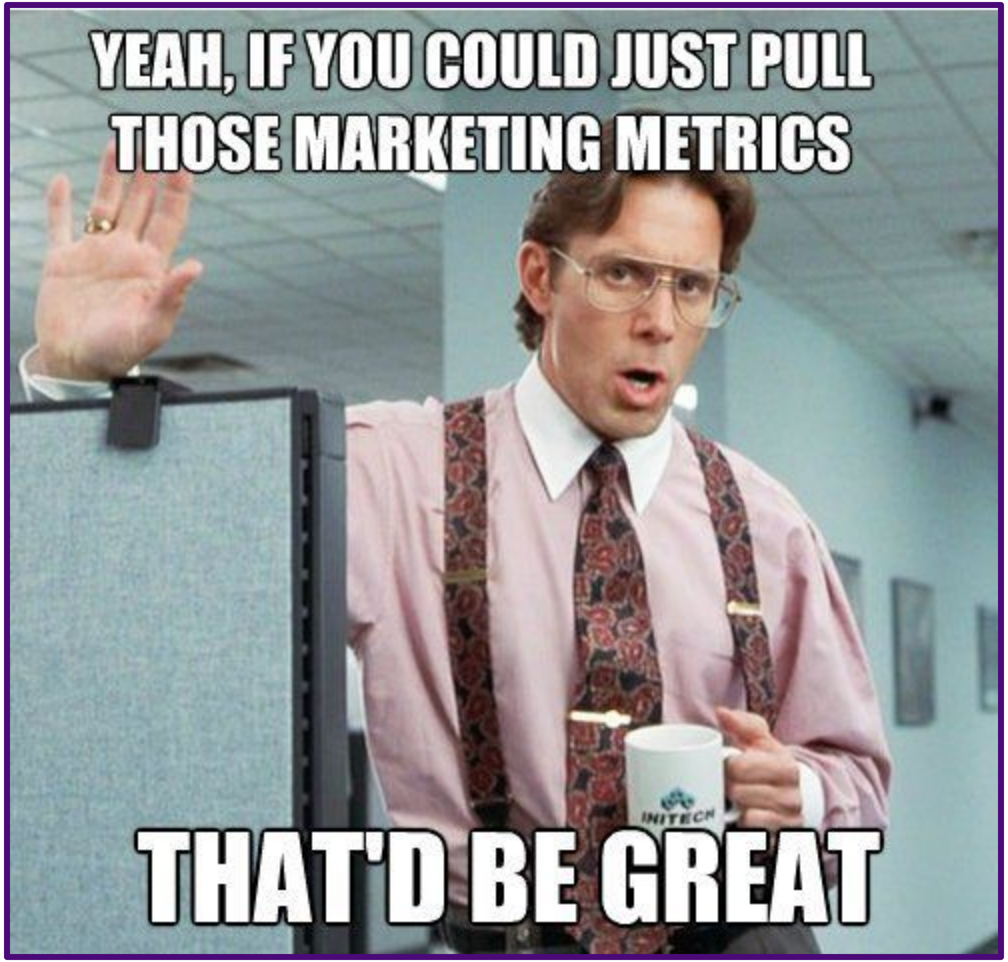
From there, they can select records to edit, add to a list, add to a campaign, delete, etc.



Key Takeaways

Key Takeaways

1. Data is king! Keep it clean, and be realistic about what the report will show
2. Start small and grow with your team as priorities change
3. Use reports as a stand alone AND as the foundation for dashboards.
4. Dashboards should tell a story. Be concise and prescriptive about what format type and components you choose to include.
5. Reporting and analytics are foundational to making strategic decisions and impacting organizational change.
6. Access is key to earning trust in reports
7. Marketing, IT and Sales can work together to build trust in the data, develop a process for feedback and overall improve reporting for the organization


YEAH, IF YOU COULD JUST PULL
THOSE MARKETING METRICS
INITECH
THAT'D BE GREAT

Key Resources

Lightning Experience Reports & Dashboards Specialist Superbadge

How to Build a Pardot Email Campaign Overview Report in Salesforce

Pardot and Salesforce Marketing Reporting: A 101 Guide

Discrepancies between Salesforce Report and Pardot Dynamic List

How to Choose a Salesforce Marketing Reporting Tool

Salesforce Native Reporting: Get More From Your Data

Demo and Q&A

Thank you!

We appreciate your attendance at this session. If you have any questions please reach out to us via Goldcast or use the information below. We hope you enjoy the rest of the conference!

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