





Which Reporting Tool Should I use?

Understanding your choices



Learn. Network. Grow.

MParDreamin' 2022



What reporting tool should I use?

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Title

SERCANTE



Platinum

D=SELECT

stensul

tray.io

Gold

FormAssembly

LeanData

STACK MOXIE

THE SPOT
FOR PARDOT by SERCANTE

Silver

MarketingOps

Goldcast

THE SPOT
FOR PARDOT JOBS

GREENKEY

FIONTA



Intuition is Key (JK)



The whole point of having data systems is reporting

Everything you do should be done with Reporting in Mind

The Salesforce Reporting Journey



Audience

Function

Complexity

Account
Engagement

SFDC

CRMA

Complexity and flexibility

PARDOT PEAK 7.1

CONVERSION CANYON 2.6

REVENUE RIVER 3.9



Account Engagement

Target Audience: Marketers

Report [Click-Through Rate Report](#) [Interaction](#) [Email Clients](#)

98.49%

Delivery Rate

20.29%

HTML Open Rate

4.86%

Click to Open Ratio

Campaign: Created from Salesforce

Subject: Monthly Newsletter

Tracker Domain: (Inherited Tracker Domain)

Content Type: Marketing Email

Sent On: Nov 2, 2019 4:04 PM

Created At: Jan 4, 2022 4:04 PM

Updated At: Jan 4, 2022 4:04 PM

Created By: Dominique Beaudin

Updated By: Dominique Beaudin

Sent To: Monthly Newsletter

Suppressed From: Competitors

Total Sent: 926

Total Queued: 0

Total Bounced: 14 Soft and 0 hard

Total Delivered: 912

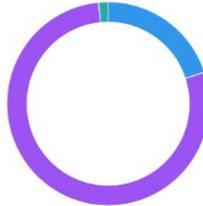
Delivery Rate: 98.49%

Total HTML Opens: 185

Sent and Queued Emails

✓ All 926 emails have been sent.

Open Rate



- Opened: 185 (19.98% of total emails sent)
- Unopened Emails: 727 (78.51% of total emails sent)

Strengths and Challenges



Strengths:

- Great at a glance asset performance
- Can use dynamic lists for quick view of audiences
- Tracks Campaign activity and related metrics
- View General performance of your marketing assets

Things to look out for:

- Limited ability to customize
- Detail data must be exported to other systems for further analysis
- Cannot track the full journey from Visitor to prospect



Salesforce Reporting

Target Audience: Sales Manager and Operational Personnel



Strengths and Challenges



Strengths:

- Lots of standard report types for common data needs
- Ability to create dashboards with many different operational views
- Can do history tracking to see trends and comparisons
- Connections between objects are created for you
- Can create custom report types
- Can get detailed information and graphs

Things to look out for:

- Dashboards must have “like” filters and are limited to 3
- No ability to “union” objects together
- Objects must be connected via lookup relationships to create a join
- Can’t create custom “rules” easily to manage data
- Limited Drill Through
- Need some creativity for special needs



Analytics CRM

Strengths and Challenges



Strengths:

- Apps available for common reporting needs (Sales, B2BMA etc)
- Can create custom dataset from any CRM object
- Can create rules to report on special business rules
- Predictive Analytics can be built into datasets
- More filters and the ability to bind “unlike” datasets
- Advanced bindings and formulas
- Custom widgets and Dashboards
- Ability to flatten data together and create the visitor to opportunity funnel
- Multiple Business unit reporting

Challenges:

- Need to validate data carefully for custom data sets
- Some skills needed for advanced features and creation
- Built in apps may not match business use case or be missing filters
- Licensing Cost(\$\$)
- Limited detail data from Pardot



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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