

Infor CRM

Step-by-step CRM data analytics for sales teams

Go beyond the metrics and find actionable insights

Every sales team needs analytics. Tracking pipeline and performance metrics is a great start. But without an analytics solution in place, you lack the ability to go deeper—to gain actionable insights and make the changes you need to improve results throughout the entire sales process.

Metrics are the foundation for good analytics—not “the answer.”



What is CRM data analytics?

CRM analytics isn't as complex or resource-intensive as traditional business intelligence (BI). It's a way to democratize data and enable multiple end-users to quickly access and share data visually via an intuitive user interface. More than static dashboards, CRM analytics allow you to dig deep to find the business insights you need.

 Perform data discovery in real-time data	 Combine data from different sources	 Slice and dice data in new ways
 Pinpoint bumps in the sales process	 Increase selling efficiency	 Leverage predictive modeling

Steps to data discovery

STEP 1 Ask the right questions	Your questions aren't helpful if they're too broad, like "Why have sales decreased?" Be specific, like "What are our best performing lead sources?" to get a meaningful answer.	
STEP 2 Drill into details	Drill down into underlying data points to understand what's happening and why. Manipulate the live data in real time (using filters, plotters, graphs, etc.) to create visualizations that answer your questions.	
STEP 3 Change with the data	Once you get the data back from your query, review it. Did it give you what you need? Now you can begin the iterative process of refinement, when you evaluate and optimize triggers, analyses, and forecasts.	

Drilling into data

Metrics show:	Revenue is down	Win rate drops	Open opportunities decrease
To find out why, you may want to drill down into:	Average productivity of salespeople Number of productive salespeople Average deal size Number of product demos and average conversion rate	Lead quality Deal size Sales cycle length Activities along sales process	Lead quality Activities along sales process

When you understand the “why,” you can figure out the “how” to fix the problem.



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