

SALESFORCE ANALYTICS



Challenges

One of the fastest growing hi-tech companies' sales team was having challenge in integrating salesforce data with other data source. Also, sales executives wanted to get their insights in the Salesforce without leaving the environment. They believed having insights handy in the Salesforce environment would increase the productivity.

Solutions

Proximos assisted in the design of a solution that sources the data from Salesforce directly into the Tableau environment and integrated that with other data sources. The BI team then utilized this data in Tableaus to create the Data Visualizations and insights that not only provided the Sales team with the Sales data insights but also provided them the insights from the related area like marketing and finance.



Results

The BI platform was used by the sales team and executive level dashboards were built to provide insight into Sales, marketing and finance data right within the Salesforce environment.

The data level security in Tableau integrated seamless with the salesforce environment ensuring that sales executive has access to only the accounts that belong to them. The integration enabled the sales executives to get the 360-degree insights within single Salesforce environment.

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