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Admin Fundamentals for Education

# Reports & Dashboards

Part 3 of 5

This webinar will begin shortly

# Forward-Looking Statements

This presentation contains forward-looking statements about the Company's financial and operating results, which may include expected GAAP and non-GAAP financial and other operating and non-operating results, including revenue, net income, earnings per share, operating cash flow growth, operating margin improvement, expected revenue growth, expected current remaining performance obligation growth, expected tax rates, stock-based compensation expenses, amortization of purchased intangibles, shares outstanding, market growth, environmental, social and governance goals, expected capital allocation, including mergers and acquisitions, capital expenditures and other investments, expectations regarding closing contemplated acquisitions and contributions from acquired companies. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, the Company's results could differ materially from the results expressed or implied by the forward-looking statements it makes. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: risks associated with our ability to successfully integrate Slack Technologies, Inc.'s operations; our ability to realize the anticipated benefits of the Slack Technologies, Inc. transaction; the impact of Slack Technologies, Inc.'s business model on our ability to forecast revenue results; disruption from the transaction making it more difficult to maintain business and operational relationships; the impact of, and actions we may take in response to, the COVID-19 pandemic, related public health measures and resulting economic downturn and market volatility; our ability to maintain service performance and security levels meeting the expectations of our customers, and the resources and costs required to avoid unanticipated downtime and prevent, detect and remediate performance degradation and security breaches; our ability to secure and costs related to data center capacity and other infrastructure provided by third parties; our reliance on third-party hardware, software and platform providers; the effect of evolving domestic and foreign government regulations, including those related to the provision of services on the Internet, those related to accessing the Internet, and those addressing data privacy; current and potential litigation involving us or our industry, including litigation involving acquired entities such as Tableau; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including any efforts to expand our services beyond the CRM market; the success of our strategy of acquiring or making investments in complementary businesses and strategic partnerships; our ability to compete in the market in which we participate; the success of our business strategy and our plan to build our business; our ability to execute our business plans; our ability to continue to grow unearned revenue and remaining performance obligation; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; our ability to limit customer attrition and costs related to those efforts; the success of our international expansion strategy; the demands on our personnel and infrastructure resulting from significant growth in our customer base and operations; our dependency on the development and maintenance of the infrastructure of the Internet; our real estate and office facilities strategy and related costs and uncertainties; fluctuations in, and our ability to predict, our operating results and cash flows; the variability in our results arising from the accounting for term license revenue products; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; our ability to protect our intellectual property rights; our ability to develop our brands; the valuation of our deferred tax assets and the release of related valuation allowances; uncertainties regarding our tax obligations in connection with potential jurisdictional transfers of intellectual property; uncertainties regarding the effect of general economic conditions; and risks related to our debt and lease obligations.

# Our Admin Fundamentals Journey

Fundamentals for Education

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### EDA Deep Dive

Understand EDA functionality

### Constituent Engagement

Learn how to engage your constituents

### Reports & Dashboards

Use data to make decisions

### Setup & Automate Cases

Build a supportive infrastructure

### Automate with Flow

Learn how to automate

# Agenda

## What we'll cover today

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1. Data Quality and Why it Matters
2. Create Functional Reports
3. Visualize Data with Dashboards
4. 5 Features to Optimize Reporting
5. Next Steps & Resources

# Data Quality and Why it Matters

# Why is Quality Data a Big Deal?

- Data decides where your organization invests
- It dictates the emails you send - as well as when, and how you send them
- It informs your conversations with students, alumni and donors
- It drives what needs to be done next

# What is “Bad” Data?

## Data quality can be measured by many criteria

| Criteria | Questions to Consider |
|---|---|
| Accuracy | Does data correctly describe the “real world” object or event? |
| Completeness | Are all data points captured across all records? |
| Consistency | Are all data points captured in the same way across all records? |
| Timeliness | Is your data time-sensitive? Does it need to be archived after a certain period? |
| Uniqueness | Are all records unique? No duplicates? |
| Validity | Does data conform to the syntax (format, type, range) of its definition? |

# How Do Data Quality Issues Occur?

“Bad” Data can occur due when:

- Users have little or poor training
- There’s no automated prevention in place
- Data hygiene policies are lacking
- Historical data is imported

# Steps to Manage Data Quality

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| #1 Learn | #2 Assess | #3 Develop a Plan | #4 Clean your Data | #5 Document |
|---|---|---|---|---|

**#1 Learn**

**Trailhead:**
Data Quality Module

**#2 Assess**

**AppExchange:**
Data Quality Analysis Dashboard

**#3 Develop a Plan**

**Trailhead:**
Improving Data Quality Module

**Knowledge Article:**
Data Hygiene Schedule and Actions for New Admins

**#4 Clean your Data**

**Data Management Tools:**
App Comparison Doc

**H&T Article:**
Salesforce Duplicate Management Tools

**#5 Document**

**Blog:**
5 Documentation Strategies to Improve Your Salesforce Org

**Video:**
Best Practices for Documenting Your Salesforce Org


For more tips on maintaining your data quality check out our Healthy Org Workbook

# Create Functional Reports

# What is a Report?

## Ways to Understand Reporting

~~A Report is **NOT**:~~

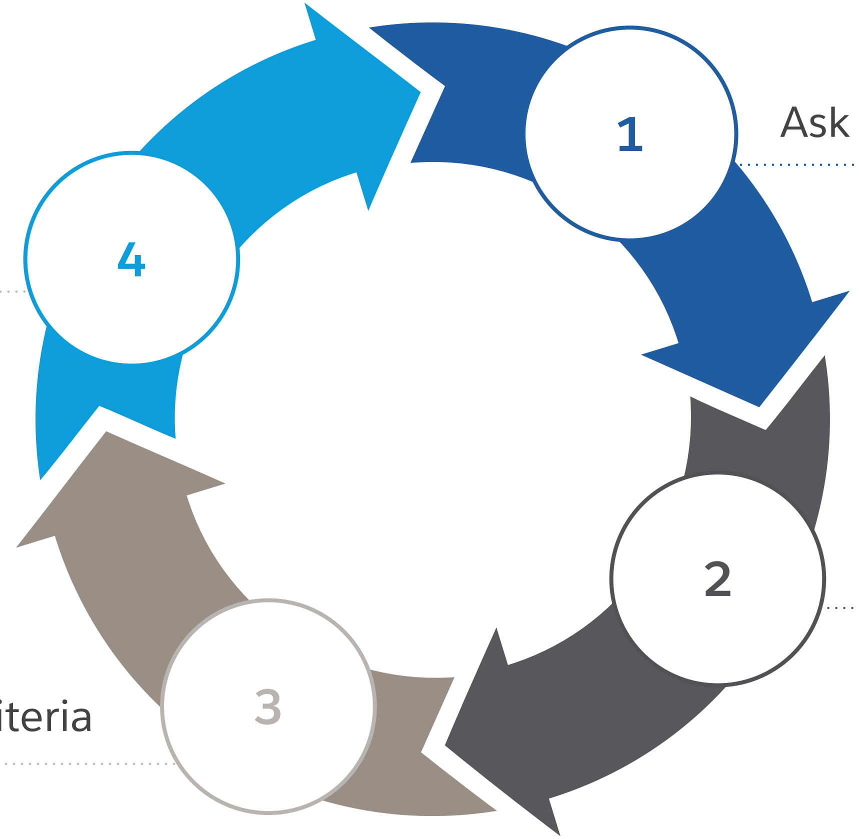
- ~~Data~~
- ~~Metrics~~
- ~~Numbers~~

A Report **IS**:

- An answer to a question
- A tool to help make decisions

# Convert Questions to Reports

## Address Your Staff Needs



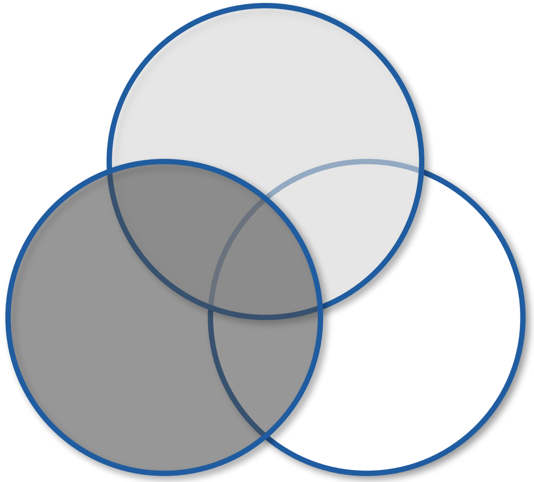

1 Ask follow-up questions

2 Write requirements

3 Map requirements to report criteria

4 Run report and deliver results

# Three Things That Drive Every Report

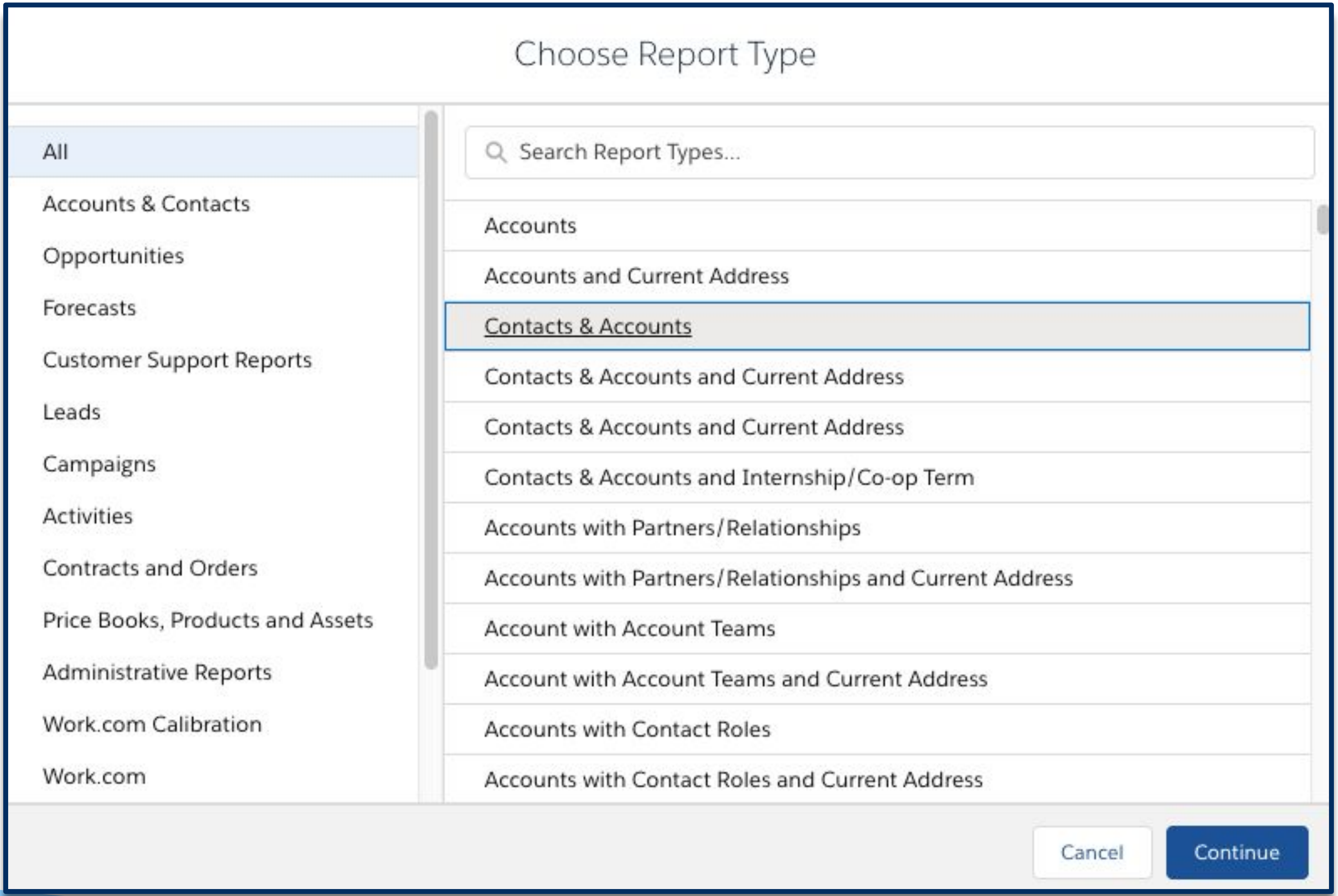


Report
Type

Filter
Criteria

Format

# Use Report Types to Build Faster



# Types of Reports

## 1 Tabular

Report: Opportunities
**Advancement: Donations by Campaign**

Total Records
4

| | Close Date | Probability (%) | Fiscal Period | Age | Created Date | Opportunity Owner |
|---|---|---|---|---|---|---|
| 1 | 10/10/2019 | 90% | Q4-2019 | 0 | 3/7/2020 | Valerie Northeast |
| 2 | 10/8/2019 | 98% | Q4-2019 | 0 | 3/7/2020 | Valerie Northeast |
| 3 | 11/5/2019 | 90% | Q4-2019 | 0 | 3/7/2020 | Ricky Southeast |
| 4 | 1/30/2020 | 90% | Q1-2020 | 0 | 3/7/2020 | Adrienne Advancement |

## 2 Summary

Report: Program Enrollments with Contact
**Program Enrollment by Class**

| Class Standing ↑ | Program ↑ | Contact: Last Name |
|---|---|---|
| Freshman (59) | BA Business Administration (16) | Hamilton |
| | | Howell |
| | | Nichols |
| | | Mills |
| | | Fisher |
| | | Stanley |
| | | Jenkins |
| | | Reynolds |
| | | Reed |
| | | Harrison |
| | | Murphy |
| | | Lewis |
| | | Griffin |
| | | Payne |
| | | Cunningham |

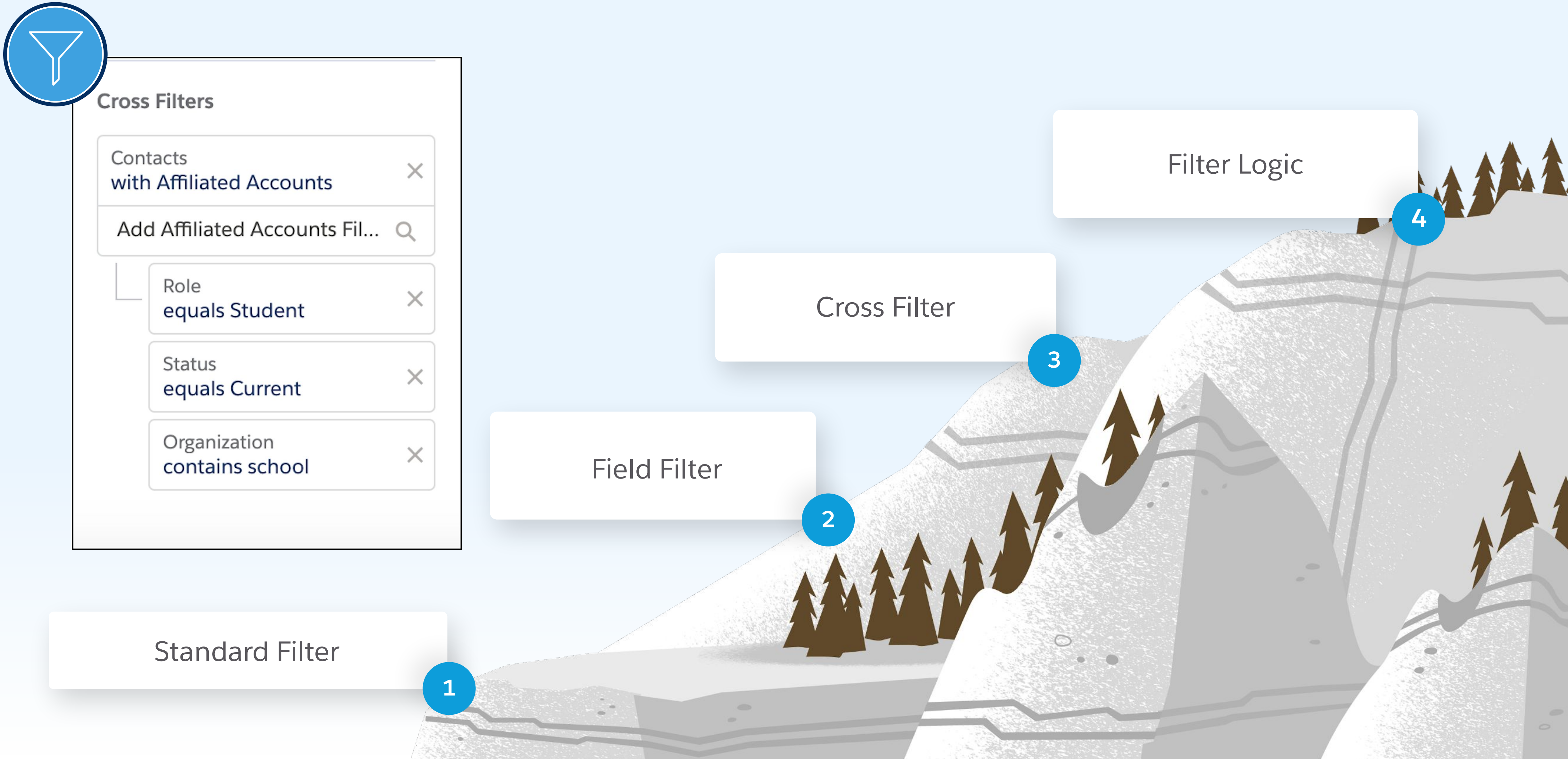
## 3 Matrix

Report: Leads
**New Leads Report**

Total Records
1,424

| Lead Source ↑ | Industry → | - | Agriculture | Apparel | Banking | Biotechnology | Chemicals | Communications |
|---|---|---|---|---|---|---|---|---|
| - | Record Count | 435 | 0 | 0 | 10 | 0 | 0 | 11 |
| Website | Record Count | 3 | 2 | 3 | 2 | 1 | 2 | 0 |
| Social Media | Record Count | 10 | 6 | 2 | 4 | 3 | 3 | 9 |
| Referral | Record Count | 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| Data.com | Record Count | 3 | 0 | 0 | 0 | 0 | 1 | 0 |
| Partner | Record Count | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

# Using Filters



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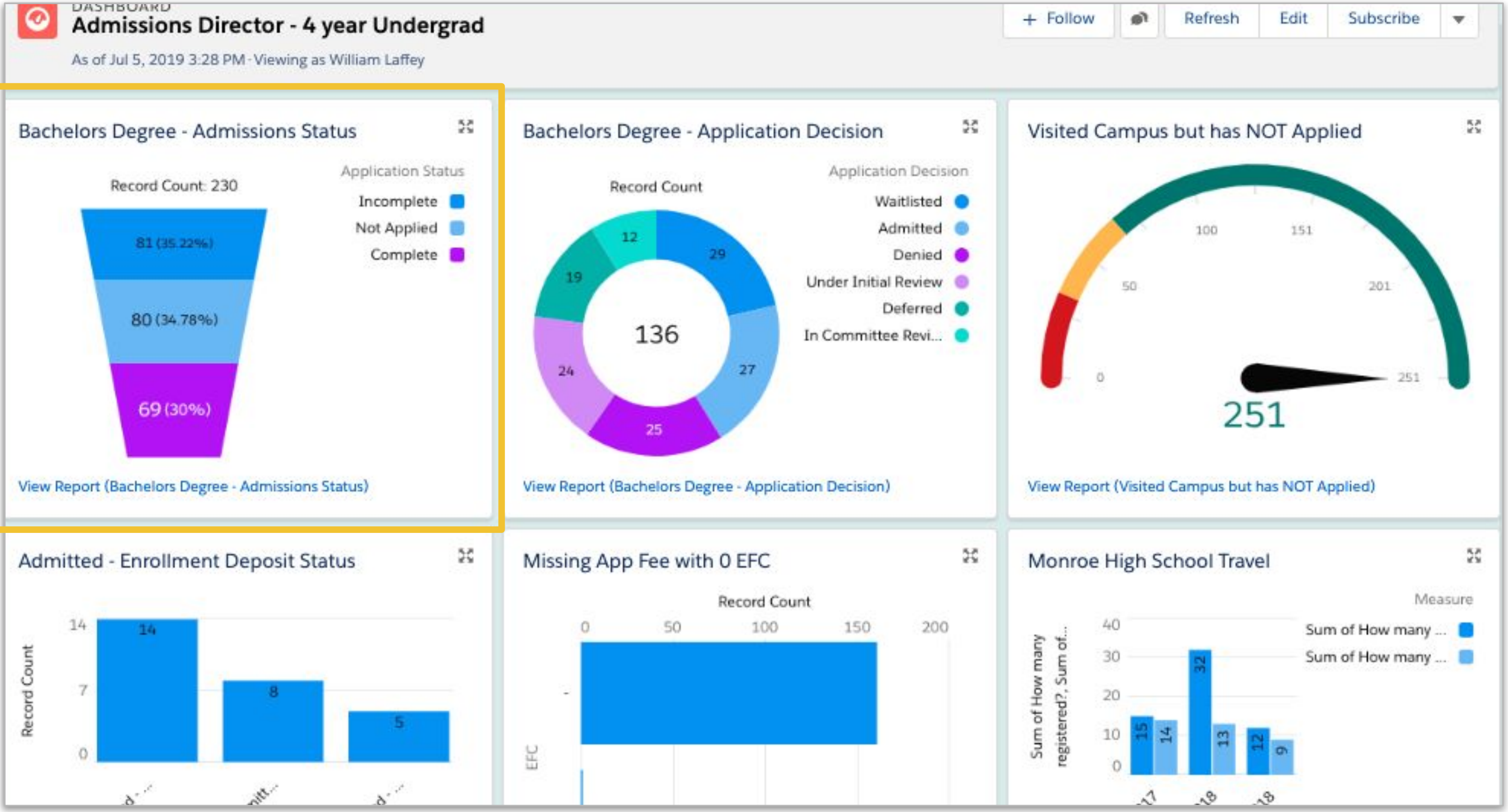
# Visualize Data with Dashboards

# Display Your Report Data

Dashboard Component



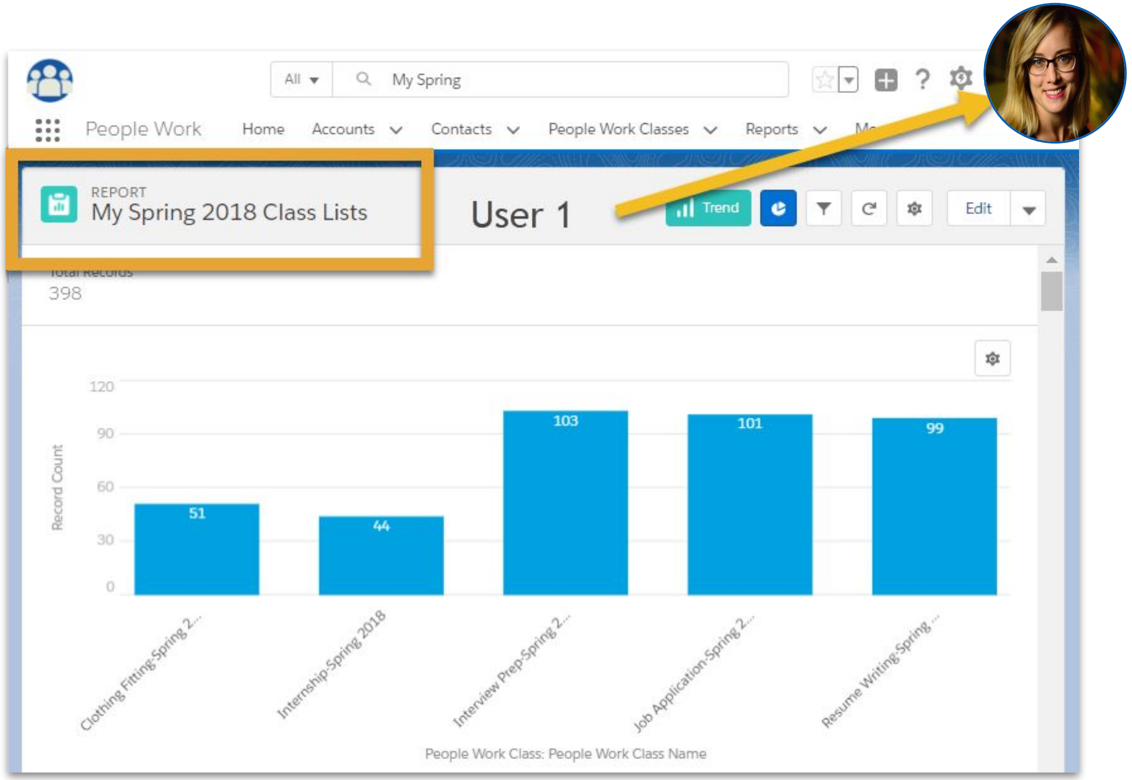

Plan

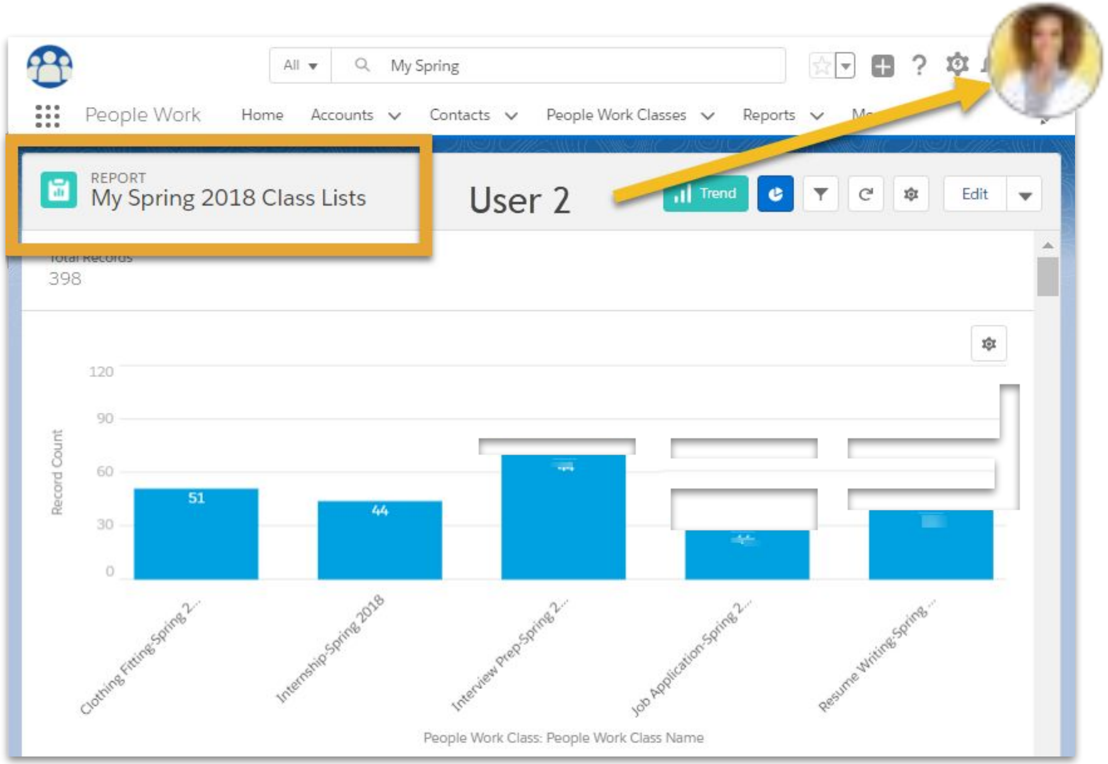
Build

Think

# Protect Your Data

## You need it and it's built in!




Dashboards and Reports honor your security model, so the same report may display different results to your users based on data ownership or user role.

TRAILHEAD [Protect Your Data]

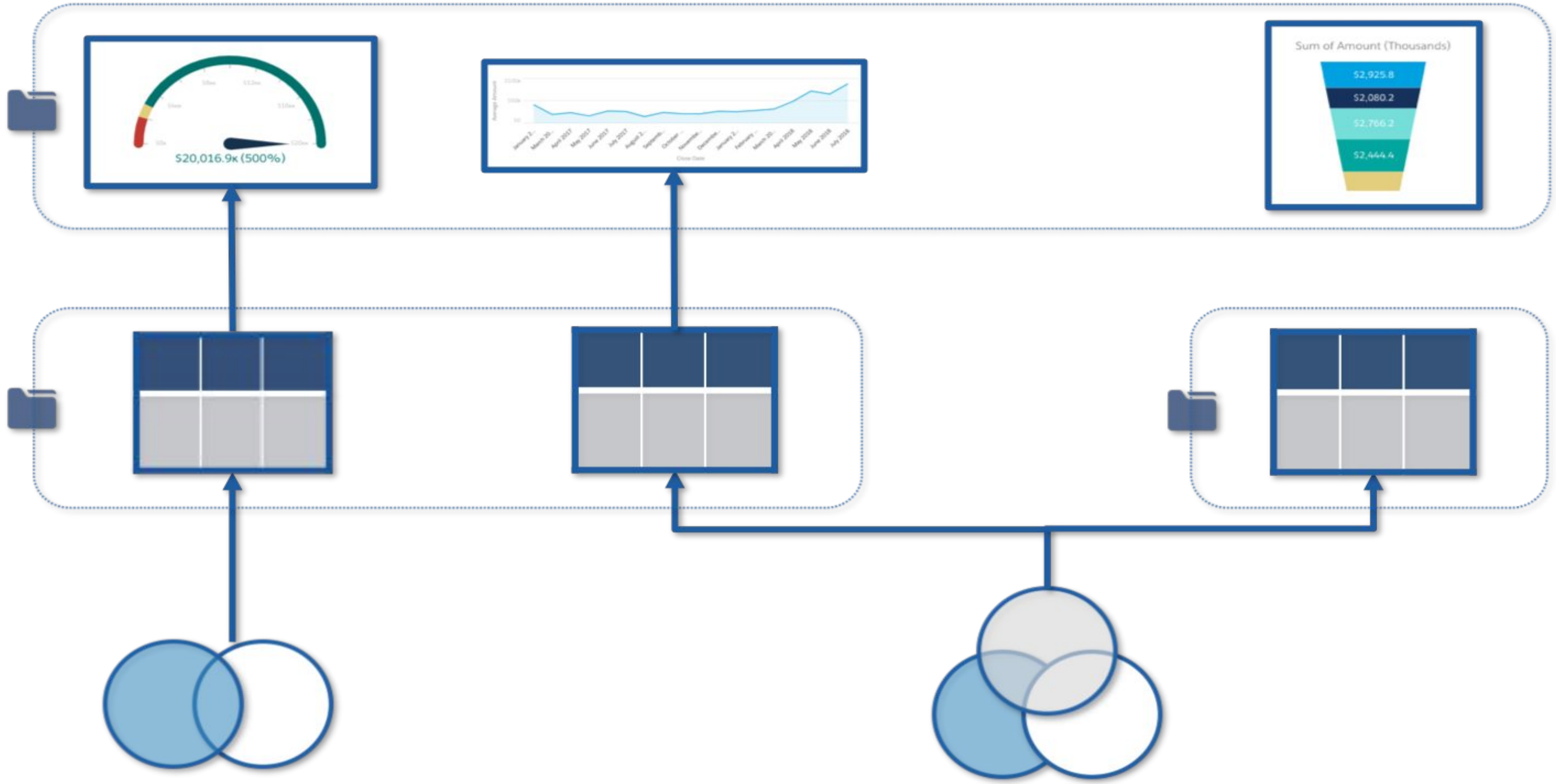
# Put it All Together

## Used Together, You'll Get Stronger Data and Meaningful Insights

Dashboards

Reports

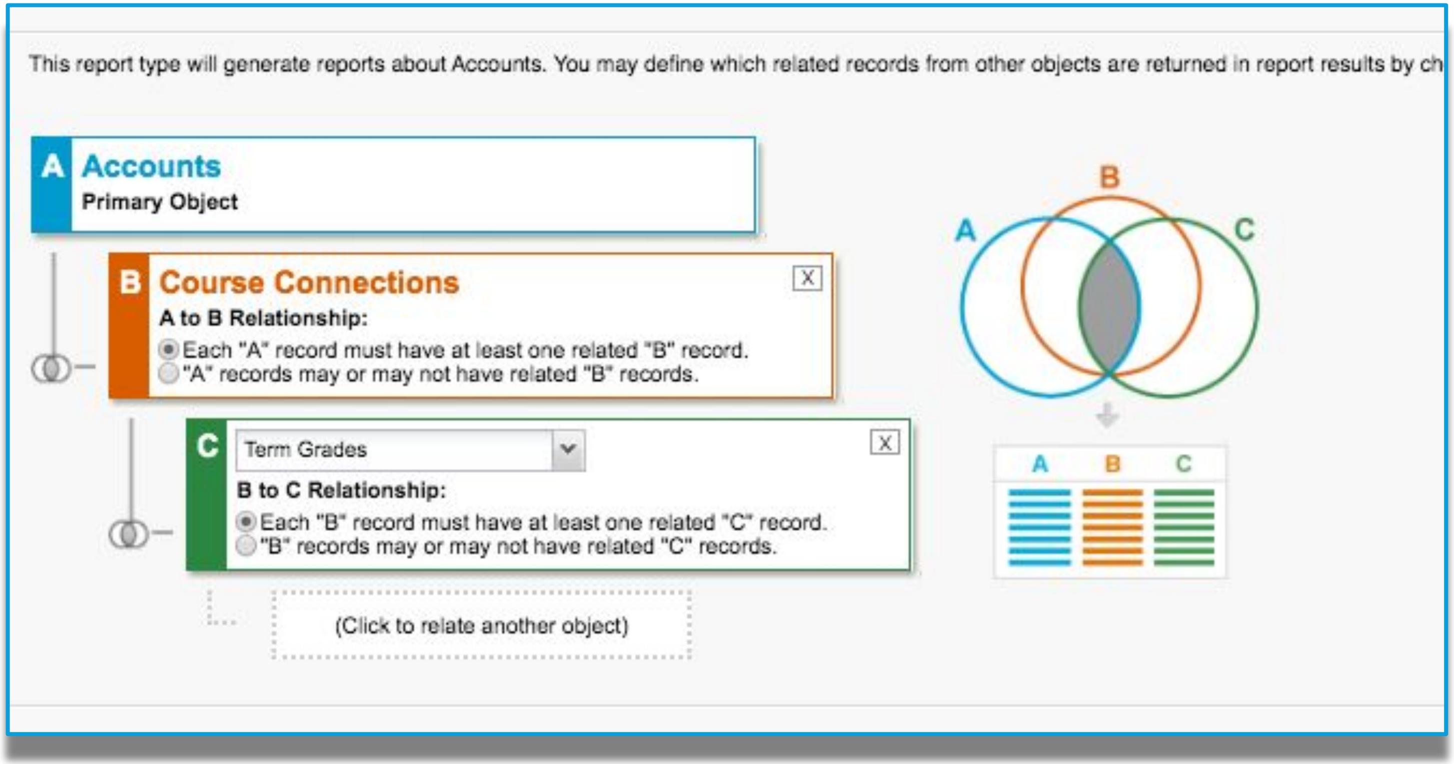
Report Types



# 5 Features to Optimize Reporting

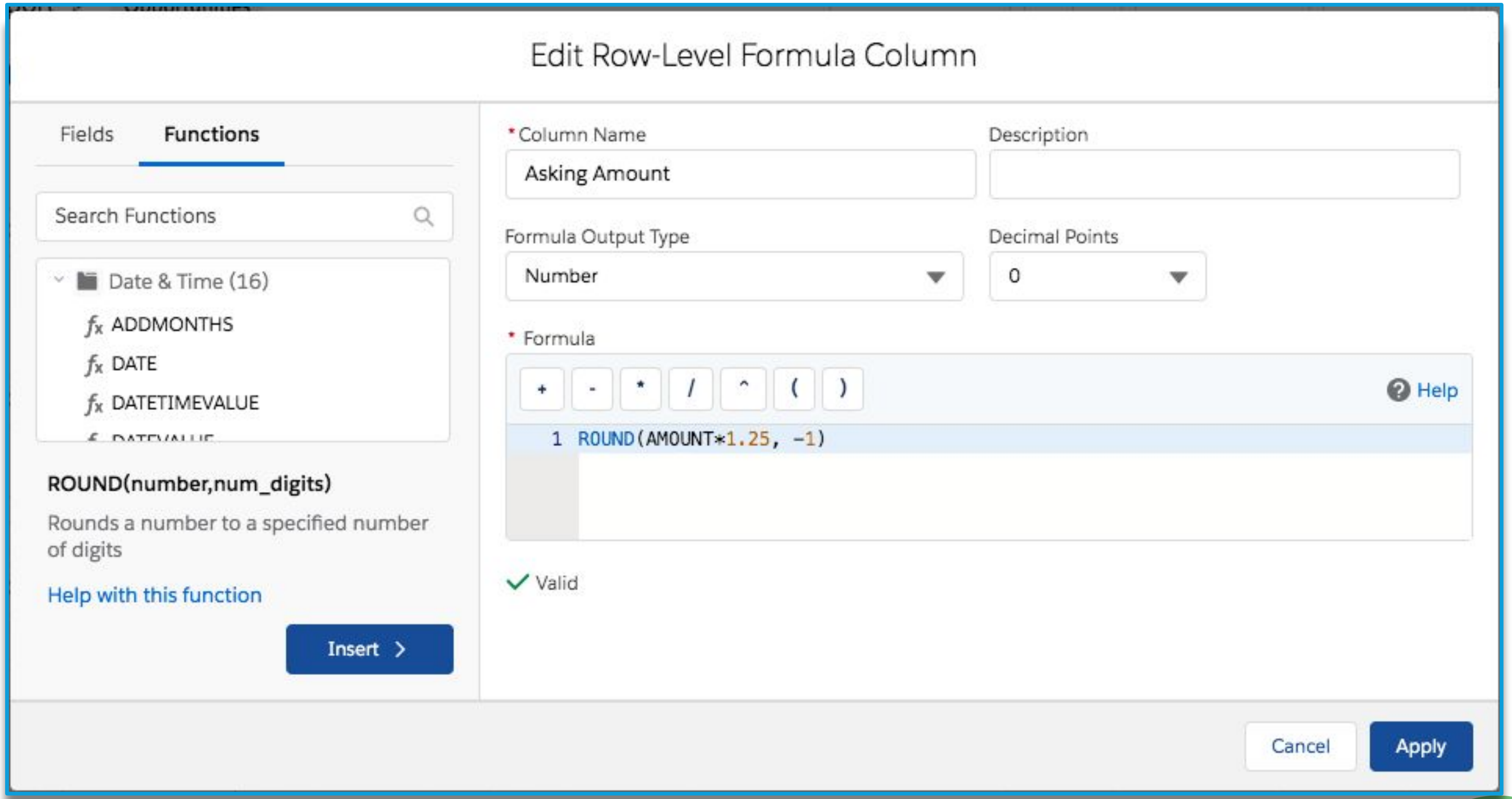
# Custom Report Types

- Define the relationships between objects displayed to users creating and customizing reports
- Select which objects' fields can be used as columns in reports

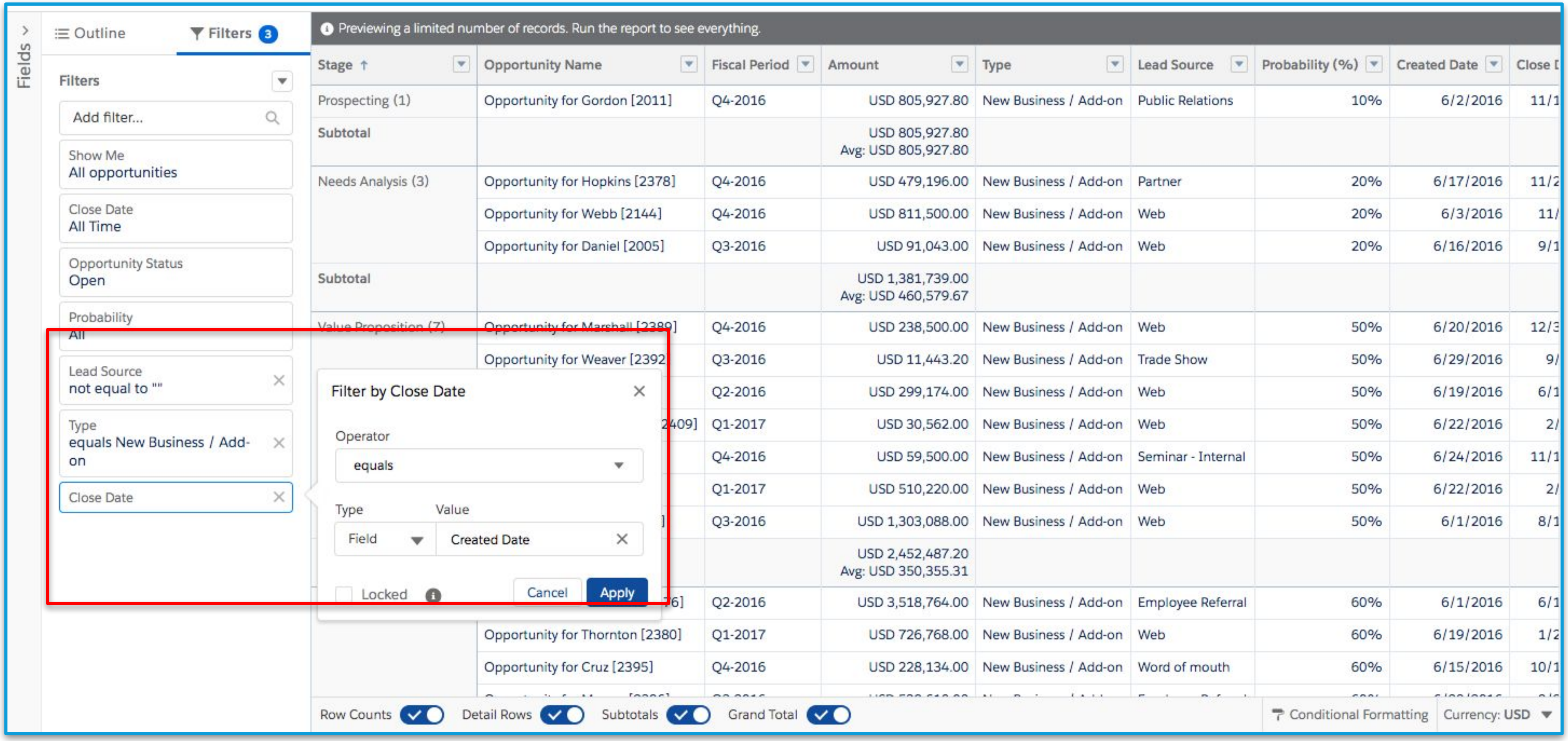


# Row Level Formulas

- Reduce 'clutter' with less custom formula fields
- Calculate values for every record in a report



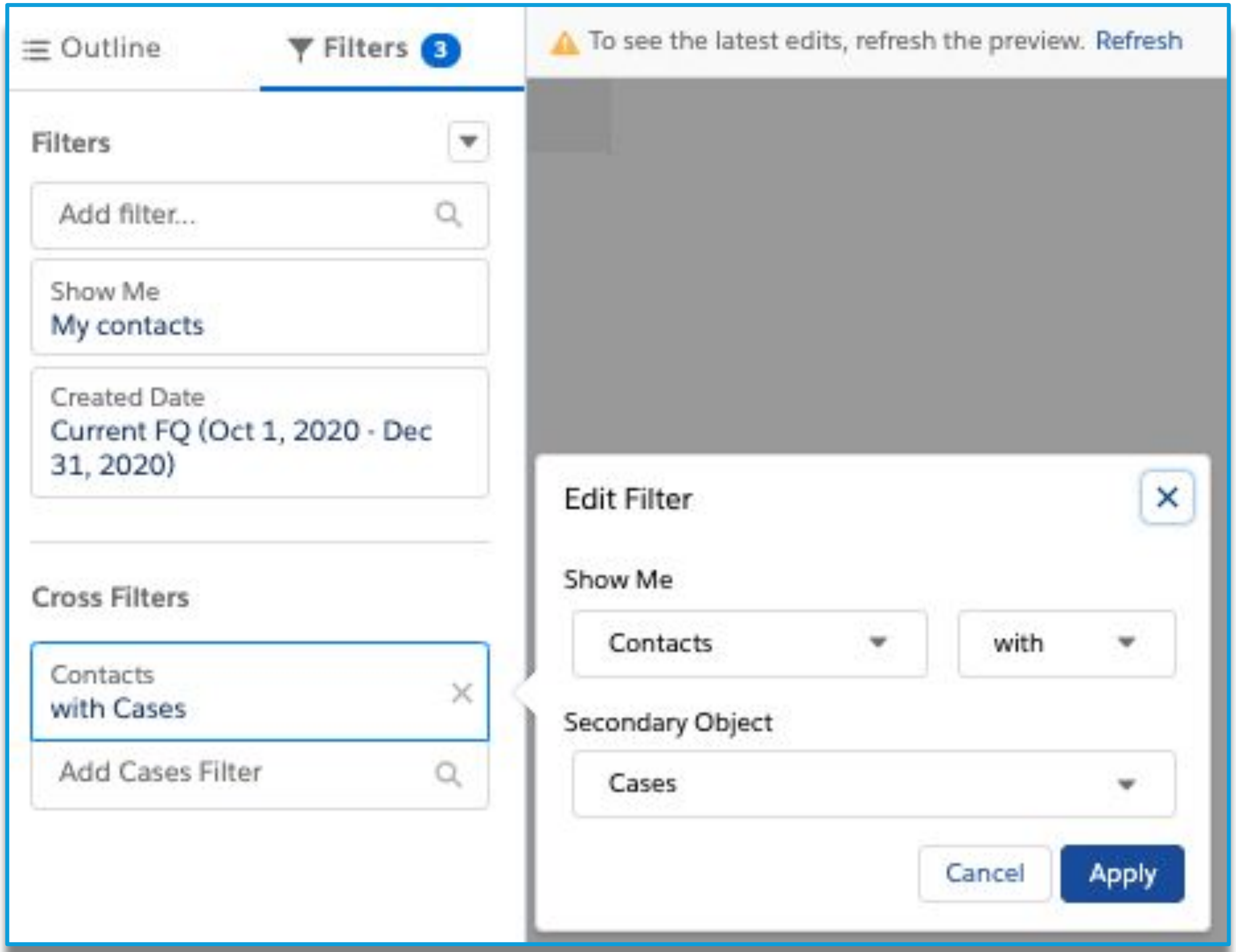
# Field to Field Filtering




- Compare values for two report fields

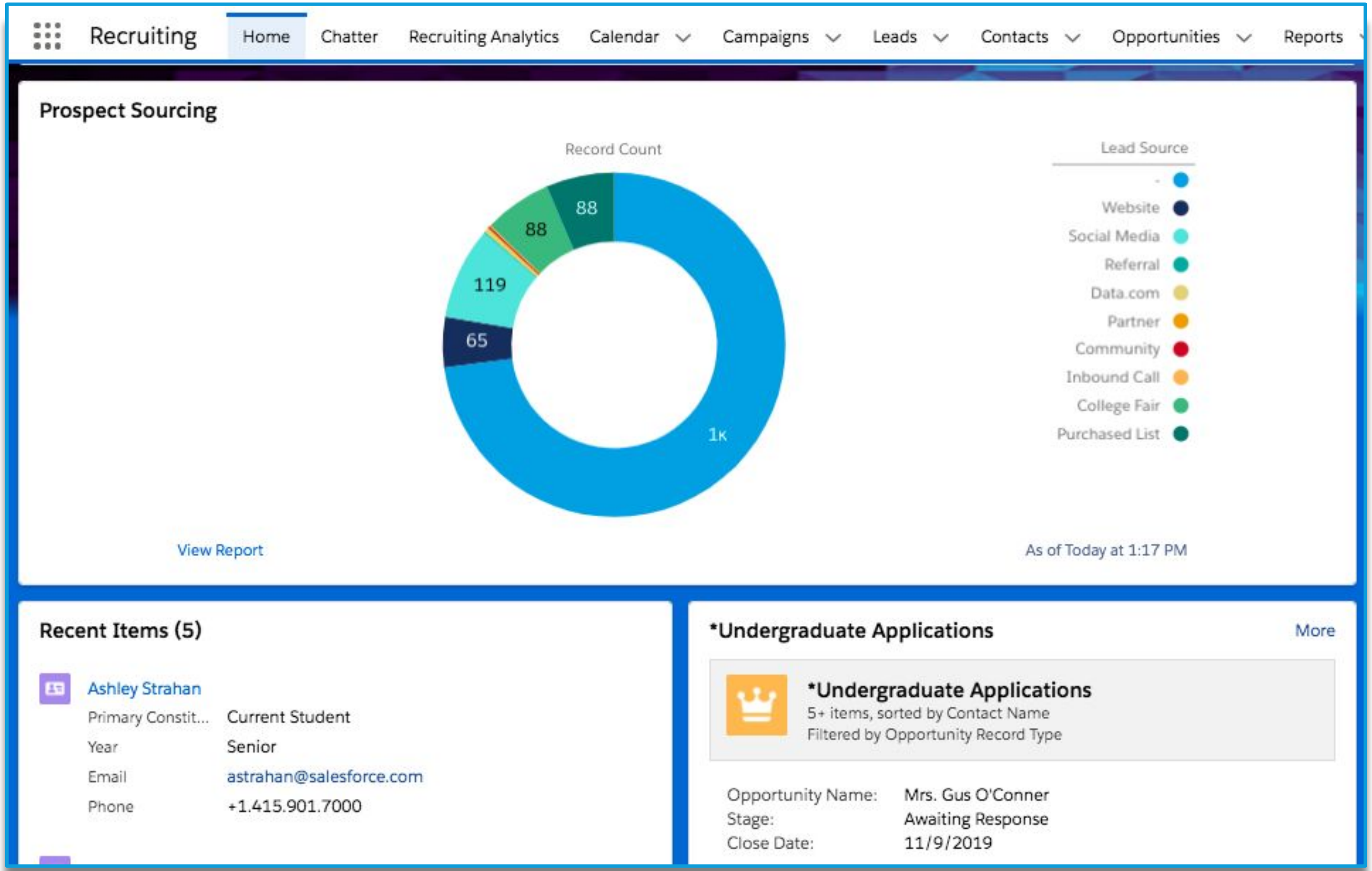
# Cross Filters

- Increase trust in data by finding:
  - Missing information
  - Contradictory information
- No need to build custom report type!



# Embedded Reports

- Surface important information in the Home page
- Easy way to check in on ongoing projects



# It’s Demo Time!

## Let’s look at Reports & Dashboards

**Scenario**: Cloudy University Student Services team would like to see which of their students have open cases with the Academic Advising team

**Scenario**: Cloudy University Advancement team would like to compare their donations to projections

**Scenario**: Cloudy University Admissions team would like to quickly see where their prospective students are coming from

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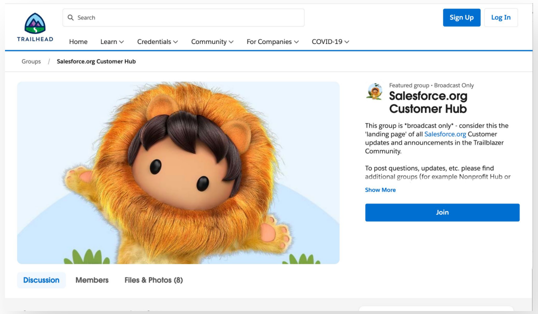
# Recommendations

Learn next steps and discover
helpful resources

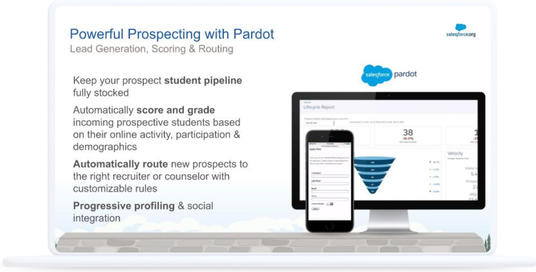
# Three Things You Can Do Today

TRAILHEAD

[Explore Trailhead]




[Go to the Trailblazer Community]

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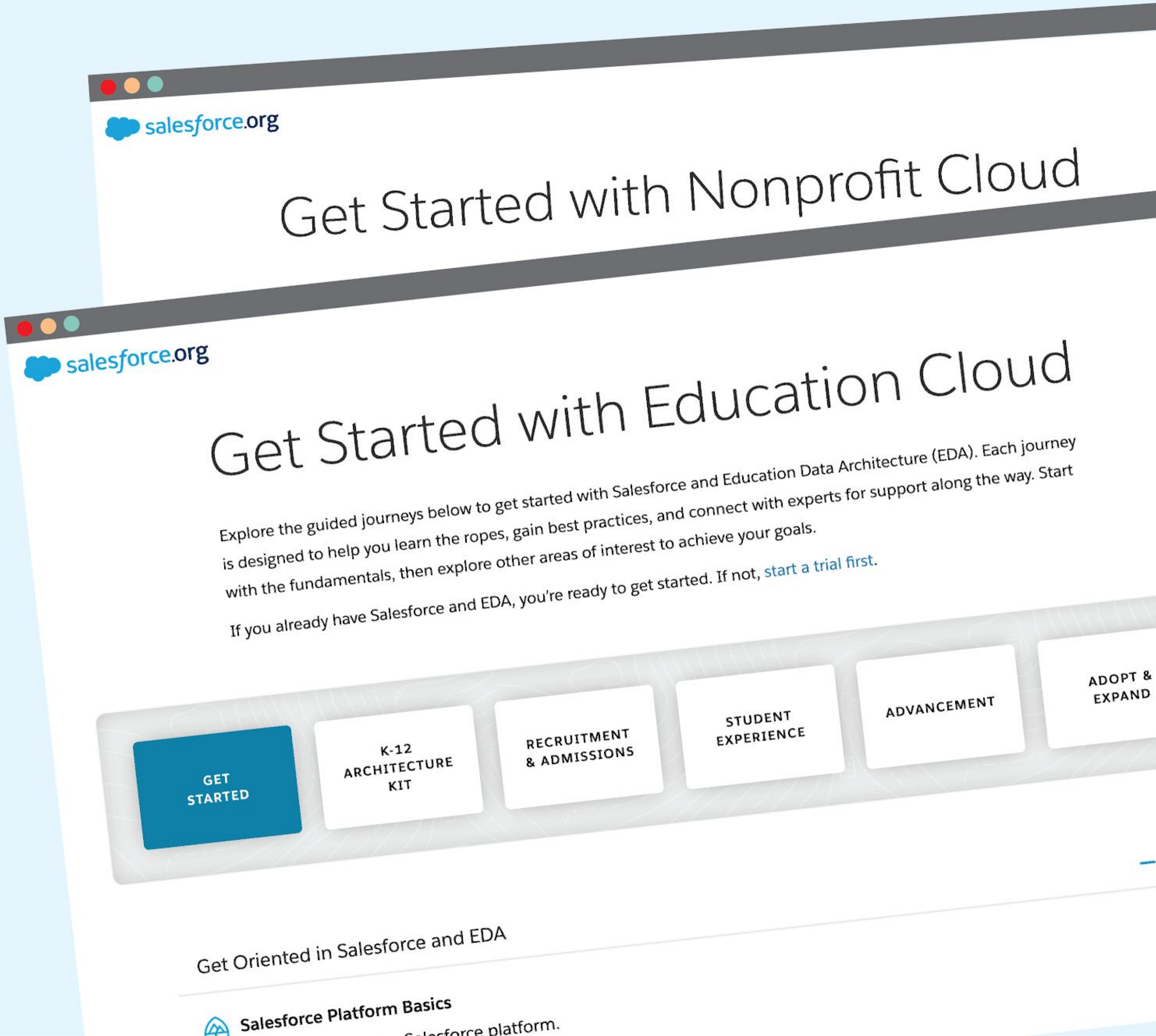
NEW

# Learning Paths to Help You Get Started

**A guided path to success.** Find the resources and experts you need to get started–all in a one-stop-shop.

- Get Started with Nonprofit Cloud
- Get Started with Education Cloud



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# Need Hands-On Support?

## Apply for the Salesforce.org Pro Bono Program!

**Apply** for help with tasks such as **Importing Data** or **Automating Business Processes**

**Match** with a Salesforce Volunteer for up to 20 hours of project support

**Apply for Pro Bono Support**

sfdc.co/probonosupport

# Thank You