

## **Business Case: Request for Data Support with Risk Analysis**

**Project & Partnership Goal with SEFF x GLE:** Complete the development of & support maintenance of Tableau dashboards that provide insight into Sales and CS Gong utilization, correlated back to productivity, revenue, & retention.

- To make this possible, what functionality is needed for the Tableaus linked here:
  - Consolidation of existing tabs (Gong Data, Additional Data Points) into one cohesive, easy-to-read and filterable data story (*correlating coaching back to Productivity & Revenue for Sales, and back to Retention for Client Success*)
  - Ability to export raw data into an easy-to-read format
  - Refreshed quarterly to reflect previous quarter's attainment numbers
  - Easy toggle between Sales and Client Success dashboards (for Sr. SLT, SEFF, CSEFF and GLE)

**Our Ask:** To accomplish this goal, we are looking to partner with SEFF both on the final Tableau design & simplification of data, as well as ongoing maintenance of the dashboards. We've broken down this request into a vision and ideal state, followed by anticipated tasks with approximate total time to complete.

**Project Time Needed:** 80 hours, or 10 total business days, broken down into 4 specific tasks (see more below)

### Vision/Ideal State

**Data story:** Gong is part of a larger chain of events (see purple cells in chart below) that help us understand the value (where value = revenue/retention/productivity metrics) of practice, execution, evaluation, and coaching. Gong will continue to be used in the evaluation & coaching phases of this workflow for Sales and CS teams.

- For further context, the new Agentforce tools (AI Sales Coach Agent in SFDC launching in Q4) are being designed to engage Sales and Client Success ICs with call prep and practice on real accounts in SFDC, prior to engaging with customers. From there, Gong will capture the real client calls as they occur (as we currently do) and then Leaders will continue to leverage Gong to evaluate and validate the success of those training sessions (via scorecards submitted for the recordings of the actual calls).

Step →	Practice	Execution	Evaluation	Coaching
Tool →	Salesforce Agentforce	Sales Call	Gong	Gong

The dashboard we need will be able to express the above values in a simple way that all GLE, Sales and CS Leaders can engage with and easily draw conclusions and take action from. Importantly, we will need it to autogenerate each quarter's data.

### Questions we're answering:

- 1) Who is coaching their teams consistently and equitably, and with what impact?
- 2) How has coaching impacted attainment?
- 3) How does coaching impact productivity?
- 4) What is the ROI on Gong? (GLE takes on)

## **Illustration of Ideal End Result**

### **Tab 1: Sales Dashboard**

*DROPDOWN SELECTION* (multiple selection allowed)

- Quarter Selection: xx
- Region Selection: xx
- Manager Selection: xx
- IC Selection: xx

*DATA*

- Productivity Metrics
  - Total Quota Achievement %
  - Impact Coverage %
  - Client Opportunity Activity %
  - Pipeline Generation
- Gong Metrics

- Gong Scorecard Total % (from Direct Mgrs)
  - ~12 per quarter per IC
- Gong Scorecard Total % (from anyone)
- Gong Scorecard Avg. Rating % (All Scorecards)
- Gong Scorecard Avg. Rating % (Direct Mgrs Only Scorecards)

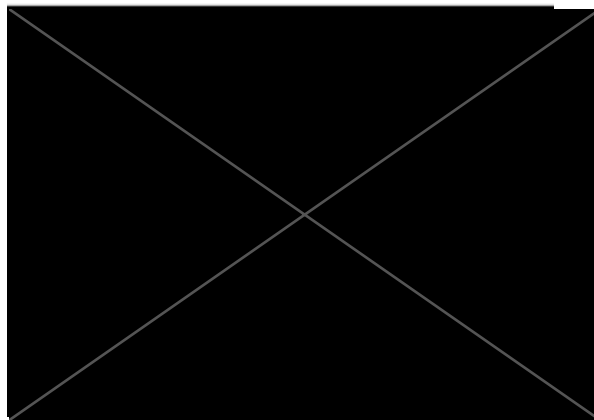
## Tab 2: CS Dashboard

*DROPDOWN SELECTION* (multiple selection allowed)

- Quarter Selection: xx
- Region Selection: xx
- Manager Selection: xx
- IC Selection: xx

*DATA*

- Productivity Metrics
  - Retention %
  - Retention KPI -



- CSAT Score %
- Gong Metrics



- o **Why:** To show the correlation between reps being coached & scored in Gong against their Retention KPI achievement; supports Gong coaching strategy & ROI, as well as promotion conversations within CS.
- o **How it functions:** Filter by Quarter, Gong Call Date and/or Rep Name
- **All Gong Scores Tab:** [REMOVE TAB FROM FINAL PRODUCT]
  - o May not be useful, but this was requested in order to see if we could identify what managers scored their ICs. However, the data uses unique IDs and I don't believe this will help us figure out what managers scored who.
  - o Quarters can be filtered.
- **Additional Data Points Tab:**
  - o **What it shows:** Previous and current quarter retention by \$, Difference QoQ, Retention Percent for the Quarter, and Avg CSAT scores (*NOTE: CSAT data is not consistent, frequent and may not exist for all reps during a given quarter*).
  - o **Why:** To correlate CSAT to revenue retention (but data is not consistent enough to tell a story currently). Added as part of promotion decisions with CS and to eventually be used to correlate between Gong coaching x CSAT and retention.
  - o **How it functions:** Quarters CANNOT be filtered and the tab needs to be manually updated each quarter to reflect previous quarters for comparison in each column.

## **SALES METRICS (Broken down by Rep):**

- **Gong Tab:**
  - o **What it shows** Used to get (**broken down by individual contributor name/title**): Sales Revenue attainment #s, average % to quota, quarters hit for quota, Gong Avg Manager, Gong Avg. Overall Scores (*NOTE: can be submitted by anyone to anyone*) and total the number of scorecards received.
  - o **Why:** To show the correlation between reps being coached & scored in Gong against their revenue attainment and consistency with meeting quota; supports Gong coaching strategy & ROI, as well as promotion conversations within Sales. (*NOTE: For ease, we need to find a way to have this data, retention data & coaching data all on one tab, to see one data story per rep*).

- o **How it functions:** Filter by Quarter, Gong Call Date and/or Rep Name  
Quarters can be filtered.
  - **All Gong Scores Tab: [REMOVE TAB FROM FINAL PRODUCT]**
    - o May not be useful, but this was requested in order to see if we could identify what managers scored their ICs. However, the data uses unique IDs and I don't believe this will help us figure out what managers scored who.
    - o Quarters can be filtered.
  - **Additional Data Points Tab:**
    - o **What it shows:** Total # of accounts and accounts per Q, Sales Productivity metric attainment rates by Q
    - o **Why:** Added as part of promotion/PE decisions with Sales and to be used to correlate between Gong coaching x CSAT and retention.  
*(NOTE: For ease, we need to find a way to have this data, quota/revenue data & coaching data all on one tab, to see one data story per rep).*
    - o **How it functions:** Filter by Quarter, Rep Name
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## **Task 2: Simplify the dashboards for ease of use by Sales/CS Leaders and Teams. (24 hours)**

- (1) Removal of **ALL GONG SCORES** Tab and other unnecessary fields
  - (2) Consolidation of existing tabs (Gong Data, Additional Data Points) into one cohesive, easy-to-read and filterable tab
  - (3) Add necessary fields via idash/IQL to result in correct information & improve queries
  - (4) As needed, include additional context within the dashboard (ex. definitions)
  - **Note:** the original use case for this Tableau was for CS Promotions, so there is a lot of extraneous data that slows down compute time.
  - **Note:** Task two project time may also be impacted by Task 3 below.
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**Task 3:** Identify locations of relevant indexes and fields in dataworld and making appropriate connections to data in Tableau. **(24 hours)**

- **What:** The analyst will need to find keys that allow different indexes to talk to each other, perhaps via aliases, to deliver data to the Tableau dashboards in a cleaner, more manageable way.
  - o NOTE: This requires *some* trial and error, considering the vast amount of data indexes available [REDACTED]
- **Knowns:**
  - o Data lives in [REDACTED]
- **Unknowns:**
  - o Identifying the exact indexes and necessary fields

**Task 4:** Ongoing Maintenance & Support of Dashboards in Partnership with GTM Leadership Enablement (~2 hours/quarter)