Business Intelligence Sprint:
The Right Tools for Your Sales Team

with

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01 Become more independent

Data gathering & processing

- **Step 1:** Internet users leave digital traces that tech companies can legally use to keep track of users activities.

- **Step 2:** The data are structured by Data Engineering in a logical way, creating basic data sets of everything that the website tracks.

- **Step 3:** The Data Science Team will consult these data sets, and then manipulate them for many purposes.

Data Science

- **Machine Learning models:**

  - Airbnb listing rank algorithm won't show

  - Predicting churn rate

- **Find new products lines or features from tests or existing data:**

  - What discounts will work best?

  - Is something a product line worth investing in?

- **Find new products lines or features from tests or existing data:**

  - Tracking Customer Experience teams and allowing them to find quick data

  - Salesforce, Tableau, or other BI tools for the Sales team to perform their jobs

  - Dashboards and analysis for the product team

- **Data:** **Why should we learn it?**

  Every company has a need to use their data.

  Every employee should know what information is being collected and what can be used for.

  Operational teams should have intermediate to advanced spreadsheet skills and enhance that with knowledge of BI tools.

  - **BI Tools:** Such as Tableau can help you keep track of your business performance.

  - **Open Source:** There's a new generation of software tools that's open sourced (ie. free to use, Superset).

  - **How do BI tools work?** Data pipelines feed the dashboards, the tool is used as a human friendly visualization.

Dashboard: Design it

- **Step 1:** Gather the requirements from the different stakeholders.

- **Step 2:** Find the data sources and build a pipeline to get the data from (existing data in your BI tool or SQL).

- **Step 3:** From the BI tool of your choice get your data and start building.

- **Step 4:** Once it's built is time for maintenance and development of new features.

Case Study: Airbnb

1. **Designing a dashboard to help the Sales team track performance**

   The process is the same as described in the previous slide. The executing team

needed to gather the requirements of the dashboard, then build it.

Once it was built, there's an iteration process and feedback gathering which are used to improve the dashboard. This is an ongoing process.

- **Problem:** The Sales Organization lacks visibility on the performance of their property managers. They also need to understand what hosts and regions we have opportunities to work on.

- **Solution:** The data science team will create a dashboard that shows every KPI relevant to the host performance and will suggest metrics to improve.

02 Forecasting at tech organizations

- **Forecasting.**

  Forecasting is a method to estimate future sales/performance, with a defined timeframe and economic conditions.

  Qualitative forecasting is based on the knowledge of the team members which are experts on the industry.

  If we have **enough numerical points** and there hasn't been any news that changes the environment of our industry, we can opt for a quantitative approach.

Forecasting Exercise

- Imagine you have to forecast your goals for 2021

- Think of the main KPIs that you would forecast for.

- What externalities will influence your models?

03 Measuring your team's performance

- **Things to take into account:**

  As a Sales Manager, your primary mission is to help the team reach their goals, the sum of the individual goals is your target after all. It is your duty to enable your team to perform at their finest.

  Other secondary (but also very important) tasks for you are:

  - Helping the team members in their career progression,

  - Suggesting new lines of products,

  - Understanding where there are inefficiencies within the business model, etc...

QUESTIONS	
Does the location and product line of your team member benefit them (or not)?	Are there any regulatory, economic or other barriers that prevent our growth?

- **Some key metrics:**

  Not every industry is the same but in general we need to think of our business needs and how our team helps in that.

  It is useful to think of a framework of input and output metrics that our team will work on. Input metrics are generally directly controlled by our team vs output metrics that depend on the input metrics plus other market dynamics.

- **Closing thoughts**

  At the end of the day, we just use tools to understand the overall performance of our team, but another important thing we can use the Sales Organization is to have answers.

The Sales team interacts with customers and they are experts on our product and industry.

- Are we focusing our efforts where we need them?

- Do we need to change our product line?

- Is there anything else we need to offer to keep growing?