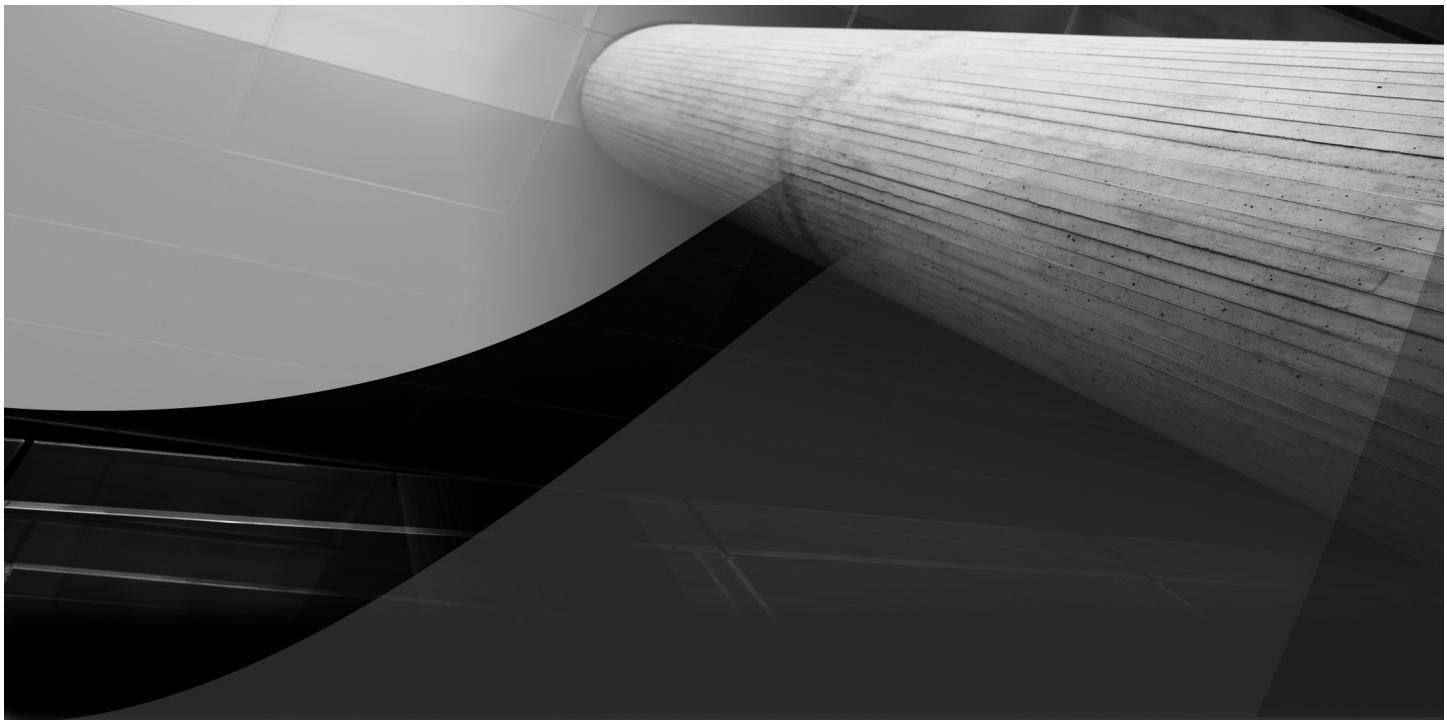

CHAPTER 1

Getting Started with Answers On Demand

Answers On Demand is the business intelligence tool built into CRM On Demand, and is the topic of this book. Answers On Demand is an extremely powerful analytical tool that, with the proper planning and knowledge, can become the difference between reporting and business intelligence. This chapter looks at the basic requirements for gaining access to Answers On Demand. Chapter 2 covers recommended stages of planning your analysis.

I encourage you to read the first two chapters of this book carefully and give their content some genuine consideration before you jump into the definitions of functions and explanations of views a little deeper into the book. After all, a little planning goes a long way and pays dividends in time when you get things right the first time.

Report Development Privileges

As a user of CRM On Demand, you have access to data and features based on the settings in your assigned role. The roles in CRM On Demand are highly configurable. Many people may share the same role if they all perform the same job. Alternatively, a single person may be the only user assigned to a role. The system administrator is typically responsible for maintaining these roles and providing or revoking certain levels of access and privileges in CRM On Demand.

Before you can go much further in this book and perform the tasks it presents, you need to ensure that you have the necessary access and privilege settings in your assigned role. Figure 1-1 shows a portion of the Role Management window, showing the privileges associated with analytics. Many users will have some of these privileges associated with their roles even if they are not responsible for creating reports. For instance, the Analytics Dashboards Access and Analytics Reports Access privileges simply enable users to view the Dashboard and Reports tabs. The Access Analytics Reports—View Prebuilt Analyses privilege allows user to run the prebuilt reports. Without this privilege, users accessing the Reports tab in CRM On Demand will not see any of the prebuilt reports listed.

The privileges that are critical to the report developer's role are Access All Data in Analytics, Analytics Scripting, Manage Dashboards, Manage Custom Reports, and Manage Personal Reports. Let us examine each of these privileges in a little more detail.

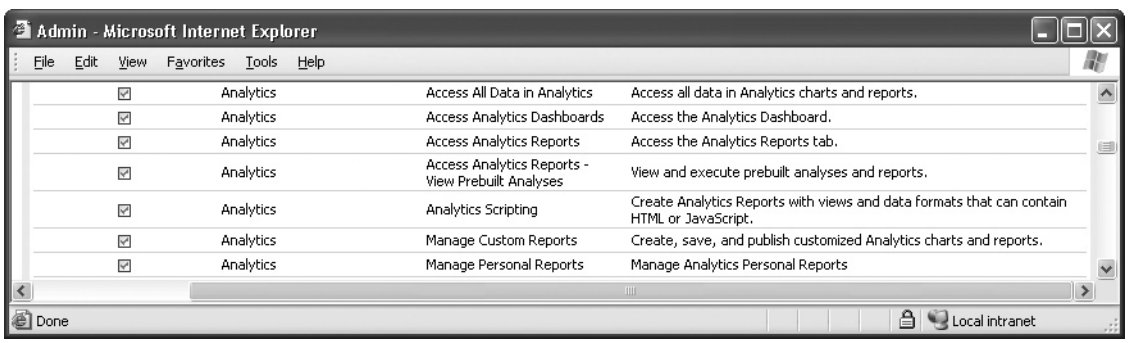

FIGURE 1-1. *Privileges associated with user roles*

The Access All Data in Analytics privilege ensures that you are, while developing reports, able to see all data in the database. Without this privilege, you will have visibility to data based on data access settings in your role and access profile. It would be difficult to develop reports for anyone other than yourself if you are only able to see a limited dataset. If your company is rather liberal with data access, and does not limit visibility, this is not a huge issue. It is still better to have this privilege and know that you have access to data than to assume you do because you believe you are able to see all records by default.

The Analytics Scripting privilege is particularly important for some of the advanced reporting techniques that employ HTML and Java scripting. It is possible to embed scripts in data formats and some view settings. In order to create reports with these capabilities, you will need your role enabled with this privilege. Your users, however, do not need this privilege in order to use reports taking advantage of these features.

The Manage Dashboards, Manage Custom Reports, and Manage Personal Reports privileges are the most important of all of the report developer's privileges. These three privileges work together, and enable you to create new public dashboards and custom reports in the Shared Custom Analyses folder for others to access or in the My Folder directory for your personal use. With the Manage Dashboards privilege, you see the Manage Dashboards link on the Dashboard tab. When you have the Manage Custom Reports and Manage Personal Reports privileges, you are able to see the Design Analyses link on the Reports tab.

Click the Design Analyses link now to open the Answers On Demand application. The first window you see within Answers is the Getting Started with Answers window, described next.

The Getting Started with Answers Window

It is from the Getting Started with Answers window, shown in Figure 1-2, that you create, edit, and maintain your custom reports. Notice that there are three sections to this window. The Create New Analysis section contains the subject areas for creating new custom reports. Before we get into the subject areas, let us look below at the Open Existing Analysis and Manage Analyses sections.

Open Existing Analysis

The Open Existing Analysis section contains the Open Analysis button. Clicking this button allows you to select an existing report to open in the Answers window for editing. You are able to open and work with existing custom reports from your My Folders directory, the Company Wide Shared Folder directory, or the Pre-built Analysis directory. Opening an existing report and saving it with a different name is a great way to create a new report without starting from a blank slate.

Manage Analyses

The Manage Analyses section contains the Manage Analyses button. Clicking this button allows you to copy, move, rename, and delete reports in the My Folders directory or the Shared Folders directory. You cannot access the prebuilt reports here. I describe the reports management features in detail in Chapter 17.

Subject Areas

The Create New Analysis section contains two lists. The first list contains the Analytics subject areas. The other list contains the Reporting subject areas. It is important to understand the

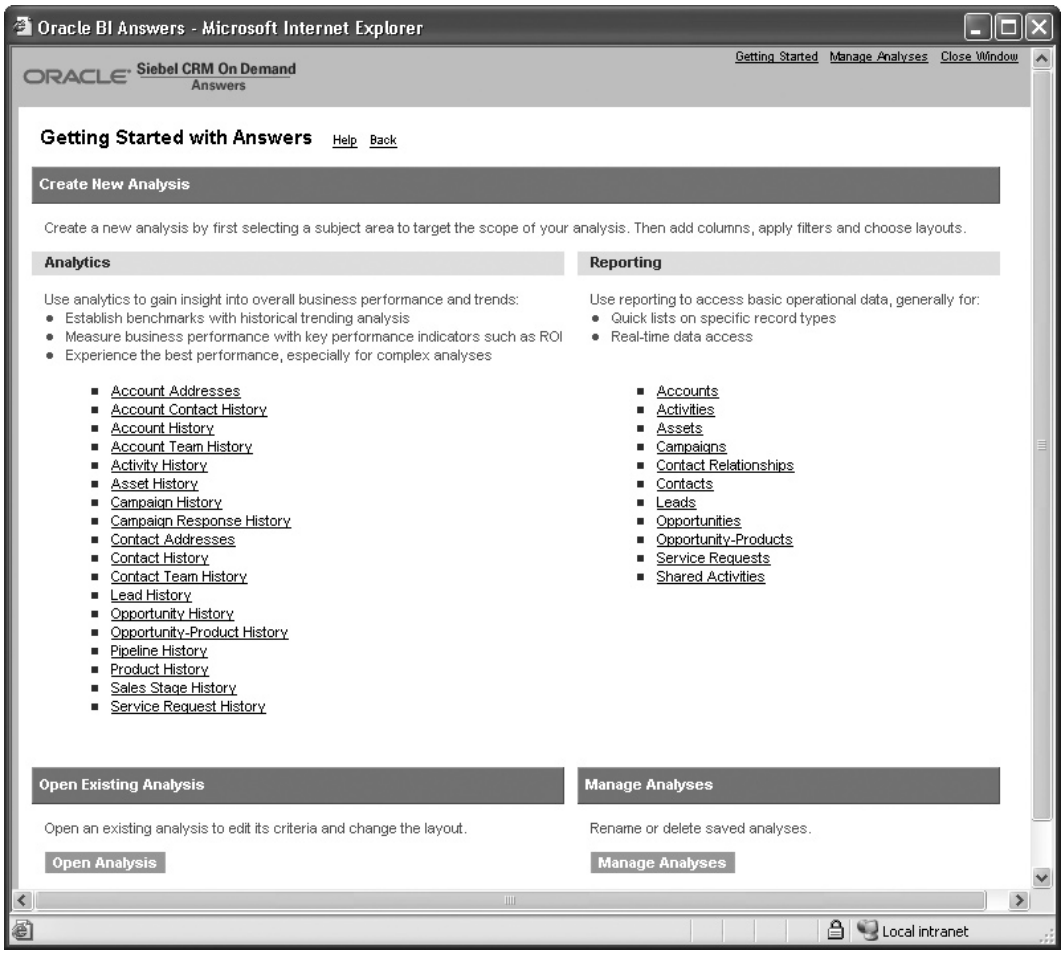

FIGURE 1-2. *Getting Started with Answers window*

differences between these two subject area classifications. Choosing the correct subject area for your report is critical to the success of your analytic venture.

Analytics Subject Areas

It is highly preferable to select a subject area from the Analytics subject areas, for a number of reasons. You will achieve the best performance from reports built from one of these subject areas. Reports based on Analytics subject areas draw data from a data warehouse. The data warehouse is tuned for maximum report performance. You will also find that data from related records is more often available for reporting as the number of available columns exceeds the columns available for real-time subject areas. Data moves from the operational database daily during an overnight data warehouse refresh. For this reason, reports built in these subject areas contain data that is current as of the previous day.

You will notice, too, that the Analytics subject areas offer several more choices of subject areas. The data warehouse allows you to take full advantage of the reporting capabilities of CRM On Demand with historical analyses, additional metric columns designed to measure key performance indicators, and a more complete library of related data within each subject area.

Reporting Subject Areas

The subject areas under Reporting draw data from the operational database. The users of On Demand are updating this database through the CRM On Demand interface. Users are constantly manipulating and updating this data. The operational database is structured for efficient data creation and management. When used for reporting, it will typically be slower than the data warehouse. You will want to use the Reporting subject areas only when real-time data analysis is a requirement of your report.

Explore the Prebuilt Reports

As you begin to think about the types of reports that you would like to build, the prebuilt reports in CRM On Demand can be a great resource to you. The prebuilt reports are an excellent source for reporting ideas as well as for examples of many of the different functions and views that you will want to include in some of your own reports. By running the prebuilt reports or opening them in Answers On Demand, you can learn a great deal about report design.

The rest of this chapter introduces the various prebuilt reports and identifies what these reports do and, perhaps more importantly, how they do what they do. One thing that you will undoubtedly notice about many of the prebuilt reports is that there is a distinct difference in the report when you run the report from the Reports tab and the design of what appears to be the same report when opened in Answers to examine the design. This is because these reports use dashboard prompts and run in a dashboard view. The preconfigured Dashboard reports visible on the Dashboard tab use many of these reports. Currently, you cannot edit standard dashboards for the Dashboard tab. You can, however, create custom public dashboards, as discussed in Chapter 13.

When you run a prebuilt report and see a separate view at the top of the window with one or more drop-down lists allowing you to filter the report data, this is likely a dashboard prompt that you will not see when you edit the same report in Answers On Demand.

A recurring theme that you should notice as you examine the prebuilt reports is simplicity. Most of these reports are quite simple in structure, and do not attempt to cram as much data as possible onto a single report. There is a clear purpose, or business question, that drives the report. When it comes to reporting, simple is almost always better. The natural trend seems to drive us in the other direction. This personal desire, or corporate directive, to do as much as possible with as few reports as possible may prove to be more difficult for you to overcome than the actual design and development of reports in general. Chapter 2 revisits this concept. For now, let us have a look at the prebuilt reports in CRM On Demand.

Quick Lists

The Quick Lists reports are the most simple of the prebuilt reports library. Their design meets the common needs of many businesses to see a logically organized list of records.

Opportunities By Account

This report provides a list of sales opportunities organized by the accounts to which those opportunities are related. The report uses the Opportunities Reporting subject area. The layout is

a simple table, but there are a few features worth mentioning. The Account Name, Opportunity Name, and User Name columns are all action links. I will discuss how to format action links in a future chapter, but if you like to figure things out on your own, it would be easy enough to dig into this report. This report also demonstrates the green-bar formatting in the Table view. Green-bar formatting emulates the old green-bar paper that was once popular for printing vast amounts of data. Every other line has light-green background shading.

Opportunities By Sales Stage

This report is quite similar to the Opportunities By Account report, and also uses the Opportunities Reporting subject area. It contains a simple Table view with action links on the Account Name, Opportunity Name, and User Name columns. One distinct difference is the use of system variables in the report filters. This report only displays records falling within the current fiscal year and quarter. You can see these filters in the Answers Define Criteria window, and I will discuss the use of the system variables beginning in Chapter 5. Notice, too, that an Active Filter view is on the report layout. This view displays all the filters affecting the data in the report.

Activities By Opportunity

The Activities By Opportunity report employs the Activities Reporting subject area. It too is a simple table, as most list reports are. This report employs the ActionLink class and green-bar styling as well. You will also notice that the report uses a filter to display only those activities which take place in the current fiscal year. This particular report makes a nice starting point for a report that provides some aggregated totals of activities. Remove the Subject and Date columns, add a metric column, and you have a completely different but quite useful report that calculates the number of activities by opportunity and type for each user.

Accounts By Sales Rep

The Accounts By Sales Rep report provides sales managers with a list of the accounts that their subordinates own. There are action links to the account record as well as the user record in the table. One interesting feature of this report is the method of limiting the data to the sales reps who report to the manager running the report. Note the filter on the Manager Email column. This session variable, used on User Email and Manager Email columns, compares the current user's email address to the email address listed in the filtered database column.

Contact Mailing List

Sorted by account and built from the Contacts Reporting subject area, this simple report pulls your contact's email, address, and phone number information into a table. Action links will take you to the detail record for an account or contact.

Employee List

Clicking the Employee List link on the Reports Homepage actually runs the Employees and Managers List report and the Employees List report. Running the Employee List report using the link on the Reports Homepage provides a list of all the users and their managers in the top table. The table below that is the Employee List report and provides just a list of the users, without listing the managers for each user.

Service List

This report does not appear on the Reports Homepage in the Quick Lists section; rather, to find it, open Answers, click Open Analysis, and look in the Quick List Reports folder. You will find this report listed further down the Reports Homepage in the Service section.

Pipeline Analysis

The Pipeline Analysis reports provide a great starting place for many of your sales reports. Often, these reports need only minor changes to customize them for your business. This section provides a brief summary of each report and calls out some of the more interesting features. Unlike the Quick Lists reports, the Pipeline Analysis reports tend to employ some more visually stimulating layout elements.

Pipeline Analysis

The Pipeline Analysis report is fantastically simple yet extremely insightful. The report itself contains only two columns. The real magic happens on the report layout. Open this report and have a look at the views in use here. The column selector view, which I describe in detail in Chapter 13, enables the user to specify exactly which two columns of data to examine with the report. By enabling columns with the column selector, this report essentially provides 20 separate reports in one simple report. The chart view below the column selector changes dynamically when you select columns from the selector, as does the table below it.

This report uses the active Opportunities Reporting subject area. Unless you have a real business need for seeing this type of data in up-to-the-second real time, I recommend you build a report like this from the Opportunity History Analytics subject area.

Opportunity Revenue Analysis

The Opportunity Revenue Analysis report is very much like the Pipeline Analysis report, only in this report, the Revenue column is fixed, and you are able to select one of four columns with which to analyze the revenue amounts. Again, this is a real-time report, but is likely just as effective for this type of analysis if built on the Opportunity History subject area.

Pipeline Quality Analysis

The Pipeline Quality Analysis report is a nice example of using the column selector to allow the user to choose the metric examined in the report. This report offers a horizontal bar chart with the sales stages listed in the vertical axis. The horizontal axis dynamically changes to reflect the metric selected in the column selector. This report could easily be adapted for multiple sales stages. You could also enable the Sales Stage column in the column selector view to allow the user to select other ways to organize the data.

Team Pipeline Analysis

The Team Pipeline Analysis report is almost identical to the Pipeline Quality Analysis report, only the fixed value in this report is users. If you run this report and see no results, it may be by design. Open the report and examine the filters. Notice that the Manager Email column filters to match the current user. What that means is that if there are no users reporting to you in the database, then you will see no results on this report. That also means that each manager will see only those users that report to him or her. Notice also that there is a filter on the Reporting Level column. By including only those records where the reporting level is equal to zero, the results of this report are limited to just those users who report directly to the individual running the report.

Top 10 Opportunities

The Top 10 Opportunities report is rather simple. The layout includes a horizontal bar chart and a basic table with revenue and expected revenue. The RANK function on the Revenue column is what limits the data to the top ten. You will find more detail on the RANK function in Chapter 6.

For now, I will just point out that by building off this report, you can very easily modify the filter on the ranked column with any number you like to create your own Top *n* Opportunities report.

Historical Pipeline Analysis

The Historical Pipeline Analysis report takes advantage of the Pipeline History Analytics subject area, which retains historical snapshots of data in order to provide this type of comparative analysis over time. The report itself is quite simple, with a bar chart comparing the metrics chosen in the column selector.

Historical Expected Revenue Quarterly Analysis

This report is essentially a copy of the Historical Pipeline Analysis report with the revenue columns removed from the column selector in favor of including only the Expected Revenue for the previous and current quarter. The column selector allows you to group the data in a number of ways, but only shows the expected revenue.

Historical Opportunity Revenue Quarterly Analysis

This report is identical to the Historical Expected Revenue Quarterly Analysis report, only with the Revenue column rather than Expected Revenue column.

Quarterly Closed Revenue Analysis

The Quarterly Closed Revenue Analysis report allows for the comparison of closed revenue from last quarter to the closed revenue of the current quarter. Again, it is very similar to the previous Pipeline Analysis reports, only the Sales Stage column is not available in the column selector. Because it includes only closed revenues, the only sales stage represented is Closed/Won, so there is no point in including the column in the selector.

Opportunity vs. Expected Revenue vs. Closed Revenue

This report takes your revenue, expected revenue, and closed revenue for each week of the quarter and plots them on a line graph. This is a nice example of another chart type that allows you to compare values visually. Since this report is concerned only with revenues in the current quarter, there is no need to build the report using the Pipeline History Analytics subject area. This report relies on the Opportunity History Analytics subject area.

Sales Stage History Analysis

The Sales Stage History Analysis report draws from the Sales Stage History subject area, as you might expect. The Sales Stage History subject area is a particularly useful Analytics subject area, especially if you are interested in how long sales opportunities are in a particular sales stage.

When you run the Sales Stage History Analysis report, you are actually running the Sales Stage History Analysis in the Sales Stage History Analytics folder rather than a report from the Pipeline Analytics folder. Looking in the Sales Stage History Analytics folder, you will notice that there are actually three reports there. There are no direct links to those other two reports from the Reports Homepage. These other two reports, Team Sales Stage History Analysis and Sales Stage History Detail, are actually targets of navigation links. Clicking a Sales Stage column value in the Sales Stage History report will navigate you to the Team Sales Stage History Analysis report. To see how this is accomplished, you can examine the column properties for the Sales Stage column. On the Column Format tab, you will see that the Value Interaction is “Navigate” with the target report identified in the Target field. The Sales Stage value that you click passes to the target report as a filter.

Open the Team Sales Stage History Analysis report and you will see that there are filters on Sales Stage and Date set equal to "is prompted." This instructs the report to look for values passed from the initiating report. Have a look at the column properties on the User Name field and you will discover that clicking a value in the User Name column of the Team Sales Stage History report navigates you to the Sales Stage History Detail report.

I explain adding interactivity, like navigation between reports, in detail in Chapter 16.

Sales Effectiveness

The Sales Effectiveness reports provide insight into your sales teams. With these reports, you can examine how sales teams are performing using a variety of different metrics. If your organization is using the sales modules of CRM On Demand, you will surely find some useful reports here that you can use to build some custom reports of your own.

Top Performers List

The Top Performers List report is a simple list report that shows the top 20 sales people and their total revenue, closed revenue, number of opportunities, and number of wins. The ranking is on the Revenue column, so it is possible that the number of opportunities, for instance, can be a small number but still show on this report if the revenue associated with those opportunities is large enough to be in the top 20. If you prefer to measure your sales people with number of opportunities or number of wins, you would need only to modify the filter so that the RANK function applies to one of the other metric columns.

Quarterly Sales Effectiveness Analysis

This report provides a quarterly breakdown of opportunity win rate, average deal size, or average sales cycle. This is another example of using a column selector to provide users control over what data they see. Suppose you need to see this type of information broken down by month. You could simply enable the Fiscal Qtr/Yr column in the column selector and add the Fiscal Mth/Yr column. This would enable users to select the time unit. Another option would be to replace the Fiscal Qtr/Yr column in the report and save the report as a new analysis.

Team Sales Effectiveness Analysis

The Team Sales Effectiveness Analysis report is another example of using the column selector view. If you are not seeing data on this report, it is likely due to the filter on the Manager Name column. This report presents an opportunity to provide a caution about the column selector view, however. Notice that the columns available here are the same in both selectors, and contain different value types. The Opportunity Loss Rate and Opportunity Win Rate columns are percentage values. The Average Deal Size column is a currency value. Finally, the Average Sales Cycle column reports a number of days. The following are a couple of things that, in my opinion, you should avoid for clarity of the report's purpose and data reported:

- When you provide the same values in multiple column selector columns, your users may select the same value in each column, eliminating the comparative function of the report.
- When you select the same column in both column selector fields, the chart becomes no more useful than a chart of a single value, and the data table repeats the same value in multiple columns.

When there are differing value formats, take caution with the type of chart you use to illustrate the selected data. For instance, if you compare deal size to sales cycle, which is a perfectly valid analysis, you run the risk of having such a large variance between the two data elements that the smaller elements practically disappear from the chart. Suppose you have an average deal size of $800,000 with an average sales cycle of 24 days. These two measurements side by side on a chart would hardly provide a helpful visual comparison.

Team Activity Analysis

This team report shows the number of open and closed activities for each employee reporting to the manager running the report. This report employs the Activity History Analytics subject area. This means that any activities created today will not appear on this report. Any activity that closes today would still show as open on this report. If up-to-the-minute accuracy is important to your analysis, build a report like this using the Activities Reporting subject area.

Team Win Rate Analysis

The Team Win Rate Analysis report provides managers with a quick summary of their team members' win or loss rate. The Win Rate and Loss Rate columns are metric columns available in the Opportunity History Analytics subject area. These columns do not appear as fields in the database. The win and loss rates are calculated and stored as metric columns in the analytics data warehouse. While it would be possible to calculate these values with the data from the database, the Analytics subject areas provide a number of precalculated metric columns for your reports.

Team Average Sales Cycle Analysis

The Team Average Sales Cycle Analysis report provides managers with a quick summary of their team members' average sales cycle or average deal size. Again, these columns are metric columns available in the Opportunity History subject area.

Customers

A customer relationship management system is all about knowing your customer. How many of your customers have purchased your products or services? How many customers do you have? How many contacts have you made? Who are your best customers? You are likely to have some reporting needs regarding customer activity. The prebuilt reports in this area provide a great starting point for this type of report.

Number of Accounts Opportunity Analysis

The Number of Accounts Opportunity Analysis report provides a count of accounts that have one or more related opportunities. A column selector allows you to select from a number of groupings by which to view the data. Without modification, you are able to view this data by Annual Revenue Tier, Region, State, Industry, and Account Type. In many cases, companies will not track all of these data points, and often create custom fields on their accounts. By modifying the Column Selector view, you can add your custom columns and remove any columns you are not using. Bear in mind that this report draws from the Account History Analytics subject area, so custom fields will not be available until the day after you create them in CRM On Demand.

Also, notice that the first column in the report is set to navigate to the Opportunities By Account report from the Quick Lists section. The value of the column passes to the target report when clicked. Interestingly, you can change this column using the column selector, so the value passed to the target report is from the active column selected from the column selector.

Number of Accounts Analysis

The Number of Accounts Analysis report is exactly like the Number of Accounts Opportunity Analysis report, only this report counts all accounts rather than just those with related opportunities. This report also allows for navigation to another report. In this case, clicking the first column value in either the table or the chart navigates you to the Accounts By Sales Rep report in the Quick Lists section. The filter value passed to the target report depends on the value clicked and the active column selected in the column selector.

Contact Analysis By Opportunity

The Contact Analysis By Opportunity report provides a count of contacts that have one or more related opportunities. Like the Number of Accounts Opportunity Analysis report, a column selector allows you to select from a number of groupings by which to view the data. In this case, you can choose from Sales Stage, Deal Size, and (Opportunity) Status. By modifying the Column Selector view, you can add your custom columns and remove any columns you are not using. This report also uses the Opportunity History Analytics subject area, so custom fields are not available until the day after you create them in CRM On Demand. The report data is accurate as of the previous day's analytics refresh. Clicking the data in this report takes you to the Contact Mailing List report in the Quick Lists section.

Contact Analysis By Account

The Contact Analysis By Account report provides a count of contacts for each of your accounts. You are able to see these counts by State, Region, or Industry. Clicking one of these columns in this report takes you to the Contact Mailing List report in the Quick Lists section.

Top 10 Customers

The Top 10 Customers report is another simple ranking report. The layout includes a horizontal bar chart and a basic table with Account Name, Revenue Tier, Account Type, and Closed Revenue columns. The RANK function is on the Closed Revenue column. (Chapter 6 provides more detail on the RANK function.) The Account Name column is an action link that navigates to the detail window for the selected account.

Account Analysis

The Account Analysis report includes a Column Selector view that allows you to select the columns you want to analyze with this report. You may choose to view the number of accounts with opportunities or closed revenue by selecting one of these columns in the Column Selector view. You can also choose the column by which you want to group the measurement. The columns available are State, Account Type, Region, Industry, and Annual Revenue Tier. With just two columns in the column selector, this report will produce ten combinations. Adding to this is as simple as adding additional columns to the report. Clicking one of the hyperlinks in the report will navigate you to the Opportunities By Account report.

Closed Revenue By Account Analysis

The Closed Revenue By Account Analysis report gives you the breakdown of closed revenue across one of five account variables. You can see the closed revenue by Account Type, State, Region, Industry, or Annual Revenue Tier. This report also provides navigation to the Account By Sales Rep report.

Service

The prebuilt reports in the Service section examine the Service Request object in CRM On Demand. You will find that the design of these reports is very similar in concept to the reports in the other sections of the prebuilt reports. There is a heavy use of the column selector view, and the overall design of the reports is simple and quite focused.

Service Analysis

The Service Analysis report is one of the many simple yet extremely insightful reports among the prebuilt reports. The report itself contains only two columns. The metric column that this report analyzes is the number of service requests, and with the column selector view, you are able to view this data by User Name, Industry, Area, Source, Region, or Priority. This report uses the active Service Request History Analytics subject area, so the data returned is current as of the previous day.

Service Report List

This is a quick list report that provides a table displaying SR Number, Source, Status, Priority, Account Name, Date, and Fiscal Year for each user. You will find this report listed in the Service section on the Reports tab, but if you want to open the report in Answers, you need to look in the Quick Lists folder.

This report would be a good candidate for a pivot table. Of course, you might want to add a metric column. You can use a pivot table view, for example, to group the data differently or to provide counts for each user across source. Pivot tables add an almost infinite set of possibilities. Learn more about pivot tables in Chapter 12.

Current Service Request Aging Analysis

The Current Service Request Aging Analysis report provides a visual analysis of how long the currently open service requests have been open. You can see this data grouped by source, priority, or area. I would like to use this report to illustrate a couple of points. First, notice that the metric column in this report is Avg Open SR Age. This column does not exist in the functional CRM On Demand database. You will not see this column exposed on any layout in the application. The column exists only in Answers as a calculated field.

In addition, if you examine the filter used on this report you will see a session variable there named NQ_SESSION.SR_OPEN. This system variable is one of many. You will not find a complete list documented in the Online Help. Having command of all the system variables is not necessary to be a successful reports developer. You can calculate all the system variable values using other functions in column formulas. You may see system variables in predefined reports, and I document some of them for you in this book.

Open Service Request Analysis

The Open Service Request Analysis report is similar to the Current Service Request Aging Analysis report, except that this report is concerned with the number of open service requests rather than how long they have been open. You can see how many open service requests there are by User Name, Source, Priority, or Area. This report also uses the NQ_SESSION.SR_OPEN system variable. You can just as easily filter on the Status column, including only the open service requests.

Number of Service Request Analysis

The Number of Service Request Analysis report is almost exactly like the Service Analysis report. This report also contains two columns. The metric column that this report analyzes is also the

number of service requests, and with the column selector view, you are able to view this data by User Name, Status, Area, Source, or Priority. This report draws from the active Service Request History subject area, so the data returned is current as of the previous day.

Team Service Analysis

Like the other "Team" reports, this one provides managers a means for examining a number of different metrics for each of their subordinates. You may need to remove the Manager Email column filter to see data in this report if you are not a service manager. Managers are able to see the average age of open service requests, the number of open service requests, the number of closed service requests, the number of pending service requests, the number of cancelled service requests, and the number of service requests regardless of status for each of their subordinates.

Notice that the report filters to show only direct reports by including only those records where the reporting level is "0."

Marketing Effectiveness

You use the prebuilt reports in this final group to analyze your marketing data. These reports focus primarily on campaign records, but rely on relationships between campaigns and leads and opportunities to determine how effective campaigns are. The Marketing Effectiveness reports are also a treasure trove of interesting report elements. Dig into them and you will see many undocumented session variables, use of images with conditional data, multiple layers of navigation, and the use of narrative report views.

You will find that beyond the nine reports listed on the Reports tab, when you look inside the Marketing Effectiveness folder from Answers, there are a dozen additional reports. These reports make up the dashboards targeted by the navigation links in the listed reports. I encourage you to explore these reports from within the CRM On Demand user interface as well as with Answers.

Active Campaign Status

The Active Campaign Status report examines all of your currently active campaigns and allows you to view statistics on those campaigns. There is a wealth of information available through this report. The metrics available here are Return on Investment (ROI), Cost Per Lead, Lead Conversion Rate, Cost Per Closed Sale, Opportunity Win Rate, Opportunity Revenue, Closed Revenue, Number of Wins, Number of Opportunities, and Number of Leads.

This report also has navigation built into the Campaign Name column that takes you to a dashboard containing a number of other campaign reports. You will also notice that the filters include a session variable named NQ_SESSION.ACTIVE_CAMPAIGN. This variable obviously limits the data to only those campaigns that are active. You can easily accomplish this with a filter on the status column that identifies all of the appropriate active status values.

Another interesting feature of this report is the dynamic sort ability on the ROI column. You can provide users with this dynamic sorting ability on columns in a table by enabling the sort on the Table View.

Completed Campaign Results

The Completed Campaign Results report examines all of your closed campaigns and allows you to view statistics on those campaigns. This is the same report as the Active Campaign Status report for your closed campaigns. The metrics included in this report, like the previous report, are Return on Investment (ROI), Cost Per Lead, Lead Conversion Rate, Cost Per Closed Sale,

Opportunity Win Rate, Opportunity Revenue, Closed Revenue, Number of Wins, Number of Opportunities, and Number of Leads.

This report also navigates to a dashboard containing a number of other campaign reports. One of the filters in this report compares the Status field with the session variable NQ_SESSION. COMPLETED_CAMPAIGN. This variable is the inverse of the variable used in the active report, and limits the data to only those campaigns that are not active.

Campaign Effectiveness By Campaign Name

The report that you are able to open in Answers is a simple table report that lists completed activities organized by type and shows metrics for each. The metrics include Actual Cost, Number of Leads, Number of Opportunities, Number of Wins, Closed Revenue, Cost Per Lead, Cost Per Closed Sale, and Return on Investment. Clicking a campaign name in this report will navigate you to the same dashboard that the previous two reports target.

If you run this same report from the Reports tab, you will notice that there is more than meets the eye compared to looking at the design of the report. Running this report exposes a number of additional embedded reports, many of which are described individually further down this list. The report makes use of a dashboard view that is currently only available on the Dashboard tab for your custom dashboards.

Campaign Effectiveness By Campaign Type

This report is the same as the Campaign Effectiveness By Campaign Name report with the Campaign Name column removed. The navigation on this report is on the Campaign Type column. This report is also quite different when run from the Reports tab.

Lead Followup Analysis

Use this report to analyze the status of your leads dated within the last 90 days. The report displays the number of leads within each stage by Fiscal Year, Fiscal Half Year, Fiscal Quarter and Year, Fiscal Month and Year, Fiscal Week and Year, Lead Owner, or Sales Person based on a selection from the column selector.

Examine the filter on this prebuilt report and you will see a great example of the TIMESTAMPADD function along with the CAST and CURRENT_DATE functions. Detailed information on these functions is provided in upcoming chapters, but in summary, this filter limits data to dates between the current date minus 90 days and the current date.

The data table on the report is not a regular table. This report uses a pivot table to group the measurements into columns for each status value. The pivot table view is the most versatile of all views in Answers On Demand, which you will discover in Chapter 12.

Lead Source Analysis

The Lead Source Analysis report displays the number of leads dated within the last 90 days organized by source, lead owner, sales person, or campaign name. This report also uses the TIMESTAMPADD filter to limit data to the past 90 days.

Opportunity Source Analysis By Close Date

The Opportunity Source Analysis By Close Date report analyzes opportunities that closed in the previous 90 days. You are able to see the number of opportunities by lead source, campaign name, owner, or territory.

Opportunity Source Analysis By Create Date

The Opportunity Source Analysis By Create Date report analyzes opportunities with a create date within the previous 90 days. You are able to see the number of opportunities by lead source, campaign name, owner, or territory.

Projected Revenue

You will not find the Projected Revenue report on the Reports tab. This report is a subreport that is part of another report. This report shows revenue data based on leads created in the last 90 days, and compares lead potential revenue to actual closed opportunity revenue.

The report filter uses the TIMESTAMPDIFF function to limit the number of days between lead creation and the last data refresh.

Campaign Activity

This report provides a line graph of number of leads, number of new opportunities, and number of wins by fiscal week. You will find this chart embedded in other prebuilt reports; it is visible when you run those reports from the Reports tab.

Campaign Averages

This small report simply calculates the average time it takes to convert a lead and close an opportunity and the average revenue amount. The interesting element in this report is the use of conditional formatting to include a small flag icon next to the values in the columns.

Campaign Detailed Results

This report is nothing more than a narrative view designed to display a campaign name as part of one of the dashboard-style reports described earlier.

Campaign Leads

This report provides a bar chart that graphs the number of leads by lead status. This report is also part of the dashboard reports described earlier.

Campaign Opportunities

The Campaign Opportunities report is another one of those simple reports that serves as an element of the dashboard reports. This report contains a bar chart that graphs the number of opportunities by sales stage.

Campaign Revenue

The Campaign Revenue report contains a bar chart that graphs revenue by opportunity sales stage.

Campaign Performance Summary—Averages

This report provides 16 separate averages using session variables in the formula for each column. The metrics provided are averages of actual campaign cost, budgeted campaign cost, percentage of budget, number of leads, lead conversion rate, cost per lead, number of leads targeted, percentage of leads achieved, revenue target, percentage of revenue target achieved, opportunity revenue, closed revenue, return on investment percentage, number of wins, opportunity win rate, and cost per closed sale.

Lead Conversion Metrics

The Lead Conversion Metrics report provides a table with conditional formatting that displays the number of accounts, contacts, leads, and opportunities for campaigns.

Accounts List, Contact List, Lead Lists, and Opportunity Lists

The List reports in the Marketing Effectiveness folder provide basic tables designed to list the accounts, contacts, leads, or opportunities associated with a particular campaign. You will find these reports embedded in other dashboard-style reports.