

Measuring KPIs Leveraging Salesforce CRM Analytics for a Leading Telecommunications Provider



Overview:

Our customer, a leading player in the telecommunications industry, sought to harness a scalable, AI-powered data and analytics platform native to Salesforce. By unifying fragmented reporting tools and introducing predictive models, they aimed to gain real-time insights, improve forecasting accuracy, and drive strategic decision-making.

Pain points:

Fragmented Reporting

Multiple reporting platforms required manual cross-comparison, complicating KPI tracking.

Limited Data Visualization & Insights

Static dashboards prevented real-time analytics, limiting predictive and prescriptive capabilities.

Forecasting Complexity

Reliance on data from numerous systems hindered prompt consolidation and delayed strategic planning.

Lack of actionable insights

Minimal visibility into prospect and customer behaviors restricted the ability to optimize sales initiatives.



Solutions:

Customer 360 ° View

Incorporated high-value report components and lists on Account and Opportunity pages to provide a holistic Customer 360 perspective.

Unified Dashboards & Sales Insights

Leveraged Salesforce CRM Analytics to merge data sources and build dashboards reflecting key reports.

Measuring Sales KPIs

Deployed out-of-the-box Salesforce CRM Analytics templates for pipeline and sales analytics, offering streamlined performance tracking across regions.

Trending & Prediction Models

Implemented Einstein Prediction Builder for custom Salesforce object predictions, optimizing trends, reducing churn, and improving forecast accuracy.

Proactive Data Management

Automated data ingestion and dynamic dashboards, ensuring stakeholders consistently have access to up-to-date, actionable insights.

Benefits:

