

Five Killer Reports For Your Dashboard



To help you gain answers to all your business questions, use any (or all!) of these **five reports** to achieve a better understanding of your business. Build these report once, place on your GoodData dashboard and daily, these reports will automatically be populated with the latest data.

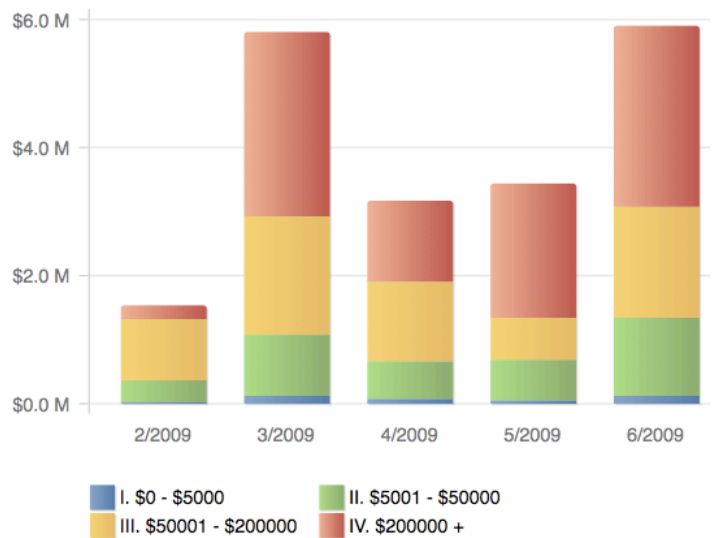
Tip: GoodData's ability to historically snapshot data is ideal for using in conjunction with your CRM (Salesforce, SugarCRM, Microsoft Dynamics).

1. Historical Trending Reports

Historical Trending charts track changes over time of a single metric or series of metrics. This level of historical trending enables you to understand how your business is changing overtime, in contrast to only seeing "today's view." In this example, you can see that while your **sales pipeline** size fluctuates over time, the majority of the pipeline is dominated by deals in the \$5001-\$50000 and \$0-5000 range.

Track your **marketing activity** historically by measuring your leads and campaigns. Visually represent how the total number of new leads and the breakdown by type are changing over time.

▼ **Historic Pipeline Size Breakdown** [Icons]



2. Tiering & Grouping Reports

Tiering & Grouping Reports take any metric and group them for easier reporting and analysis. For instance, it is easy to track deals that are 0-60 days old or opportunities that are between \$50,000 - \$200,000. This example shows a breakdown of the **sales pipeline** by opportunity age and deals that are 0-60 days, 61-120 days, 121-180 days, etc. Sometimes the simplest visualizations are the most powerful.

Tiering & Grouping Reports can be used for tracking open **support tickets**. Measure open ticket status in a simple colored line chart which tracks tickets by number of days open.

▼ **Current Quarter Pipeline by Deal Size & Age** [Icons]

Opp Age Tier	Opp Size Tier	Amount [Sum]
I. 0 - 60 days	III. \$50001 - \$200000	\$1.61 M
	IV. \$200000 +	\$9.47 M
II. 61- 120 days	III. \$50001 - \$200000	\$2.76 M
	IV. \$200000 +	\$2.70 M
III. 121 - 180 days	III. \$50001 - \$200000	\$2.88 M
	IV. \$200000 +	\$2.23 M
IV. 181 - 360 days	III. \$50001 - \$200000	\$3.66 M
	IV. \$200000 +	\$5.22 M
V. 360 + days	III. \$50001 - \$200000	\$2.03 M
	IV. \$200000 +	\$2.80 M

3. Waterfall Reports

Waterfall Reports (often called What's Changed Reports) track a cohort group of metrics or facts over time to see what happens to them. In this example, we are tracking **sales deals** that start a quarter in the "Discovery" stage. You can see that 93.9% of the deals remain in the "Discovery" stage throughout the quarter, while only 5.7% moved to a later stage.

Stage 2 - Beginning of Period

Quarter/Year	Q1/2011	
Stage	Count	Amount
Discovery	2,505	\$49.6MM

Stage 2 - Waterfall Report

Quarter/Year	Q1/2011		
Stage	Count	Amount	% of Count
Interest	8	\$275,681.83	0.4%
Discovery	1,779	\$42,588,237.86	93.9%
Short List	37	\$351,917.73	2.0%
Conviction	33	\$1,392,488.32	1.7%
Risk Assessment	21	\$468,815.01	1.1%
Negotiation	17	\$417,184.43	0.9%
Sum	1,896	\$45,494,325.18	100.0%

Waterfall reports are useful for uncovering trends and patterns for **marketing** and **customer support** analytics too. Track tradeshow leads, page visits, ticket sources and more.

4. Exception Reports

Exception Reporting allows you to track metrics that deviate from any set standard. Tracking where **marketing leads**, **sales opportunities** or **support tickets** are deviating from the norm is an extremely powerful reporting tool. In this example, we are monitoring **marketing campaigns** spends that are greater than what sales generated.

Marketing Campaign Exception Report

Campaign Name	Campaign Cost [Tot]	# Leads Created	Amount [Won]	Amount Won/Camp
Ad Campaign 131	10,051.00	128	\$11,000.00	\$1.09
Conf/Event 162	11,058.00	2,870	\$12,000.00	\$1.09
Email Blast 69	1,898.00	129	\$2,000.00	\$1.05
Conf/Event 126	9,706.00	6	\$10,000.00	\$1.03
Conf/Event 117	9,784.00	81	\$10,000.00	\$1.02
Ad Campaign 38	9,969.00	7	\$10,000.00	\$1.00
Ad Campaign 61	9,081.00	232	\$9,000.00	\$0.99
Conf/Event 82	8,785.00	78	\$8,000.00	\$0.91
Conf/Event 68	10,151.00	51	\$9,000.00	\$0.89
Ad Campaign 42	9,333.00	7	\$7,000.00	\$0.75

5. Multidimensional Reports

For immediate visual insight, start tracking many dimensions of your data. You can track **sales opportunities** across size, age, win status and time. In this example we are tracking **support activity** across four dimensions: support request, priority, case type and time. This reports is great for monitoring what case types are closing the fastest according to priority status.

