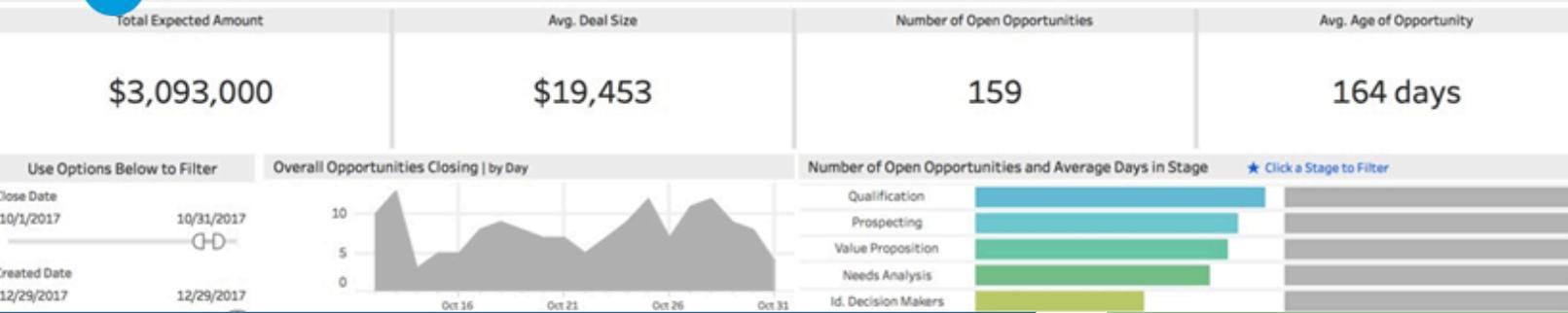


AGENTFORCE TABLEAU QUICK START



Ellie Rogers's team



What's Included

- A PRODUCT AND TERRITORY PERFORMANCE DASHBOARD
- CREATE A UNIQUE TABLEAU DATASET FROM YOUR SALESFORCE DATA
- FOCUSED ON TERRITORY-SPECIFIC PRODUCT PERFORMANCE
- QUOTA VS SALES PERFORMANCE
- ACCOUNT CHURN METRICS

Results

Duration: 6 weeks
\$10,000

- GAIN VISIBILITY WITH INTERACTIVE FILTERING OF YOUR PRODUCT AND TERRITORY DATA
- IDENTIFY ACCOUNTS LIKELY TO CHURN



THE SETUP

- Tableau installed and connected to 1 Salesforce instance
- 1 homepage dashboard built, highlighting historical product performance, territory performance, and account churn metrics
- 1 dataset created to power all dashboards
- 1 Salesforce-to-Tableau data connection configured
- 1 training session delivered

CONSIDERATIONS



OPTIONAL ENHANCEMENTS (PHASE 2)

- Data Cleanup
- ERP Integrations
- Historical data loads

Disclaimer: Not included in the core quick start

CLIENT PROVIDES



- Access to the production environment
- Sample sales and product-level data
- Primary point of contact for feedback and testing

SCHEDULE YOUR QUICK START CONSULTATION [HERE](#)

