Oracle Fusion Cloud Customer Experience

Subject Areas for Transactional Business Intelligence

April 2024

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1 Overview

Subject Areas Overview

This guide provides a list of all the prebuilt subject areas with the following detail:

- Description of the subject area.
- Business questions that can be answered by data in the subject area, with a link to more detailed information about each business question.
- Job roles and duty roles that can be used to secure access to the subject area, with a link to more detailed information about each job role and duty role.
- Primary navigation to the work area that is represented by the subject area.
- Time reporting considerations in using the subject area, such as whether the subject area reports historical data or only the current data. Historical reporting refers to reporting on historical transactional data in a subject area. With a few exceptions, all dimensional data are current as of the primary transaction dates or system date.
- The lowest grain of transactional data in a subject area. The lowest transactional data grain determines how data are joined in a report.
- Special considerations, tips, and things to look out for in using the subject area to create analyses and reports.

Scheduled ESS Processes

Some subject area dimensions have scheduled processes to refresh the data. If your analytic doesn't have the correct or updated data, you might need to run an ESS scheduled process update. For a list of subject areas that contain dimensions that have ESS scheduled processes, and general detail on scheduling ESS processes see, *Scheduled Processes for Analytics*

Choosing the Right Subject Area

You can use the prebuilt subject areas to build your own analytics. or you can build your own subject areas and use them for building or editing analytics. Most importantly, the focus of a subject area is to provide a way for you to gain access to key insights about your organization.

We provide a wide variety of subject areas that give insight on a lot of different business activities. So how do you know which subject area is right for you? It starts with the names of the subject areas. Let's say you're building your own analytic because you want to know something about your pipeline. The area of interest to you in this case would be pipeline, and would make sense to choose a pipeline subject area for starters. Take a look at the subject areas in the guide. You might notice that the Sales — CRM Historical Pipeline has questions like " How are product revenues trending month to month?" Or "What are the higher value deals that have been pushed out?" There are lots of business questions that can guide you to the right subject area and help you get the insights you're looking for.

Now let's assume you know your subject area. But wait, there could be a prebuilt analytic that uses this subject area. You might take a look at the prebuilt analytics spreadsheet. But if none of those prebuilt analytics work for you, go to BI and click New > Analysis and choose the Sales — CRM Historical Pipeline subject area. You can see the available columns of information you can use to build your analytic. You can add any columns and facts you want, and at any time click the "Results" tab and see how it looks. .

Exploring Subject Area Components

This guide doesn't detail the dimensions, columns, and facts that make up a subject area. But no problem. You can explore the components right in your application. Here's how:

1. From the Home page of your application go to Navigator.
2. Go to Tools > Reports and Analytics. This brings you to the Reports and Analytics page where your sales team see analytic detail specific to their role. Let's go BI where we can access all the details and tools related to subject areas.
3. Now let's go to BI. Click Browse Catalog.
4. In BI let's take steps as if we are building a new analytic. Go to New and then Analysis.
5. Choose the subject area you are interested in exploring. Let's pick Sales — CRM Pipeline as an example.
6. Expand some of the folders. The top level folders are called Dimensions. They hold the columns a related to that dimension. You will also see Fact folders. Let's look more closely at the Fact folders.

What are Facts?

Facts are a little tricky. This first thing to understand is that facts and dimensions work together as a pair for reporting. Think of the fact as the verb or the action in an analytic, and the dimensions as the nouns, or a bunch of related nouns —things grouped together in context. You can have a collection of things, but without doing something with them, they are just there to look at. Same with dimensions, sure you can go into the subject area editor, and expand all the folders and look at the columns. You can drag a column onto the editor and view row after row of data. But, if you want to analyze the data, you need a way to measure it. You need to count it, compare it, sum it up, average it over time or perform any other statistical operation.

So keep in mind that all dimensions need a fact, at least one fact. Facts give meaning and purpose to your analysis. Don't build analytics without a fact, especially if you have more than one dimension because this leads to unpredictable results.

2 Subject Areas

Overview

This chapter provides information on the subject areas with data you maintain in Oracle Engagement Cloud. These subject areas, with their corresponding data, are available for you to use when creating and editing analyses and reports. The information for each subject area includes:

- Description of the subject area.
- Business questions that can be answered by data in the subject area, with a link to more detailed information about each business question.
- Job roles and duty roles that can be used to secure access to the subject area, with a link to more detailed information about each job role and duty role.
- Primary navigation to the work area that is represented by the subject area.
- Time reporting considerations in using the subject area, such as whether the subject area reports historical data or only the current data. Historical reporting refers to reporting on historical transactional data in a subject area. With a few exceptions, all dimensional data are current as of the primary transaction dates or system date.
- The lowest grain of transactional data in a subject area. The lowest transactional data grain determines how data are joined in a report.
- Special considerations, tips, and things to look out for in using the subject area to create analyses and reports.

CRM - CRM Activities with Related Activities

Description

This subject area lets you report on the quotes associated with opportunities, the quoteline items and the associated products. You can analyze useful metrics like recurring and non-recurring revenue, usage revenue and contract value at both quote and quote line item level, as well as number of quotesand number of quote line items.Products listed on quotes in multiple currencies can be converted to the corporate currency as part of Quote Line reporting due to currency rates stamped on the quote header.

Business Questions

This subject area can answer the following business questions:

- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *What are the associated activities related to my upcoming appointment and task?*

- *What are the follow-up tasks I need to do on a particular customer?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*

* *Service Managerial Transaction Analysis Duty*
* *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Reports and Analytics

Time Reporting

This subject area reports historical data.

Time dimension is linked to User System Usage."Time"."Date".

Transactional Grain

This subject area returns the data at the grain of the User.

Special Considerations

The subject area requires the FBI_USER_SYSTEM_USAGE_TRANSACTIONAL_DUTY duty role for access.

CRM - CRM Activity Contact Real Time

Description

Used to analyze/report on all the contacts/contact roles on an activity. Contact dimension in this subject area refers to both primary and non-primary contacts, unlike other subject areas, where it refers to only primary contact. This subject area can be combined with any other subject area that has activity dimension, when results are needed at the level of an activity. For cross-subject-area queries, include at least one metric from each subject area and ensure that the Dimensionality check box under the Advanced tab in reporting is selected.

Business Questions

This subject area can answer the following business questions:

* *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
* *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
* *How many contacts were not favored with a positive outcome with a given agent?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Activities

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Activity and Contact

Special Considerations

This subject area is an alias of Sales CRM Activity Contact.

CRM - CRM Activity Objective Real Time

Description

Used to analyze/report on all the objectives defined on an activity. This subject area can be combined with any other subject area that has activity dimension, when results are needed at the level of an activity. For cross-subject-area queries, include at least one metric from each subject area and ensure that the Dimensionality check box under the Advanced tab in reporting is selected.

Business Questions

This subject area can answer the following business questions:

- *Who has completed the most activity objectives?*
- *What are the activity objectives for the current period?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*

- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Activities

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Activity and Objective

Special Considerations

This subject area is an alias of Sales CRM Activity Objective.

CRM - CRM Activity Real Time

Description

Used to analyze/report on activities such as Tasks and Appointments associated to Service Requests and other CRM business entities. For example, Lead and Opportunity. Useful activity attributes such as Type (Call, Meeting, and so on), Owner, Priority, Status, and Outcome make it possible to perform compelling analysis, leading to a better understanding of the time and resource demands in supporting customers, pursuing leads and opportunities, or running marketing campaigns.

Business Questions

This subject area can answer the following business questions:

- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*

- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Activities

Time Reporting

This subject area can report historical data.

Time dimension is linked to Sales - CRM Sales Activity."Activity"."Sort Date".

Transactional Grain

Activity

Special Considerations

This subject area is an alias of Sales CRM Sales Activity.

CRM - CRM Activity Resource Real Time

Description

Used to analyze/report on all the resources/resource roles on an activity. Resources dimension in this subject area refers to both primary and non-primary resources, unlike other subject areas, where resource refers to only primary resource. This subject area can be combined with any other subject area that has activity dimension, when results are needed at the level of an activity. For cross-subject-area queries, include at least one metric from each subject area, and ensure that the Dimensionality check box under the Advanced tab in reporting is selected.

Business Questions

This subject area can answer the following business questions:

- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What managers have teams averaging the most activities?*
- *What are the activity levels in specific regions?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*

- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Activities

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Activity and Resource

Special Considerations

This subject area is an alias of Sales CRM Activity Resource.

CRM - CRM Click History

Description

This subject area helps you understand individual, team, and organization usage in your application: It gives you data on the most and least used flows and helps you discover usage patterns that impact adoption. Use this information to help you identify and act on ways to improve adoption.

Business Questions

This subject area can answer the following business questions:

- *What areas of the application are used by users in specific geographic region or resource hierarchies?*
- *What areas of the application are users viewing or not viewing?*
- *How are the areas of the application performing?*
- *Which users are using the application the most or least based on clicks?*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to this subject area:

- *User System Usage Transaction Analysis Duty*

Primary Navigation

Home page > Sales > Usage Insights

Time Reporting

This subject area reports historical data.

Time dimension is linked to User System Usage."Time"."Date".

Transactional Grain

This subject area returns the data at the grain of the User.

Special Considerations

Although not necessary for the Click History itself, it may be a good idea to Enable Adoption and Usage Tracking to leverage other User Adoption subject areas. Ensure that users have the assign the FBI_USER_SYSTEM_USAGE_TRANSACTION_ANALYSIS_DUTY role. Users will need this to access the Click History subject area. Running the User Analytics Click Mapping Translation ESS job refreshes the data used in the subject area. The Click History Aggregation ESS job aggregates and purges the dataset. It needs to be run daily.

CRM - CRM Interaction Activity Real Time

Description

The CRM Interaction Activity Real Time subject area lets you get real-time insights into interactions related to activities. The activities include a range of engagements, including emails, calls, meetings, and other communication events.

Use this subject area to engage with customers more effectively, improve your internal processes, and optimize customer-related activities in real-time.

Business Questions

This subject area can answer the following business questions:

- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Are certain channels more effective in generating positive customer responses?*
- *How have interactions evolved over a period?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Activities

Time Reporting

This subject area doesn't report historical data.

Time dimension is linked to CRM - CRM Interaction Activity Real Time."Interaction"."Start Time".

Transactional Grain

This subject area returns the granular data of Activity based Interaction.

Special Considerations

By default, the 'implicit' fact table for this subject area is the Interaction Fact. This means that in the absence of any Activity related metric, a report would return all the data assocaited at the Interaction level. To report on Interactions for Activities, select an Activity-related metric from the subject area.

CRM - CRM Interaction Aggregate

Description

This subject area can be used by itself or in conjunction with the CRM - CRM Service Request Summary subject area. It is intended to help with speed of reporting while obtaining an aggregated view of interactions by any or all of: month, week, agent, and/or channel. Managers can obtain an insight into the volume of interactions that occur with or without an associated SR, how often these occur, and across what channels. Further enhancements in the subject area provide for additional metrics covering interactions crossing channels and agents, to help managers understand the behavior and performance of agents as interactions get transferred between agents or passed on to other real time channels

Business Questions

This subject area can answer the following business questions:

- *How many customer interactions happen without an SR?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Requests > Service Request Details > Interaction History

Time Reporting

This subject area reports historical data.

Time dimension is linked to CRM - CRM Interaction Aggregate.Interaction.Creation Date .

Transactional Grain

Aggregated interactions at weekly and monthly level

Special Considerations

Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. 'Aggregate Service Requests' 2. Execute Full Load of Cross-Channel Interaction Data for Reporting 3. Execute Incremental Load of Cross-Channel Interaction Data for Reporting 4. Reporting Hierarchy Generation

CRM - CRM Interaction Lead Real Time

Description

The CRM Interaction Lead Real Time subject area provides real-time insights into interactions as they relate to various leads. This will help to effectively manage and evaluate communication, correspondence, and engagement.

Use this subject area to monitor lead interactions, help boost lead conversion rates, and streamline lead engagement processes in real-time.

Business Questions

This subject area can answer the following business questions:

- *How do interactions affect the progression of leads through the sales funnel?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*

- *How do customer interactions correlate with the success of marketing campaigns?*
- *Which lead interactions are most successful in moving leads toward conversion?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Leads

Time Reporting

This subject area doesn't report historical data.

Time dimension is linked to CRM - CRM Interaction Lead Real Time."Interaction"."Start Time".

Transactional Grain

This subject area returns the data at the grain of Lead based Interaction.

Special Considerations

By default, the 'implicit' fact table for this subject area is the Interaction Fact. This means that in the absence of any Lead related metric, a report would return all the data assocaited at the Interaction level. To report on Interactions for Leads, select a Lead-related metric from the subject area.

CRM - CRM Interaction Opportunity Real Time

Description

The CRM Interaction Activity Real Time subject area lets you get real-time insights into interactions related to opportunities. This will help you effectively manage and nurture opportunities and ultimately increases the chances of successful closures.

Use this subject area to monitor opportunity interactions, enhance sales opportunity management, increase win rates, and streamline opportunity engagement processes in real-time.

Business Questions

This subject area can answer the following business questions:

- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*

- *Are there areas where team members require additional training for more effective interactions?*
- *Which sales team members are most effective in managing opportunities?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Opportunities

Time Reporting

This subject area doesn't report historical data.

Time dimension is linked to CRM - CRM Interaction Opportunity Real Time."Interaction"."Start Time".

Transactional Grain

This subject area returns the data at the grain of Opportunity based Interaction.

Special Considerations

By default, the 'implicit' fact table for this subject area is the Interaction Fact. This means that in the absence of any Opportunity related metric, a report would return all the data assocaited at the Interaction level. To report on Interactions for Opportunities, select an Opportunity-related metric from the subject area.

CRM - CRM Interaction Service Requests Real Time

Description

This subject area enables you to analyze interactions in the context of SRs and helps answer questions such as the average number of interactions it takes to close an SR, how would that vary between regions, customer segments, products, service categories, and other business contexts. Insights such as these help managers identify outliers to take corrective action.

Business Questions

This subject area can answer the following business questions:

- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *What percentage of service requests involve at least one interaction?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Requests > Service Request Details > Interaction History

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Interaction and Service Request

Special Considerations

None.

CRM - CRM Interactions Real Time

Description

Interaction information is captured whenever an inbound or outbound communication occurs between a service personnel and a customer. This subject area enables you to build analyses to obtain a real-time view of the nature of interactions such as the number and frequency of interactions, whether they are inbound, outbound, and so on, across the spectrum of customers, contacts, channels, and agents. Performance indicators such as average interaction handling times are available ready-to-use to enable building quick insights. Interaction Wrap-Up analysis is also supported.

Business Questions

This subject area can answer the following business questions:

- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*

- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Center > Service Request and Navigator > Help Desk > Help Desk Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to CRM - CRM Interactions Real Time.Interaction.Creation Date.

Transactional Grain

Interaction

Special Considerations

Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Reporting Hierarchy Generation

CRM - CRM Reporting Performance

Description

This subject area shows the performance of reports and subject areas in OBTI in CRM. The subject area exposes metrics around subject areas, analyses, and dashboards, including execution time. These metrics enable reporting on details such as the fastest or slowest subject areas and reports. The metrics in the new subject area provide insights to help determine which reports should be prioritized for development.

Business Questions

This subject area can answer the following business questions:

- *Which reports are running poorly?*
- *Which reports need maintenance?*
- *Which reports are running well?*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to this subject area:

- *CRM OTBI Report Performance Transactional Analysis Duty*

Primary Navigation

Navigator > Reports and Analytics

Time Reporting

This subject area reports historical data.

Time dimension is linked to User System Usage."Time"."Date".

Transactional Grain

This subject area returns the data at the grain of the User.

Special Considerations

The subject area requires the FBI_USER_SYSTEM_USAGE_TRANSACTIONAL_DUTY duty role for access.

CRM - CRM Reporting Usage

Description

This reporting usage subject area lets you see how your users and teams use OBTI in CRM. This subject area exposes execution metrics around subject areas, analyses, and dashboards. These metrics provide reporting on details like the most popular and unpopular reports and which analytics are important to your users. This reporting gives you powerful insights for understanding your users' interests in reporting and analytics, as well as which reports should be prioritized for development.

Business Questions

This subject area can answer the following business questions:

- *Which types of reports and subject areas are the users in your organization are looking at?*
- *Which analytics should you prioritize and which can be phased out to optimize resources?*
- *How important are analytics to your team, and how much do they use them?*
- *What are the most and least popular reports and which analytics are important to your team?*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to this subject area:

- *User System Usage Transaction Analysis Duty*

Primary Navigation

Navigator > Reports and Analytics

Time Reporting

This subject area reports historical data.

Time dimension is linked to User System Usage."Time"."Date".

Transactional Grain

This subject area returns the data at the grain of the User.

Special Considerations

The subject area requires the FBI_USER_SYSTEM_USAGE_TRANSACTIONAL_DUTY duty role for access.

CRM - CRM Service Request Summary

Description

Analyses built using this subject area enable customer service managers to obtain a complete picture of service performance, as it relates to interactions, compliance, and knowledge article usage. The analyses built serve to expand the real-time reporting of service interactions, by providing additional summary metrics and prebuilt reports. Similarly, SR compliance analysis delivers a comprehensive view of SR milestone attainments and compliance. Managers can gain visibility into the diverse factors affecting compliance, identify patterns for a better understanding of this key area of help desk performance, and take corrective action. Managers can also understand agent usages of knowledge articles in SRs and their impact for faster help desk request issue resolutions.

Business Questions

This subject area can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What is the average length of time of an interaction, by agent and channel?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How often do communications cross channels before they are resolved?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to CRM - CRM Service Request Summary."Service Request Secondary Dates"."Open Date" or CRM - CRM Service Request Summary."Service Request Secondary Dates"."Close Date" or CRM - CRM Service Request Summary."Service Request Secondary Dates"."Resolution Date" depending on metric used with the date.

Transactional Grain

Service Request

Special Considerations

1. Interaction metrics in this subject area consider 'Parent' interactions only for calculation purposes. 2. Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Aggregate Service Requests 2. Refresh Service Categories for Reporting 3. Refresh Denormalized Product Catalog Table for BI 4.Reporting Hierarchy Generation

CRM - CRM Work Orders Real Time

Description

The analysis built using this subject area provides the ability for managers to keep close tabs on SR generated field work orders to ensure alignment with customer commitments and SLAs governing the underlying SRs. Agents can monitor the progress of work orders tied to their own SRs. Key dates such as resolution due date and scheduled date are compared with actual completion dates across resources, teams, products, and customers, to spot trends and exceptions, with the objective of taking corrective action or plan better to avoid future recurrence of suboptimal performance.

Business Questions

This subject area can answer the following business questions:

- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*

- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Work Orders

Time Reporting

This subject area reports historical data.

Time dimension is linked to CRM - CRM Work Orders Real Time."CRM Work Order"."Creation Date".

Transactional Grain

Work Order

Special Considerations

Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Refresh Denormalized Product Catalog Table for BI 2. Reporting Hierarchy Generation

CRM - Marketing Web Activities

Description

This feature lets you report on activities synced from Oracle Eloqua into CX Sales. This reporting enhancement proactively provides marketing context for sales users. This new business intelligence (BI) subject area gives you a detailed reporting overview and lets you show combined Sales and Marketing interactions for leads generated and synced from Oracle Eloqua to CX Sales.

Business Questions

This subject area can answer the following business questions:

- *What are my web activities for the accounts and leads for a sales user's territory?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *How many touch points have there been for a certain account or prospect?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Marketing Analyst*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Marketing Administrative Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*

Primary Navigation

Navigator > Reports and Analytics > Browse Catalog

Time Reporting

This SA to be used for Real Time reporting

Time dimension is linked to CRM - Marketing Web Activities.Web Activities.Creation Date.

Transactional Grain

Web Activities on Leads

Special Considerations

Reporting on these objects can be achieved using these cross-subject areas: 1. Opportunity 2. Lead Territory 3. Account Territory 4. Resource Territory

CRM/Help Desk - Case Action Plan Actions Real Time

Description

This subject area enables analysis that helps Case Managers and Agents obtain a complete picture of an action plan's enforcement of company policies and procedures. Agents can monitor their own performance on action plan completion and delays.

The action plan information records compliance for a set of predefined actions, and the analytics highlights metrics for open, closed, delayed and aging action plans. The real-time reporting provides both summary and detailed metrics.

Business Questions

This subject area can answer the following business questions:

- *What is the delay in estimated completion dates?*
- *What is the breakdown of open action plans by Action Plan Action Owner?*
- *Are there action plans tracking late to an overall target completion date?*

Job Roles

The following job roles secure access to this subject area:

- *Case Manager*
- *Case Worker*
- *Customer Relationship Management Application Administrator*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Case Manager Transaction Analysis Duty*
- *Case Worker Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Cases > My Cases > Case Details

Time Reporting

This subject area reports historical data.

Time dimension is linked to CRM/Help Desk - Case Action Plan Actions Real Time."Time"."Date".

Transactional Grain

Action Plan and Action

Special Considerations

1. Data is limited to Action Plans associated to Cases 2. Run the following scheduled processes as needed for initial data load and subsequent refreshes: a. Fully Loads Action Plan Actions Data for Reporting b. Incrementally Loads Action Plan Actions Data for Reporting c. Reporting Hierarchy Generation

CRM/Help Desk - Case Management Real Time

Description

Reports built using this subject area help Case Managers gain valuable insights into case resolution performance. Cases typically have longer resolution times, so an aging analysis brings to light cases that have been pending for longer durations. Case Workers can obtain an insight into their own pending active cases and the service requests that are blocking resolution.

Business Questions

This subject area can answer the following business questions:

- *Which of my team's cases have been open for more than 15 days?*

- *What are the cases that have not updated a case in the past 10 days? Who owns them?*
- *What are the cases that have not been actioned since reopening?*
- *On an average, how many days do each of my team members take to close a case?*

Job Roles

The following job roles secure access to this subject area:

- *Case Manager*
- *Case Worker*
- *Customer Relationship Management Application Administrator*
- *Internal Help Desk Administrator*
- *Next Gen Human Resource Help Desk Administrator*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Case Manager Transaction Analysis Duty*
- *Case Worker Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Cases > My Cases > Case Details

Time Reporting

This subject area reports historical data.

Time dimension is linked to Service - CRM Case Management Real Time."Case Secondary Dates"."Open Date" or Service - CRM Case Management Real Time."Case Secondary Dates"."Close Date" depending on metric used with the date.

Transactional Grain

Case

Special Considerations

Run the following scheduled processes as needed for initial data load and subsequent refreshes. 1. Reporting Hierarchy Generation

CRM/Help Desk - Inbound Messages Real Time

Description

Allows users to develop analyses to track inbound communications by message channel and the resulting service request creations and updates from those messages. Performance metrics such as average time to create an SR and time for the agent to acknowledge are available down to seconds, allowing for a granular understanding of inbound message flow and the resulting SR response and closure. This subject area can be used for both CX Service and Help Desk.

Business Questions

This subject area can answer the following business questions:

- *How many emails came from known versus unknown contacts?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *How many emails are we receiving over time?*
- *What is the current count of inbound email requests by status and mailbox?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*

- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Requests > Service Request Details > Messages

Time Reporting

This subject area reports historical data.

Time dimension is linked to CRM Help Desk - Inbound Messages Real Time.Inbound Message.Creation Date.

Transactional Grain

Inbound Message

Special Considerations

Note that this SA was earlier called Service - CRM Inbound Messages Real Time

CRM/Help Desk - Omni Channel Events Real Time

Description

Enables users to build dynamic analyses to monitor Omnichannel work assignments across agent, queue, and channel. Managers can balance agent workload by obtaining insight into their current workload, presence, and availability. Key performance indicators such as average customer wait times, duration in queues, offers, and agent acceptance rates of work assignments can be measured, for better throughput, higher system efficiency, and improvement in customer satisfaction. The subject area is applicable for both CX Service and Help Desk.

Business Questions

This subject area can answer the following business questions:

- *How long is it taking for offers to be made to agents?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What are the rates for agents declining work offers?*
- *What are the average handle times?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*

- *Internal Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Requests > Service Request Details > Interaction History

Time Reporting

This subject area reports historical data.

Time dimension is linked to "CRM - CRM Omni Channel Events Real Time"."Omni Channel Event"."Start Time".

Transactional Grain

Omni Channel Event

Special Considerations

Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Reporting Hierarchy Generation

CRM/Help Desk - Omni Channel Queue Resource Availability Real Time

Description

Use this subject area to provide service managers, improved insights into agent presence/availability . For queue focused organizations, there is a need to often know the number of agents online/available/busy to take up incoming requests for specific queues and by a channel like chat. Other metrics in the subject area help managers understand agent presence to improve queue and agent load balancing. Note that a queue attribute (like Queue Name) needs to be included in any report built using this subject area. Failing to do so may result in not showing any data or showing wrong data or a report error. Establish a cross join with the Omnichannel Events subject area using Service Queue as the common dimension to show metrics from that subject area side by side in the same report. This subject area is applicable for both CX Service and Help Desk.

Business Questions

This subject area can answer the following business questions:

- *Are agents making themselves available for certain channels and not for others?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *What is the current distribution of active and inactive agents across queues?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *For a given service queue, how many agents are available to take chats?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*

- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Center > Service Requests Navigator > Help Desk > Help Desk Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to "CRM - CRM Omni Channel Events Real Time"."Omni Channel Event"."Start Date".

Transactional Grain

Omni Channel Event and Queue Resource

Special Considerations

1.Run the "Reporting Hierarchy Generation" scheduled process as needed for initial data load and subsequent refreshes.
2. Any report built using this subject area has to include a column from the Service Queue folder like queue name

CRM/Help Desk - Service Request SmartText Usages Real Time

Description

A SmartText entry is a reusable fragment of text that lets you create a text and reuse the text in service requests and messages. The texts can be admin-defined or user-defined. Admins create most relevant SmartTexts that help users achieve higher efficiency while updating SRs or composing messages.

Analyses built using this subject area help Admins understand usage of specific SmartText fragments to either promote or demote them on the UI. It also provides metrics related to private and public SmartTexts that help Admins make popular private ones as public to benefit the larger user base. The scope of this subject area is limited to:

a. SmartText usage and not their creation

b. SmartText usage in SRs and Help Desk Requests and not Chats

c. SmartText usage on Redwood UI only

Business Questions

This subject area can answer the following business questions:

- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *When was the last, a SmartText was used?*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *What Smarttexts have not been used even once?*
- *Which SmartTexts were not used in the last month/quarter/year?*

Job Roles

The following job roles secure access to this subject area:

- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Center > Service Request > Compose Message > Type '#'

Time Reporting

This subject area reports historical data.

Time dimension is linked to Date when SmartText was associated to Request: CRM/Help Desk - Service Request SmartText Usages Real Time.Time.Date.

Transactional Grain

SmartText and Service Request/Help Desk Request

Special Considerations

Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Refresh Service Categories for Reporting 2. Reporting Hierarchy Generation

Enterprise Contracts - Contracts Real Time

Description

This subject area provides information on enterprise contracts which include contract lines, parties, sales credits, risks, and deviations.

Business Questions

This subject area can answer the following business questions:

- *How is my contract team loaded?*
- *Show me all the contracts that have a nonstandard clause.*
- *What contracts have a specific policy deviation?*
- *Which contracts are related to my given contract?*

- *How many days on average did a resource work on a contract assigned to them in the last quarter?*
- *What's the primary reason for contract closure in the last year?*
- *How many contracts might get affected if I modify the Payment clause?*
- *Show me all the contracts that have a particular deliverable due.*
- *How many days on average did a resource organization work on a contract assigned to them in the last quarter?*
- *Show me the user status progression for contracts within a given date range.*

Job Roles

The following job roles secure access to this subject area:

- *Customer Contract Administrator*
- *Customer Contract Manager*
- *Customer Contract Team Member*
- *Enterprise Contract Administrator*
- *Enterprise Contract Manager*
- *Enterprise Contract Team Member*
- *Supplier Contract Administrator*
- *Supplier Contract Manager*
- *Supplier Contract Team Member*

Duty Roles

The following duty roles secure access to this subject area:

- *Enterprise Contracts Transaction Analysis Duty Role*

Primary Navigation

Navigator > Contract Management - Contracts

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Contract Header

Special Considerations

None.

Help Desk - HR Help Desk Queue Resources Real Time

Description

Use this subject area to understand resource staffing of queues such as whether they are properly balanced and with the proper resources. To understand queue resource deployment across requests and their categories, products and other key entities, perform a cross join with the "Help Desk - Internal Service Requests Real Time" subject area. Managers can understand whether team resources are optimally staffed across help desk queues to maximize productivity. Visibility into team members deployed as resources in various queues and the associated open help desk requests aids in making informed load balancing decisions.

Business Questions

This subject area can answer the following business questions:

- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *Can the variation in Help Desk Request resolution times between team members be attributable to sub-optimal queue assignments?*
- *Is there scope for a better resource load balance keeping in consideration the Help Desk Request throughput across queues?*

Job Roles

The following job roles secure access to this subject area:

- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

Primary Navigation

Navigator > Help Desk > Help Desk Requests

Time Reporting

This subject area reports historical data.

This subject area has no anchoring date.

Transactional Grain

Service Queue and Resource

Special Considerations

Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Refresh the Business Intelligence Queue Resources Table 2. Reporting Hierarchy Generation

Help Desk - HR Service Request Action Plan Actions Real Time

Description

Enables help desk managers to obtain a complete picture of action plan enforcement of company policies and procedures. Action plans are a checklist, a series of events, or steps that have to be done before you can close a Help Desk Request. You can monitor completions and ensure compliance against a predefined set of actions. Pre-defined metrics around open and closed action plans, delayed actions, and aging of action plans help managers gain insights into performance at an aggregate level to address areas of concern. Agents can gain visibility to their own action plan completions and delays. Real-time reporting built using this subject area provides both summary and detail analyses.

Business Questions

This subject area can answer the following business questions:

- *What is the delay in estimated completion dates?*
- *How many action plans are open and how long have they been open?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*

Job Roles

The following job roles secure access to this subject area:

- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*

- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

Primary Navigation

Navigator > Help Desk > Help Desk Requests > All HR Help Desk Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to "Help Desk - HR Service Request Action Plan Actions Real Time"."Time"."Date".

Transactional Grain

Action Plan and Action

Special Considerations

1.Data is limited to Action Plans associated with Service Requests. 2. Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Fully Loads Action Plan Actions Data for Reporting 2. Incrementally Loads Action Plan Actions Data for Reporting 3. Refresh Service Categories for Reporting 4. Refresh Denormalized Product Catalog Table for BI 5. Reporting Hierarchy Generation

Help Desk - HR Service Request Conversation Messages Real Time

Description

Help Desk agents have internal conversations with other agents and subject matter experts during the course of resolution of an employee issue. Analyses built using this subject area help users understand the extent of collaboration happening by way of such conversations, leading to further analyses such as: Do they exhibit a pattern? Are our agents overly reliant on subject matter experts? If so, is there scope for their own skill upgrade/training? Visibility to message details can help agents follow up on message recipients for pending responses. Analyses of conversation metrics provided out of the box in context of entities such as employee orgs, help desk request categories, business units and products yield powerful insights to help managers during staffing and resource deployments.

Business Questions

This subject area can answer the following business questions:

- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *What are the most popular channels used for internal conversations?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Show me all the conversation messages together with the conversation message subject, body, sender and recipient details for a focused set of requests*
- *Are internal conversations taking place across high cost channels?*

Job Roles

The following job roles secure access to this subject area:

- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

Primary Navigation

Navigator > Help Desk > Help Desk Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to Conversation Message Sent Date Help Desk - HR Service Request Conversation Messages Real Time.Time.Date.

Transactional Grain

HR Help Desk Request Message Recipient

Special Considerations

Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Refresh Service Categories for Reporting 2. Refresh Denormalized Product Catalog Table for BI

Help Desk - HR Service Request Messages Real Time

Description

This subject area can be used to build analyses that lets you understand HR Help Desk Request message traffic patterns, channel usages, message processing statuses, message types, message origins, and assignments. You can also track specific message types such as Customer Entry and Response to ensure timely response in cases of critical and long pending employee issues.

Business Questions

This subject area can answer the following business questions:

- *Do we see a pattern in the average number of messages per closed Help Desk request going up in recent months? What factors are contributing to this surge?*
- *What are the help desk requests that are waiting for an agent response?*
- *Do we see any patterns in message traffic and resolution times?*
- *Are we responding to help desk request messages in a timely manner?*

Job Roles

The following job roles secure access to this subject area:

- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

Primary Navigation

Navigator > Help Desk > Help Desk Requests > All HR Help Desk Requests > Messages

Time Reporting

This subject area reports historical data.

Time dimension is linked to Help Desk - HR Service Request Messages Real Time."HR Service Request Message"."Last Update Date".

Transactional Grain

HR Service Request Message

Special Considerations

None.

Help Desk - HR Service Request Resource Real Time

Description

Used to analyze and report on all the resources, and resource roles on an HR Help Desk Request. Employee dimension in this subject area refers to both primary and non-primary resources, unlike other subject areas where employee refers to only primary resource. This subject area can be combined with any other subject area that has HR Help Desk Request dimension, when results are required at the level of an HR Help Desk Request. For cross-subject-area queries, include at least one metric from each subject area.

Business Questions

This subject area can answer the following business questions:

- *As an agent am I spreading myself too thin by being part of one too many HR Help Desk Request teams?*
- *What is the incidence of participation of my resource team in HR Help Desk Requests over a period? How many open Requests are they a part of, presently?*
- *By being part of the HR Help Desk Request team, how many Request resolutions has my resource team been able to influence during the past period?*

Job Roles

The following job roles secure access to this subject area:

- *Next Gen Human Resource Help Desk Administrator*

- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

Primary Navigation

Navigator > Help Desk > Help Desk Requests > All HR Help Desk Requests

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

HR Help Desk Request and Resource

Special Considerations

Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Reporting Hierarchy Generation

Help Desk - HR Service Request Summary

Description

Analyses built using this subject area enable HR help desk managers to obtain a complete picture of help desk request performance. SR compliance analysis delivers a comprehensive view of SR milestone attainments and compliance. Help Desk managers can gain visibility into the diverse factors affecting compliance, identify patterns for a better understanding of this key area of service performance, and take corrective action. Managers can also understand agent usages of knowledge articles in requests and their impact for faster help desk request issue resolutions. Insights into issue resolutions and compliance involving affected parties is an additional area of analysis.

Business Questions

This subject area can answer the following business questions:

- *Are we keeping the number of non-compliant Help Desk Requests in check for those with Affected Parties?*
- *What employee organization files the most requests with affected parties? Which one has the most open, the highest resolution times?*
- *What is the impact of linking knowledge articles to Help Desk Requests? Has it led to reduced Request resolution times and reopenings?*
- *What Request categories have a higher percentage of non-compliant Help Desk Requests open?*
- *Where are the outliers when it comes to compliance?*
- *What is the incidence of agents linking knowledge articles to Help Desk Requests?*

Job Roles

The following job roles secure access to this subject area:

- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

Primary Navigation

Navigator > Help Desk > Help Desk Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to Help Desk - HR Service Request Summary. "Request Secondary Dates"."Open Date" or Help Desk - HR Service Request Summary. "Request Secondary Dates"."Close Date" or Help Desk - HR Service Request Summary. "Request Secondary Dates"."Resolution Date" depending on metric used with the date.

Transactional Grain

Internal Help Desk Request

Special Considerations

1. Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Aggregate Service Requests 2. Refresh Service Categories for Reporting 3. Refresh Denormalized Product Catalog Table for BI 4.Reporting Hierarchy Generation 2. Use the 'HR Help Desk Request Summary' dimension while reporting off of any of the summry metrics.

Help Desk - HR Service Requests Real Time

Description

Use this subject area to build compelling analyses for your HR help desk managers and agents to review critical HR service requests, their severities and statuses. Uncover bottlenecks to speedy resolution of service requests by alerting to long wait times or agent/queue assignment delays Monitor help desk. service performance levels to ensure they align with organizational goals. Build reports that measure and analyze service request throughput such as submissions, updates, resolutions, transfers and reopens. Help your business gain the needed insight to better manage and course correct exceptions before they snowball into issues.

Business Questions

This subject area can answer the following business questions:

- *What are the HR SRs that are waiting on my customers?*
- *What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?*
- *How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What are the open critical HR SRs that my team is working on currently? How many of these are escalated?*
- *Who are my agents that have the most pending HR SRs?*
- *What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*

Job Roles

The following job roles secure access to this subject area:

- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*

- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

Primary Navigation

NA

Time Reporting

This subject area reports historical data.

Time dimension is linked to Help Desk - HR Service Requests Real Time."HR Service Request Secondary Dates"."Open Date" or Service - CRM Service Requests Real Time."Service Request Secondary Dates"."Close Date" or Service - CRM Service Requests Real Time."HR Service Request Secondary Dates"."Resolution Date" depending on metric used with the date.

Transactional Grain

HR Service Request

Special Considerations

1. Metrics to measure SR queue/ resource assignment times such as 'Total Time to Assign to Resource(Days)', consider initial assignment only. If the most recent assignment needs to be considered, use 'Last Queue Assigned Date/Last Resource Assigned Date' attribute to create custom metrics. 2. Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Refresh Service Categories for Reporting 2. Refresh Denormalized Product Catalog Table for BI 3. Reporting Hierarchy Generation 4. Execute Full Load/Incremental Load of HCM Person Mapping Data for Reporting

Help Desk - Internal Help Desk Queue Resources Real Time

Description

Use this subject area to understand resource staffing of queues such as whether they are properly balanced and with the proper resources. To understand queue resource deployment across requests and their categories, products and other key entities, perform a cross join with the "Help Desk - Internal Service Requests Real Time" subject area. Managers can understand whether team resources are optimally staffed across help desk queues to maximize productivity. Visibility into team members deployed as resources in various queues and the associated open help desk requests aids in making informed load balancing decisions.

Business Questions

This subject area can answer the following business questions:

- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *Can the variation in Help Desk Request resolution times between team members be attributable to sub-optimal queue assignments?*
- *Is there scope for a better resource load balance keeping in consideration the Help Desk Request throughput across queues?*

Job Roles

The following job roles secure access to this subject area:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Primary Navigation

Navigator > Help Desk > Help Desk Requests

Time Reporting

This subject area reports historical data.

This subject area has no anchoring date.

Transactional Grain

Service Queue and Resource

Special Considerations

Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Refresh the Business Intelligence Queue Resources Table 2. Reporting Hierarchy Generation

Help Desk - Internal Service Request Action Plan Actions Real Time

Description

Enables help desk managers to obtain a complete picture of action plan enforcement of company policies and procedures. Action plans are a checklist, a series of events, or steps that have to be done before you can close a Help Desk Request. You can monitor completions and ensure compliance against a predefined set of actions. Pre-defined metrics around open and closed action plans, delayed actions, and aging of action plans help managers gain insights into performance at an aggregate level to address areas of concern. Agents can gain visibility to their own action plan completions and delays. Real-time reporting built using this subject area provides both summary and detail analyses.

Business Questions

This subject area can answer the following business questions:

- *What is the incidence of participation of my resource team in Internal Help Desk Requests over a period? How many open Requests are they a part of, presently?*
- *As an agent am I spreading myself too thin by being part of one too many Internal Help Desk Request teams?*
- *By being part of the Internal Help Desk Request team, how many Request resolutions has my resource team been able to influence during the past period?*

Job Roles

The following job roles secure access to this subject area:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Primary Navigation

Navigator > Help Desk > Help Desk Requests > All Open Internal Help Desk Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to "Help Desk - Internal Service Request Action Plan Actions Real Time"."Time" "Date".

Transactional Grain

Action Plan and Action

Special Considerations

1.Data is limited to Action Plans associated with Service Requests. 2. Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Fully Loads Action Plan Actions Data for Reporting 2. Incrementally Loads Action Plan Actions Data for Reporting 3. Refresh Service Categories for Reporting 4. Refresh Denormalized Product Catalog Table for BI 5. Reporting Hierarchy Generation

Help Desk - Internal Service Request Conversation Messages Real Time

Description

Help Desk agents have internal conversations with other agents and/or subject matter experts during the course of resolving an employee issue. Analyses built using this subject area help users understand the extent of collaboration happening by way of such conversations, leading to further analyses such as: Do they exhibit a pattern? Are our agents overly reliant on subject matter experts? If so, is there scope for their own skill upgrade/training? Visibility to message details can help agents follow up on message recipients for pending responses. Analyses of conversation metrics provided out of the box in context of entities such as employee orgs, help desk categories, business units, assets and products yield powerful insights to help managers during staffing and resource deployments.

Business Questions

This subject area can answer the following business questions:

- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *What are the most popular channels used for internal conversations?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Show me all the conversation messages together with the conversation message subject and body and the sender and recipient details for a focused set of requests*
- *Are internal conversations taking place across high cost channels?*

Job Roles

The following job roles secure access to this subject area:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Primary Navigation

Navigator > Help Desk > Help Desk Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to Conversation Message Sent Date Help Desk - Internal Service Request Conversation Messages Real Time.Time.Date.

Transactional Grain

Internal Help Desk Request Message Recipient

Special Considerations

Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Refresh Service Categories for Reporting 2. Refresh Denormalized Product Catalog Table for BI

Help Desk - Internal Service Request Messages Real Time

Description

This subject area can be used to build analyses that lets you understand Internal Help Desk Request message traffic patterns, channel usages, message processing statuses, message types, message origins, and assignments. You can also track specific message types such as Customer Entry and Response to ensure timely response in cases of critical and long pending employee issues.

Business Questions

This subject area can answer the following business questions:

- *What are the help desk requests that are waiting for an agent response?*
- *Do we see any patterns in message traffic and resolution times?*
- *Do we see a pattern in the average number of messages per closed Help Desk Request going up in recent months? What factors are contributing to this surge?*

Job Roles

The following job roles secure access to this subject area:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Internal Help Desk Administrator Transaction Analysis Duty*

- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Primary Navigation

Navigator > Help Desk > Help Desk Requests > All Open Internal Help Desk Requests > Messages

Time Reporting

This subject area reports historical data.

Time dimension is linked to Help Desk - Internal Service Request Messages Real Time."Internal Service Request Message"."Last Update Date".

Transactional Grain

Internal Service Request Message

Special Considerations

None.

Help Desk - Internal Service Request Relationships Real Time

Description

Relationships enhance the efficiency of your agents and improve your help desk request resolution outcomes. This subject area is used to build analysis that helps your help desk agents and managers gain visibility into relationships between Internal Help Desk Requests and other similar Requests or with other supported Business Object such as Case. This analysis helps them understand dependencies blocking speedier resolutions. For example, agents and managers would like to know the dependent Internal Help Desk Requests blocking resolution of a critical Request.

Business Questions

This subject area can answer the following business questions:

- *What are the Cases (target) 'blocked by' this particular Request (source)?*
- *What Internal Help Desk request, if resolved, will also resolve my dependent requests?*
- *Are we seeing an increasing trend of blocking issues limiting speedy resolution of Internal Help Desk Requests?*
- *What Internal Help Desk Requests escalate the Requests assigned to my team?*
- *How many Requests are blocked by this open Internal HelpD esk Request?*

Job Roles

The following job roles secure access to this subject area:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Primary Navigation

Navigator > Help Desk > Help Desk Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to Internal Help Desk Request Open Date Help Desk - Internal Service Request Relationships Real Time.Time.Date.

Transactional Grain

Internal Help Desk Request Relationship Type

Special Considerations

Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Refresh Service Categories for Reporting 2. Refresh Denormalized Product Catalog Table for BI 3. Reporting Hierarchy Generation

Help Desk - Internal Service Request Resource Real Time

Description

Used to analyze and report on all the resources, and resource roles on an Internal Help Desk Request. Employee dimension in this subject area refers to both primary and non-primary resources, unlike other subject areas where employee refers to only primary resource. This subject area can be combined with any other subject area that has Internal Help Desk Request dimension, when results are required at the level of an Internal Help Desk Request. For cross-subject-area queries, include at least one metric from each subject area.

Business Questions

This subject area can answer the following business questions:

- *What is the incidence of participation of my resource team in Internal Help Desk Requests over a period? How many open Requests are they a part of, presently?*
- *As an agent am I spreading myself too thin by being part of one too many Internal Help Desk Request teams?*
- *By being part of the Internal Help Desk Request team, how many Request resolutions has my resource team been able to influence during the past period?*

Job Roles

The following job roles secure access to this subject area:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Primary Navigation

Navigator > Help Desk > Help Desk Requests > All Open Internal Help Desk Requests

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Internal Help Desk Request and Resource

Special Considerations

Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Reporting Hierarchy Generation

Help Desk - Internal Service Request Summary

Description

Analyses built using this subject area enable internal help desk managers to obtain a complete picture of help desk request performance. SR compliance analysis delivers a comprehensive view of SR milestone attainments and compliance. Help Desk managers can gain visibility into the diverse factors affecting compliance, identify patterns for a better understanding of this key area of service performance, and take corrective action. Managers can also understand agent usages of knowledge articles in requests and their impact for faster help desk request issue resolutions.

Business Questions

This subject area can answer the following business questions:

- *What is the impact of linking knowledge articles to Help Desk Requests? Has it led to reduced Request resolution times and reopenings?*
- *What Request categories have a higher percentage of non-compliant Help Desk Requests open?*
- *Where are the outliers when it comes to compliance?*
- *What is the incidence of agents linking knowledge articles to Help Desk Requests?*

Job Roles

The following job roles secure access to this subject area:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Primary Navigation

Navigator > Help Desk > Help Desk Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to Help Desk - Internal Service Request Summary. "Request Secondary Dates"."Open Date" or Help Desk - Internal Service Request Summary. "Request Secondary Dates"."Close Date" or Help Desk - Internal Service Request Summary. "Request Secondary Dates"."Resolution Date" depending on metric used with the date.

Transactional Grain

Internal Help Desk Request

Special Considerations

1. Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Aggregate Service Requests 2. Refresh Service Categories for Reporting 3. Refresh Denormalized Product Catalog Table for BI 4.Reporting Hierarchy Generation 2. Use the 'Internal Help Desk Request Summary' dimension while reporting off of any of the summry metrics.

Help Desk - Internal Service Requests Lifecycle

Description

Help Desk Requests go through a life cycle, from the point they are created up until they are resolved, and finally closed. Help Desk personnel are interested in keeping this life cycle short while attempting a timely, quality fix to issues. This subject area helps building analyses that helps keep a close watch on the requests, finding outliers and taking corrective steps proactively, to avoid customer escalations and potential SLA violations. Useful measures such as actual time spent by an agent on an SR, customer wait times, SR latency times with queues and assignees and number of queue transfers provide the much needed insight into potential issues before they reach crisis proportions. The ability to analyze these measures in relation to key information of a Help Desk Request (Criticality. Category, Channel, Product, and so on), make the analyses even more powerful.

Business Questions

This subject area can answer the following business questions:

- *Was the assigned agent overloaded with other work?*
- *Was an Help Desk request sitting in a queue longer than the average time for all other SRs?*
- *How long was an Help Desk request unassigned and how long did it sit in each queue?*
- *Was the Help Desk request queue modified or the Help Desk request resource owner modified at any point?*

- *Do some Help Desk request categories imply higher difficulties (going by the actual time agents spend on such Help Desk requests)?*
- *How long did it take to assign the Help Desk request to the correct queue?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents, and so on?*
- *Was the assigned agent overloaded with other work (based on the average number of Help desk Requests assigned to the agent)?*
- *Did the Help Desk request get assigned to the wrong queue/team?*
- *Did the Help Desk request have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*

Job Roles

The following job roles secure access to this subject area:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Primary Navigation

Navigator > Help Desk > Help Desk Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to Help Desk - Internal Service Request Lifecycle."Service Request Secondary Dates"."Open Date" or Help Desk - Internal Service Request Lifecycle."Service Request Secondary Dates"."Close Date" or Help Desk - Internal Service Request Lifecycle."Service Request Secondary Dates"."Resolution Date" depending on metric used with the date.

Transactional Grain

Internal Service Request

Special Considerations

1. Auditing should be enabled on Service Request Object 2. Run the following scheduled processes as needed for initial data load* and subsequent refreshes: Note: Only Help Desk requests created in the current partial and the previous full calendar months are loaded initially. (a) Execute Incremental Load of SR Audit Data for Reporting (b) Unlock Scheduled Process that Incrementally Loads SR Audit data (as necessary) 3. Execute Incremental Load of HCM Person Mapping Data for Reporting

Help Desk - Internal Service Requests Real Time

Description

Use this subject area to build compelling analyses for your HR help desk managers and agents to review critical HR service requests, their severities and statuses. Uncover bottlenecks to speedy resolution of service requests by alerting to long wait times or agent/queue assignment delays Monitor help desk service performance levels to ensure they align with organizational goals. Build reports that measure and analyze service request throughput such as submissions, updates, resolutions, transfers and reopens. Help your business gain the needed insight to better manage and course correct exceptions before they snowball into issues.

Business Questions

This subject area can answer the following business questions:

- *What are the Internal SRs waiting on my customers?*
- *How are we doing on Internal SR resolution times between current and past months? What are the reasons for any degradations?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the status of our aging SRs? Are there any outliers that require intervention?*
- *Who are my agents that have the most pending Internal SRs?*
- *How many Internal SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are critical?*
- *What are the open critical Internal SRs that my team is working on currently? How many of these are escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *How many Internal SRs have been waiting on my agents action for more than 24 hours? Which of these are critical or escalated?*
- *What is the reopen rate for Internal SRs owned by my team? Who has the highest reopen rate? Is there a training issue?*

Job Roles

The following job roles secure access to this subject area:

- *Internal Help Desk Administrator*

- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Primary Navigation

NA

Time Reporting

This subject area reports historical data.

Time dimension is linked to Help Desk - Internal Service Requests Real Time."Internal Service Request Secondary Dates"."Open Date" or Help Desk - Internal Service Requests Real Time."Internal Service Request Secondary Dates"."Close Date" or Help Desk - Internal Service Requests Real Time."Internal Service Request Secondary Dates"."Resolution Date" depending on metric used with the date.

Transactional Grain

Internal Service Request

Special Considerations

1. Metrics to measure SR queue/ resource assignment times such as 'Total Time to Assign to Resource(Days)', consider initial assignment only. If the most recent assignment needs to be considered,, use 'Last Queue Assigned Date/Last Resource Assigned Date' attribute to create custom metrics. 2. Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Refresh Service Categories for Reporting 2. Refresh Denormalized Product Catalog Table for BI 3. Reporting Hierarchy Generation 4. Execute Full Load/Incremental Load of HCM Person Mapping Data for Reporting

Incentive Compensation - Attainments Real Time

Description

Sales management reports use it to review participant achievements with different performance measures at transaction-level detail in real time.

This subject area supports detailed validation reporting.

You can combine Attainments Real Time and Transaction Real Time subject areas to use a single report.

Business Questions

This subject area can answer the following business questions:

- *What are the various attainment attributes associated with my credits?*
- *How much credit did a participant receive for their sales transactions?*
- *How much credit did my team receive for their attainment?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Incentive Compensation Transaction Analysis Duty*

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Attainments

Special Considerations

Administrators and analyst users need to have the BU assigned through 'Manage Business Unit Data Access for users' FSM task in order to see data. For further details please review "Configure Administrators to Acess Incentive Compensation" steps 7 - 13. https://docs.oracle.com/en/cloud/saas/sales/22c/oscus/configure-administrators-to-access-incentive-compensation.html#s20067888

Incentive Compensation - Compensation Plan Assignments Real Time

Description

Compensation analysts use it to review and validate payment plan assignments across participants and the time dimension.

Business Questions

This subject area can answer the following business questions:

- *Which participants are assigned to which plans?*
- *What type of assignment does a participant have to a plan?*
- *Does the participant have an individualized target incentive for the plan?*
- *Has the participant accepted the assignment to the plan?*
- *What are the assignment start and end dates for a participant?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*

- *Partner Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Incentive Compensation Transaction Analysis Duty*

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Payment Plan Assignments

Special Considerations

Administrators and analyst users need to have the BU assigned through 'Manage Business Unit Data Access for users' FSM task in order to see data. For further details please review "Configure Administrators to Acess Incentive Compensation" steps 7 - 13. https://docs.oracle.com/en/cloud/saas/sales/22c/oscus/configure-administrators-to-access-incentive-compensation.html#s20067888

Incentive Compensation - Credits Real Time

Description

Compensation analysts use it to check the results of the crediting and rollup processes. They can review credit transactions after crediting.

Create reports to show various credit transaction attributes that analysts can use to address participant credit disputes.

Create reports that show participants and their managers their credit transactions. Managers view only their own or direct report information based on the HR Supervisor Hierarchy.

You can combine Credits Real Time and Transaction Real Time subject areas in a single report.

Business Questions

This subject area can answer the following business questions:

- *Were there credit or rollup errors that must be fixed?*
- *Are participants correctly credited?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Incentive Compensation Transaction Analysis Duty*

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Credits

Special Considerations

Administrators and analyst users need to have the BU assigned through 'Manage Business Unit Data Access for users' FSM task in order to see data. For further details please review "Configure Administrators to Acess Incentive Compensation" steps 7 - 13. https://docs.oracle.com/en/cloud/saas/sales/22c/oscus/configure-administrators-to-access-incentive-compensation.html#s20067888

Incentive Compensation - Disputes Real Time

Description

Compensation analysts who work with dispute resolution use it because it provides all dispute attributes plus access to source transaction details.

Business Questions

This subject area can answer the following business questions:

- *Is the dispute load balanced between my analysts? Asked by compensation managers.*
- *Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Incentive Compensation Transaction Analysis Duty*

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Disputes

Special Considerations

Administrators and analyst users need to have the BU assigned through 'Manage Business Unit Data Access for users' FSM task in order to see data. For further details please review "Configure Administrators to Acess Incentive Compensation" steps 7 - 13. https://docs.oracle.com/en/cloud/saas/sales/22c/oscus/configure-administrators-to-access-incentive-compensation.html#s20067888

Incentive Compensation - Earning and Attainment Summary Real Time

Description

To hide this subject area, set the profile option CN_HIDE_OTBI_SUBJECT_AREAS, Hide Legacy Incentive Compensation Business Intelligence Subject Areas, to Yes.

Sales management reports use it to review participant achievement with specific performance measures. They also compare achievement, in summary, across a variety of attributes.

Review attainment and earnings at various frequencies, such as period and interval, depending on the measure interval. Also review participant on target earnings by plan component.

You can combine this subject area with the Participant Interval Goals Real Time and Participant Period Goals Real Time subject areas to review attainment and goals together. When creating this cross-subject-area report, add the Participant common dimension from each subject area to your report and hide one of the Participant dimensions. The Participant Performance Summary Real Time work area alone provides the information you need without creating a cross-subject-area report.

Compensation administrators can use this data with the Payments Real Time subject area to resolve payment disputes.

For individually calculated earnings, you can trace back to the credits and transaction subject areas to validate credit percent or transaction attributes used in calculation.

For earnings calculated using grouped transactions, add Participant Name as the common dimension from each subject area and hide one of the dimensions.

Note: There isn't a one-to-one relationship between earnings and transactions when transactions are grouped.

Business Questions

This subject area can answer the following business questions:

- *Which of my direct reports' attainment or earnings are below the wanted performance expectation?*
- *Are we on track in achieving quota this period or quarter?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Incentive Compensation Transaction Analysis Duty*

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Earnings, Attainments

Special Considerations

Administrators and analyst users need to have the BU assigned through 'Manage Business Unit Data Access for users' FSM task in order to see data. For further details please review "Configure Administrators to Acess Incentive Compensation" steps 7 - 13. https://docs.oracle.com/en/cloud/saas/sales/22c/oscus/configure-administrators-to-access-incentive-compensation.html#s20067888

Incentive Compensation - Earnings Real Time

Description

This subject area supports the detailed analysis of participant earnings across a variety of dimensions, including the participant hierarchy, compensation plans, plan components, product, customer, and credit categories. It also includes source transaction and credit details

Business Questions

This subject area can answer the following business questions:

- *Who got paid what amount and from where, at the detail level?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Incentive Compensation Transaction Analysis Duty*

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Earnings

Special Considerations

Incentive Compensation - Earnings Real Time

Incentive Compensation - Participant Balances Real Time

Description

Compensation analysts use it to review payment, draw balances, carry over from prior periods, and hold backs. It includes beginning, period to date, interval to date, and ending balances for the year, by period.

Business Questions

This subject area can answer the following business questions:

- *Why wasn't I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*

- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Incentive Compensation Transaction Analysis Duty*

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Draw balances

Special Considerations

Administrators and analyst users need to have the BU assigned through 'Manage Business Unit Data Access for users' FSM task in order to see data. For further details please review "Configure Administrators to Acess Incentive Compensation" steps 7 - 13. https://docs.oracle.com/en/cloud/saas/sales/22c/oscus/configure-administrators-to-access-incentive-compensation.html#s20067888

Incentive Compensation - Participant Compensation Plan Real Time

Description

To hide this subject area, set the profile option CN_HIDE_OTBI_SUBJECT_AREAS, Hide Legacy Incentive Compensation Business Intelligence Subject Areas, to Yes.

Compensation and participant managers use it to view compensation plans and individualized participant plans to compare incentive targets and performance measure goals. The Participant Performance Summary Real Time work area alone provides the information you need without creating a cross-subject-area report.

Business Questions

This subject area can answer the following business questions:

- *How are these targets individualized across the participants.*
- *What are the targets and goals settings for an individual?*
- *What are my compensation plan incentive targets?*
- *Are my individualized performance measure goals set properly?*
- *Who is assigned to a given plan?*
- *As a participant manager, what are the targets and goals settings for my direct reports?*
- *How do they compare to the base goals set on the measure?*
- *How do these targets break down by plan component?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Incentive Compensation Transaction Analysis Duty*

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Compensation plan

Special Considerations

Administrators and analyst users need to have the BU assigned through 'Manage Business Unit Data Access for users' FSM task in order to see data. For further details please review "Configure Administrators to Acess Incentive Compensation" steps 7 - 13. https://docs.oracle.com/en/cloud/saas/sales/22c/oscus/configure-administrators-to-access-incentive-compensation.html#s20067888

Incentive Compensation - Participant Detail Real Time

Description

Use it to view details of the participant object. The participant object can be extended using its associated descriptive flexfield, which can be configured to capture user-defined attributes.

You can combine delivered attributes, such as home currency and business unit, with extended attributes to create an overview of the participant for validation purposes.

You can combine this subject area with others, such as attainment, earnings, or payment to create detailed reports. Use the extended attributes to constrain the data of the joined subject area.

Business Questions

This subject area can answer the following business questions:

- *To what country and business unit does the participant belong?*
- *What is the participant's home currency or cost center?*
- *Is the participant active? And for which dates?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Incentive Compensation Transaction Analysis Duty*

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Compensation participant

Special Considerations

Administrators and analyst users need to have the BU assigned through 'Manage Business Unit Data Access for users' FSM task in order to see data. For further details please review "Configure Administrators to Acess Incentive Compensation" steps 7 - 13. https://docs.oracle.com/en/cloud/saas/sales/22c/oscus/configure-administrators-to-access-incentive-compensation.html#s20067888

Incentive Compensation - Participant Interval Goals Real Time

Description

To hide this subject area, set the profile option CN_HIDE_OTBI_SUBJECT_AREAS, Hide Legacy Incentive Compensation Business Intelligence Subject Areas, to Yes.

Compensation managers or analysts use it to review the individualized interval goals by interval, performance measure, and participant.

You can compare total quota to credit attainment by performance measure by creating a cross-subject-area report for this subject area. Add Participant Name as the common dimension from each subject area and hide one of the dimensions. Typically, you use the Earning and Attainment Summary Real Time subject area for this analysis. The Participant Performance Summary Real Time work area alone provides the information you need without creating a cross-subject-area report.

Business Questions

This subject area can answer the following business questions:

- *What is the total quota by performance measure for the interval across the organization?*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *What is the total quota across the organization by performance measure for the interval?*
- *Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*

- *Partner Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Incentive Compensation Transaction Analysis Duty*

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Participant Interval Goals

Special Considerations

Administrators and analyst users need to have the BU assigned through 'Manage Business Unit Data Access for users' FSM task in order to see data. For further details please review "Configure Administrators to Acess Incentive Compensation" steps 7 - 13. https://docs.oracle.com/en/cloud/saas/sales/22c/oscus/configure-administrators-to-access-incentive-compensation.html#s20067888

Incentive Compensation - Participant Period Goals Real Time

Description

To hide this subject area, set the profile option CN_HIDE_OTBI_SUBJECT_AREAS, Hide Legacy Incentive Compensation Business Intelligence Subject Areas, to Yes.

Compensation managers or analysts use it to review individualized period goals and performance measures by participant.

You can compare period quota to credit attainment by performance measure by creating a cross-subject-area report with this subject area. Add Participant Name as the common dimension from each subject area, hiding one of the dimensions. Typically, you use the Earning and Attainment Summary Real Time subject area for this analysis. The

Participant Performance Summary Real Time work area alone provides the information you need without creating a cross-subject-area report.

Business Questions

This subject area can answer the following business questions:

- *What is the total quota by performance measure for the period across the organization?*
- *What is the total quota across the organization by performance measure for the period or across periods?*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Incentive Compensation Transaction Analysis Duty*

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Participant Period Goals

Special Considerations

Administrators and analyst users need to have the BU assigned through 'Manage Business Unit Data Access for users' FSM task in order to see data. For further details please review "Configure Administrators to Acess Incentive Compensation" steps 7 - 13. https://docs.oracle.com/en/cloud/saas/sales/22c/oscus/configure-administrators-to-access-incentive-compensation.html#s20067888

Incentive Compensation - Pay Group Assignments Real Time

Description

Compensation managers and analysts use it to review and validate the accuracy of pay group assignments across all participants.

Business Questions

This subject area can answer the following business questions:

- *When was a given participant assigned to a specific pay group?*
- *Which participants are assigned to a given pay group?*
- *What pay groups are in the application? What are their types and descriptions?*
- *As a participant manager, which pay groups do my direct reports belong to?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*

- *Partner Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Incentive Compensation Transaction Analysis Duty*

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Pay Group Assignments

Special Considerations

Administrators and analyst users need to have the BU assigned throiugh 'Manage Business Unit Data Access for users' FSM task in order to see data. For further details please review "Configure Administrators to Acess Incentive Compensation" steps 7 - 13. https://docs.oracle.com/en/cloud/saas/sales/20c/oscus/create-sales-users.html#OSCUS3257850

Incentive Compensation - Payments Real Time

Description

Compensation managers use it to review participant payments on different pay components in real time. Source transaction detail, credit detail, earnings, and payment details, such as earning rates and percentage, are available.

Business Questions

This subject area can answer the following business questions:

- *What is my cost of compensation by participant, plan component, plan, and frequencies?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Incentive Compensation Transaction Analysis Duty*

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Payments

Special Considerations

Administrators and analyst users need to have the BU assigned through 'Manage Business Unit Data Access for users' FSM task in order to see data. For further details please review "Configure Administrators to Acess Incentive Compensation" steps 7 - 13. https://docs.oracle.com/en/cloud/saas/sales/22c/oscus/configure-administrators-to-access-incentive-compensation.html#s20067888

Incentive Compensation - Paysheet Summary Real Time

Description

Compensation managers use it to review participant payments at a high level of detail, in real time.

Business Questions

This subject area can answer the following business questions:

- *What is the current status of the payment batches? Are they paid, reviewed, or frozen?*
- *What is the status of each paysheet within the payment batches?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Incentive Compensation Transaction Analysis Duty*

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Compensation paysheet

Special Considerations

Administrators and analyst users need to have the BU assigned through 'Manage Business Unit Data Access for users' FSM task in order to see data. For further details please review "Configure Administrators to Acess Incentive Compensation" steps 7 - 13. https://docs.oracle.com/en/cloud/saas/sales/22c/oscus/configure-administrators-to-access-incentive-compensation.html#s20067888

Incentive Compensation - Performance and Earnings Summary Real Time

Description

Participants, analysts, participant managers, and compensation managers use it to:

Monitor performance and review incentive results.

Review the individualized interval goals by interval, performance measure, and participant.

Review the individualized interval goals by interval, performance measure, and participant.

View compensation plans and individualized participant plans to compare incentive targets and performance measure goals.

Business Questions

This subject area can answer the following business questions:

- *How does the performance measure attainment compare with a participant's personalized goal across his directs?*
- *Is the company on track to attain its goals? Who is lagging and might require coaching?*
- *What are my compensation plan incentive targets?*
- *As a participant manager, what are the targets and goals settings for my direct reports?*

- *How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?*
- *How do participants' plan component earnings compare with their personalized target incentives?*
- *What is the total quota across the organization by performance measure for the interval?*
- *Do I have to realign quota based on current attainment levels?*
- *What is the total quota by performance measure for the period across the organization? Validate quota levels.*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Incentive Compensation Transaction Analysis Duty*

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Performance and Earnings Summary

Special Considerations

Administrators and analyst users need to have the BU assigned through 'Manage Business Unit Data Access for users' FSM task in order to see data. For further details please review "Configure Administrators to Acess Incentive Compensation" steps 7 - 13. https://docs.oracle.com/en/cloud/saas/sales/22c/oscus/configure-administrators-to-access-incentive-compensation.html#s20067888

Incentive Compensation - Rules Real Time

Description

Compensation Analysts use it to verify the Credit, Roll-up and Classification rules setup. You can also use this subject area to report on Participant Assignment Rules. You can build ad-hoc queries and operational reports using this subject area. Credit rules determine who gets the credit for a sales transaction. Classification rules are used to classify sales transactions to user-defined categories such as credit categories. Generally these rules are organized in hierarchies.

Business Questions

This subject area can answer the following business questions:

- *What are the credit rules which a credit receiver is assigned to?*
- *What are the criteria for a rule including the inherited criteria from the ancestors?*
- *What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?*
- *What are the rules effective as of the given date in the hierarchy?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Incentive Compensation Transaction Analysis Duty*

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Rules

Special Considerations

Administrators and analyst users need to have the BU assigned through 'Manage Business Unit Data Access for users' FSM task in order to see data. For further details please review "Configure Administrators to Acess Incentive Compensation" steps 7 - 13. https://docs.oracle.com/en/cloud/saas/sales/22c/oscus/configure-administrators-to-access-incentive-compensation.html#s20067888

Incentive Compensation - Transactions Real Time

Description

Compensation analysts use it to check the results of the Collect Transactions process. They can review raw transactions before the crediting process as well as descriptive flexfield values.

Business Questions

This subject area can answer the following business questions:

- *What are the results of the collected transactions before the crediting process?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Operations Manager*

- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Incentive Compensation Transaction Analysis Duty*

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Transactions

Special Considerations

Administrators and analyst users need to have the BU assigned through 'Manage Business Unit Data Access for users' FSM task in order to see data. For further details please review "Configure Administrators to Acess Incentive Compensation" steps 7 - 13. https://docs.oracle.com/en/cloud/saas/sales/22c/oscus/configure-administrators-to-access-incentive-compensation.html#s20067888

Knowledge Management - Article Category Real Time

Description

This subject area provides information about the categories to which articles belong. It also provides information on employee interaction with the articles. This subject area displays a one-to-many relationship from an article to a product.

Business Questions

This subject area can answer the following business questions:

- *Which articles are linked to a category?*
- *Which category contains the highest number of knowledge articles?*

Job Roles

The following job roles secure access to this subject area:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Knowledge Management Transaction Analysis Duty*

Primary Navigation

Navigator > Knowledge Management > Authoring

Time Reporting

Yes

Time dimension is linked to Knowledge Management - Article Real Time."Time"."Date".

Transactional Grain

Article Version - Category

Special Considerations

Employees must be assigned the Resource role to be visible in reports. This subject area displays a one-to-many relationship from an article to a category.

Knowledge Management - Article Links Real Time

Description

This subject area provides linking information from knowledge articles to service requests. It also provides information on articles linked in SRs that were shared and articles that were resolved as helpful.

Business Questions

This subject area can answer the following business questions:

- *Which users created the link to an article?*
- *Which articles are linked to the maximum number of service requests?*
- *Which article versions are linked to service requests?*
- *How many links exist between services requests and knowledge articles?*

Job Roles

The following job roles secure access to this subject area:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Knowledge Management Transaction Analysis Duty*

Primary Navigation

Navigator > Knowledge Management > Authoring

Time Reporting

Yes

Time dimension is linked to Knowledge Management - Article Links Real Time."Time"."Date".

Transactional Grain

Article Latest Version - Link/SR

Special Considerations

Employees must be assigned the Resource role to be visible in reports. Only articles linked to service requests, and service requests linkedto articles appear in this subject area.

Knowledge Management - Article Product Real Time

Description

This subject area provides details for associating articles to products. This is a separate subject area because it has a one-to-many relationship from an article to products.

Business Questions

This subject area can answer the following business questions:

- *What types of ratings are assigned articles?*
- *Which articles are linked to a product?*
- *Which products are associated with the most number of knowledge articles?*

Job Roles

The following job roles secure access to this subject area:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Knowledge Management Transaction Analysis Duty*

Primary Navigation

Navigator > Knowledge Management > Authoring

Time Reporting

Yes

Time dimension is linked to NA.

Transactional Grain

Article Version - Product

Special Considerations

Employees must be assigned the Resource role to be visible in reports. This subject area displays a one-to-many relationship from an article to a product.

Knowledge Management - Article Rating Real Time

Description

This subject area contains information about article ratings, such as ratings values, rated article details, and the users who rated the articles. This subject area helps analysts identify content that satisfies users' needs, content that users are dissatisfied with, and content linked to SRs that effectively resolves them. Only articles which have ratings appear in this subject area.

Business Questions

This subject area can answer the following business questions:

- *What content in the knowledge base is satisfying users' needs?*
- *What content rating effectively resolves users' questions?*
- *What articles are not satisfying users' needs?*

Job Roles

The following job roles secure access to this subject area:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Knowledge Management Transaction Analysis Duty*

Primary Navigation

Navigator > Knowledge Management > Authoring

Time Reporting

Yes

Time dimension is linked to Knowledge Management - Article Rating Real Time.Time"."Date".

Transactional Grain

Article Latest Version - Rating

Special Considerations

Employees must be assigned the Resource role to be visible in reports.

Knowledge Management - Article Real Time

Description

This subject area provides information on articles in your knowledge base, such as the version, locale, content type, author, and lifecycle dates. It also lets you report on employee interaction with articles.

Business Questions

This subject area can answer the following business questions:

- *Which articles are published or unpublished?*
- *Which employees interacted with the articles?*
- *What are the locales, content types, and authors of the articles in the database?*
- *How many articles are available in the knowledgebase?*

Job Roles

The following job roles secure access to this subject area:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Knowledge Management Transaction Analysis Duty*

Primary Navigation

Navigator > Knowledge Management > Authoring

Time Reporting

Yes

Time dimension is linked to Knowledge Management - Article Real Time."Time"."Date".

Transactional Grain

Article Version

Special Considerations

Employees must be assigned the Resource role to be visible in reports.

Knowledge Management - Article Search Historical

Description

This subject area provides detailed information on searches for knowledge management articles. In addition to search count information, it also contains both normalized questions and full text of users' questions that you can report on. Seeing the full question text helps you to better understand customers' questions and helps you tune your knowledge base.

Business Questions

No applicable business questions

Job Roles

The following job roles secure access to this subject area:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Knowledge Management Transaction Analysis Duty*

Primary Navigation

Navigator > Knowledge Management > Authoring

Time Reporting

This subject area reports historical data.

Time dimension is linked to Knowledge Management - Article Search Historical."Time"."Search Stat Date".

Transactional Grain

Normalized Question - Department

Special Considerations

Employees must be assigned the Resource role to be visible in reports.

Knowledge Management - Article Search Question Tokens Historical

Description

This subject area provides detailed information on searches for knowledge management articles. It contains an additional level of detail about search tokens and how they relate to the knowledge management dictionary. In addition to the normalized question, this subject area contains the full question asked in the search. Seeing the full question text helps you to better understand customers' questions, and helps you tune your knowledge base.

Business Questions

This subject area can answer the following business questions:

- *How are customers finding and using knowledgebase content?*
- *How do knowledge managers view article search historical metrics?*
- *How many concept tokens as associated to articles?*

Job Roles

The following job roles secure access to this subject area:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Knowledge Management Transaction Analysis Duty*

Primary Navigation

Navigator > Knowledge Management > Authoring

Time Reporting

This subject area reports historical data.

Time dimension is linked to Knowledge Management - Article Search Question Tokens Historical.Time"."Search Stat Date".

Transactional Grain

Normalized Question Token - Department

Special Considerations

Employees must be assigned the Resource role to be visible in reports.

Knowledge Management - Article Search Questions Historical

Description

This subject area provides detailed information on searches for knowledge management articles. In addition to the normalized question, this subject area contains the full question asked in the search. Seeing the full question text helps you to better understand customers' questions and helps you tune your knowledge base.

Business Questions

This subject area can answer the following business questions:

- *How are customers are finding knowledge base content*
- *How do knowledge managers view search article metrics?*

Job Roles

The following job roles secure access to this subject area:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Knowledge Management Transaction Analysis Duty*

Primary Navigation

Navigator > Knowledge Management > Authoring

Time Reporting

This subject area reports historical data.

Time dimension is linked to Knowledge Management - Article Search Questions Historical."Time"."Search Stat Date".

Transactional Grain

Raw/Actual Question - Department

Special Considerations

Employees must be assigned the Resource role to be visible in reports.

Knowledge Management - Article Summary Historical

Description

This subject area contains information on knowledge management article historical metrics. This data shows how articles are ranked in popularity and which articles require updates. Users can create reports on article views, ratings, service request links, article creation, and publishing. The historical data is refreshed on an hourly basis.

Business Questions

This subject area can answer the following business questions:

- *How do knowledge managers view article historical metrics?*
- *How are articles in the knowledge base ranked in popularity?*
- *How are articles are ranked in popularity?*
- *How do Knowledge managers view information on article historical metrics?*
- *Which articles require updates?*

Job Roles

The following job roles secure access to this subject area:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Knowledge Management Transaction Analysis Duty*

Primary Navigation

Navigator > Knowledge Management > Authoring

Time Reporting

This subject area reports historical data.

Time dimension is linked to Knowledge Management - Article Summary Historical."Time"."Stat Date".

Transactional Grain

Article Latest Version

Special Considerations

Employees must be assigned the Resource role to be visible in reports. The historical data is refreshed on an hourly basis.

Knowledge Management - Article User Group Real Time

Description

The Article User Group Real Time subject area contains information about the user groups that are associated with articles. This subject area is structured as many-to one, so you open your core subject area (for example, Article Real Time), and then add this subject area. You can report on the user groups that are associated with articles in Knowledge Management Analytics to gain additional insight into how users are interacting with secured content.

Business Questions

This subject area can answer the following business questions:

- *How many articles are consumed by a particular user group during a specified period?*
- *Which user groups area associated to an article?*
- *Which employee in a user group created the most or least articles?*

Job Roles

The following job roles secure access to this subject area:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Knowledge Management Transaction Analysis Duty*

Primary Navigation

Navigator > Knowledge Management > Authoring

Time Reporting

Yes

Time dimension is linked to NA.

Transactional Grain

Article Version - User Group

Special Considerations

Employees must be assigned the Resource role to be visible in reports. This subject area isstructured as many-to one, so you open your core subject area (forexample, Article Real Time), and then add this subject area.

Marketing - CRM Leads

Description

This subject area provides information on all the leads created in the system.

Employee and contact refers to the primary employee and contact for the lead.

Business Questions

This subject area can answer the following business questions:

- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *What are the top 10 products associated to the Leads in the system?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What are the sources of the Leads created in the current quarter?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How many Leads are unassigned in the system?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *Who are the top Sales representatives by their Lead conversion ratio?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Corporate Marketing Manager*
- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Leads

Time Reporting

Yes

Time dimension is linked to Marketing - CRM Leads."Lead"."Lead Creation Date".

Transactional Grain

This subject area returns data at the grain of a Lead.

Special Considerations

None.

Marketing - CRM Leads and Opportunities Real Time

Description

This subject area provides information on all leads converted to an opportunity or associated or defined on an opportunity.

A lead can be associated to multiple opportunities and vice versa. This subject area provides information on lead and the opportunities associated to it.

This subject area can be combined with any other subject area that has Lead or Opportunity dimension.

Business Questions

This subject area can answer the following business questions:

- *How many Leads are associated for a given Opportunity?*
- *What are the Leads that are converted into Opportunities?*
- *How many Opportunities were created from a given Lead?*

Job Roles

The following job roles secure access to this subject area:

- *Corporate Marketing Manager*

- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Leads

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns data at the grain of Lead-Opportunity; i.e. for a given Lead shows data of the Opportunity associated and vice versa.

Special Considerations

None.

OTBI Performance Real Time

Description

Analyze OTBI analysis and dashboard usage and performance, including logical and physical database SQL, execution time, and errors. View the last six months of OTBI usage and performance trends, commonly used subject areas, and report errors. This subject area provides data to monitor and diagnose OTBI reporting performance. Historical data older than six months is purged each week.

Business Questions

This subject area can answer the following business questions:

- *What are the most commonly used OTBI subject areas?*
- *What are the least-used OTBI subject areas?*
- *Which subject areas have large data volume?*
- *Which analyses reached OTBI max row limit?*
- *What is the database SQL execution time and row count?*
- *Which analyses have low usage because of poor performance?*
- *Which analyses have the longest response time?*
- *Which analyses have high data row count?*
- *Which subject areas have slow performance?*
- *What are the long-running analyses in the past month?*
- *What is the OTBI execution time histogram in the past month?*
- *What are the common execution errors in the past month?*
- *How many analyses and dashboards failed in the past month?*

Job Roles

The following job roles secure access to this subject area:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *OTBI Performance Transactional Analysis Duty*

Primary Navigation

Not available

Time Reporting

This subject area supports six-month usage history data.

Time dimension is linked to "Time"."Report Start Date".

Transactional Grain

This subject area returns data at the grain of a query execution and database physical SQL.

Special Considerations

This subject area contains six months of query execution data. Each OTBI query execution can generate multiple database SQL statements. Usage data volume grows over time, so use proper filters to narrow reporting data load. Because this subject area has no data security, you're advised to secure user access to it.

OTBI Usage Real Time

Description

Analyze six months of subject area and analysis usage trends and patterns with a simpler and lighter-weight selection of OTBI usage metrics, including for example user, report and subject area usage patterns. Historical data older than six months is purged each week.

Business Questions

This subject area can answer the following business questions:

- *Who are the top OTBI users?*
- *How many ad-hoc OTBI analyses have been run in the past month?*
- *What is the weekly OTBI analysis usage trend?*
- *What is the execution history of dashboard X in the past month?*
- *How many OTBI SOAP web services have been run in the past month?*
- *How many users run OTBI analyses?*
- *How many custom OTBI analyses have been run in the past month?*

- *Which analyses have low usage in the past month?*
- *How many predefined OTBI analyses have been run in the past month?*
- *What are the most frequently-run OTBI analyses?*

Job Roles

The following job roles secure access to this subject area:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *OTBI Usage Transactional Analysis Duty*

Primary Navigation

Not available

Time Reporting

This subject area supports six-month usage history data.

Time dimension is linked to "Time"."Report Start Date".

Transactional Grain

This subject area returns data at the grain of a query execution.

Special Considerations

This subject area contains six months of usage history. It doesn't contain database SQL execution details so it has less data volume.

Partners - CRM Leads and Opportunities Real Time

Description

This subject area provides information on the leads and opportunities as related to partners.

Contact and resource refers to the primary contact and primary resources.

Business Questions

This subject area can answer the following business questions:

- *What is the potential revenue of leads by partners?*
- *What are the open Opportunities associated to a given Partner?*
- *What is the number of leads by partners for a specific product group?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

Primary Navigation

Navigator > Partner Management > Partners

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at multiple grains

a) Lead Facts: Provides information at the grain of a Lead

b) Partner Pipeline Detail Facts: Provides information at the grain of an Opportunity

c) Partner Pipeline Facts: Provides information at the grain of an Opportunity Revenue Line

Special Considerations

By default, the 'implicit' fact table for this subject area is the Lead Fact. This means that in the absence of any metric, a report would return the data assocaited at the Lead level.

Partners - CRM Opportunities and Products Real Time

Description

This subject area provides information on the opportunities associated with a partner and the products within that opportunity.

Contact dimension refers to partner contacts.

Business Questions

This subject area can answer the following business questions:

- *What is the quarterly revenue trend for a specific product/product group by partner?*
- *What is the average deal size by Product groups?*
- *What is the distribution of Partner Opportunities by sales stages?*
- *What is the revenue generated by Partners per Customer?*
- *What are the top ten Partners by Revenue during the past quarter/year?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*

- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

Primary Navigation

Navigator > Partner Management > Partners

Time Reporting

Yes

Time dimension is linked to Partner - CRM Campaigns and Opportunities Real Time."Opportunity"."Created Date".

Transactional Grain

This subject area returns the data at multiple grains

a) Partner Pipeline Detail Facts: Provides information at the grain of an Opportunity

b) Partner Pipeline Facts: Provides information at the grain of an Opportunity Revenue Line

Special Considerations

By default, the 'implicit' fact table for this subject area is the Partner Pipeline Fact. This means that in the absence of any metric, a report would return the data assocaited at the Opportunity level. As of release 20D, this subject area reports on inactive products. Active and inactive reporting shows the same attributes with the exception that for inactive products Product Hierarchy fields are empty.

Partners - CRM Partner Assessments

Description

This subject area provides information on partner assessments submitted against the partner.

This subject area can be combined with any other subject area that has Partner dimension when the results are needed at level of partner grain.

Business Questions

This subject area can answer the following business questions:

- *How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?*
- *What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? Submitted e.g. Partner Performance?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*

- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

Primary Navigation

Navigator > Partner Management > Partners

Time Reporting

Yes

Time dimension is linked to Partners - CRM Partner Assessments."Partner Assessments"."Creation Date".

Transactional Grain

This subject area returns the data at multiple grains

a) Partner Assessment Facts: Provides information at the grain of a Partner Assessment

b) Partner Assessment Response Facts: Provides information at the grain of a Partner Assessment Response

Special Considerations

By default, the 'implicit' fact table for this subject area is the Partner Assessment fact. This means that in the absence of any metric, a report would return the data associated at the Partner Assessment level.

Partners - CRM Partner Classification

Description

This subject area provides information on the classification of a partner, and provides support for reporting on the partner within the classification hierarchy.

Business Questions

This subject area can answer the following business questions:

- *What is total number of Partners assigned to a specific classification for this period?*
- *What is the number of partners in a specific classification within a defined geographic region?*
- *How are the Partners classified?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

Primary Navigation

Navigator > Partner Management > Partners

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns data at the grain of Partner-Classification.

Special Considerations

None.

Partners - CRM Partner Contact

Description

This subject area provides information on the contacts (primary and non primary) of a partner. It also provides information on how many of those contacts are users and resources.

Contact Dimension refers to partner contacts. Contact Profile Dimension refers to Partner Contact Profile level when combined together to query partner.

This subject area can be combined with any other subject area that has Partner dimension when the results are needed at level of partner grain.

Business Questions

This subject area can answer the following business questions:

- *How many Partners is a Contact is associated to?*
- *What are the number of Partner contacts by Partner?*
- *What is the number of Partner Contacts that are also resources and users?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

Primary Navigation

Navigator > Partner Management > Partners

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grian of Partner-Contact.

Special Considerations

None.

Partners - CRM Partner Overview

Description

This subject area provides information partners.

Partner resource dimension refers to the primary resource on partners and contact is the primary contact of the partner.

Business Questions

This subject area can answer the following business questions:

- *What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?*
- *What are the Partners created in the system for a given time period?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

Primary Navigation

Navigator > Partner Management > Partners

Time Reporting

Yes

Time dimension is linked to Partners - CRM Partner Overview."Partners"."Creation date".

Transactional Grain

This subject area returns the data at multiple grains

a) Partner Facts: Provides information at the grain of a Partner

b) Partner Pipeline Detail Facts: Provides information at the grain of a Partner Opportunity Revenue Line

c) Partner Pipeline Facts: Provides information at thr grain of a Partner Opportunity

d) Service Facts: Provides information at the grain of a Service Request

Special Considerations

By default, the 'implicit' fact table for this subject area is the Partner fact. This means that in the absence of any metric, a report would return the data associated at the Partner level.

Partners - CRM Partner Program Benefits

Description

This subject area provides information related to Partner Program Benefits.

Use this subject area to report Partner Programs, Program Benefits, Benefit details and partner tiers where the benefits are applicable

Business Questions

No applicable business questions

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*

Primary Navigation

Navigator > Partners

Time Reporting

There is no time dimension associated to this subject area.

Time dimension is linked to No Anchoring Date..

Transactional Grain

Partner Program

Special Considerations

None.

Partners - CRM Partner Resource

Description

This subject area provides information on all the Resources (primary and non primary) and resource roles on a partner.

Employee dimension in this subject area refers to both primary and non primary resources.

This subject area can be combined with any other subject area that has Partner dimension when the results are needed at level of partner grain.

Business Questions

This subject area can answer the following business questions:

- *How many Partners' team is a given Resource part of?*
- *Who all is part of the Partner Resource Team for a given Partner and what is their role?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*

- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

Primary Navigation

Navigator > Partner Management > Partners

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of Partner-Resource.

Special Considerations

None.

Partners - CRM Partner Territory

Description

This subject area provides information on all the territories that are associated to a partner.

Territory here refers to both primary and non primary resources associated to a partner.

This subject area can be combined with any other subject area that has Partner dimension when the results are needed at level of partner grain.

Business Questions

This subject area can answer the following business questions:

- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*

- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Partner Management > Partners

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of Partner-Territory.

Special Considerations

None.

Partners - CRM Program Enrollments

Description

This subject area provides information on the program enrollments and the associated programs and partners that are enrolled into the program.

Business Questions

This subject area can answer the following business questions:

- *Which Program has the highest number of Enrollments?*
- *How many Enrollments are going o expire in the next quarter?*
- *What are the Programs that Partners have enrolled into?*
- *How many Enrollments were created/submitted/expired/terminated in the last month?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

Primary Navigation

Navigator > Partner Management > Enrollments

Time Reporting

Yes

Time dimension is linked to 1) "Partners - CRM Program Enrollments"."Enrollments Approved Date"."Date" 2) "Partners - CRM Program Enrollments"."Enrollments Created Date"."Date" 3) "Partners - CRM Program Enrollments"."Enrollments Expired Date"."Date" 4) "Partners - CRM Program Enrollments"."Enrollments Submitted Date"."Date" 5) "Partners - CRM Program Enrollments"."Enrollments Terminated Date"."Date".

Transactional Grain

This subject area returns the data at the grain of a Program Enrollment.

Special Considerations

None.

Partners - CRM Programs

Description

This subject area provides information on the programs.

Business Questions

This subject area can answer the following business questions:

- *How many Programs were created in the last quarter?*
- *How many Programs are owned by the team with their expiration date?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

Primary Navigation

Navigator > Partner Management > Programs

Time Reporting

Yes

Time dimension is linked to 1) "Partners - CRM Programs"."Program Created Date"."Date" 2) "Partners - CRM Programs"."Program End Date"."Date" 3) "Partners - CRM Programs"."Program Start Date"."Date".

Transactional Grain

This subject area returns the data at the grian of a Program.

Special Considerations

None.

Sales - CRM Account Relationship

Description

This subject area provides real time information on the relationship between different accounts.

This subject area can be combined with other subject areas that have the Customer dimension when results are needed at the level of customer grain.

Business Questions

This subject area can answer the following business questions:

- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *What are the total number of Relationships for a given Account?*

Job Roles

The following job roles secure access to this subject area:

- *Accounts Receivable Manager*
- *Accounts Receivable Specialist*
- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Receivables Customer Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Account

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of Account relationship.

Special Considerations

None.

Sales - CRM All Contact Contact Point

Description

This subject area is designed to support reporting of all contact point information (i.e. email's, phone numbers and URL) for all contacts defined in the application. Here all contacts refers to both primary and non-primary contacts. For cross subject area queries, this subject area can be joined with other subject areas where the contact dimension has a many-to-many relationship with another dimension. See the Special Considerations section for more information.

Business Questions

This subject area can answer the following business questions:

- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*

- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Contacts

Time Reporting

None

Time dimension is linked to NA.

Transactional Grain

Contact Point

Special Considerations

1. This subject area can be joined with other subject areas where the contact dimension has a many-to-many relationship with another dimension. Example subject areas include Partners - CRM Partner Contact, Sales - CRM Activity Contact, Sales - CRM Asset Contact, Sales - CRM Lead Contact and Sales - CRM Opportunity Contact. Contact in these subject areas is considered as All contact. 2. This subject area supports contact point information specifically for all contacts, including both primary contact and non-primary contact. Contact point information for primary contact only is supported by separate subject area Sales - CRM Primary Contact Contact Point. 3. Contact points supported in this subject area do not include physical address. Other contact points are supported however, such as email address, phone number and URL.

Sales - CRM All Contacts Addresses

Description

This subject area is designed to support reporting of all addresses associated with any contact defined in the application. Here any contact refers to both primary and non-primary contacts. For cross subject area queries, this subject area can be joined with other subject areas where the contact dimension has a many-to-many relationship with another dimension (e.g. Sales - CRM Opportunity Contact or CRM - CRM Activity Contact). See the Special Considerations section for more information.

Business Questions

This subject area can answer the following business questions:

- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*

- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *CRM Administrative Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Contacts

Time Reporting

No

This subject area has no anchoring date.

Transactional Grain

Contact Address

Special Considerations

1. This subject area can be joined with other subject areas where the contact dimension has a many-to-many relationship with another dimension. Example subject areas include Sales - CRM Opportunity Contact and CRM - CRM Activity Contact. Contact in these subject areas is considered as All contact. 2. This subject area supports reporting on addresses for all contacts, including both primary contact and non-primary contact. Reporting on addresses for primary contact specifically is supported by the separate subject area Sales - CRM Primary Contact Addresses. 3. Separate subject areas exist to report on contact point information such as email address and phone number. These subject areas are Sales - CRM Primary Contact Contact Point and Sales - CRM All Contacts Contact Point.

Sales - CRM Asset

Description

This subject area provides information on all the assets that are created in the system.

Contact and Employee dimension in this subject area refer to the primary contact and employee that is assigned to the Asset.

Business Questions

This subject area can answer the following business questions:

- *What are the Assets that are expiring in the next quarter?*
- *What is the QoQ growth for Assets by Products?*
- *How many Assets are created in a particular time period?*
- *What are the top 10 Products by Asset count?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*

- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Assets

Time Reporting

Yes

Time dimension is linked to Sales - CRM Asset."Asset"."Purchase Date".

Transactional Grain

This subject area returns the data at the grain of an Asset.

Special Considerations

None.

Sales - CRM Asset Contact

Description

This subject area provides information on primary and non primary contacts that are assigned to assets.

The Contact dimension provides information on all primary and non primary contacts associated to the assets.

This subject area can be combined with any other subject area that has Asset dimension when the results are needed at level of asset grain.

Business Questions

This subject area can answer the following business questions:

- *Who are all the Contacts assigned to the Assets?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Assets

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of Asset-Contact.

Special Considerations

None.

Sales - CRM Asset Resource

Description

This subject area provides information on primary and non primary resources that are assigned to the assets.

The Employee dimension provides information on all primary non primary resources associated to the assets.

This subject area can be combined with any other subject area that has Asset dimension when the results are needed at level of asset grain.

Business Questions

This subject area can answer the following business questions:

- *Who are all the resources assigned to the Assets?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Assets

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of Asset-Resource.

Special Considerations

None.

Sales - CRM Business Plan

Description

This subject area provides information on the Business Plans and their objectives that are created in the system.

Business Questions

This subject area can answer the following business questions:

- *What Business plans are owned by the team?*
- *What Business plan objectives have not met the target values?*

- *How many Business plans were created in the System in the last quarter and for what Partner or Account?*
- *What are the Business plan objectives and what are their target v/s actual value?*

Job Roles

No applicable job roles

Duty Roles

No applicable duty roles

Primary Navigation

Navigator > Business Plans

Time Reporting

Yes

Time dimension is linked to Sales - CRM Business Plan."Business Plan"."Original Creation Date".

Transactional Grain

This subject area returns the data at the grain of Business plan and Business plan objectives.

Special Considerations

None.

Sales - CRM Business Plan Objective Split

Description

This subject area provides information on the Business Plans objectives and their objective splits that are created in the system.

Business Questions

This subject area can answer the following business questions:

- *How are the business plan objectives split?*
- *What are the target v/s actual number of the split objectives?*

- *What are the objectives that have not met the target value set?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Requests > Service Request Details > Interaction History

Time Reporting

Yes

Time dimension is linked to Sales - CRM Business Plan."Objective Split Detail"."Creation Date".

Transactional Grain

This subject area returns the data at the grain of business plan objectives split.

Special Considerations

None.

Sales - CRM Campaign Members

Description

This subject area provides information on a campaign and the associated campaign members such as leads and contacts.

Customer dimension is the Contact's primary customer.

This subject area can be joined with other subject areas that have the Campaign dimension when the data is needed at campaign level.

Business Questions

This subject area can answer the following business questions:

- *How many Leads are part of the Campaign?*
- *How many Leads do not have Contact?*
- *How many responses received for a given campaign?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*

- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Campaign

Time Reporting

Yes

Time dimension is linked to 1) "Sales - CRM Campaign Members"."Campaign Created Date"."Date" 2) "Sales - CRM Campaign Members"."Campaign End Date"."Date" 3) "Sales - CRM Campaign Members"."Campaign Start Date"."Date".

Transactional Grain

This subject area returns the data at the grain of Campaign Member.

Special Considerations

None.

Sales - CRM Campaign Opportunity

Description

This subject area provides information on the campaign and the associated opportunities.

This subject area can be joined with other subject area that have the Campaign dimension when the data is needed at campaign level.

Business Questions

This subject area can answer the following business questions:

- *What is the Campaign ROI (return on investment)?*
- *How many Opportunities associated to a Campaign?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Campaign

Time Reporting

Yes

Time dimension is linked to 1) "Sales - CRM Campaign Opportunity"."Campaign Created Date"."Date" 2) "Sales - CRM Campaign Opportunity"."Campaign End Date"."Date" 3) "Sales - CRM Campaign Opportunity"."Campaign Start Date"."Date".

Transactional Grain

This subject area returns the data at the grain of Campaign-Opportunity.

Special Considerations

None.

Sales - CRM Contact Note

Description

This subject area provides information on the notes added for the contact.

This subject area can be combined with any other subject area that has Contact dimension when the results are needed at level of contact grain.

Business Questions

This subject area can answer the following business questions:

- *What is the additional information updated in the Notes for a Contact?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Contacts

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of a Contact Note.

Special Considerations

None.

Sales - CRM Contact Relationship

Description

This subject area provides information on the relationship between different contacts.

Business Questions

This subject area can answer the following business questions:

- *Does this Contact have subsidiaries?*
- *What are the total number of Contact Relationships between two Contact?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*

- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Account

Time Reporting

Yes

Time dimension is linked to "Sales - CRM Account Relationship"."Customer"."Creation Date".

Transactional Grain

This subject area returns the data at the grain of Contact-Relationship.

Special Considerations

None.

Sales - CRM Contact Resource

Description

This subject area provides information on contacts associated to a record.

Business Questions

This subject area can answer the following business questions:

- *What are the Resources are associated to this contact?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Contacts

Time Reporting

Yes

Time dimension is linked to Sales - CRM Contacts."Contact"."Creation Date".

Transactional Grain

This subject area returns the data at the grain of a Contact Resource.

Special Considerations

None.

Sales - CRM Contacts

Description

This subject area provides information on all the contacts created in the system.

Business Questions

This subject area can answer the following business questions:

- *How many new contacts are created in the system in the current month?*
- *What are all the contacts created in the system by Geography?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Contacts

Time Reporting

Yes

Time dimension is linked to Sales - CRM Contacts."Contact"."Creation Date".

Transactional Grain

This subject area returns the data at the grain of a Contact.

Special Considerations

None.

Sales - CRM Customer Classification

Description

This subject area provides information on the classification of a customer and provides support for reporting on the customer within the customer hierarchy.

This subject area can be combined with any other subject area that has Customer dimension when the results are needed at level of customer grain.

Business Questions

This subject area can answer the following business questions:

- *How are the customers classified?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*

- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Accounts

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of a customer-classification.

Special Considerations

None.

Sales - CRM Customer Note

Description

This subject area provides information on the notes added for the customer.

This subject area can be combined with any other subject area that has Customer dimension when the results are needed at level of customer grain.

Business Questions

This subject area can answer the following business questions:

- *What is the additional information updated in the Notes for a Customer?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*

- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Accounts

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of a Customer Note.

Special Considerations

None.

Sales - CRM Customer Overview

Description

This subject area provides information on the Customers/Accounts created in the system and all comprehensive customer analysis across the sales process including leads, pipeline revenues, sales cycles, win/loss, and activities.

The Contact and Employee dimension refers to the primary contact and employees only.

Business Questions

This subject area can answer the following business questions:

- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are my best performing product lines by customer geographies?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Account

Time Reporting

Yes

Time dimension is linked to Sales - CRM Customer Overview.CRM Customers."Customer"."Creation Date".

Transactional Grain

This subject area returns the data at multiple grains

a) Activity Facts: Provides information at the grain of Customer Activity

b) Lead Fact: Provides information at the grain of Customer Lead

c) Pipeline Detail Fact: Provides information at the grain of Customer - Opportunity Revenue line

d) Pipeline Fact: Provides information at the grain of Customer-Opportunity

e) Sales Account Fact: Provides information at the grain of Sales Account

f) Sales Cycle Fact: Provides information at the grain of Customer-Opportunity

g) Win Loss Fact: Provides information at the grain of Customer-Opportunity

Special Considerations

By default, the implicit fact table for this subject area is the Pipeline fact. This means that in the absence of any metric, a report would include only such customer and other data that are associated with opportunity transactions. If you add the Fact from this subject area called # of sales accounts the query will return all sales accounts with every party status. To build a report to show only active sales accounts, an explicit filter needs to be added to the report to define Party Status = 'A' for active.

Sales - CRM Customers

Description

This subject area provides real time information on the customers created in the system. It can be used to report on facts and dimensions associated with customers such as customer geography, industry, and employees.

Business Questions

This subject area can answer the following business questions:

- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *Who are my teams top Customers?*
- *Who manages my top accounts?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Account

Time Reporting

Yes

Time dimension is linked to Sales - CRM Customers."Customer"."Creation Date".

Transactional Grain

This subject area returns the data at the grain of the Customer.

Special Considerations

None.

Sales - CRM Customers and Contacts Real Time

Description

This subject area provides information on the Customer and all of the contacts associated to it.

The Contact dimension here refers to the Primary and Non-Primary contacts associated with a customer.

This subject area can be combined with any other subject area that has Customer or Contact as a common dimension.

Business Questions

This subject area can answer the following business questions:

- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Accounts

Time Reporting

Yes

Time dimension is linked to "Sales - CRM Contacts"."Contact"."Creation Date".

Transactional Grain

This subject area returns the data at the grain of Customer-Contact.

Special Considerations

None.

Sales - CRM Deal Registration

Description

This subject area provides information on the deals created in the system.

Contact and Employee dimension refers to the primary contact and employees.

Business Questions

This subject area can answer the following business questions:

- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*

- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales - Deal Registrations

Time Reporting

Yes

Time dimension is linked to Sales - CRM Deal Registration."Deal Registration"."Creation Date".

Transactional Grain

This subject area returns the data at the grain of a Deal Registration.

Special Considerations

None.

Sales - CRM Deal Registration Product

Description

This subject area provides information on the deal registration and the associated products.

Business Questions

This subject area can answer the following business questions:

- *What are the Products associated with the Deals?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales - Deal Registrations

Time Reporting

Yes

Time dimension is linked to Sales - CRM Deal Registration Product."Deal Registration Product"."Creation Date".

Transactional Grain

This subject area returns the data at the grain of a Deal Registration and Deal Registration-Product.

Special Considerations

None.

Sales - CRM Forecasting

Description

This subject area provides information on the forecast revenues at both aggregate (such as for a forecast period or year) and detail levels (such as every submitted forecast or opportunity).

Business Questions

This subject area can answer the following business questions:

- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*

- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Forecasts

Time Reporting

Yes

Time dimension is linked to Sales - CRM Forecasting."Opportunity"."Created Date".

Transactional Grain

This subject area returns the data at the grain of the Forecast.

Special Considerations

None.

Sales - CRM Forecasting and Pipeline Revenue Real Time

Description

This subject area provides information on forecast and pipeline revenues at both aggregate (such as for a forecast period or year) and detail levels (such as every submitted forecast or opportunity).

Business Questions

This subject area can answer the following business questions:

- *Do Forecast rely on Revenue from few Products?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*

- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Forecasts

Time Reporting

Yes

Time dimension is linked to Sales - CRM Forecasting and Pipeline Revenue Real Time."Opportunity"."Created Date".

Transactional Grain

This subject area returns the data at the grain of Forecast-Opportunity and Forecast Revenue.

Special Considerations

None.

Sales - CRM Historical Forecasting

Description

This subject area provides information to track historical forecast revenue numbers and forecast changes over time related to your pipeline, quantity and revenue.

Reporting from this subject area can include key business objects such as Customer/Account, Business Unit, Opportunity, Sales Forecast, Sales Channel, Product, and Territory.

Business Questions

This subject area can answer the following business questions:

- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Forecasts

Time Reporting

Yes

Time dimension is linked to "Sales - CRM Pipeline"."Opportunity"."Created Date".

Transactional Grain

This subject area returns the data at the grain of Forecast.

Special Considerations

None.

Sales - CRM Historical Pipeline

Description

This subject area enables you to track and report on historical pipeline revenue numbers and opportunity transitions in the context of key business objects such as Customer/Account, Opportunity, Sales Resource, Product, and Territory.

Although this subject area is similar to the Sales - CRM Pipeline Subject Area, the Pipeline subject area is used for current state analysis of revenues, whereas the Historical Pipeline subject area is used for analyzing historical trends in pipeline revenue.

Both summary and detail historical pipeline revenue metrics are supported. Historical pipeline analysis is always with respect to Pipeline Snapshot Date/Period/Quarter/Year. Note that Enterprise Calendar is only supported for Snapshot time.

The dimension entities for snapshot for historical analysis are Opportunity (via Historical Opportunity) and Revenue (via Historical Revenue).

Except as just noted, all dimensions - such as Product, Territory, Sales Resource, and so on, represent current state. Any historical pipeline metrics analyzed in this context show current data for the dimensions.

For example, a report showing sales resource hierarchy and 'open opportunity line revenue' across a range of past snapshot dates, would show historical revenue numbers against present hierarchy.

Business Questions

This subject area can answer the following business questions:

- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *What are the historical monthly trend of closed revenue by current territories?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales - Opportunities

Time Reporting

Yes

Time dimension is linked to "Sales - CRM Pipeline"."Opportunity"."Created Date".

Transactional Grain

This subject area returns the data at multiple grains

a) Historical Pipeline Facts: Provides information at the grain of an Opportunity

b) Historical Pipeline Details Facts: Provides information at the grain of an Opportunity Revenue Line

Special Considerations

In order to use this subject area, it is advised to run Generate Sales Historical Snapshots ESS schedule process. Although this process runs automatically, before you run a report that uses this subject area you might want to run this ESS job before you report on snapshots to ensure you have the most recent snapshot data capture. The dimension entities that are snapshot for historical analysis are Opportunity (via Historical Opportunity) and Revenue (via Historical Revenue). There are both Opportunity/Historical Opportunity and Revenue/Historical Revenue. By default, the implicit fact table for this subject area is the Pipeline fact. This means that in the absence of any metric, a report would return data at the Opportunity level. When the ESS job is run, the snapshot data is captured by the parameters in the profile option MOO_MANAGE_SALES_HISTORICAL_SNAPSHOT_CONFIGURATION. The retention values set for this profile are C=120,D=120,W=58,M=14,Q=5. A snapshot qualifies as a weekly snapshot if it collected in the last day of the week. A snapshot collected on the last day of the month qualifies as a monthly snapshot if it is collected on the last day of the month. And finally, a snapshot collected on the last days of the fiscal quarter qualifies as a quarterly snapshot. If you run reports that use this subject area with time periods that fall on random days, that is, days that don't fall on end of week, end of month, or end of quarter then it is considered a daily snapshot. By default the daily snapshot retention period is configured in the profile MOO_MANAGE_SALES_HISTORICAL_SNAPSHOT_CONFIGURATION to retain data for 120 days. If you are running daily snapshots and you want an extended daily time period you should change the profile daily (D) values.

Sales - CRM Lead Assessments

Description

This subject area provides information on the lead assessments submitted against the leads.

This subject area can be combined with any other subject area that has Lead dimension when the results are needed at level of lead grain.

Business Questions

This subject area can answer the following business questions:

- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Leads

Time Reporting

Yes

Time dimension is linked to Sales - CRM Lead Asssessmenst."Lead Assessment"."Creation Date".

Transactional Grain

This subject area returns the data at multiple grains

a) Lead Assessment Facts: Provides information at the grain of a Lead Assessment

b) Lead Assessment Response Facts: Provides information at the grain of a Lead Assessment Response

Special Considerations

By default, the 'implicit' fact table for this subject area is the Lead Assessment fact. This means that in the absence of any metric, a report would return the data associated at the Lead Assessment level.

Sales - CRM Lead Contact

Description

This subject area provides information on all of the Contact and Contact Roles associated with a lead.

Contact and Customer Contact profile dimensions in this SA refer to both Primary and Non Primary Contacts.

This subject area can be combined with any other subject area that has a Lead dimension when the results are needed at the level of Lead grain.

Business Questions

This subject area can answer the following business questions:

- *Who all are the Contacts associated to the Lead?*
- *How many Leads is a Contact associated to?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Leads

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of Lead-Contact.

Special Considerations

None.

Sales - CRM Lead Product

Description

This subject area provides information on all of the Products and Product hierarchy associated with a lead.

Product and Product dimensions in this SA refer to both Primary and Non Primary Products.

Business Questions

This subject area can answer the following business questions:

- *How many Leads are open for a given Product?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are the Leads associated with certain products?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*

- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Leads

Time Reporting

Yes

Time dimension is linked to Sales - CRM Lead Product."Lead"."Creation Date".

Transactional Grain

This subject area returns the data at the grain of Lead-Product.

Special Considerations

None.

Sales - CRM Lead Resource

Description

This subject area provides information on one or more resources associated to the lead.

Employee/Resource dimension refers to the primary and non primary resources associated to the lead.

This subject area can be combined with any other subject area that has Lead dimension when the results are needed at level of lead grain.

Business Questions

This subject area can answer the following business questions:

- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Leads

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of Lead-Resource.

Special Considerations

None.

Sales - CRM Lead Territory

Description

This subject area provides information on one or more territories associated to the lead.

Territory dimension refers to the primary and non primary resources associated to the lead.

This subject area can be combined with any other subject area that has lead dimension when the results are needed at level of lead grain.

Business Questions

This subject area can answer the following business questions:

- *How many territories is the Lead part of?*
- *What are all the Territories the Lead is part of?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Leads

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of Lead-Territory.

Special Considerations

None.

Sales - CRM MDF Budget

Description

This subject area provides information on the tracking and management of market development funds (MDF).

This subject area can be combined with any other subject area that has the MDF Budget dimension.

Business Questions

This subject area can answer the following business questions:

- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *What are my claimed vs unclaimed MDF totals?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*

- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Partner Management > MDF

Time Reporting

Yes

Time dimension is linked to 1) "MDF Budget Activation Date"."Activation Date" 2) "MDF Budget Secondary Dates"."Inactivation Date".

Transactional Grain

This subject area returns the data at the grain of a MDF budget.

Special Considerations

None.

Sales - CRM MDF Claim

Description

This subject area provides information on the tracking and analysis of all of MDF Claims.

This subject area can be combined with any other subject area that has MDF Budget/Claim dimension.

Business Questions

This subject area can answer the following business questions:

- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Partner Management > MDF

Time Reporting

Yes

Time dimension is linked to 1) "Sales - CRM MDF Claim"."MDF Claim Secondary Dates"."Approved Date" 2) "Sales - CRM MDF Claim"."MDF Claim Submitted Date"."Submitted Date".

Transactional Grain

This subject area returns the data at the grain of a MDF Claim.

Special Considerations

None.

Sales - CRM MDF Claim Settlement

Description

This subject area provides information on the MDF Claim Settlements.

This subject area can be combined with any other subject area that has MDF Claim dimension.

Business Questions

This subject area can answer the following business questions:

- *What was the currency conversion rate applied to a specific claim?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*

- *Was an MDF claim rejected? What was the reason the claim was rejected?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Partner Management > MDF

Time Reporting

Yes

Time dimension is linked to "Sales - CRM MDF Claim Settlement"."MDF Claim Settlement Transaction Date"."Date".

Transactional Grain

This subject area returns the data at the grain of a Claim Settlement.

Special Considerations

None.

Sales - CRM MDF Request

Description

This subject area provides information on the MDF Requests.

This subject area can be combined with any other subject area that has MDF Request/Budget dimension.

Business Questions

No applicable business questions

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*

- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Partner Management > MDF

Time Reporting

Yes

Time dimension is linked to 1) "Sales - CRM MDF Request"."MDF Request Secondary Dates"."Approved Date" 2) "Sales - CRM MDF Request"."MDF Request Submitted Date"."Date".

Transactional Grain

This subject area returns the data at the grain of a MDF request.

Special Considerations

None.

Sales - CRM Object Activity

Description

This subject area provides data for reporting on object activity, specifically object creation and updates.

Use this subject area to report on object activity by channel, object activity performed by users, object activity by channel, and time periods with no object activity.

As of 21A, this subject area now reports on the number of reads for the Mobile and Microsoft 365 channels. These metrics give you a broader understanding of how much sales teams interact with these channels.

Gain vital insights on user adoption by reporting on which types of records are read, such as account, activity, or opportunity, via the Mobile and Microsoft 365 channels. Seeing which types of records are read on these channels gives you critical insights into user behavior in the field.

Business Questions

This subject area can answer the following business questions:

- *How is the object activity split across channels (web/mobile/email)?*
- *Which times are objects not being created or updated?*
- *How many records were created or updated by a user in a month?*
- *What is the count of records created or updated by object type?*

Job Roles

No applicable job roles

Duty Roles

No applicable duty roles

Primary Navigation

Navigator > Manage Users

Time Reporting

Yes

Time dimension is linked to Time dimension is linked to Object activity date..

Transactional Grain

Object Activity Date / Object / Channel / User

Special Considerations

1. Considering the sensitivity of the data, access to this subject area is restricted to the BI duty role "BI User System SA Access". 2. This subject area captures user activity data only when ESS job Refresh BI Reports Audit Data for User Adoption Reporting is run. 3. Data retention period is configurable when submitting ESS jobs. Default data retention is 13 months. 4. Object creates (inserts) are available by channel (web/mobile/email). 5. Object updates are available for the mobile and email channels. Object updates for the web channel is not yet offered. 6.Proxy is not supported for this subject area. 7. This subject area supports negative reporting at the resource and time level. This allows reporting on which users are not using the system and when the system is not being used. 8. This subject area shows activities for all

Time Periods, based on the Employee dimension, to support reporting on Time periods with or without activity. For this reason, if a custom report is built which includes a Time Period at either Year or Month, the report must be filtered by a specific time period. Without such a filter the report will show results for the complete 100 years in the Time dimension. 9. For mail (Microsoft 365) and mobile applications, if reports are run on a given day, data from that day will not show until a period of 24 hours has passed. Running the scheduled process 'Refresh BI Reports Audit Data for User Adoption Reporting' will not change this behavior. 10. For best performance it is recommended to: a. Add a time filter for a specific year or month. Time filters should not be longer than one year. b. Add a Resource filter, such as Region. c. Try to break larger reports into smaller reports. d. Filter # of Active Days fact > 0 to report on days with activity, unless negative reporting is the requirement.

Sales - CRM Opportunities and Products Real Time

Description

This subject area provides information on all the Opportunities created in the system.

The Contact and Employee dimension in this subject area refers to the Primary Contact and Primary Employee respectively.

This subject area can be combined with any other subject area that has Opportunity dimension when the results are needed at the level of opportunity grain.

Business Questions

This subject area can answer the following business questions:

- *How do wins and losses trend quarterly for a specific product line?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales - Opportunities

Time Reporting

Yes

Time dimension is linked to Sales - CRM Opportunities and Products Real Time."Opportunity"."Created Date".

Transactional Grain

This subject area returns the data at multiple grains

a) Pipeline Facts: Provides information at the grain of an Opportunity

b) Pipeline Details Facts: Provides information at the grain of an Opportunity Revenue Line

Special Considerations

By default, the 'implicit' fact table for this subject area is the Pipeline fact. This means that in the absence of any metric, a report would return the data associated at the Opportunity level. As of release 20D, this subject area reports on inactive products. Active and inactive reporting shows the same attributes with the exception that for inactive products Product Hierarchy fields are empty.

Sales - CRM Opportunity Assessments

Description

This subject area provides information on the opportunity assessments submitted against the opportunity.

This subject area can be combined with any other subject area that has Opportunity dimension when the results are needed at level of opportunity grain.

Business Questions

This subject area can answer the following business questions:

- *What are the responses for different Opportunity for an Assessment submitted?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Opportunities

Time Reporting

Yes

Time dimension is linked to "Sales - CRM Opportunity Assessments"."Opportunity Assessments"."Creation Date".

Transactional Grain

This subject area returns the data at multiple grains

a) Opportunity Assessment Facts: Provides information at the grain of a Opportunity Assessment

b) Opportunity Assessment Response Facts: Provides information at the grain of an Opportunity Assessment Response

Special Considerations

By default, the implicit fact table for this subject area is the Opportunity Assessment fact. This means that in the absence of any metric, a report would return the data assocaited at the Opportunity Assessment level.

Sales - CRM Opportunity Campaign

Description

This subject area provides information on all the campaigns that are associated to an opportunity.

Campaign here refers to both primary and non primary campaigns associated to an opportunity.

This subject area can be combined with any other subject area that has Opportunity dimension when the results are needed at level of opportunity grain.

Business Questions

This subject area can answer the following business questions:

- *What are all the Campaigns assigned to an Opportunity?*
- *What are all the Opportunities resulted from a Campaign?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Opportunities

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of Opportunity-Campaign.

Special Considerations

None.

Sales - CRM Opportunity Contact

Description

This subject area provides information on all the contacts that are associated to an opportunity.

Contact here refers to both primary and non primary contacts associated to an opportunity.

This subject can be combined with any other subject area that has Opportunity dimension when the results are needed at the level of an opportunity.

Business Questions

This subject area can answer the following business questions:

- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Opportunities

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of Opportunity-Contact.

Special Considerations

None.

Sales - CRM Opportunity Note

Description

This subject area provides information on Notes associated to an Opportunity.

Use this subject area to report Opportunity Note information such as Note text, author, Created by etc.

Business Questions

This subject area can answer the following business questions:

- *What is the opportunity information captured in the note to an opportunity?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*

- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

many-to-many relationship with another dimension

Time Reporting

There is no time dimension associated to this subject area.

Time dimension is linked to No Anchoring Date..

Transactional Grain

Opportunity

Special Considerations

None.

Sales - CRM Opportunity Partner

Description

This subject area provides information on all the partners that are associated to an opportunity.

Partner here refers to both primary and non primary partners associated to an opportunity.

This subject area can be combined with any other subject area that has Opportunity dimension when the results are needed at level of opportunity grain.

Business Questions

This subject area can answer the following business questions:

- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*

- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Opportunities

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of Opportunity-Partner.

Special Considerations

None.

Sales - CRM Opportunity Resource

Description

This subject area provides information on all the Resources that are associated to an opportunity.

Employee/Resource here refers to both primary and non primary resources associated to an opportunity.

This subject area can be combined with any other subject area that has Opportunity dimension when the results are needed at level of opportunity grain.

Business Questions

This subject area can answer the following business questions:

- *How many Resources are assigned to an Opportunity?*
- *Who are all the Resources assigned to Opportunities?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Opportunities

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of Opportunity-Resource.

Special Considerations

None.

Sales - CRM Opportunity Sales Stage Snapshot

Description

This subject area provides information on the Opportunity Sales Stage historical data.

Any given Opportunity goes through multiple stages before it is marked as closed in the system. This subject area provides historical data pertaining to the Opportunity sales stages to provide more information on how an Opportunity evolved over time.

Business Questions

This subject area can answer the following business questions:

- *How did the Opportunity evolve over time?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What is the average time the Opportunity is in a particular sales stage?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Opportunities

Time Reporting

Yes

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of Opportunity.

Special Considerations

In order to use this subject area, you must have run the required ESS jobs in Oracle Sales Cloud so that transaction data has been snapshot and stored with your required frequency.

Sales - CRM Opportunity Territory

Description

This subject area provides information on all the territories associated to an opportunity.

Territory here refers to both primary and non primary resources associated to an opportunity.

This subject area can be combined with any other subject area that has Opportunity dimension when the results are needed at level of opportunity grain.

Business Questions

This subject area can answer the following business questions:

- *What are all the Territories assigned to Opportunities?*
- *How many Territories are assigned to an Opportunity?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Opportunities

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of Opportunity-Territory.

Special Considerations

None.

Sales - CRM Partner Relationship

Description

This subject area provides information on the relationship between different partners.

Business Questions

This subject area can answer the following business questions:

- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *What are the total number of Relationships between two Partners?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*

- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Partner Management > Partners

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of a Partner-Relationship.

Special Considerations

None.

Sales - CRM Pipeline

Description

This subject area provides information on all the opportunities created in the system.

The Contact and Employee dimension in this subject area refers to primary contact and primary employee.

Business Questions

This subject area can answer the following business questions:

- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *How to gauge the pending effort required to progress the opportunity?*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*

- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales - Opportunities

Time Reporting

Yes

Time dimension is linked to "Sales - CRM Pipeline"."Opportunity"."Created Date".

Transactional Grain

This subject area returns the data at multiple grains

a) Activity Facts: Provides information at the grain of an Opportunity

b) Lead Facts: Provides information at the grain of an Opportunity Revenue Line

c) Pipeline Fact: Provides information at the grain of an Opportunity

d) Pipeline Detail Fact: Provides information at the grain of an Opportunity Revenue line

e) Resource Quota Fact:

f) Sales Cycle Fact: Provides information at the grain of an Opportunity

g) Territory Quota Fact:

h) Win Loss Facts: Provides information at the grain of an Opportunity

Special Considerations

By default, the 'implicit' fact table for this subject area is the Pipeline fact. This means that in the absence of any metric, a report would return the data associated at the Opportunity level.

Sales - CRM Primary Contact Addresses

Description

This subject area is designed to support reporting of different addresses associated with primary contacts. For cross subject area queries, this subject area can be joined with other subject areas where the contact dimension points to the primary contact.

Business Questions

This subject area can answer the following business questions:

- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*

- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Contacts

Time Reporting

No

This subject area has no anchoring date.

Transactional Grain

Contact Address

Special Considerations

1. This subject area supports address information for primary contact only. Address information for all contacts, including both primary contact and non-primary contacts, is supported by separate subject area Sales - CRM All Contacts Addresses. 2. Separate subject areas exist to report on contact point information such as email address and phone number. These subject areas are Sales - CRM Primary Contact Contact Point" and Sales - CRM All Contacts Contact Point.

Sales - CRM Primary Contact Contact Point

Description

This Subject Area is designed to support reporting of all contact point information (i.e. email's, phone numbers, URL) only for primary contacts. For cross subject area queries, this Subject Area can be joined with other subject areas where the contact dimension points to the primary contact.

Business Questions

This subject area can answer the following business questions:

- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*
- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Contacts

Time Reporting

No

Time dimension is linked to n/a.

Transactional Grain

Contact Point

Special Considerations

1. This subject area supports contact point information for primary contact only. Contact point information for all contacts, including both primary contact and non-primary contacts, is supported by separate subject area Sales - CRM All Contacts Contact Point. 2. Contact points supported in this subject area do not include physical address. Other contact points are supported however, such as email address, phone number and URL.

Sales - CRM Quota Management

Description

This subject area provides information on all the resource and territory quotas.

Business Questions

This subject area can answer the following business questions:

- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *What are the Quotas assigned to the team and the Actuals?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Quotas

Time Reporting

Yes

Time dimension is linked to "Sales - CRM Quota Management". "Quota Plan"."Creation Date".

Transactional Grain

This subject area returns the data at the grain of a Quota.

Special Considerations

None.

Sales - CRM Quote Lines

Description

With this new subject area, you can report on the quotes associated with opportunities, the quoteline items, and the associated products. You can analyze useful metrics like recurring and non-recurring revenue, usage revenue and contract value at both quote and quote line item level, as well as number of quotesand number of quote line items.Products listed on quotes in multiple currencies can be converted to the corporate currency as part of Quote Line reporting due to currency rates stamped on the quote header.

Business Questions

This subject area can answer the following business questions:

- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*

- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Reports and Analytics

Time Reporting

This subject area reports historical data.

Time dimension is linked to User System Usage."Time"."Date".

Transactional Grain

This subject area returns the data at the grain of the User.

Special Considerations

The subject area requires the FBI_USER_SYSTEM_USAGE_TRANSACTIONAL_DUTY duty role for access.

Sales - CRM Quotes

Description

This subject area provides information on quotes.

This subject area can help you determine from which opportunities a quote is created, as well as how many times a quote is revised, and the associated revenue.

This subject area can be combined with any other subject area that has the Opportunity dimension, when the data is needed at the opportunity Level.

Business Questions

This subject area can answer the following business questions:

- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Naviagator > Sales > Quotes

Time Reporting

Yes

Time dimension is linked to "Quotes Creation Date"."Date".

Transactional Grain

This subject area returns the data at the grain of a Quote.

Special Considerations

None.

Sales - CRM Resource

Description

This subject area provides information on all the available resources.

Business Questions

This subject area can answer the following business questions:

- *What is the Hire date of the resources in an Organization?*
- *How many new Resources are created in the current quarter?*
- *What are the user preferences for the Users created in the system?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*

- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Resource

Time Reporting

Yes

Time dimension is linked to "Sales - CRM Resource"."Hire Date"."Date" "Sales - CRM Resource"."Resource Created Date"."Date".

Transactional Grain

This subject area returns the data at the grain of a Resource.

Special Considerations

None.

Sales - CRM Resource System Usage

Description

This subject area provides data for reporting on CRM resource activity (a resource is a person or user).

Use this subject area to report on resource activity by channel, resource activity in time periods, and time periods with no resource activity.

As of 21 A, the Sales - CRM Object Activity and Sales - CRM Resource System Usage subject areas now support the latest CX Sales Mobile application in the mobile channel. The mobile channel now provides reporting for all versions of the CX Sales Mobile application.

With support for User Adoption reporting available in all versions of the CX Sales Mobile application, your organization's user adoption metrics will be accurate as your organization transitions to the latest CX Sales Mobile application.

For mail (Microsoft 365) and mobile applications, if reports are run on a given day, data from that day will not show until a period of 24 hours has passed. Running the scheduled process 'Refresh BI Reports Audit Data for User

Adoption Reporting' will not change this behavior.

Business Questions

This subject area can answer the following business questions:

- *Who are the top 10 active resources of the system?*
- *Who are the top 10 active and bottom 10 inactive employees from a user adoption perspective?*
- *How many days was a resource active by channel?*
- *Who are the resources who have not logged in the system in the last week?*
- *Which department has the highest number of active resources?*
- *How is the resource activity split across channels (web/mobile/email)?*
- *Which region has the highest number of inactive resources?*
- *Resources of which job title are most active in the system?*

Job Roles

No applicable job roles

Duty Roles

No applicable duty roles

Primary Navigation

Navigator > Manage Users

Time Reporting

This subject area supports the reporting of CRM user activity in the system over a period of time. Time dimension is linked to CRM user login date

Time dimension is linked to NA.

Transactional Grain

Login Date / Channel / User

Special Considerations

1. Considering the sensitivity of the data, access to this subject area is restricted to the BI duty role BI User System SA Access. 2. The system tracks User activity data only when the profile option FND_TRACK_USER_ACTIVITY is enabled and ESS job Refresh BI Reports Audit Data for User Adoption Reporting is run. 3. To report by resource hierarchy, see the following post in Cloud Customer Connect, "System Usage By Resource Hierarchy", https://cloudcustomerconnect.oracle.com/posts/177c03f749 4. Supports negative reporting at the resource and time level. This allows reporting on which resources are not using the system and when the system is not being used. 5. This subject area shows activities for all Time Periods, based on the Employee dimension, to support reporting on Time periods with or without activities. For this reason, if a custom report is built which includes a Time Period at either Year or Month, the report must be filtered by a specific time period. Without such a filter, the report will show results for the complete 100 years in the Time dimension. 6. For the best performance, it is recommended to: a. Add a time Filter for a specific year

or month. Time filters should not be longer than one year. b. Add a Resource filter, such as Region. c. Try to break larger reports into smaller reports. d. Filter # of Active Days fact > 0 to report on days with activity, unless negative reporting is the requirement. 7. For mail (Microsoft 365) and mobile applications, if reports are run on a given day, data from that day will not show until a period of 24 hours has passed. Running the scheduled process 'Refresh BI Reports Audit Data for User Adoption Reporting' will not change this behavior.

Sales - CRM Resource Territory

Description

This subject area provides information on all the territories that are associated to an employee/resource.

Territory here refers to both primary and non primary resources associated to an employee.

This subject can be combined with any other subject area that has Resource/Employee dimension when the results are needed at the level of an Employee.

Business Questions

This subject area can answer the following business questions:

- *What are all the Territories assigned to Resources/Employees?*
- *How many territories are assigned to a Resource/Employee?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales CRM Sales Activity Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Resource

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of Resource-Territory.

Special Considerations

None.

Sales - CRM Sales Account Assessments

Description

This subject area provides information on the account assessments submitted against the account.

This subject area can be combined with any other subject area that has Customer dimension when the results are needed at level of customer grain.

Business Questions

This subject area can answer the following business questions:

- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*

- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Accounts

Time Reporting

Yes

Time dimension is linked to "Sales - CRM Account Assessments"."Account Assessments"."Creation Date".

Transactional Grain

This subject area returns the data at multiple grains

a) Account Assessment Facts: Provides information at the grain of an Account Assessment

b) Account Assessment Response Facts: Provides information at the grain of a Account Assessment Response

Special Considerations

By default, the 'implicit' fact table for this subject area is the Account Assessment fact. This means that in the absence of any metric, a report would return the data associated at the Account Assessment level.

Sales - CRM Sales Account Resource

Description

This subject area provides information on a sales account and the role that each resource plays.

The Employee/Resource dimension refers to both primary and non primary resources associated to an Account.

This subject area can be combined with any other subject area that has Customer dimension when the results are needed at the level of customer grain.

Business Questions

This subject area can answer the following business questions:

- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *What are the sales accounts owned by the Sales team?*

- *What are the sales accounts that a given Sales representative owns?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Accounts

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of Account-Resource.

Special Considerations

None.

Sales - CRM Sales Account Territory

Description

This subject area provides information on the Territories associated to an Account.

This subject area can be combined with any other subject area that has Customer dimension when the results are needed at the level of Customer grain.

Business Questions

This subject area can answer the following business questions:

- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Accounts

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of Sales Account-Territory.

Special Considerations

None.

Sales - CRM Territory Resource

Description

This subject area provides information on all the resources associated to a territory.

Employee/Resource dimension in this subject area refers to both primary and non primary resources assigned to a territory.

This subject area can be combined with any other subject area that has Territory dimension when the results are needed at the level of territory grain.

Business Questions

This subject area can answer the following business questions:

- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *Who are the resources assigned for a particular territory?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Primary Navigation

Navigator > Sales > Territories

Time Reporting

Yes

Time dimension is linked to Sales - CRM Sales CRM Territory Resource."Employee"."Hire Date".

Transactional Grain

This subject area returns the data at the grain of Territory-Resource.

Special Considerations

None.

Security - Audit Real Time

Description

Provides real-time information on audit details related to security. For example, when a custom role was created, when roles were assigned to specific users, or when roles were given specific function or data privileges.

Business Questions

This subject area can answer the following business questions:

- *Which roles were added with a specific functional security policy, and who added them?*
- *What are all the data security privileges that a specific user added?*

Job Roles

The following job roles secure access to this subject area:

- *IT Security Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Security Transaction Analysis Duty*

Primary Navigation

Tools > Security Console

Time Reporting

This subject area does not support history data.

Transactional Grain

Not applicable.

Special Considerations

This subject area can't be used to create a cross-subject area analysis. Don't mix data from different folders within this subject area either. For example, keep data from the Data Security Policy Audit folder separate from the Instance Set Audit folder. If you need to combine data from different folders, use a union operation or create a report instead of an analysis.

Security - Roles and Privileges Real Time

Description

Provides real-time information about the security setup in the application. This subject area is independent of the pillar and can be used to report on roles and details across pillars like HCM, ERP, SCM and so on.

Use this subject area to report on role categories, roles, functional security policies, data security policies, and the users assigned to the roles.

You can report on the correlation between the objects like the roles that are directly assigned to another role, the roles that are inherited by the virtue of the directly assigned roles, or the functional and data security policies that are directly assigned to the roles.

For a given user, all the roles that have been assigned can also be reported.

Business Questions

This subject area can answer the following business questions:

- *Can I view and edit a particular page? If yes, which functional security policy do I need to provide to a user who needs similar access?*
- *Why am I not able to view certain subject areas with my login credentials?*
- *Which data security policy would provide access to the data I need to see?*
- *I have not added a specific role to a user, but the user seems to have this job role. Can I trace how has this been inherited by the user?*

Job Roles

The following job roles secure access to this subject area:

- *IT Security Manager*

Duty Roles

The following duty roles secure access to this subject area:

- *Security Transaction Analysis Duty*

Primary Navigation

Tools > Security Console

Time Reporting

This subject area does not support history data.

Transactional Grain

Not applicable.

Special Considerations

This subject area is used to report on users, functional security policies, and data security policies all in the correlation of roles. For a role, you can report on functional security policies, or data security policies, or users. If you try to combine all the security objects in a single report, it displays an error message. This subject area can't be used to create a cross subject area report.

Service - CRM Customer Coverage Real Time

Description

Provides the ability to report on the detail of service request coverage. Working from date ranges, this subject area is suitable for cross-subject-area queries to provide customer level detail.

Business Questions

This subject area can answer the following business questions:

- *To what extent has the number of customer coverages increased between two given dates?*
- *How many new coverages begin in the ensuing month?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to Service - CRM Customer Coverage Real Time."Customer Coverage"."Start Date".

Transactional Grain

Coverage

Special Considerations

None.

Service - CRM Service Queue Resources Real Time

Description

Use this subject area to understand resource staffing of queues such as whether they are properly balanced and with the proper resources. When used in conjunction with "Service - CRM Service Requests Real Time," one can perform analyses with respect to specific SRs and related attributes such as category and product. Managers understand whether team resources are optimally deployed across service queues to maximize productivity. Visibility into team members deployed as resources in various queues and the associated open SRs aids in making informed load balancing decisions.

Business Questions

This subject area can answer the following business questions:

- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*

- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Queues

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Service Queue and Resource

Special Considerations

Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Refresh the Business Intelligence Queue Resources Table 2. Reporting Hierarchy Generation

Service - CRM Service Request Action Plan Actions Real Time

Description

Enables an analysis that helps customer service managers to obtain a complete picture of action plan enforcement of company policies and procedures. Agents can monitor their own performance regarding action plan completions and delays. Action plan information captures compliance against a predefined set of actions, and analytics highlights metrics around open and closed action plans, delayed actions, and aging of action plans. Real-time reporting built using this subject area provides both summary and detail metrics.

Business Questions

This subject area can answer the following business questions:

- *What is the delay in estimated completion dates?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Requests > Service Request Details > Action Plans

Time Reporting

This subject area reports historical data.

Time dimension is linked to "Service - CRM Service Request Action Plan Actions Real Time"."Time"."Date".

Transactional Grain

Action Plan and Action

Special Considerations

1.Data is limited to Action Plans associated to Service Requests. 2. Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Fully Loads Action Plan Actions Data for Reporting 2. Incrementally Loads Action Plan Actions Data for Reporting 3. Refresh Service Categories for Reporting 4. Refresh Denormalized Product Catalog Table for BI 5. Reporting Hierarchy Generation

Service - CRM Service Request Conversation Messages Real Time

Description

Customer Service agents use internal conversations to communicate with other agents and subject matter experts. Analyses built using this subject area help users understand the extent of collaboration through such conversations, and lead to further analyses such as: Do they exhibit a pattern? Are agents overly reliant on subject matter experts? If so, is there scope for their own skill upgrade/training?

Visibility into message details helps agents follow up with message recipients. Analyses of conversation metrics provided out-of-the-box in context of entities such as service orgs, service request categories, business units, and products yield powerful insights that help managers during staffing and resource deployments.

Business Questions

This subject area can answer the following business questions:

- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *What are the most popular channels used for internal conversations?*
- *Are internal conversations taking place across high cost channels?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Center > Service Request > Start Internal Conversation

Time Reporting

This subject area reports historical data.

Time dimension is linked to Conversation Message Sent Date: Service - CRM Service Request Conversation Messages Real Time.Time.Date.

Transactional Grain

Service Request Message Recipient

Special Considerations

Run the following scheduled processes for initial data load and subsequent refreshes: 1. Refresh Service Categories for Reporting 2. Refresh Denormalized Product Catalog Table for BI

Service - CRM Service Request Lifecycle

Description

SRs go through a life cycle, from the point they are created up until they are resolved, and finally closed. Service personnel are interested in keeping this life cycle short while attempting a timely, quality fix to issues. This subject area helps building analyses that helps keep a close watch on the SRs, finding outliers and taking corrective steps pro-actively to avoid customer escalations and potential SLA violations. Useful measures such as actual time spent by an agent on an SR, customer wait times, SR duration with specific queues and assignees and number of queue transfers provide the much needed insight into potential issues before they reach crisis proportions. The ability to analyze these measures in relation to key information of an SR (Criticality. Category, Channel etc.) together with surrounding entities such as Agent, Account, Channel and Product make the analyses even more powerful.

Business Questions

This subject area can answer the following business questions:

- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*

- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to Service - CRM Service Request Lifecycle."Service Request Secondary Dates"."Open Date" or Service - CRM Service Request Lifecycle."Service Request Secondary Dates"."Close Date" or Service - CRM Service Request Lifecycle."Service Request Secondary Dates"."Resolution Date" depending on metric used with the date.

Transactional Grain

Audited change to SR

Special Considerations

1. Auditing should be enabled on Service Request Object 2. Run the following scheduled processes as needed for initial data load* and subsequent refreshes: (a) Execute Incremental Load of SR Audit Data for Reporting (b) Unlock Scheduled Process that Incrementally Loads SR Audit data (as necessary) (*Only SRs created in the current partial and the previous full calendar months are loaded initially)

Service - CRM Service Request Messages Real Time

Description

Enables analysis of SR messages for service managers to understand message traffic patterns, channel usages, message processing statuses, message types, message origins and assignments, and such other aspects of messaging. Tracking of specific message types that have a bearing on customer satisfaction such as customer entry and response message types to ensure timely response or updates is another key value that can be derived from the analyses created.

Business Questions

This subject area can answer the following business questions:

- *Are we responding to customer messages in a timely manner?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*

- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Requests > Service Request Details > Messages

Time Reporting

This subject area reports historical data.

Time dimension is linked to Service - CRM Service Request Messages Real Time."Service Request Message"."Last Update Date".

Transactional Grain

Service Request Message

Special Considerations

None.

Service - CRM Service Request Milestones Real Time

Description

Provides the ability to report on the performance of each service agent, and the means to resolve SRs and meet stated targets. A milestone is a specific target set for the resolution of the SR. The information provided in this subject area allows service managers to identify efficient agents, coach, and measure under-performance within the team. It also allows agents to effectively monitor personal performance to meet the milestone targets. Like most others, this is a real-time subject area, allowing up to the moment reporting on SR performance to milestone targets.

Business Questions

This subject area can answer the following business questions:

- *Are there currently service requests that have missed the target milestone and require escalation?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*

- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Requests > Service Request Details > Milestone Details

Time Reporting

This subject area reports historical data.

Time dimension is linked to Service - CRM Service Request Milestones Real Time."Time"."Date" (Note: This is the Service Request Open Date)..

Transactional Grain

Service Request and Coverage Template

Special Considerations

Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Monitor Service Request Milestones 2. Refresh Service Categories for Reporting. 3. Refresh Denormalized Product Catalog Table for BI. 4. Reporting Hierarchy Generation

Service - CRM Service Request Resource Real Time

Description

Used to analyze and report on all the resources, and resource roles on an SR. Employee dimension in this subject area refers to both primary and non-primary resources, unlike other subject areas where employee refers to only primary resource. This subject area can be combined with any other subject area that has SR dimension, when results are required at the level of an SR. For cross-subject-area queries, include at least one metric from each subject area.

Business Questions

This subject area can answer the following business questions:

- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*

- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Requests

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Service Request and Resource

Special Considerations

Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Reporting Hierarchy Generation

Service - CRM Service Request Tags Real Time

Description

Tags help in identifying SRs with similar characteristics. A tag based analysis of SRs yields valuable insights into support health across the business. Service quality and performance can be measured for SRs with specific tags to spot exceptions, anomalies, trends and patterns. Once the problem is identified, corrective action can be initiated. As an example, if an organization mandates that agents use the tag 'churn' to identify 'at risk' customers, reports and alerts can be created to notify managers when these SR's are reopened or take longer than normal resolution times.

Business Questions

This subject area can answer the following business questions:

- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*

- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to Servivce Request Open Date.

Transactional Grain

Service Request and Tag

Special Considerations

1. Run the following scheduled processes as needed for initial data load and subsequent refreshes: 2. Refresh Service Categories for Reporting 3. Refresh Denormalized Product Catalog Table for BI 4. Reporting Hierarchy Generation

Service - CRM Service Requests Real Time

Description

Use this subject area to build compelling analyses for your service managers and agents to review critical service requests, their severities and statuses. Uncover bottlenecks to speedy resolution of service requests by alerting to long wait times or agent/queue assignment delays Monitor service performance levels to ensure they align with organizational goals. Build reports that measure and analyze service request throughput such as submissions, updates, resolutions, transfers and reopens. Help your business gain the needed insight to better manage and course correct exceptions before they snowball into issues.

Business Questions

This subject area can answer the following business questions:

- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *What are the SRs that are waiting on my customers?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*

- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to Service - CRM Service Requests Real Time."Service Request Secondary Dates"."Open Date" or Service - CRM Service Requests Real Time."Service Request Secondary Dates"."Close Date" or Service - CRM Service Requests Real Time."Service Request Secondary Dates"."Resolution Date" depending on metric used with the date.

Transactional Grain

Service Request

Special Considerations

1. 'Metrics to measure SR queue/ resource assignment times such as 'Total Time to Assign to Resource(Days)', consider initial assignment only. If the most recent assignment needs to be considered, use 'Last Queue Assigned Date/Last Resource Assigned Date' attribute to create custom metrics.' 2. Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Refresh Service Categories for Reporting 2. Refresh Denormalized Product Catalog Table for BI 3. Reporting Hierarchy Generation

Service - CRM Social Post Real Time

Description

Provides the ability to develop analyses around social posts created in the context of an SR. Access to the social post channel, associated SR, social post detail, and social post specific metrics supports the development of complex reporting around SR social posts in real-time.

Business Questions

This subject area can answer the following business questions:

- *How many social posts came from known versus unknown contacts?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*

- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to Service - CRM Social Post Real Time."Social Post"."Social Post Creation Date".

Transactional Grain

Social Post

Special Considerations

None.

Service - CRM Survey Requests Real Time

Description

Use this subject area to obtain insight into survey request activity in the context of a Service Request. Build ad hoc summary reports for a comparison of survey requests sent and SRs resolved over a chosen periodicity such as monthly or quarterly. Analyze survey response percentages against requests sent in relation to service categories, accounts, account regions, products, teams and other key business contexts. Examine request/response performance for survey templates used, to determine if any template changes are necessary.

Note: The subject area can be used for both service and employee help desk survey reporting

Business Questions

This subject area can answer the following business questions:

- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *Does the survey request activity show a declining trend?*
- *Does seasonality impact response rates?*
- *Do we need to adjust our survey template to improve response rates?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Manager*

- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Requests (Note: No navigation path for survey data as the UI is on external survey tool and data is sourced via REST API)

Time Reporting

This subject area reports historical data.

Time dimension is linked to Service - CRM Survey Requests Real Time."Service Request Secondary Dates"."Open Date" or Service - CRM Survey Requests Real Time."Service Request Secondary Dates"."Close Date" or Service - CRM Survey Requests Real Time."Service Request Secondary Dates"."Resolution Date" depending on metric used with the date.

Transactional Grain

Survey Request

Special Considerations

Survey specific data is sourced from an external survey tool of choice via REST API. SR, product, account employee, BU and other service related data are from the Oracle B2B Service application

Service - CRM Survey Responses Real Time

Description

Once a service request is closed, a survey is sent out to the SR's primary customer contact to respond with their feedback on various aspects of the service experience such as issue resolution, timeliness and agent knowledge and responsiveness. This subject area makes it possible to build insightful reports that help obtain a summarized view of survey responses for the specific questions in a survey. The aggregated response measures serve as a barometer for Service Managers and Executives to gauge how well the team and service organization have been successful in meeting their customer expectations. A comparison of survey response measures across customer regions, products, teams, service categories and other service organizational entities helps in identifying areas for improvements.

Note: The subject area can be used for both service and employee help desk survey reporting

Business Questions

This subject area can answer the following business questions:

- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*

- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to this subject area:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Primary Navigation

Navigator > Service > Service Requests (Note: No navigation path for survey data as the UI is on external survey tool and data is sourced via REST API)

Time Reporting

This subject area reports historical data.

Time dimension is linked to Service - CRM Survey Requests Real Time."Service Request Secondary Dates"."Open Date" or Service - CRM Survey Requests Real Time."Service Request Secondary Dates"."Close Date" or Service - CRM Survey Requests Real Time."Service Request Secondary Dates"."Resolution Date" depending on metric used with the date.

Transactional Grain

Survey Question/Answer

Special Considerations

Survey specific data is sourced from an external survey tool of choice via REST API. SR, product, account employee, BU and other service related data are from the Oracle B2B Service application

Subscription Management - Covered Levels Real Time

Description

This subject area provides real time analysis of Subscription Covered Levels by customer, product, status and various dates. This subject area can be combined with any other subject area that has customer dimension, when results are needed at the level of a customer.

Business Questions

This subject area can answer the following business questions:

- *Which covered levels expired without renewal in the last month?*
- *Which customers have covered levels worth more then $50k that are expiring in 30 days?*
- *What are all the assets covered for a particular customer?*
- *Which customers or coverage products deliver the most revenue?*

Job Roles

The following job roles secure access to this subject area:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to this subject area:

- *Subscription Management Transaction Analysis Duty*

Primary Navigation

Navigator > Subscription Management

Time Reporting

This subject area doesn't report historical data.

Time dimension is linked to This subject area has no anchoring date..

Transactional Grain

Subscription Covered Levels

Special Considerations

None.

Subscription Management - Subscription Billing Real Time

Description

This subject area provides real time analysis of Subscription Bill Lines by Customer and Product. "Calendar- Prorated Billing" dimension can be used to analyze trends by monthly, quarterly or yearly rollups. This subject area can be combined with any other subject area that has customer dimension, when results are needed at the level of a customer.

Business Questions

This subject area can answer the following business questions:

- *What is the projected billing for the next 6 months?*
- *How does the usage of a particular subscription product trend?*
- *What is the discount that was provided for a particular customer or product?*
- *What is the Net Billing for the last 6 months?*

Job Roles

The following job roles secure access to this subject area:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to this subject area:

- *Subscription Management Transaction Analysis Duty*

Primary Navigation

Navigator > Subscription Management

Time Reporting

This subject area doesn't report historical data.

Time dimension is linked to This subject area has no anchoring date..

Transactional Grain

Subscription Bill Lines

Special Considerations

None

Subscription Management - Subscription Relationships Real Time

Description

This subject area provides real time analysis of Subscription Amendments, Renewals and Suspend/Resume relationships. This subject area can be used to analyze changes to MRR,TCV, Line quanties by analyzing source and target subscriptions in a relationship

Business Questions

This subject area can answer the following business questions:

- *How much MRR was renewed each month in the last 6 months?*
- *Which products are most frequently upgraded to or downgraded from?*
- *What is the MRR lost each month due to suspensions in the last 6 months?*
- *What is the Net MRR change due to amendments?*
- *What is the trend of successful, outstanding and churned renewals in the last 6 months?*
- *What is the Net MRR change due to amendments where full credit was issued?*

Job Roles

The following job roles secure access to this subject area:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to this subject area:

- *Subscription Management Transaction Analysis Duty*

Primary Navigation

Navigator > Subscription Management

Time Reporting

This subject area doesn't report historical data.

Time dimension is linked to This subject area has no anchoring date..

Transactional Grain

Subscription relationships

Special Considerations

None

Subscription Management - Subscriptions Real Time

Description

This subject area provides real time analysis of subscriptions by customer, product, status and various dates. This subject area can be combined with any other subject area that has customer dimension, when results are needed at the level of a customer.

Business Questions

This subject area can answer the following business questions:

- *What's the total contract value (TCV) in the last one year?*
- *What's the number of subscriptions by status and date range?*
- *How many subscriptions were terminated in the last year?*
- *How many subscriptions are expiring in the next quarter?*
- *What's the total MRR?*
- *How many subscriptions were renewed the last quarter?*

Job Roles

The following job roles secure access to this subject area:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to this subject area:

- *Subscription Management Transaction Analysis Duty*

Primary Navigation

Navigator > Subscription Management

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Subscription Products

Special Considerations

None.

User System Usage

Description

This subject area provides information on user activities.

Use this subject area to determine whether a user was active or not for a particular day, and what channel they used to access the system and when they were active.

Business Questions

This subject area can answer the following business questions:

- *Which department has the highest number of Active users?*
- *How is the user activity split across Channel (Web/Mobile/Mail)?*

- *Who are the top 10 active users of the system?*
- *Users belonging to what job title are most active in the system?*
- *Who are the users who have not logged in the system in the last week?*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to this subject area:

- *User System Usage Transaction Analysis Duty*

Primary Navigation

Navigator > Manage Users

Time Reporting

This subject area reports historical data.

Time dimension is linked to User System Usage."Time"."Date".

Transactional Grain

This subject area returns the data at the grain of the User.

Special Considerations

Date needs to be considered for computation, one can use the last assigned. This subject area uses the ESS job "Refresh BI Reports Audit Data for User Adoption Reporting" to summarize and aggregate data used for user adoption reporting.

3 Business Questions

Overview

For each business question in this chapter, links are provided for more detailed information about the subject areas, job roles, and duty roles associated with the business question.

What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Activities with Related Activities*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are the associated activities related to my upcoming appointment and task?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Activities with Related Activities*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are the follow-up tasks I need to do on a particular customer?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Activities with Related Activities*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Activity Contact Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*

- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How many contacts were not favored with a positive outcome with a given agent?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Activity Contact Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How many distinct customer contacts does an agent interact with through a given channel during a specific period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Activity Contact Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*

- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are the activity objectives for the current period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Activity Objective Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*

- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Who has completed the most activity objectives?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Activity Objective Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are there any workload balancing issues on my team? Are a few members performing most of the activities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Activity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Activity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Activity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Activity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*

- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How can I identify neglected but strategic accounts to guide my team to focus on these?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Activity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*

- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are the activity levels in specific regions?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Activity Resource Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

- *Service Transaction Analysis Duty*

What managers have teams averaging the most activities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Activity Resource Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How do the number of activities in a region and their average SR resolution rates by quarter compare?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Activity Resource Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*

- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What areas of the application are users viewing or not viewing?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Click History*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to the data related to this business question:

- *User System Usage Transaction Analysis Duty*

Which users are using the application the most or least based on clicks?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Click History*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to the data related to this business question:

- *User System Usage Transaction Analysis Duty*

How are the areas of the application performing?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Click History*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to the data related to this business question:

- *User System Usage Transaction Analysis Duty*

What areas of the application are used by users in specific geographic region or resource hierarchies?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Click History*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to the data related to this business question:

- *User System Usage Transaction Analysis Duty*

How often do communications cross channels to get to resolution?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Aggregate*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How many customer interactions happen without an SR?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Aggregate*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*

- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Across what channels do such non-SR interactions most often occur?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Aggregate*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*

- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Is my team following the norm that an SR must be opened (or updated) for every customer communication?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Aggregate*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How many times has the customer communicated with the contact center on this particular service request and what channels did they use?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*

- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What percentage of service requests involve at least one interaction?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

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- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
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- *Partner Channel Transaction Analysis Duty*
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- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

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- *HR Help Desk Agent Transaction Analysis Duty*
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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

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- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What is the interactions activity level across channels and agents? How do they compare across time periods?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interactions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

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- *Partner Channel Transaction Analysis Duty*
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- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

- *Service Transaction Analysis Duty*

How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interactions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*

- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Do customers contact us more often to solve issues or to seek answers to questions?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interactions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*

- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What channels are the most effective for resolving issues with a single interaction?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interactions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are our issue resolution rates for low and high cost channels?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interactions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*

- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are agents prematurely updating SRs as Resolved to make their numbers look better?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interactions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How often are my agents able to resolve issues using a low cost channel like chat?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interactions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*

- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Which reports are running poorly?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Reporting Performance*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to the data related to this business question:

- *CRM OTBI Report Performance Transactional Analysis Duty*

Which reports are running well?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Reporting Performance*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to the data related to this business question:

- *CRM OTBI Report Performance Transactional Analysis Duty*

Which reports need maintenance?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Reporting Performance*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to the data related to this business question:

- *CRM OTBI Report Performance Transactional Analysis Duty*

Which types of reports and subject areas are the users in your organization are looking at?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Reporting Usage*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to the data related to this business question:

- *User System Usage Transaction Analysis Duty*

What are the most and least popular reports and which analytics are important to your team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Reporting Usage*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to the data related to this business question:

- *User System Usage Transaction Analysis Duty*

How important are analytics to your team, and how much do they use them?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Reporting Usage*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to the data related to this business question:

- *User System Usage Transaction Analysis Duty*

Which analytics should you prioritize and which can be phased out to optimize resources?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Reporting Usage*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to the data related to this business question:

- *User System Usage Transaction Analysis Duty*

How often do communications cross channels before they are resolved?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*

- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What percent of communications are resolved the first time? What is the most commonly used channel?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
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- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are there preferred channels that customers use to contact us for specific service issue categories and product areas?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
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- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*

- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

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- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
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- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are the number of interactions by channel, agent, and time period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
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- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

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- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How often are communications being transferred between agents?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How many interactions, on average, does it require to resolve an issue?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

- *Service Transaction Analysis Duty*

What is the average length of time of an interaction, by agent and channel?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*

- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What product lines have a higher percentage of non-compliant SRs open?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*

- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How is the percentage of compliant SRs trending month over month, quarter over quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Where are the outliers when it comes to compliance?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Service Request Summary*
- *Help Desk - HR Service Request Summary*
- *Help Desk - Internal Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*

- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*

- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are we keeping the number of non-compliant SRs in check for our most valuable customers?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*

- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How frequently do agents link articles to SRs?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*

- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Work Orders Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How many were compliant and non-compliant when I, as an agent review my own completed work orders?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Work Orders Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*

- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Work Orders Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*

- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are the activities that are synched from Eloqua into CX Sales?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - Marketing Web Activities*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Marketing Analyst*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*

What are my interactions for leads generated and synched from Eloqua to CX Sales?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - Marketing Web Activities*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Marketing Analyst*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

- *Sales Operational Transaction Analysis Duty*

What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - Marketing Web Activities*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Marketing Analyst*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*

What are my web activities for the accounts and leads for a sales user's territory?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - Marketing Web Activities*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Marketing Analyst*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*

- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*

How many touch points have there been for a certain account or prospect?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - Marketing Web Activities*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*

- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Marketing Analyst*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*

How many emails are we receiving over time?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Inbound Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

What is the current count of inbound email requests by status and mailbox?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Inbound Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

How many messages resulted in new service request creation versus update to existing service request?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Inbound Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*

- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

How many emails came from known versus unknown contacts?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Inbound Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*

- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

Is the Service organization effectively handling new emails in the appropriate timeframe?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Inbound Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Omni Channel Events Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*

- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are the rates for agents declining work offers?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Omni Channel Events Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*

- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are there currently work requests that have a long acceptance time? What are the agent utilization rates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Omni Channel Events Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are the average handle times?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Omni Channel Events Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*

- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How long is it taking for offers to be made to agents?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Omni Channel Events Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*

- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

For a given service queue, how many agents are available to take chats?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*

- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*

- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What is the current distribution of active and inactive agents across queues?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How are agents handling various work types, for example, are some agents declining incoming billing issues?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*

- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are agents making themselves available for certain channels and not for others?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*

- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*

- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What's the primary reason for contract closure in the last year?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Enterprise Contracts - Contracts Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Contract Administrator*
- *Customer Contract Manager*
- *Customer Contract Team Member*
- *Enterprise Contract Administrator*
- *Enterprise Contract Manager*
- *Enterprise Contract Team Member*
- *Supplier Contract Administrator*
- *Supplier Contract Manager*
- *Supplier Contract Team Member*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Enterprise Contracts Transaction Analysis Duty Role*

What contracts have a specific policy deviation?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Enterprise Contracts - Contracts Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Contract Administrator*
- *Customer Contract Manager*
- *Customer Contract Team Member*
- *Enterprise Contract Administrator*
- *Enterprise Contract Manager*
- *Enterprise Contract Team Member*
- *Supplier Contract Administrator*
- *Supplier Contract Manager*
- *Supplier Contract Team Member*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Enterprise Contracts Transaction Analysis Duty Role*

How is my contract team loaded?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Enterprise Contracts - Contracts Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Contract Administrator*
- *Customer Contract Manager*
- *Customer Contract Team Member*
- *Enterprise Contract Administrator*
- *Enterprise Contract Manager*
- *Enterprise Contract Team Member*
- *Supplier Contract Administrator*
- *Supplier Contract Manager*
- *Supplier Contract Team Member*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Enterprise Contracts Transaction Analysis Duty Role*

How many contracts might get affected if I modify the Payment clause?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Enterprise Contracts - Contracts Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Contract Administrator*
- *Customer Contract Manager*
- *Customer Contract Team Member*
- *Enterprise Contract Administrator*
- *Enterprise Contract Manager*

- *Enterprise Contract Team Member*
- *Supplier Contract Administrator*
- *Supplier Contract Manager*
- *Supplier Contract Team Member*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Enterprise Contracts Transaction Analysis Duty Role*

Which contracts are related to my given contract?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Enterprise Contracts - Contracts Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Contract Administrator*
- *Customer Contract Manager*
- *Customer Contract Team Member*
- *Enterprise Contract Administrator*
- *Enterprise Contract Manager*
- *Enterprise Contract Team Member*
- *Supplier Contract Administrator*
- *Supplier Contract Manager*
- *Supplier Contract Team Member*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Enterprise Contracts Transaction Analysis Duty Role*

Show me all the contracts that have a particular deliverable due.

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Enterprise Contracts - Contracts Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Contract Administrator*
- *Customer Contract Manager*
- *Customer Contract Team Member*
- *Enterprise Contract Administrator*
- *Enterprise Contract Manager*
- *Enterprise Contract Team Member*
- *Supplier Contract Administrator*
- *Supplier Contract Manager*
- *Supplier Contract Team Member*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Enterprise Contracts Transaction Analysis Duty Role*

Show me the user status progression for contracts within a given date range.

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Enterprise Contracts - Contracts Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Contract Administrator*
- *Customer Contract Manager*
- *Customer Contract Team Member*
- *Enterprise Contract Administrator*
- *Enterprise Contract Manager*
- *Enterprise Contract Team Member*
- *Supplier Contract Administrator*
- *Supplier Contract Manager*
- *Supplier Contract Team Member*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Enterprise Contracts Transaction Analysis Duty Role*

How many days on average did a resource work on a contract assigned to them in the last quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Enterprise Contracts - Contracts Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Contract Administrator*

- *Customer Contract Manager*
- *Customer Contract Team Member*
- *Enterprise Contract Administrator*
- *Enterprise Contract Manager*
- *Enterprise Contract Team Member*
- *Supplier Contract Administrator*
- *Supplier Contract Manager*
- *Supplier Contract Team Member*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Enterprise Contracts Transaction Analysis Duty Role*

How many days on average did a resource organization work on a contract assigned to them in the last quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Enterprise Contracts - Contracts Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Contract Administrator*
- *Customer Contract Manager*
- *Customer Contract Team Member*
- *Enterprise Contract Administrator*
- *Enterprise Contract Manager*
- *Enterprise Contract Team Member*
- *Supplier Contract Administrator*
- *Supplier Contract Manager*
- *Supplier Contract Team Member*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Enterprise Contracts Transaction Analysis Duty Role*

Show me all the contracts that have a nonstandard clause.

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Enterprise Contracts - Contracts Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Contract Administrator*
- *Customer Contract Manager*
- *Customer Contract Team Member*
- *Enterprise Contract Administrator*
- *Enterprise Contract Manager*
- *Enterprise Contract Team Member*
- *Supplier Contract Administrator*
- *Supplier Contract Manager*
- *Supplier Contract Team Member*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Enterprise Contracts Transaction Analysis Duty Role*

Are there action plans tracking late to an overall target completion date?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Case Action Plan Actions Real Time*
- *Help Desk - HR Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Case Manager*
- *Case Worker*
- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Case Manager Transaction Analysis Duty*
- *Case Worker Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What is the delay in estimated completion dates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Case Action Plan Actions Real Time*
- *Help Desk - HR Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Case Manager*
- *Case Worker*
- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Case Manager Transaction Analysis Duty*
- *Case Worker Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What is the breakdown of open action plans by category?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How many action plans are open and how long have they been open?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Action Plan Actions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

Are we responding to help desk request messages in a timely manner?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

What are the help desk requests that are waiting for an agent response?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Messages Real Time*
- *Help Desk - Internal Service Request Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

Do we see any patterns in message traffic and resolution times?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Messages Real Time*
- *Help Desk - Internal Service Request Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

Do we see a pattern in the average number of messages per closed Help Desk request going up in recent months? What factors are contributing to this surge?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

What is the incidence of participation of my resource team in HR Help Desk Requests over a period? How many open Requests are they a part of, presently?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Resource Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

By being part of the HR Help Desk Request team, how many Request resolutions has my resource team been able to influence during the past period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Resource Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

As an agent am I spreading myself too thin by being part of one too many HR Help Desk Request teams?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Resource Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

What are the open critical HR SRs that my team is working on currently? How many of these are escalated?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

What is the prevalence of SR transfers for an agent/ manager/group/product/location?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Requests Real Time*
- *Help Desk - Internal Service Requests Real Time*
- *Service - CRM Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How are SR transfers contributing to overall latency/ resolution delays?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Requests Real Time*
- *Help Desk - Internal Service Requests Real Time*
- *Service - CRM Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are the popular reasons for SRs to be transferred? Is there a pattern?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Requests Real Time*
- *Help Desk - Internal Service Requests Real Time*
- *Service - CRM Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*

- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are the HR SRs that are waiting on my customers?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

Who are my agents that have the most pending HR SRs?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*

- *HR Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

What is the incidence of participation of my resource team in Internal Help Desk Requests over a period? How many open Requests are they a part of, presently?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Request Action Plan Actions Real Time*
- *Help Desk - Internal Service Request Resource Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

By being part of the Internal Help Desk Request team, how many Request resolutions has my resource team been able to influence during the past period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Request Action Plan Actions Real Time*
- *Help Desk - Internal Service Request Resource Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

As an agent am I spreading myself too thin by being part of one too many Internal Help Desk Request teams?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Request Action Plan Actions Real Time*
- *Help Desk - Internal Service Request Resource Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Do we see a pattern in the average number of messages per closed Help Desk Request going up in recent months? What factors are contributing to this surge?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Request Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

How long did it take to assign the Help Desk request to the correct queue?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Did the Help Desk request get assigned to the wrong queue/team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

How long was an Help Desk request unassigned and how long did it sit in each queue?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*

- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Was an Help Desk request sitting in a queue longer than the average time for all other SRs?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Was the assigned agent overloaded with other work?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Lifecycle*

- *Service - CRM Service Request Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*

- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Was there a lot of time spent waiting on customers to respond to more information, documents, and so on?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*

- *Internal Help Desk Manager Transaction Analysis Duty*

Did the Help Desk request have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Was the Help Desk request queue modified or the Help Desk request resource owner modified at any point?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Do some Help Desk request categories imply higher difficulties (going by the actual time agents spend on such Help Desk requests)?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Was the assigned agent overloaded with other work (based on the average number of Help desk Requests assigned to the agent)?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

What are the open critical Internal SRs that my team is working on currently? How many of these are escalated?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

How are we doing on Internal SR resolution times between current and past months? What are the reasons for any degradations?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

What are the Internal SRs waiting on my customers?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Who are my agents that have the most pending Internal SRs?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

How many Internal SRs have been waiting on my agents action for more than 24 hours? Which of these are critical or escalated?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

What is the reopen rate for Internal SRs owned by my team? Who has the highest reopen rate? Is there a training issue?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

What is the status of our aging SRs? Are there any outliers that require intervention?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

How many Internal SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are critical?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

How much credit did a participant receive for their sales transactions?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Attainments Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

How much credit did my team receive for their attainment?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Attainments Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What are the various attainment attributes associated with my credits?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Attainments Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Which participants are assigned to which plans?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Compensation Plan Assignments Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What type of assignment does a participant have to a plan?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Compensation Plan Assignments Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What are the assignment start and end dates for a participant?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Compensation Plan Assignments Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Has the participant accepted the assignment to the plan?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Compensation Plan Assignments Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Does the participant have an individualized target incentive for the plan?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Compensation Plan Assignments Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Are participants correctly credited?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Credits Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Were there credit or rollup errors that must be fixed?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Credits Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Is the dispute load balanced between my analysts? Asked by compensation managers.

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Disputes Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Disputes Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Are we on track in achieving quota this period or quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Earning and Attainment Summary Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Which of my direct reports' attainment or earnings are below the wanted performance expectation?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Earning and Attainment Summary Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Who got paid what amount and from where, at the detail level?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Earnings Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Why wasn't I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Balances Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*

- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What are my compensation plan incentive targets?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Compensation Plan Real Time*
- *Incentive Compensation - Performance and Earnings Summary Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

How are these targets individualized across the participants.

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Compensation Plan Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

How do these targets break down by plan component?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Compensation Plan Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Are my individualized performance measure goals set properly?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Compensation Plan Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

How do they compare to the base goals set on the measure?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Compensation Plan Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Who is assigned to a given plan?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Compensation Plan Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What are the targets and goals settings for an individual?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Compensation Plan Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

As a participant manager, what are the targets and goals settings for my direct reports?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Compensation Plan Real Time*
- *Incentive Compensation - Performance and Earnings Summary Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

To what country and business unit does the participant belong?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Detail Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What is the participant's home currency or cost center?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Detail Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*

- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Is the participant active? And for which dates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Detail Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What is the total quota across the organization by performance measure for the interval?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Interval Goals Real Time*
- *Incentive Compensation - Performance and Earnings Summary Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What is the total quota by performance measure for the interval across the organization?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Interval Goals Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Interval Goals Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Interval Goals Real Time*
- *Incentive Compensation - Participant Period Goals Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What is the total quota across the organization by performance measure for the period or across periods?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Period Goals Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What is the total quota by performance measure for the period across the organization?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Period Goals Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Period Goals Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Which participants are assigned to a given pay group?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Pay Group Assignments Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*

- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What pay groups are in the application? What are their types and descriptions?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Pay Group Assignments Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

When was a given participant assigned to a specific pay group?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Pay Group Assignments Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

As a participant manager, which pay groups do my direct reports belong to?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Pay Group Assignments Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What is my cost of compensation by participant, plan component, plan, and frequencies?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Payments Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What is the current status of the payment batches? Are they paid, reviewed, or frozen?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Paysheet Summary Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What is the status of each paysheet within the payment batches?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Paysheet Summary Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

How does the performance measure attainment compare with a participant's personalized goal across his directs?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Performance and Earnings Summary Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Performance and Earnings Summary Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

How do participants' plan component earnings compare with their personalized target incentives?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Performance and Earnings Summary Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Do I have to realign quota based on current attainment levels?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Performance and Earnings Summary Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What is the total quota by performance measure for the period across the organization? Validate quota levels.

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Performance and Earnings Summary Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Is the company on track to attain its goals? Who is lagging and might require coaching?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Performance and Earnings Summary Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What are the rules effective as of the given date in the hierarchy?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Rules Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What are the credit rules which a credit receiver is assigned to?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Rules Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Rules Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What are the criteria for a rule including the inherited criteria from the ancestors?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Rules Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

What are the results of the collected transactions before the crediting process?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Transactions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Which category contains the highest number of knowledge articles?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Category Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*

- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

Which articles are linked to a category?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Category Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

Which articles are linked to the maximum number of service requests?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Links Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

Which article versions are linked to service requests?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Links Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

Which users created the link to an article?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Links Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

How many links exist between services requests and knowledge articles?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Links Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*

- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

Which products are associated with the most number of knowledge articles?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Product Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

Which articles are linked to a product?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Product Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

What types of ratings are assigned articles?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Product Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

What content in the knowledge base is satisfying users' needs?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Rating Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

What articles are not satisfying users' needs?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Rating Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*

- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

What content rating effectively resolves users' questions?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Rating Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

How many articles are available in the knowledgebase?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

Which articles are published or unpublished?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

Which employees interacted with the articles?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

What are the locales, content types, and authors of the articles in the database?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*

- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

How are customers finding and using knowledgebase content?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Search Question Tokens Historical*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

How many concept tokens as associated to articles?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Search Question Tokens Historical*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

How do knowledge managers view article search historical metrics?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Search Question Tokens Historical*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

How are customers are finding knowledge base content

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Search Questions Historical*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

How do knowledge managers view search article metrics?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Search Questions Historical*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*

- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

How do knowledge managers view article historical metrics?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Summary Historical*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

How are articles are ranked in popularity?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Summary Historical*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

Which articles require updates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Summary Historical*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

How do Knowledge managers view information on article historical metrics?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Summary Historical*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

How are articles in the knowledge base ranked in popularity?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Summary Historical*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

How many articles are consumed by a particular user group during a specified period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article User Group Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

Which user groups area associated to an article?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article User Group Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

Which employee in a user group created the most or least articles?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article User Group Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*

- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Marketing - CRM Leads*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Corporate Marketing Manager*
- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

How many Leads are converted in the current quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Marketing - CRM Leads*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Corporate Marketing Manager*
- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

How many Leads are unassigned in the system?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Marketing - CRM Leads*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Corporate Marketing Manager*
- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What are the sources of the Leads created in the current quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Marketing - CRM Leads*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Corporate Marketing Manager*
- *Marketing Analyst*
- *Marketing Manager*

- *Marketing Operations Manager*
- *Marketing VP*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

Who are the top Sales representatives by their Lead conversion ratio?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Marketing - CRM Leads*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Corporate Marketing Manager*
- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*

- *Sales Administrative Transaction Analysis Duty*

How many Leads were rejected in the last quarter and what were the reason for those?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Marketing - CRM Leads*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Corporate Marketing Manager*
- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What are the top 10 products associated to the Leads in the system?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Marketing - CRM Leads*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*

- *Corporate Marketing Manager*
- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Marketing - CRM Leads*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Corporate Marketing Manager*
- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

Who is the Primary Contact and Resource assigned for a given Lead?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Marketing - CRM Leads*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Corporate Marketing Manager*
- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*

- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What are the Leads that are converted into Opportunities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Marketing - CRM Leads and Opportunities Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Corporate Marketing Manager*
- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*

- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many Leads are associated for a given Opportunity?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Marketing - CRM Leads and Opportunities Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Corporate Marketing Manager*

- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many Opportunities were created from a given Lead?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Marketing - CRM Leads and Opportunities Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Corporate Marketing Manager*
- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the long-running analyses in the past month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Performance Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Performance Transactional Analysis Duty*

What is the OTBI execution time histogram in the past month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Performance Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Performance Transactional Analysis Duty*

Which analyses have the longest response time?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Performance Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Performance Transactional Analysis Duty*

Which analyses have high data row count?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Performance Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Performance Transactional Analysis Duty*

Which analyses reached OTBI max row limit?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Performance Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Performance Transactional Analysis Duty*

What are the common execution errors in the past month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Performance Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Performance Transactional Analysis Duty*

How many analyses and dashboards failed in the past month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Performance Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Performance Transactional Analysis Duty*

What are the most commonly used OTBI subject areas?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Performance Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Performance Transactional Analysis Duty*

What are the least-used OTBI subject areas?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Performance Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Performance Transactional Analysis Duty*

Which subject areas have slow performance?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Performance Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Performance Transactional Analysis Duty*

Which subject areas have large data volume?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Performance Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Performance Transactional Analysis Duty*

Which analyses have low usage because of poor performance?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Performance Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Performance Transactional Analysis Duty*

What is the database SQL execution time and row count?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Performance Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Performance Transactional Analysis Duty*

How many users run OTBI analyses?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Usage Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*

- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Usage Transactional Analysis Duty*

Who are the top OTBI users?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Usage Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Usage Transactional Analysis Duty*

What is the weekly OTBI analysis usage trend?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Usage Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Usage Transactional Analysis Duty*

What are the most frequently-run OTBI analyses?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Usage Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Usage Transactional Analysis Duty*

How many predefined OTBI analyses have been run in the past month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Usage Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Usage Transactional Analysis Duty*

How many custom OTBI analyses have been run in the past month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Usage Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Usage Transactional Analysis Duty*

How many ad-hoc OTBI analyses have been run in the past month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Usage Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Usage Transactional Analysis Duty*

What is the execution history of dashboard X in the past month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Usage Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Usage Transactional Analysis Duty*

Which analyses have low usage in the past month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Usage Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*

- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Usage Transactional Analysis Duty*

How many OTBI SOAP web services have been run in the past month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Usage Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Usage Transactional Analysis Duty*

What are the open Opportunities associated to a given Partner?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Leads and Opportunities Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What is the potential revenue of leads by partners?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Leads and Opportunities Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What is the number of leads by partners for a specific product group?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Leads and Opportunities Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What is the revenue generated by Partners per Customer?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Opportunities and Products Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*

- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What are the top ten Partners by Revenue during the past quarter/year?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Opportunities and Products Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*

- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What is the average deal size by Product groups?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Opportunities and Products Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What is the distribution of Partner Opportunities by sales stages?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Opportunities and Products Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What is the quarterly revenue trend for a specific product/product group by partner?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Opportunities and Products Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*

- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? Submitted e.g. Partner Performance?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Partner Assessments*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*

- *Sales Administrative Transaction Analysis Duty*

How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Partner Assessments*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

How are the Partners classified?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Partner Classification*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What is the number of partners in a specific classification within a defined geographic region?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Partner Classification*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What is total number of Partners assigned to a specific classification for this period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Partner Classification*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What are the number of Partner contacts by Partner?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Partner Contact*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What is the number of Partner Contacts that are also resources and users?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Partner Contact*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

How many Partners is a Contact is associated to?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Partner Contact*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What are the Partners created in the system for a given time period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Partner Overview*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Partner Overview*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

Who all is part of the Partner Resource Team for a given Partner and what is their role?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Partner Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

How many Partners' team is a given Resource part of?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Partner Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What Partners are assigned to specific geographic territories?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Partner Territory*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many Territories is a Partner part of?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Partner Territory*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many Enrollments were created/submitted/expired/terminated in the last month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Program Enrollments*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

How many Enrollments are going o expire in the next quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Program Enrollments*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

Which Program has the highest number of Enrollments?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Program Enrollments*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

What are the Programs that Partners have enrolled into?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Program Enrollments*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

How many Programs were created in the last quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Programs*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

How many Programs are owned by the team with their expiration date?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Programs*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

Does this account have subsidiaries?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Account Relationship*

Job Roles

The following job roles secure access to the data related to this business question:

- *Accounts Receivable Manager*
- *Accounts Receivable Specialist*
- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*

- *Receivables Customer Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the Customers from this account, including all subsidiaries?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Account Relationship*

Job Roles

The following job roles secure access to the data related to this business question:

- *Accounts Receivable Manager*
- *Accounts Receivable Specialist*
- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Receivables Customer Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the total number of Relationships for a given Account?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Account Relationship*

Job Roles

The following job roles secure access to the data related to this business question:

- *Accounts Receivable Manager*
- *Accounts Receivable Specialist*
- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Receivables Customer Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM All Contact Contact Point*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*

- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM All Contact Contact Point*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM All Contact Contact Point*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM All Contacts Addresses*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *CRM Administrative Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM All Contacts Addresses*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *CRM Administrative Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM All Contacts Addresses*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*

- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *CRM Administrative Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many Assets are created in a particular time period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Asset*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*

- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the top 10 Products by Asset count?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Asset*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*

- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the QoQ growth for Assets by Products?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Asset*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*

- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the Assets that are expiring in the next quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Asset*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who are all the Contacts assigned to the Assets?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Asset Contact*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who are all the resources assigned to the Assets?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Asset Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many Business plans were created in the System in the last quarter and for what Partner or Account?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Business Plan*

Job Roles

No applicable job roles

Duty Roles

No applicable job roles

What are the Business plan objectives and what are their target v/s actual value?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Business Plan*

Job Roles

No applicable job roles

Duty Roles

No applicable job roles

What Business plans are owned by the team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Business Plan*

Job Roles

No applicable job roles

Duty Roles

No applicable job roles

What Business plan objectives have not met the target values?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Business Plan*

Job Roles

No applicable job roles

Duty Roles

No applicable job roles

How are the business plan objectives split?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Business Plan Objective Split*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

* *Sales Transaction Analysis Duty*

What are the target v/s actual number of the split objectives?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

* *Sales - CRM Business Plan Objective Split*

Job Roles

The following job roles secure access to the data related to this business question:

* *Channel Account Manager*
* *Channel Administrator*
* *Channel Operations Manager*
* *Channel Partner Manager*
* *Channel Partner Portal Administrator*
* *Channel Sales Director*
* *Channel Sales Manager*
* *Partner Administrator*
* *Partner Sales Manager*
* *Partner Sales Representative*
* *Sales Administrator*
* *Sales Manager*
* *Sales Representative*
* *Sales Restricted User*
* *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

* *Partner Channel Administrative Transaction Analysis Duty*
* *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the objectives that have not met the target value set?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Business Plan Objective Split*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are all the Leads/Contacts (Campaign Members) associated to the Campaign?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Campaign Members*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*

- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many Leads are part of the Campaign?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Campaign Members*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many Leads do not have Contact?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Campaign Members*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*

- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many responses received for a given campaign?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Campaign Members*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*

- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many Opportunities associated to a Campaign?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Campaign Opportunity*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*

- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the Campaign ROI (return on investment)?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Campaign Opportunity*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*

- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the additional information updated in the Notes for a Contact?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Contact Note*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the total number of Contact Relationships between two Contact?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Contact Relationship*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Does this Contact have subsidiaries?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Contact Relationship*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the Resources are associated to this contact?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Contact Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

- *Sales Transaction Analysis Duty*

What are all the contacts created in the system by Geography?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Contacts*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who are the Primary owners of the Contacts for contacts created in the last quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Contacts*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many new contacts are created in the system in the current month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Contacts*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*

- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How are the customers classified?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customer Classification*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the additional information updated in the Notes for a Customer?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customer Note*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the top ten accounts by revenue in the last quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customer Overview*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*

- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many Leads and Opportunities are Open for a given Customer in the Current quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customer Overview*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How is the Revenue spread for a given Customer hierarchy?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customer Overview*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

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- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How actively (# of Activities) are the Sales reps engaged with customers?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customer Overview*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are my most active accounts? Who owns them and where are these located?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customer Overview*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

For given set of Customers, what percentage of my revenue is exposed to competition?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customer Overview*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*

- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are my best performing product lines by customer geographies?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customer Overview*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How is my Revenue distributed across Customer geographies?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customer Overview*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What regions are my customers clustered in?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customers*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who are my teams top Customers?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customers*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*

- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

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- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who manages my top accounts?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customers*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*

- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

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The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who are the 'new' customers, created in the past 6 months?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customers*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the contact - points (phone, email, address, etc.) of key contacts?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customers and Contacts Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

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The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the names of the customers that a Sales team owns? Who are the key contacts?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customers and Contacts Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
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- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

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- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who are all the contacts for key customers and what are their roles?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customers and Contacts Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
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- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customers and Contacts Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the Deals submitted by the Partners in the current quarter with the Deal size?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Deal Registration*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*

- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are all the Opportunities created as a result of Deal closure by a particular resource/team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Deal Registration*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*

- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who are the Employees/Resource for the Deals that are submitted in the current month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Deal Registration*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*

- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the top 10 Deals created in the current quarter by their Deal size?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Deal Registration*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*

- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the Products associated with the Deals?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Deal Registration Product*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the top 10 products for all the Deals submitted in the current quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Deal Registration Product*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How is the Deal Amount split between the products associated to the Deal Registration Lines?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Deal Registration Product*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*

- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Are revenues getting closed in line with their forecast figures? To what extent do they deviate?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Forecasting*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Do forecasts rely on revenues from a few customers? What is the dependency profile?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Forecasting*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*

- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Does the forecast versus pipeline trend show a healthy picture?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Forecasting*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

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- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How to forecasts trend across periods?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Forecasting*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

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- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Forecasting*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*

- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
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- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the relative mix of forecast revenues by the various sales channels in a specific territory?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Forecasting*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What were the forecast revenues for the same period, last year? How did it compare with closed revenues?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Forecasting*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the Opportunity Revenue line details contributing the most to the Forecast?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Forecasting and Pipeline Revenue Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Do Forecast rely on Revenue from few Products?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Forecasting and Pipeline Revenue Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

- *Sales Transaction Analysis Duty*

Is there a team or group who are over or underperforming vs forecast?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Historical Forecasting*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What forecasts have changed over time and are impacting my total quarterly revenue?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Historical Forecasting*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What forecasts have seen changes in the quantities ordered vs the quantities planned?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Historical Forecasting*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*

- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the channel performance vs channel forecast?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Historical Forecasting*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Are too many deals being pushed out to the subsequent fiscal quarters?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Historical Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*

- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How are product revenues trending month over month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Historical Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*

- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

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- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Historical Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the historical monthly trend of closed revenue by current territories?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Historical Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
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- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the higher value deals that have been moved out?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Historical Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Historical Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
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- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Lead Assessments*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who all are the Contacts associated to the Lead?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Lead Contact*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many Leads is a Contact associated to?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Lead Contact*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Are the Leads supporting products that appeal to certain customers by size of company?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Lead Product*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*

- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Are the Leads associated with certain products?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Lead Product*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*

- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many Leads are open for a given Product?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Lead Product*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*

- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who are the Resources assigned to the Leads created in any given time period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Lead Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the Leads assigned to me/my team member?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Lead Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are all the Territories the Lead is part of?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Lead Territory*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many territories is the Lead part of?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Lead Territory*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Are the Approved Claims fully allocated or are the Channel partners not spending to approval?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM MDF Budget*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*

- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are my claimed vs unclaimed MDF totals?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM MDF Budget*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many outstanding claims in the current sales period assigned to a given Channel user?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM MDF Claim*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*

- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are total number of Claims in the current quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM MDF Claim*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What were the approved amounts vs the settled claim totals for the last 4 quarters?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM MDF Claim*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*

- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who approved an MDF claim? What are the start and end dates of that claim?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM MDF Claim*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*

- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM MDF Claim Settlement*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Was an MDF claim rejected? What was the reason the claim was rejected?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM MDF Claim Settlement*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What was the currency conversion rate applied to a specific claim?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM MDF Claim Settlement*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many records were created or updated by a user in a month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Object Activity*

Job Roles

No applicable job roles

Duty Roles

No applicable job roles

What is the count of records created or updated by object type?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Object Activity*

Job Roles

No applicable job roles

Duty Roles

No applicable job roles

How is the object activity split across channels (web/mobile/email)?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Object Activity*

Job Roles

No applicable job roles

Duty Roles

No applicable job roles

Which times are objects not being created or updated?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Object Activity*

Job Roles

No applicable job roles

Duty Roles

No applicable job roles

Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunities and Products Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How do wins and losses trend quarterly for a specific product line?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunities and Products Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*

- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the top ten products by revenue during the past quarter/year?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunities and Products Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the open/closed revenue for each of the product groups in the selected geography?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunities and Products Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the revenue lost to competition for a specific product/product group?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunities and Products Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What products are often lost to key competitors? Is there a pattern?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunities and Products Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*

- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the responses for different Opportunity for an Assessment submitted?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunity Assessments*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*

- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are all the Campaigns assigned to an Opportunity?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunity Campaign*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are all the Opportunities resulted from a Campaign?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunity Campaign*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many Contacts are assigned to an Opportunity?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunity Contact*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

- *Sales Transaction Analysis Duty*

Who are all the Contacts assigned to Opportunities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunity Contact*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the opportunity information captured in the note to an opportunity?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunity Note*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*

- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many Partners are assigned to an Opportunity?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunity Partner*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who are all the Partners assigned to Opportunities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunity Partner*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*

- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many Resources are assigned to an Opportunity?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunity Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who are all the Resources assigned to Opportunities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunity Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How did the Opportunity evolve over time?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunity Sales Stage Snapshot*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*

- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the average time the Opportunity is in a particular sales stage?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunity Sales Stage Snapshot*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*

- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunity Sales Stage Snapshot*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many Territories are assigned to an Opportunity?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunity Territory*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are all the Territories assigned to Opportunities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunity Territory*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the total number of Relationships between two Partners?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Partner Relationship*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Does this Partner have subsidiaries?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Partner Relationship*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

- *Sales Transaction Analysis Duty*

What are the partner I have from this Partner, including all subsidiaries?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Partner Relationship*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the SIC codes associated with a Partner, and with all associated Partners?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Partner Relationship*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Are the sales reps moving their opportunities fast enough?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*

- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Are there any up sell/cross sell opportunities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How is each member on the team performing on deal size, account coverage, and win rate?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Is the sales team converting leads to opportunities fast enough?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*

- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Is overall pipeline healthy enough to meet sales goals?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*

- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the top stalled opportunities and who are the sales reps working on these?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the most likely reasons that the Opportunities are lost against our key competitors?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the top 10 open opportunities? What are the target close dates and revenues for these?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the buying trend of our biggest customers?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

- *Sales Transaction Analysis Duty*

What is the value trend of high value opportunities? Do they show a positive or negative trend?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who are the top competitors and what is the revenue exposure to them?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Primary Contact Addresses*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are all addresses associated with the primary contact for all active opportunities in the current quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Primary Contact Addresses*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*

- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Primary Contact Addresses*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Primary Contact Contact Point*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the contact point information of the primary contact for all active opportunities in the current quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Primary Contact Contact Point*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*

- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Primary Contact Contact Point*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the Quotas assigned to the team and the Actuals?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Quota Management*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the Territory Quota vs/ Actual?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Quota Management*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*

- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How is the Quota attainment rate for the sales team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Quota Management*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*

- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What Resources will not be able to meet the Quotas in the current quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Quota Management*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*

- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Which Territories have exceeded their Quotes in the current Quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Quota Management*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Quote Lines*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Quote Lines*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*

- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Quote Lines*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Against how many Opportunities, were the Quotes submitted in this month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Quotes*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the total Quotes revenue for the current month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Quotes*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*

- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many times a Quote is revised before it gets approved?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Quotes*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who has submitted the highest number of Quotes in the current month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Quotes*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How many new Resources are created in the current quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What is the Hire date of the resources in an Organization?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*

- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the user preferences for the Users created in the system?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who are the Partner resources in the system and which Partner Organization they belong to?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who are the top 10 active resources of the system?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Resource System Usage*

Job Roles

No applicable job roles

Duty Roles

No applicable job roles

How many days was a resource active by channel?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Resource System Usage*

Job Roles

No applicable job roles

Duty Roles

No applicable job roles

How is the resource activity split across channels (web/mobile/email)?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Resource System Usage*

Job Roles

No applicable job roles

Duty Roles

No applicable job roles

Which department has the highest number of active resources?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Resource System Usage*

Job Roles

No applicable job roles

Duty Roles

No applicable job roles

Which region has the highest number of inactive resources?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Resource System Usage*

Job Roles

No applicable job roles

Duty Roles

No applicable job roles

Who are the resources who have not logged in the system in the last week?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Resource System Usage*

Job Roles

No applicable job roles

Duty Roles

No applicable job roles

Resources of which job title are most active in the system?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Resource System Usage*

Job Roles

No applicable job roles

Duty Roles

No applicable job roles

Who are the top 10 active and bottom 10 inactive employees from a user adoption perspective?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Resource System Usage*

Job Roles

No applicable job roles

Duty Roles

No applicable job roles

How many territories are assigned to a Resource/ Employee?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Resource Territory*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*

- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales CRM Sales Activity Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are all the Territories assigned to Resources/ Employees?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Resource Territory*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales CRM Sales Activity Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the responses by different Accounts/ Customers for an Assessment submitted e.g. Customer Satisfaction?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Sales Account Assessments*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*

- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Sales Account Assessments*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Sales Account Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

On which sales accounts is a given sales representative a member of the account team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Sales Account Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the sales accounts owned by the Sales team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Sales Account Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the sales accounts that a given Sales representative owns?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Sales Account Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the Accounts under the sales team, by territory?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Sales Account Territory*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*

- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Do the sales territories need rebalancing?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Sales Account Territory*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Sales Account Territory*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*

- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Territory Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Who are the resources assigned for a particular territory?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Territory Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

What are all the data security privileges that a specific user added?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Security - Audit Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Security Transaction Analysis Duty*

Which roles were added with a specific functional security policy, and who added them?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Security - Audit Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Security Transaction Analysis Duty*

Why am I not able to view certain subject areas with my login credentials?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Security - Roles and Privileges Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Security Transaction Analysis Duty*

Which data security policy would provide access to the data I need to see?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Security - Roles and Privileges Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Security Transaction Analysis Duty*

Can I view and edit a particular page? If yes, which functional security policy do I need to provide to a user who needs similar access?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Security - Roles and Privileges Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Security Transaction Analysis Duty*

I have not added a specific role to a user, but the user seems to have this job role. Can I trace how has this been inherited by the user?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Security - Roles and Privileges Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Security Transaction Analysis Duty*

On an average, how many days do each of my team members take to close a case?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Case Management Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Case Manager*
- *Case Worker*
- *Customer Relationship Management Application Administrator*
- *Internal Help Desk Administrator*
- *Next Gen Human Resource Help Desk Administrator*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Case Manager Transaction Analysis Duty*
- *Case Worker Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*

Which of my team's cases have been open for more than 15 days?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Case Management Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Case Manager*
- *Case Worker*
- *Customer Relationship Management Application Administrator*
- *Internal Help Desk Administrator*
- *Next Gen Human Resource Help Desk Administrator*

- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Case Manager Transaction Analysis Duty*
- *Case Worker Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*

What are the cases that have not updated a case in the past 10 days? Who owns them?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Case Management Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Case Manager*
- *Case Worker*
- *Customer Relationship Management Application Administrator*
- *Internal Help Desk Administrator*
- *Next Gen Human Resource Help Desk Administrator*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Case Manager Transaction Analysis Duty*

- *Case Worker Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*

What are the cases that have not been actioned since reopening?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Case Management Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Case Manager*
- *Case Worker*
- *Customer Relationship Management Application Administrator*
- *Internal Help Desk Administrator*
- *Next Gen Human Resource Help Desk Administrator*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Case Manager Transaction Analysis Duty*
- *Case Worker Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*

How many new coverages begin in the ensuing month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Customer Coverage Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

To what extent has the number of customer coverages increased between two given dates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Customer Coverage Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are my team resources optimally deployed across service queues to maximize productivity?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Help Desk Queue Resources Real Time*
- *Help Desk - Internal Help Desk Queue Resources Real Time*
- *Service - CRM Service Queue Resources Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*

- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*

- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Queue Resources Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*

- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Queue Resources Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*

- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How long did it take to assign the SR to the correct queue?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Did the SR get assigned to the wrong queue/team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How long was an SR unassigned and how long did it sit in each queue?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Was an SR sitting in a queue longer than the average time for all other SRs?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*

- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Was there a lot of time spent waiting on customers to respond to more information, documents and so on?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*

- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Was the SR queue modified or SR resource owner modified at any point?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*

- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Lifecycle*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are we responding to customer messages in a timely manner?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Milestones Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are there currently service requests that have missed the target milestone and require escalation?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Milestones Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

- *Service Transaction Analysis Duty*

Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Milestones Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*

- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are our processes inefficient or preventing agents from meeting milestones?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Milestones Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*

- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

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- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
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- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Milestones Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*

- *Sales VP*

Duty Roles

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- *HR Help Desk Administrator Transaction Analysis Duty*
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- *HR Help Desk Manager Transaction Analysis Duty*
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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How does my team perform in meeting first response milestones versus resolution milestones?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Milestones Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*

- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
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- *Partner Sales Representative*
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- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Resource Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
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- *Partner Channel Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Resource Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*

- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
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The following duty roles secure access to the data related to this business question:

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- *Partner Channel Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

As an agent am I spreading myself too thin by being part of one too many SR teams?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Resource Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Sales Administrator*
- *Sales Manager*
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- *Sales VP*

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- *Partner Channel Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Tags Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
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- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

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- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Tags Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
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- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
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- *Sales VP*

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- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are we seeing an issue regarding compliance rates with certain tags?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Tags Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
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- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Tags Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*

- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

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- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How many open SRs are linked to each tag?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Tags Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

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- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How is tag usage across agents and resource teams? Which teams perform better than others?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Tags Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*

- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are the open critical SRs that my team is working on currently? How many of these are escalated?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
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- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*

- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

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- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are the SRs that are waiting on my customers?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

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- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Who are my agents that have the most pending SRs?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
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- *Sales Restricted User*
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Duty Roles

The following duty roles secure access to the data related to this business question:

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- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*

- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
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- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
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- *Sales VP*

Duty Roles

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- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
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- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How does the aging profile of SRs look like? Are there any outliers calling for intervention?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*

- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How many social posts came from known versus unknown contacts?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Social Post Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*

- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

Does the survey request activity show a declining trend?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Survey Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Restricted User*

- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

How is survey request trending compared to SR resolutions during the same period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Survey Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*

- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

Do we need to adjust our survey template to improve response rates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Survey Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

Does seasonality impact response rates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Survey Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

How does response differ for various service teams? Do some teams obtain better response rates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Survey Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

- *Sales Manager*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

Are survey requests being sent per plan across teams, service categories, products, account regions?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Survey Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*

- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

Are survey request frequencies meeting our norms?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Survey Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

What is the overall satisfaction levels of our customers with regards to issue resolutions?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Survey Responses Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Survey Responses Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*

- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Survey Responses Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*

- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are the response scores for customer where we have not met SLA's?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Survey Responses Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*

- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Is our resolution performance for escalated issues worse or better than non escalated issues?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Survey Responses Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*

- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Survey Responses Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Do one or more of the agents in my team need training to improve customer communication skills?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Survey Responses Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Survey Responses Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Which of our product lines most frequently receive suggestions for product improvements?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Survey Responses Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*

- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Which customers have covered levels worth more then $50k that are expiring in 30 days?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Covered Levels Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

Which customers or coverage products deliver the most revenue?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Covered Levels Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

Which covered levels expired without renewal in the last month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Covered Levels Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

What are all the assets covered for a particular customer?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Covered Levels Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

What is the Net Billing for the last 6 months?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscription Billing Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

What is the projected billing for the next 6 months?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscription Billing Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

How does the usage of a particular subscription product trend?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscription Billing Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

What is the discount that was provided for a particular customer or product?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscription Billing Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

What is the Net MRR change due to amendments?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscription Relationships Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

What is the Net MRR change due to amendments where full credit was issued?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscription Relationships Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

Which products are most frequently upgraded to or downgraded from?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscription Relationships Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

What is the trend of successful, outstanding and churned renewals in the last 6 months?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscription Relationships Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

How much MRR was renewed each month in the last 6 months?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscription Relationships Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

What is the MRR lost each month due to suspensions in the last 6 months?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscription Relationships Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

What's the total contract value (TCV) in the last one year?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscriptions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

What's the number of subscriptions by status and date range?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscriptions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

What's the total MRR?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscriptions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

How many subscriptions were renewed the last quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscriptions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

How many subscriptions are expiring in the next quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscriptions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

How many subscriptions were terminated in the last year?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscriptions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

Who are the top 10 active users of the system?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *User System Usage*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to the data related to this business question:

- *User System Usage Transaction Analysis Duty*

Who are the users who have not logged in the system in the last week?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *User System Usage*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to the data related to this business question:

- *User System Usage Transaction Analysis Duty*

Which department has the highest number of Active users?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *User System Usage*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to the data related to this business question:

- *User System Usage Transaction Analysis Duty*

Users belonging to what job title are most active in the system?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *User System Usage*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to the data related to this business question:

- *User System Usage Transaction Analysis Duty*

How is the user activity split across Channel (Web/ Mobile/Mail)?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *User System Usage*

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to the data related to this business question:

- *User System Usage Transaction Analysis Duty*

Is there scope for a better resource load balance keeping in consideration the Help Desk Request throughput across queues?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Help Desk Queue Resources Real Time*
- *Help Desk - Internal Help Desk Queue Resources Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

Can the variation in Help Desk Request resolution times between team members be attributable to sub-optimal queue assignments?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Help Desk Queue Resources Real Time*
- *Help Desk - Internal Help Desk Queue Resources Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

What Request categories have a higher percentage of non-compliant Help Desk Requests open?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Summary*
- *Help Desk - Internal Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

Are we keeping the number of non-compliant Help Desk Requests in check for those with Affected Parties?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

What is the incidence of agents linking knowledge articles to Help Desk Requests?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Summary*
- *Help Desk - Internal Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

What is the impact of linking knowledge articles to Help Desk Requests? Has it led to reduced Request resolution times and reopenings?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Summary*
- *Help Desk - Internal Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

What employee organization files the most requests with affected parties? Which one has the most open, the highest resolution times?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

What are the most popular channels used for internal conversations?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Conversation Messages Real Time*
- *Help Desk - Internal Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*

- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Do internal conversation message volumes and higher turnaround time of requests go together?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Conversation Messages Real Time*
- *Help Desk - Internal Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*

- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are internal conversations taking place across high cost channels?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Conversation Messages Real Time*
- *Help Desk - Internal Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*

- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

- *Service Transaction Analysis Duty*

Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Conversation Messages Real Time*
- *Help Desk - Internal Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Show me all the conversation messages together with the conversation message subject and body and the sender and recipient details for a focused set of requests

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Request Conversation Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Show me all the conversation messages together with the conversation message subject, body, sender and recipient details for a focused set of requests

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Request Conversation Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

How effective are our customer engagement strategies?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Activity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Which types of activities and interactions lead to the highest customer engagement?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Activity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

- *Service Transaction Analysis Duty*

Which team members or sales representatives are most active in terms of interactions?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Activity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*

- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Do specific team members excel in response times or quality of interactions?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Activity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*

- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are there any bottlenecks or inefficiencies in our activity management processes?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Activity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are the most preferred communication channels for customer interactions?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Activity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*

- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are certain channels more effective in generating positive customer responses?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Activity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How have interactions evolved over a period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Activity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*

- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are there seasonal trends or patterns in customer engagements?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Activity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

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The following duty roles secure access to the data related to this business question:

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- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How do customer interactions correlate with the success of marketing campaigns?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Lead Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*

- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are there specific interactions that coincide with higher campaign conversion rates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Lead Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*

- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
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- *Human Resource Help Desk Agent*
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- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

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- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are there specific types of interactions that contribute to lead generation?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Lead Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
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- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

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- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How do interactions affect the progression of leads through the sales funnel?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Lead Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*

- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How is the sales team nurturing leads through various interactions?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Lead Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

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- *Partner Channel Transaction Analysis Duty*

- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Which lead interactions are most successful in moving leads toward conversion?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Lead Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
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- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*

- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Which team members or sales representatives are most effective at managing leads?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Lead Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How do interactions correlate with the progression of sales opportunities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Opportunity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

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- *HR Help Desk Manager Transaction Analysis Duty*
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- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Which interactions are most influential in advancing opportunities through the sales pipeline?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Opportunity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

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- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
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- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

- *Service Transaction Analysis Duty*

Which interactions have the highest impact on closing opportunities successfully?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Opportunity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*

- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

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- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Which sales team members are most effective in managing opportunities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Opportunity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*

- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

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- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What interaction patterns indicate healthy or at-risk opportunities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Opportunity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

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- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What types of interactions lead to higher engagement and response rates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Opportunity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*

- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

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- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How long, on average, does it take to close an opportunity from the initial interaction?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Opportunity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
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- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
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- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

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- *Partner Channel Transaction Analysis Duty*

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- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Opportunity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
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- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*

- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
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- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Do certain interaction patterns correlate with more accurate forecasts?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Opportunity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
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- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
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- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How can we optimize the sales process based on interaction insights?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Opportunity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
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- *Partner Sales Representative*
- *Sales Administrator*
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- *Sales Representative*
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Duty Roles

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- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Gain insights into why some opportunities are won while others are lost based on interactions

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Opportunity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
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- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Are there areas where team members require additional training for more effective interactions?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Interaction Opportunity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What is the breakdown of open action plans by Action Plan Action Owner?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Case Action Plan Actions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Case Manager*
- *Case Worker*
- *Customer Relationship Management Application Administrator*
- *Sales Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Case Manager Transaction Analysis Duty*
- *Case Worker Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*

Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Conversation Messages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*

- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are the top/bottom 10 Smarttexts used during the last week/month/quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Service Request SmartText Usages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Service Request SmartText Usages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*

- *Service Transaction Analysis Duty*

When was the last, a SmartText was used?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Service Request SmartText Usages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*

- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

Which SmartTexts were not used in the last month/quarter/year?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Service Request SmartText Usages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What Smarttexts have not been used even once?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM/Help Desk - Service Request SmartText Usages Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*

- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are the Cases (target) 'blocked by' this particular Request (source)?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Request Relationships Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

How many Requests are blocked by this open Internal HelpD esk Request?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Request Relationships Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

What Internal Help Desk Requests escalate the Requests assigned to my team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Request Relationships Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

What Internal Help Desk request, if resolved, will also resolve my dependent requests?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Request Relationships Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

Are we seeing an increasing trend of blocking issues limiting speedy resolution of Internal Help Desk Requests?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Request Relationships Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*

How does orchestration impact lead conversion to opportunity quarter over quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Marketing - CRM Leads*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Corporate Marketing Manager*
- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*

- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

Which types of Lead orchestration steps are reps skipping the most?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Marketing - CRM Leads*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*

- *Channel Sales Director*
- *Channel Sales Manager*
- *Corporate Marketing Manager*
- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Marketing - CRM Leads*
- *Sales - CRM Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Corporate Marketing Manager*
- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*

- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How to compare the performance of Lead Orchestrations?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Marketing - CRM Leads*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Corporate Marketing Manager*
- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

How can I identify the missing activities that could be used to optimize and guide the reps better?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Activity Real Time*
- *Marketing - CRM Leads*
- *Sales - CRM Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Corporate Marketing Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Corporate Transaction Analysis Duty*
- *Marketing Executive Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

How to gauge the pending effort required to progress the opportunity?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Which types of Opportunity orchestration steps are reps skipping the most?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*

- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How does orchestration impact the time spent in various opportunity sales stages?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunities and Products Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How to compare the performance of Opportunity Orchestrations?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunities and Products Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*

- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunities and Products Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*

- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

How can I analyze the impact of orchestration in closing opportunities and revenue generation?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunities and Products Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*

- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Activity Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Marketing Lead Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

4 Job Roles

Overview

For each job role in this chapter, links are provided for more detailed information about the duty roles, subject areas, and business questions associated with the job role.

Accounts Receivable Manager

Code Name

ORA_AR_ACCOUNTS_RECEIVABLE_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Receivables Customer Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *Sales - CRM Account Relationship*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *What are the total number of Relationships for a given Account?*

Accounts Receivable Specialist

Code Name

ORA_AR_ACCOUNTS_RECEIVABLE_SPECIALIST_JOB

Duty Roles

This job role is related to the following duty roles:

- *Receivables Customer Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *Sales - CRM Account Relationship*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *What are the total number of Relationships for a given Account?*

Application Implementation Consultant

Code Name

APP_IMPL_CONSULTANT

Duty Roles

This job role is related to the following duty roles:

- *OTBI Performance Transactional Analysis Duty*

- *OTBI Usage Transactional Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *OTBI Performance Real Time*
- *OTBI Usage Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *What are the most commonly used OTBI subject areas?*
- *What are the least-used OTBI subject areas?*
- *Which subject areas have large data volume?*
- *Who are the top OTBI users?*
- *How many ad-hoc OTBI analyses have been run in the past month?*
- *Which analyses reached OTBI max row limit?*
- *What is the database SQL execution time and row count?*
- *What is the weekly OTBI analysis usage trend?*
- *Which analyses have low usage because of poor performance?*
- *What is the execution history of dashboard X in the past month?*
- *How many OTBI SOAP web services have been run in the past month?*
- *Which analyses have the longest response time?*
- *Which analyses have high data row count?*
- *How many users run OTBI analyses?*
- *How many custom OTBI analyses have been run in the past month?*
- *Which analyses have low usage in the past month?*
- *Which subject areas have slow performance?*
- *How many predefined OTBI analyses have been run in the past month?*
- *What are the long-running analyses in the past month?*
- *What is the OTBI execution time histogram in the past month?*
- *What are the most frequently-run OTBI analyses?*
- *What are the common execution errors in the past month?*
- *How many analyses and dashboards failed in the past month?*

Case Manager

Code Name

ORA_SVC_CASE_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Case Manager Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM/Help Desk - Case Action Plan Actions Real Time*
- *CRM/Help Desk - Case Management Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Which of my team's cases have been open for more than 15 days?*
- *What is the delay in estimated completion dates?*
- *What are the cases that have not updated a case in the past 10 days? Who owns them?*
- *What are the cases that have not been actioned since reopening?*
- *What is the breakdown of open action plans by Action Plan Action Owner?*
- *On an average, how many days do each of my team members take to close a case?*
- *Are there action plans tracking late to an overall target completion date?*

Case Worker

Code Name

ORA_SVC_CASE_WORKER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Case Worker Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM/Help Desk - Case Action Plan Actions Real Time*
- *CRM/Help Desk - Case Management Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Which of my team's cases have been open for more than 15 days?*
- *What is the delay in estimated completion dates?*
- *What are the cases that have not updated a case in the past 10 days? Who owns them?*
- *What are the cases that have not been actioned since reopening?*
- *What is the breakdown of open action plans by Action Plan Action Owner?*
- *On an average, how many days do each of my team members take to close a case?*
- *Are there action plans tracking late to an overall target completion date?*

Channel Account Manager

Code Name

ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Incentive Compensation Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Incentive Compensation - Attainments Real Time*
- *Incentive Compensation - Compensation Plan Assignments Real Time*
- *Incentive Compensation - Credits Real Time*
- *Incentive Compensation - Disputes Real Time*
- *Incentive Compensation - Earning and Attainment Summary Real Time*
- *Incentive Compensation - Earnings Real Time*
- *Incentive Compensation - Participant Balances Real Time*
- *Incentive Compensation - Participant Compensation Plan Real Time*
- *Incentive Compensation - Participant Detail Real Time*
- *Incentive Compensation - Participant Interval Goals Real Time*
- *Incentive Compensation - Participant Period Goals Real Time*
- *Incentive Compensation - Pay Group Assignments Real Time*
- *Incentive Compensation - Payments Real Time*
- *Incentive Compensation - Paysheet Summary Real Time*
- *Incentive Compensation - Performance and Earnings Summary Real Time*
- *Incentive Compensation - Rules Real Time*
- *Incentive Compensation - Transactions Real Time*

- *Marketing - CRM Leads*
- *Partners - CRM Leads and Opportunities Real Time*
- *Partners - CRM Opportunities and Products Real Time*
- *Partners - CRM Partner Assessments*
- *Partners - CRM Partner Classification*
- *Partners - CRM Partner Contact*
- *Partners - CRM Partner Overview*
- *Partners - CRM Partner Program Benefits*
- *Partners - CRM Partner Resource*
- *Partners - CRM Partner Territory*
- *Partners - CRM Program Enrollments*
- *Partners - CRM Programs*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*

- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*

- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Were there credit or rollup errors that must be fixed?*
- *Is the dispute load balanced between my analysts? Asked by compensation managers.*
- *Who got paid what amount and from where, at the detail level?*
- *What is the total quota by performance measure for the period across the organization?*
- *What is the current status of the payment batches? Are they paid, reviewed, or frozen?*
- *How does the performance measure attainment compare with a participant's personalized goal across his directs?*
- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*

- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *What are the top 10 products associated to the Leads in the system?*
- *How many Partners' team is a given Resource part of?*
- *How many Leads are part of the Campaign?*
- *What are the various attainment attributes associated with my credits?*
- *To what country and business unit does the participant belong?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*

- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What is the potential revenue of leads by partners?*
- *What is the quarterly revenue trend for a specific product/product group by partner?*
- *How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?*
- *What is total number of Partners assigned to a specific classification for this period?*
- *Who all is part of the Partner Resource Team for a given Partner and what is their role?*
- *Which Program has the highest number of Enrollments?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*

- *Which participants are assigned to which plans?*
- *When was a given participant assigned to a specific pay group?*
- *What are the credit rules which a credit receiver is assigned to?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*

- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *What is the number of partners in a specific classification within a defined geographic region?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *How much credit did a participant receive for their sales transactions?*
- *How much credit did my team receive for their attainment?*
- *Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.*
- *Which of my direct reports' attainment or earnings are below the wanted performance expectation?*
- *Why wasn't I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.*
- *What is the total quota across the organization by performance measure for the period or across periods?*
- *Which participants are assigned to a given pay group?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*

- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*

- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *How are the Partners classified?*
- *How many Programs were created in the last quarter?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *What type of assignment does a participant have to a plan?*
- *Does the participant have an individualized target incentive for the plan?*
- *Are we on track in achieving quota this period or quarter?*
- *How are these targets individualized across the participants.*
- *What are the targets and goals settings for an individual?*
- *What is the total quota by performance measure for the interval across the organization?*
- *What pay groups are in the application? What are their types and descriptions?*
- *What are the criteria for a rule including the inherited criteria from the ancestors?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *How many emails are we receiving over time?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*

- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*

- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*
- *What is the average deal size by Product groups?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *Are participants correctly credited?*
- *What are my compensation plan incentive targets?*
- *Are my individualized performance measure goals set properly?*
- *Who is assigned to a given plan?*
- *As a participant manager, what are the targets and goals settings for my direct reports?*
- *What is the participant's home currency or cost center?*
- *Is the participant active? And for which dates?*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*

- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*
- *What are the open Opportunities associated to a given Partner?*
- *What is the number of leads by partners for a specific product group?*
- *What is the distribution of Partner Opportunities by sales stages?*
- *How many Partners is a Contact is associated to?*
- *What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?*

- *How many Enrollments are going o expire in the next quarter?*
- *What are the Programs that Partners have enrolled into?*
- *How many Programs are owned by the team with their expiration date?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Has the participant accepted the assignment to the plan?*
- *How do they compare to the base goals set on the measure?*
- *What is the total quota across the organization by performance measure for the interval?*
- *As a participant manager, which pay groups do my direct reports belong to?*
- *What is my cost of compensation by participant, plan component, plan, and frequencies?*
- *How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?*
- *How do participants' plan component earnings compare with their personalized target incentives?*
- *Do I have to realign quota based on current attainment levels?*
- *What is the total quota by performance measure for the period across the organization? Validate quota levels.*
- *What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*

- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What is the revenue generated by Partners per Customer?*
- *What are the number of Partner contacts by Partner?*
- *What is the number of Partner Contacts that are also resources and users?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*

- *What are the assignment start and end dates for a participant?*
- *How do these targets break down by plan component?*
- *Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.*
- *What is the status of each paysheet within the payment batches?*
- *What are the rules effective as of the given date in the hierarchy?*
- *What are the results of the collected transactions before the crediting process?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*
- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*

- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *What are the top ten Partners by Revenue during the past quarter/year?*
- *What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? Submitted e.g. Partner Performance?*
- *What are the Partners created in the system for a given time period?*
- *How many Enrollments were created/submitted/expired/terminated in the last month?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Channel Administrator

Code Name

ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

- *Partner Channel Administrative Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*

- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Marketing - CRM Leads*
- *Partners - CRM Leads and Opportunities Real Time*
- *Partners - CRM Opportunities and Products Real Time*
- *Partners - CRM Partner Assessments*
- *Partners - CRM Partner Classification*
- *Partners - CRM Partner Contact*
- *Partners - CRM Partner Overview*
- *Partners - CRM Partner Program Benefits*
- *Partners - CRM Partner Resource*
- *Partners - CRM Partner Territory*
- *Partners - CRM Program Enrollments*
- *Partners - CRM Programs*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*

- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*

- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*

- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *What are the top 10 products associated to the Leads in the system?*
- *How many Partners' team is a given Resource part of?*
- *How many Leads are part of the Campaign?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*

- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What is the potential revenue of leads by partners?*
- *What is the quarterly revenue trend for a specific product/product group by partner?*
- *How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?*
- *What is total number of Partners assigned to a specific classification for this period?*
- *Who all is part of the Partner Resource Team for a given Partner and what is their role?*

- *Which Program has the highest number of Enrollments?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*

- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *What is the number of partners in a specific classification within a defined geographic region?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*

- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *How are the Partners classified?*

- *How many Programs were created in the last quarter?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *How many emails are we receiving over time?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*

- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*
- *What is the average deal size by Product groups?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*

- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*

- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*
- *What are the open Opportunities associated to a given Partner?*
- *What is the number of leads by partners for a specific product group?*
- *What is the distribution of Partner Opportunities by sales stages?*
- *How many Partners is a Contact is associated to?*
- *What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?*
- *How many Enrollments are going o expire in the next quarter?*
- *What are the Programs that Partners have enrolled into?*
- *How many Programs are owned by the team with their expiration date?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*

- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What is the revenue generated by Partners per Customer?*
- *What are the number of Partner contacts by Partner?*
- *What is the number of Partner Contacts that are also resources and users?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*

- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*
- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *What are the top ten Partners by Revenue during the past quarter/year?*
- *What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? Submitted e.g. Partner Performance?*
- *What are the Partners created in the system for a given time period?*

- *How many Enrollments were created/submitted/expired/terminated in the last month?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Channel Operations Manager

Code Name

ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Incentive Compensation Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*

- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Incentive Compensation - Attainments Real Time*
- *Incentive Compensation - Compensation Plan Assignments Real Time*
- *Incentive Compensation - Credits Real Time*
- *Incentive Compensation - Disputes Real Time*
- *Incentive Compensation - Earning and Attainment Summary Real Time*
- *Incentive Compensation - Earnings Real Time*
- *Incentive Compensation - Participant Balances Real Time*
- *Incentive Compensation - Participant Compensation Plan Real Time*
- *Incentive Compensation - Participant Detail Real Time*
- *Incentive Compensation - Participant Interval Goals Real Time*
- *Incentive Compensation - Participant Period Goals Real Time*
- *Incentive Compensation - Pay Group Assignments Real Time*
- *Incentive Compensation - Payments Real Time*
- *Incentive Compensation - Paysheet Summary Real Time*
- *Incentive Compensation - Performance and Earnings Summary Real Time*
- *Incentive Compensation - Rules Real Time*
- *Incentive Compensation - Transactions Real Time*
- *Marketing - CRM Leads*
- *Partners - CRM Leads and Opportunities Real Time*
- *Partners - CRM Opportunities and Products Real Time*
- *Partners - CRM Partner Assessments*
- *Partners - CRM Partner Classification*
- *Partners - CRM Partner Contact*
- *Partners - CRM Partner Overview*
- *Partners - CRM Partner Program Benefits*
- *Partners - CRM Partner Resource*
- *Partners - CRM Partner Territory*
- *Partners - CRM Program Enrollments*
- *Partners - CRM Programs*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*

- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*

- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Were there credit or rollup errors that must be fixed?*
- *Is the dispute load balanced between my analysts? Asked by compensation managers.*
- *Who got paid what amount and from where, at the detail level?*
- *What is the total quota by performance measure for the period across the organization?*
- *What is the current status of the payment batches? Are they paid, reviewed, or frozen?*
- *How does the performance measure attainment compare with a participant's personalized goal across his directs?*

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *What are the top 10 products associated to the Leads in the system?*
- *How many Partners' team is a given Resource part of?*
- *How many Leads are part of the Campaign?*

- *What are the various attainment attributes associated with my credits?*
- *To what country and business unit does the participant belong?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*

- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What is the potential revenue of leads by partners?*
- *What is the quarterly revenue trend for a specific product/product group by partner?*
- *How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?*
- *What is total number of Partners assigned to a specific classification for this period?*
- *Who all is part of the Partner Resource Team for a given Partner and what is their role?*
- *Which Program has the highest number of Enrollments?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *Which participants are assigned to which plans?*
- *When was a given participant assigned to a specific pay group?*
- *What are the credit rules which a credit receiver is assigned to?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*

- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *What is the number of partners in a specific classification within a defined geographic region?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*

- *What are the Assets that are expiring in the next quarter?*
- *How much credit did a participant receive for their sales transactions?*
- *How much credit did my team receive for their attainment?*
- *Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.*
- *Which of my direct reports' attainment or earnings are below the wanted performance expectation?*
- *Why wasn't I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.*
- *What is the total quota across the organization by performance measure for the period or across periods?*
- *Which participants are assigned to a given pay group?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*

- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *How are the Partners classified?*
- *How many Programs were created in the last quarter?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *What type of assignment does a participant have to a plan?*
- *Does the participant have an individualized target incentive for the plan?*
- *Are we on track in achieving quota this period or quarter?*
- *How are these targets individualized across the participants.*
- *What are the targets and goals settings for an individual?*

- *What is the total quota by performance measure for the interval across the organization?*
- *What pay groups are in the application? What are their types and descriptions?*
- *What are the criteria for a rule including the inherited criteria from the ancestors?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *How many emails are we receiving over time?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*

- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*
- *What is the average deal size by Product groups?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *Are participants correctly credited?*
- *What are my compensation plan incentive targets?*
- *Are my individualized performance measure goals set properly?*
- *Who is assigned to a given plan?*
- *As a participant manager, what are the targets and goals settings for my direct reports?*
- *What is the participant's home currency or cost center?*
- *Is the participant active? And for which dates?*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching?*
- *How many interactions, on average, does it require to resolve an issue?*

- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*

- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*
- *What are the open Opportunities associated to a given Partner?*
- *What is the number of leads by partners for a specific product group?*
- *What is the distribution of Partner Opportunities by sales stages?*
- *How many Partners is a Contact is associated to?*
- *What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?*
- *How many Enrollments are going o expire in the next quarter?*
- *What are the Programs that Partners have enrolled into?*
- *How many Programs are owned by the team with their expiration date?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Has the participant accepted the assignment to the plan?*
- *How do they compare to the base goals set on the measure?*
- *What is the total quota across the organization by performance measure for the interval?*
- *As a participant manager, which pay groups do my direct reports belong to?*
- *What is my cost of compensation by participant, plan component, plan, and frequencies?*
- *How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?*
- *How do participants' plan component earnings compare with their personalized target incentives?*
- *Do I have to realign quota based on current attainment levels?*
- *What is the total quota by performance measure for the period across the organization? Validate quota levels.*
- *What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*

- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*

- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What is the revenue generated by Partners per Customer?*
- *What are the number of Partner contacts by Partner?*
- *What is the number of Partner Contacts that are also resources and users?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *What are the assignment start and end dates for a participant?*
- *How do these targets break down by plan component?*
- *Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.*
- *What is the status of each paysheet within the payment batches?*
- *What are the rules effective as of the given date in the hierarchy?*
- *What are the results of the collected transactions before the crediting process?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*

- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *What are the top ten Partners by Revenue during the past quarter/year?*
- *What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? Submitted e.g. Partner Performance?*
- *What are the Partners created in the system for a given time period?*
- *How many Enrollments were created/submitted/expired/terminated in the last month?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Channel Partner Manager

Code Name

ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Partner Channel Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Marketing - CRM Leads*
- *Partners - CRM Leads and Opportunities Real Time*
- *Partners - CRM Opportunities and Products Real Time*
- *Partners - CRM Partner Assessments*
- *Partners - CRM Partner Classification*
- *Partners - CRM Partner Contact*
- *Partners - CRM Partner Overview*
- *Partners - CRM Partner Program Benefits*
- *Partners - CRM Partner Resource*

- *Partners - CRM Partner Territory*
- *Partners - CRM Program Enrollments*
- *Partners - CRM Programs*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*

- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *What are the top 10 products associated to the Leads in the system?*

- *How many Partners' team is a given Resource part of?*
- *How many Leads are part of the Campaign?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*

- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What is the potential revenue of leads by partners?*
- *What is the quarterly revenue trend for a specific product/product group by partner?*
- *How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?*
- *What is total number of Partners assigned to a specific classification for this period?*
- *Who all is part of the Partner Resource Team for a given Partner and what is their role?*
- *Which Program has the highest number of Enrollments?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*

- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *What is the number of partners in a specific classification within a defined geographic region?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*

- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*

- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *How are the Partners classified?*
- *How many Programs were created in the last quarter?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *How many emails are we receiving over time?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*

- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*

- *What is the average deal size by Product groups?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*

- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*
- *What are the open Opportunities associated to a given Partner?*
- *What is the number of leads by partners for a specific product group?*
- *What is the distribution of Partner Opportunities by sales stages?*
- *How many Partners is a Contact is associated to?*
- *What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?*
- *How many Enrollments are going o expire in the next quarter?*
- *What are the Programs that Partners have enrolled into?*
- *How many Programs are owned by the team with their expiration date?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*

- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*

- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What is the revenue generated by Partners per Customer?*
- *What are the number of Partner contacts by Partner?*
- *What is the number of Partner Contacts that are also resources and users?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*
- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*

- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *What are the top ten Partners by Revenue during the past quarter/year?*
- *What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? Submitted e.g. Partner Performance?*
- *What are the Partners created in the system for a given time period?*
- *How many Enrollments were created/submitted/expired/terminated in the last month?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Channel Partner Portal Administrator

Code Name

ORA_ZPM_CHANNEL_PARTNER_PORTAL_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

- *Partner Channel Administrative Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*

- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Marketing - CRM Leads*
- *Partners - CRM Leads and Opportunities Real Time*
- *Partners - CRM Opportunities and Products Real Time*
- *Partners - CRM Partner Assessments*
- *Partners - CRM Partner Classification*
- *Partners - CRM Partner Contact*
- *Partners - CRM Partner Overview*
- *Partners - CRM Partner Program Benefits*
- *Partners - CRM Partner Resource*
- *Partners - CRM Partner Territory*
- *Partners - CRM Program Enrollments*
- *Partners - CRM Programs*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*

- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*

- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*

- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *What are the top 10 products associated to the Leads in the system?*
- *How many Partners' team is a given Resource part of?*
- *How many Leads are part of the Campaign?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*

- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What is the potential revenue of leads by partners?*
- *What is the quarterly revenue trend for a specific product/product group by partner?*
- *How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?*

- *What is total number of Partners assigned to a specific classification for this period?*
- *Who all is part of the Partner Resource Team for a given Partner and what is their role?*
- *Which Program has the highest number of Enrollments?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*

- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *What is the number of partners in a specific classification within a defined geographic region?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*

- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*

- *What are all the Campaigns assigned to an Opportunity?*
- *How are the Partners classified?*
- *How many Programs were created in the last quarter?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *How many emails are we receiving over time?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*

- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*
- *What is the average deal size by Product groups?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*

- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*

- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*
- *What are the open Opportunities associated to a given Partner?*
- *What is the number of leads by partners for a specific product group?*
- *What is the distribution of Partner Opportunities by sales stages?*
- *How many Partners is a Contact is associated to?*
- *What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?*
- *How many Enrollments are going o expire in the next quarter?*
- *What are the Programs that Partners have enrolled into?*
- *How many Programs are owned by the team with their expiration date?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*

- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What is the revenue generated by Partners per Customer?*
- *What are the number of Partner contacts by Partner?*
- *What is the number of Partner Contacts that are also resources and users?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*

- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*
- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*

- *What are the top ten Partners by Revenue during the past quarter/year?*
- *What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? Submitted e.g. Partner Performance?*
- *What are the Partners created in the system for a given time period?*
- *How many Enrollments were created/submitted/expired/terminated in the last month?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Channel Sales Director

Code Name

ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB

Duty Roles

This job role is related to the following duty roles:

- *Partner Channel Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*

- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Marketing - CRM Leads*
- *Partners - CRM Leads and Opportunities Real Time*
- *Partners - CRM Opportunities and Products Real Time*
- *Partners - CRM Partner Assessments*
- *Partners - CRM Partner Classification*
- *Partners - CRM Partner Contact*
- *Partners - CRM Partner Overview*
- *Partners - CRM Partner Program Benefits*
- *Partners - CRM Partner Resource*
- *Partners - CRM Partner Territory*
- *Partners - CRM Program Enrollments*
- *Partners - CRM Programs*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*

- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*

- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *Which types of Lead orchestration steps are reps skipping the most?*

- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *What are the top 10 products associated to the Leads in the system?*
- *How many Partners' team is a given Resource part of?*
- *How many Leads are part of the Campaign?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*

- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What is the potential revenue of leads by partners?*
- *What is the quarterly revenue trend for a specific product/product group by partner?*
- *How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?*
- *What is total number of Partners assigned to a specific classification for this period?*
- *Who all is part of the Partner Resource Team for a given Partner and what is their role?*
- *Which Program has the highest number of Enrollments?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*

- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*

- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *What is the number of partners in a specific classification within a defined geographic region?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*

- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *How are the Partners classified?*
- *How many Programs were created in the last quarter?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *How many emails are we receiving over time?*

- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*

- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*
- *What is the average deal size by Product groups?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*

- *What are the SRs that are waiting on my customers?*
- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*
- *What are the open Opportunities associated to a given Partner?*
- *What is the number of leads by partners for a specific product group?*
- *What is the distribution of Partner Opportunities by sales stages?*
- *How many Partners is a Contact is associated to?*
- *What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?*
- *How many Enrollments are going o expire in the next quarter?*
- *What are the Programs that Partners have enrolled into?*

- *How many Programs are owned by the team with their expiration date?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*

- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What is the revenue generated by Partners per Customer?*
- *What are the number of Partner contacts by Partner?*
- *What is the number of Partner Contacts that are also resources and users?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*

- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *What are the top ten Partners by Revenue during the past quarter/year?*
- *What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? Submitted e.g. Partner Performance?*
- *What are the Partners created in the system for a given time period?*
- *How many Enrollments were created/submitted/expired/terminated in the last month?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Channel Sales Manager

Code Name

ORA_ZPM_CHANNEL_SALES_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Incentive Compensation Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Incentive Compensation - Attainments Real Time*
- *Incentive Compensation - Compensation Plan Assignments Real Time*
- *Incentive Compensation - Credits Real Time*
- *Incentive Compensation - Disputes Real Time*
- *Incentive Compensation - Earning and Attainment Summary Real Time*
- *Incentive Compensation - Earnings Real Time*
- *Incentive Compensation - Participant Balances Real Time*
- *Incentive Compensation - Participant Compensation Plan Real Time*

- *Incentive Compensation - Participant Detail Real Time*
- *Incentive Compensation - Participant Interval Goals Real Time*
- *Incentive Compensation - Participant Period Goals Real Time*
- *Incentive Compensation - Pay Group Assignments Real Time*
- *Incentive Compensation - Payments Real Time*
- *Incentive Compensation - Paysheet Summary Real Time*
- *Incentive Compensation - Performance and Earnings Summary Real Time*
- *Incentive Compensation - Rules Real Time*
- *Incentive Compensation - Transactions Real Time*
- *Marketing - CRM Leads*
- *Partners - CRM Leads and Opportunities Real Time*
- *Partners - CRM Opportunities and Products Real Time*
- *Partners - CRM Partner Assessments*
- *Partners - CRM Partner Classification*
- *Partners - CRM Partner Contact*
- *Partners - CRM Partner Overview*
- *Partners - CRM Partner Program Benefits*
- *Partners - CRM Partner Resource*
- *Partners - CRM Partner Territory*
- *Partners - CRM Program Enrollments*
- *Partners - CRM Programs*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*

- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*

- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Were there credit or rollup errors that must be fixed?*
- *Is the dispute load balanced between my analysts? Asked by compensation managers.*
- *Who got paid what amount and from where, at the detail level?*
- *What is the total quota by performance measure for the period across the organization?*
- *What is the current status of the payment batches? Are they paid, reviewed, or frozen?*
- *How does the performance measure attainment compare with a participant's personalized goal across his directs?*
- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*

- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *What are the top 10 products associated to the Leads in the system?*
- *How many Partners' team is a given Resource part of?*
- *How many Leads are part of the Campaign?*
- *What are the various attainment attributes associated with my credits?*
- *To what country and business unit does the participant belong?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*

- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What is the potential revenue of leads by partners?*

- *What is the quarterly revenue trend for a specific product/product group by partner?*
- *How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?*
- *What is total number of Partners assigned to a specific classification for this period?*
- *Who all is part of the Partner Resource Team for a given Partner and what is their role?*
- *Which Program has the highest number of Enrollments?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *Which participants are assigned to which plans?*
- *When was a given participant assigned to a specific pay group?*
- *What are the credit rules which a credit receiver is assigned to?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*

- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *What is the number of partners in a specific classification within a defined geographic region?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *How much credit did a participant receive for their sales transactions?*
- *How much credit did my team receive for their attainment?*
- *Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.*
- *Which of my direct reports' attainment or earnings are below the wanted performance expectation?*
- *Why wasn't I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.*
- *What is the total quota across the organization by performance measure for the period or across periods?*
- *Which participants are assigned to a given pay group?*

- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*

- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *How are the Partners classified?*
- *How many Programs were created in the last quarter?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *What type of assignment does a participant have to a plan?*
- *Does the participant have an individualized target incentive for the plan?*
- *Are we on track in achieving quota this period or quarter?*
- *How are these targets individualized across the participants.*
- *What are the targets and goals settings for an individual?*
- *What is the total quota by performance measure for the interval across the organization?*
- *What pay groups are in the application? What are their types and descriptions?*
- *What are the criteria for a rule including the inherited criteria from the ancestors?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *How many emails are we receiving over time?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*

- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*

- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*
- *What is the average deal size by Product groups?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *Are participants correctly credited?*
- *What are my compensation plan incentive targets?*
- *Are my individualized performance measure goals set properly?*
- *Who is assigned to a given plan?*
- *As a participant manager, what are the targets and goals settings for my direct reports?*
- *What is the participant's home currency or cost center?*
- *Is the participant active? And for which dates?*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*

- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*

- *What are the open Opportunities associated to a given Partner?*
- *What is the number of leads by partners for a specific product group?*
- *What is the distribution of Partner Opportunities by sales stages?*
- *How many Partners is a Contact is associated to?*
- *What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?*
- *How many Enrollments are going o expire in the next quarter?*
- *What are the Programs that Partners have enrolled into?*
- *How many Programs are owned by the team with their expiration date?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Has the participant accepted the assignment to the plan?*
- *How do they compare to the base goals set on the measure?*
- *What is the total quota across the organization by performance measure for the interval?*
- *As a participant manager, which pay groups do my direct reports belong to?*
- *What is my cost of compensation by participant, plan component, plan, and frequencies?*
- *How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?*
- *How do participants' plan component earnings compare with their personalized target incentives?*
- *Do I have to realign quota based on current attainment levels?*
- *What is the total quota by performance measure for the period across the organization? Validate quota levels.*
- *What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*

- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What is the revenue generated by Partners per Customer?*
- *What are the number of Partner contacts by Partner?*
- *What is the number of Partner Contacts that are also resources and users?*

- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *What are the assignment start and end dates for a participant?*
- *How do these targets break down by plan component?*
- *Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.*
- *What is the status of each paysheet within the payment batches?*
- *What are the rules effective as of the given date in the hierarchy?*
- *What are the results of the collected transactions before the crediting process?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*
- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*

- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *What are the top ten Partners by Revenue during the past quarter/year?*
- *What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? Submitted e.g. Partner Performance?*
- *What are the Partners created in the system for a given time period?*
- *How many Enrollments were created/submitted/expired/terminated in the last month?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Corporate Marketing Manager

Code Name

ORA_MKT_CORPORATE_MARKETING_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Marketing Corporate Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *Marketing - CRM Leads*
- *Marketing - CRM Leads and Opportunities Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *What are the top 10 products associated to the Leads in the system?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *How many Leads are associated for a given Opportunity?*
- *What are the sources of the Leads created in the current quarter?*
- *What are the Leads that are converted into Opportunities?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How many Leads are unassigned in the system?*
- *How many Opportunities were created from a given Lead?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *Who are the top Sales representatives by their Lead conversion ratio?*

Customer Contract Administrator

Code Name

ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

- *Enterprise Contracts Transaction Analysis Duty Role*

Subject Areas

This job role secures access to the following subject areas:

- *Enterprise Contracts - Contracts Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How is my contract team loaded?*
- *Show me all the contracts that have a nonstandard clause.*
- *What contracts have a specific policy deviation?*
- *Which contracts are related to my given contract?*
- *How many days on average did a resource work on a contract assigned to them in the last quarter?*
- *What's the primary reason for contract closure in the last year?*
- *How many contracts might get affected if I modify the Payment clause?*
- *Show me all the contracts that have a particular deliverable due.*
- *How many days on average did a resource organization work on a contract assigned to them in the last quarter?*
- *Show me the user status progression for contracts within a given date range.*

Customer Contract Manager

Code Name

ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Enterprise Contracts Transaction Analysis Duty Role*

Subject Areas

This job role secures access to the following subject areas:

- *Enterprise Contracts - Contracts Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How is my contract team loaded?*
- *Show me all the contracts that have a nonstandard clause.*
- *What contracts have a specific policy deviation?*
- *Which contracts are related to my given contract?*
- *How many days on average did a resource work on a contract assigned to them in the last quarter?*
- *What's the primary reason for contract closure in the last year?*
- *How many contracts might get affected if I modify the Payment clause?*
- *Show me all the contracts that have a particular deliverable due.*
- *How many days on average did a resource organization work on a contract assigned to them in the last quarter?*
- *Show me the user status progression for contracts within a given date range.*

Customer Contract Team Member

Code Name

ORA_OKC_CUSTOMER_CONTRACT_TEAM_MEMBER_ABSTRACT

Duty Roles

This job role is related to the following duty roles:

- *Enterprise Contracts Transaction Analysis Duty Role*

Subject Areas

This job role secures access to the following subject areas:

- *Enterprise Contracts - Contracts Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How is my contract team loaded?*
- *Show me all the contracts that have a nonstandard clause.*
- *What contracts have a specific policy deviation?*

- *Which contracts are related to my given contract?*
- *How many days on average did a resource work on a contract assigned to them in the last quarter?*
- *What's the primary reason for contract closure in the last year?*
- *How many contracts might get affected if I modify the Payment clause?*
- *Show me all the contracts that have a particular deliverable due.*
- *How many days on average did a resource organization work on a contract assigned to them in the last quarter?*
- *Show me the user status progression for contracts within a given date range.*

Customer Relationship Management Application Administrator

Code Name

ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

- *Service Administrative Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*

- *CRM - CRM Work Orders Real Time*
- *CRM/Help Desk - Case Action Plan Actions Real Time*
- *CRM/Help Desk - Case Management Real Time*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*

- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *Which of my team's cases have been open for more than 15 days?*
- *When was the last, a SmartText was used?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*

- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*

- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *What Smarttexts have not been used even once?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *How many emails are we receiving over time?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *How many interactions, on average, does it require to resolve an issue?*

- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *What are the cases that have not updated a case in the past 10 days? Who owns them?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*

- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *What are the cases that have not been actioned since reopening?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What is the breakdown of open action plans by Action Plan Action Owner?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *On an average, how many days do each of my team members take to close a case?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*

Customer Service Manager

Code Name

ORA_SVC_CUSTOMER_SERVICE_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Service Managerial Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*

- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*

- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *When was the last, a SmartText was used?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*

- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *What Smarttexts have not been used even once?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *How many emails are we receiving over time?*
- *What are the associated activities related to my upcoming appointment and task?*

- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*

- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*

- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*

Customer Service Representative

Code Name

ORA_SVC_CUSTOMER_SERVICE_REPRESENTATIVE_JOB

Duty Roles

This job role is related to the following duty roles:

- *Service Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*

- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *How do interactions affect the progression of leads through the sales funnel?*

- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *When was the last, a SmartText was used?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*

- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *What Smarttexts have not been used even once?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*

- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*

- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*

- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*

Enterprise Contract Administrator

Code Name

ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

- *Enterprise Contracts Transaction Analysis Duty Role*

Subject Areas

This job role secures access to the following subject areas:

- *Enterprise Contracts - Contracts Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How is my contract team loaded?*

- *Show me all the contracts that have a nonstandard clause.*
- *What contracts have a specific policy deviation?*
- *Which contracts are related to my given contract?*
- *How many days on average did a resource work on a contract assigned to them in the last quarter?*
- *What's the primary reason for contract closure in the last year?*
- *How many contracts might get affected if I modify the Payment clause?*
- *Show me all the contracts that have a particular deliverable due.*
- *How many days on average did a resource organization work on a contract assigned to them in the last quarter?*
- *Show me the user status progression for contracts within a given date range.*

Enterprise Contract Manager

Code Name

ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Enterprise Contracts Transaction Analysis Duty Role*

Subject Areas

This job role secures access to the following subject areas:

- *Enterprise Contracts - Contracts Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How is my contract team loaded?*
- *Show me all the contracts that have a nonstandard clause.*
- *What contracts have a specific policy deviation?*
- *Which contracts are related to my given contract?*
- *How many days on average did a resource work on a contract assigned to them in the last quarter?*
- *What's the primary reason for contract closure in the last year?*

- *How many contracts might get affected if I modify the Payment clause?*
- *Show me all the contracts that have a particular deliverable due.*
- *How many days on average did a resource organization work on a contract assigned to them in the last quarter?*
- *Show me the user status progression for contracts within a given date range.*

Enterprise Contract Team Member

Code Name

ORA_OKC_ENTERPRISE_CONTRACT_TEAM_MEMBER_ABSTRACT

Duty Roles

This job role is related to the following duty roles:

- *Enterprise Contracts Transaction Analysis Duty Role*

Subject Areas

This job role secures access to the following subject areas:

- *Enterprise Contracts - Contracts Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How is my contract team loaded?*
- *Show me all the contracts that have a nonstandard clause.*
- *What contracts have a specific policy deviation?*
- *Which contracts are related to my given contract?*
- *How many days on average did a resource work on a contract assigned to them in the last quarter?*
- *What's the primary reason for contract closure in the last year?*
- *How many contracts might get affected if I modify the Payment clause?*
- *Show me all the contracts that have a particular deliverable due.*
- *How many days on average did a resource organization work on a contract assigned to them in the last quarter?*
- *Show me the user status progression for contracts within a given date range.*

Human Resource Help Desk Administrator

Code Name

ORA_SVC_HUMAN_RESOURCE_HELP_DESK_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

- *HR Help Desk Administrator Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activity Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Help Desk - HR Service Requests Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the HR SRs that are waiting on my customers?*
- *What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*

- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *What are the open critical HR SRs that my team is working on currently? How many of these are escalated?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*

- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *How many emails are we receiving over time?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *Who are my agents that have the most pending HR SRs?*
- *What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*

- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *What are the average handle times?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*

- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*

Human Resource Help Desk Agent

Code Name

ORA_SVC_HUMAN_RESOURCE_HELP_DESK_AGENT_JOB

Duty Roles

This job role is related to the following duty roles:

- *HR Help Desk Agent Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activity Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*

- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Help Desk - HR Service Requests Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the HR SRs that are waiting on my customers?*
- *What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*

- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *What are the open critical HR SRs that my team is working on currently? How many of these are escalated?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*

- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *What is the average length of time of an interaction, by agent and channel?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*

- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *Who are my agents that have the most pending HR SRs?*
- *What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *What are the rates for agents declining work offers?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *What are the average handle times?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*

- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*

Human Resource Help Desk Manager

Code Name

ORA_SVC_HUMAN_RESOURCE_HELP_DESK_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *HR Help Desk Manager Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activity Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Help Desk - HR Service Requests Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*

- *Are agents making themselves available for certain channels and not for others?*
- *What are the HR SRs that are waiting on my customers?*
- *What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*

- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *What are the open critical HR SRs that my team is working on currently? How many of these are escalated?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*

- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *How many emails are we receiving over time?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *Who are my agents that have the most pending HR SRs?*
- *What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*

- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *What are the average handle times?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*

- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*

IT Security Manager

Code Name

ORA_FND_IT_SECURITY_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *OTBI Performance Transactional Analysis Duty*
- *OTBI Usage Transactional Analysis Duty*
- *Security Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *OTBI Performance Real Time*
- *OTBI Usage Real Time*
- *Security - Audit Real Time*
- *Security - Roles and Privileges Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *What are the most commonly used OTBI subject areas?*
- *What are the least-used OTBI subject areas?*
- *Which subject areas have large data volume?*
- *Who are the top OTBI users?*
- *How many ad-hoc OTBI analyses have been run in the past month?*
- *Can I view and edit a particular page? If yes, which functional security policy do I need to provide to a user who needs similar access?*

- *Which analyses reached OTBI max row limit?*
- *What is the database SQL execution time and row count?*
- *What is the weekly OTBI analysis usage trend?*
- *Which roles were added with a specific functional security policy, and who added them?*
- *Which analyses have low usage because of poor performance?*
- *What is the execution history of dashboard X in the past month?*
- *How many OTBI SOAP web services have been run in the past month?*
- *What are all the data security privileges that a specific user added?*
- *Why am I not able to view certain subject areas with my login credentials?*
- *Which analyses have the longest response time?*
- *Which analyses have high data row count?*
- *How many users run OTBI analyses?*
- *How many custom OTBI analyses have been run in the past month?*
- *Which analyses have low usage in the past month?*
- *Which subject areas have slow performance?*
- *How many predefined OTBI analyses have been run in the past month?*
- *Which data security policy would provide access to the data I need to see?*
- *What are the long-running analyses in the past month?*
- *What is the OTBI execution time histogram in the past month?*
- *What are the most frequently-run OTBI analyses?*
- *I have not added a specific role to a user, but the user seems to have this job role. Can I trace how has this been inherited by the user?*
- *What are the common execution errors in the past month?*
- *How many analyses and dashboards failed in the past month?*

Incentive Compensation Analyst

Code Name

ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB

Duty Roles

This job role is related to the following duty roles:

- *Incentive Compensation Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *Incentive Compensation - Attainments Real Time*
- *Incentive Compensation - Compensation Plan Assignments Real Time*
- *Incentive Compensation - Credits Real Time*
- *Incentive Compensation - Disputes Real Time*
- *Incentive Compensation - Earning and Attainment Summary Real Time*
- *Incentive Compensation - Earnings Real Time*
- *Incentive Compensation - Participant Balances Real Time*
- *Incentive Compensation - Participant Compensation Plan Real Time*
- *Incentive Compensation - Participant Detail Real Time*
- *Incentive Compensation - Participant Interval Goals Real Time*
- *Incentive Compensation - Participant Period Goals Real Time*
- *Incentive Compensation - Pay Group Assignments Real Time*
- *Incentive Compensation - Payments Real Time*
- *Incentive Compensation - Paysheet Summary Real Time*
- *Incentive Compensation - Performance and Earnings Summary Real Time*
- *Incentive Compensation - Rules Real Time*
- *Incentive Compensation - Transactions Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Were there credit or rollup errors that must be fixed?*
- *Is the dispute load balanced between my analysts? Asked by compensation managers.*
- *Who got paid what amount and from where, at the detail level?*
- *What is the total quota by performance measure for the period across the organization?*
- *What is the current status of the payment batches? Are they paid, reviewed, or frozen?*
- *How does the performance measure attainment compare with a participant's personalized goal across his directs?*
- *What are the various attainment attributes associated with my credits?*
- *To what country and business unit does the participant belong?*
- *Which participants are assigned to which plans?*
- *When was a given participant assigned to a specific pay group?*
- *What are the credit rules which a credit receiver is assigned to?*

- *How much credit did a participant receive for their sales transactions?*
- *How much credit did my team receive for their attainment?*
- *Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.*
- *Which of my direct reports' attainment or earnings are below the wanted performance expectation?*
- *Why wasn't I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.*
- *What is the total quota across the organization by performance measure for the period or across periods?*
- *Which participants are assigned to a given pay group?*
- *What type of assignment does a participant have to a plan?*
- *Does the participant have an individualized target incentive for the plan?*
- *Are we on track in achieving quota this period or quarter?*
- *How are these targets individualized across the participants.*
- *What are the targets and goals settings for an individual?*
- *What is the total quota by performance measure for the interval across the organization?*
- *What pay groups are in the application? What are their types and descriptions?*
- *What are the criteria for a rule including the inherited criteria from the ancestors?*
- *Are participants correctly credited?*
- *What are my compensation plan incentive targets?*
- *Are my individualized performance measure goals set properly?*
- *Who is assigned to a given plan?*
- *As a participant manager, what are the targets and goals settings for my direct reports?*
- *What is the participant's home currency or cost center?*
- *Is the participant active? And for which dates?*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching?*
- *Has the participant accepted the assignment to the plan?*
- *How do they compare to the base goals set on the measure?*
- *What is the total quota across the organization by performance measure for the interval?*
- *As a participant manager, which pay groups do my direct reports belong to?*
- *What is my cost of compensation by participant, plan component, plan, and frequencies?*
- *How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?*
- *How do participants' plan component earnings compare with their personalized target incentives?*
- *Do I have to realign quota based on current attainment levels?*

- *What is the total quota by performance measure for the period across the organization? Validate quota levels.*
- *What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?*
- *What are the assignment start and end dates for a participant?*
- *How do these targets break down by plan component?*
- *Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.*
- *What is the status of each paysheet within the payment batches?*
- *What are the rules effective as of the given date in the hierarchy?*
- *What are the results of the collected transactions before the crediting process?*

Incentive Compensation Manager

Code Name

ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Incentive Compensation Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *Incentive Compensation - Attainments Real Time*
- *Incentive Compensation - Compensation Plan Assignments Real Time*
- *Incentive Compensation - Credits Real Time*
- *Incentive Compensation - Disputes Real Time*
- *Incentive Compensation - Earning and Attainment Summary Real Time*
- *Incentive Compensation - Earnings Real Time*
- *Incentive Compensation - Participant Balances Real Time*
- *Incentive Compensation - Participant Compensation Plan Real Time*
- *Incentive Compensation - Participant Detail Real Time*
- *Incentive Compensation - Participant Interval Goals Real Time*
- *Incentive Compensation - Participant Period Goals Real Time*

- *Incentive Compensation - Pay Group Assignments Real Time*
- *Incentive Compensation - Payments Real Time*
- *Incentive Compensation - Paysheet Summary Real Time*
- *Incentive Compensation - Performance and Earnings Summary Real Time*
- *Incentive Compensation - Rules Real Time*
- *Incentive Compensation - Transactions Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Were there credit or rollup errors that must be fixed?*
- *Is the dispute load balanced between my analysts? Asked by compensation managers.*
- *Who got paid what amount and from where, at the detail level?*
- *What is the total quota by performance measure for the period across the organization?*
- *What is the current status of the payment batches? Are they paid, reviewed, or frozen?*
- *How does the performance measure attainment compare with a participant's personalized goal across his directs?*
- *What are the various attainment attributes associated with my credits?*
- *To what country and business unit does the participant belong?*
- *Which participants are assigned to which plans?*
- *When was a given participant assigned to a specific pay group?*
- *What are the credit rules which a credit receiver is assigned to?*
- *How much credit did a participant receive for their sales transactions?*
- *How much credit did my team receive for their attainment?*
- *Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.*
- *Which of my direct reports' attainment or earnings are below the wanted performance expectation?*
- *Why wasn't I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.*
- *What is the total quota across the organization by performance measure for the period or across periods?*
- *Which participants are assigned to a given pay group?*
- *What type of assignment does a participant have to a plan?*
- *Does the participant have an individualized target incentive for the plan?*
- *Are we on track in achieving quota this period or quarter?*
- *How are these targets individualized across the participants.*
- *What are the targets and goals settings for an individual?*
- *What is the total quota by performance measure for the interval across the organization?*
- *What pay groups are in the application? What are their types and descriptions?*

- *What are the criteria for a rule including the inherited criteria from the ancestors?*
- *Are participants correctly credited?*
- *What are my compensation plan incentive targets?*
- *Are my individualized performance measure goals set properly?*
- *Who is assigned to a given plan?*
- *As a participant manager, what are the targets and goals settings for my direct reports?*
- *What is the participant's home currency or cost center?*
- *Is the participant active? And for which dates?*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching?*
- *Has the participant accepted the assignment to the plan?*
- *How do they compare to the base goals set on the measure?*
- *What is the total quota across the organization by performance measure for the interval?*
- *As a participant manager, which pay groups do my direct reports belong to?*
- *What is my cost of compensation by participant, plan component, plan, and frequencies?*
- *How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?*
- *How do participants' plan component earnings compare with their personalized target incentives?*
- *Do I have to realign quota based on current attainment levels?*
- *What is the total quota by performance measure for the period across the organization? Validate quota levels.*
- *What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?*
- *What are the assignment start and end dates for a participant?*
- *How do these targets break down by plan component?*
- *Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.*
- *What is the status of each paysheet within the payment batches?*
- *What are the rules effective as of the given date in the hierarchy?*
- *What are the results of the collected transactions before the crediting process?*

Incentive Compensation Participant

Code Name

ORA_CN_INCENTIVE_COMPENSATION_PARTICIPANT_ABSTRACT

Duty Roles

This job role is related to the following duty roles:

- *Incentive Compensation Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *Incentive Compensation - Attainments Real Time*
- *Incentive Compensation - Compensation Plan Assignments Real Time*
- *Incentive Compensation - Credits Real Time*
- *Incentive Compensation - Disputes Real Time*
- *Incentive Compensation - Earning and Attainment Summary Real Time*
- *Incentive Compensation - Earnings Real Time*
- *Incentive Compensation - Participant Balances Real Time*
- *Incentive Compensation - Participant Compensation Plan Real Time*
- *Incentive Compensation - Participant Detail Real Time*
- *Incentive Compensation - Participant Interval Goals Real Time*
- *Incentive Compensation - Participant Period Goals Real Time*
- *Incentive Compensation - Pay Group Assignments Real Time*
- *Incentive Compensation - Payments Real Time*
- *Incentive Compensation - Paysheet Summary Real Time*
- *Incentive Compensation - Performance and Earnings Summary Real Time*
- *Incentive Compensation - Rules Real Time*
- *Incentive Compensation - Transactions Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Were there credit or rollup errors that must be fixed?*
- *Is the dispute load balanced between my analysts? Asked by compensation managers.*
- *Who got paid what amount and from where, at the detail level?*
- *What is the total quota by performance measure for the period across the organization?*
- *What is the current status of the payment batches? Are they paid, reviewed, or frozen?*

- *How does the performance measure attainment compare with a participant's personalized goal across his directs?*
- *What are the various attainment attributes associated with my credits?*
- *To what country and business unit does the participant belong?*
- *Which participants are assigned to which plans?*
- *When was a given participant assigned to a specific pay group?*
- *What are the credit rules which a credit receiver is assigned to?*
- *How much credit did a participant receive for their sales transactions?*
- *How much credit did my team receive for their attainment?*
- *Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.*
- *Which of my direct reports' attainment or earnings are below the wanted performance expectation?*
- *Why wasn't I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.*
- *What is the total quota across the organization by performance measure for the period or across periods?*
- *Which participants are assigned to a given pay group?*
- *What type of assignment does a participant have to a plan?*
- *Does the participant have an individualized target incentive for the plan?*
- *Are we on track in achieving quota this period or quarter?*
- *How are these targets individualized across the participants.*
- *What are the targets and goals settings for an individual?*
- *What is the total quota by performance measure for the interval across the organization?*
- *What pay groups are in the application? What are their types and descriptions?*
- *What are the criteria for a rule including the inherited criteria from the ancestors?*
- *Are participants correctly credited?*
- *What are my compensation plan incentive targets?*
- *Are my individualized performance measure goals set properly?*
- *Who is assigned to a given plan?*
- *As a participant manager, what are the targets and goals settings for my direct reports?*
- *What is the participant's home currency or cost center?*
- *Is the participant active? And for which dates?*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching?*
- *Has the participant accepted the assignment to the plan?*
- *How do they compare to the base goals set on the measure?*

- *What is the total quota across the organization by performance measure for the interval?*
- *As a participant manager, which pay groups do my direct reports belong to?*
- *What is my cost of compensation by participant, plan component, plan, and frequencies?*
- *How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?*
- *How do participants' plan component earnings compare with their personalized target incentives?*
- *Do I have to realign quota based on current attainment levels?*
- *What is the total quota by performance measure for the period across the organization? Validate quota levels.*
- *What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?*
- *What are the assignment start and end dates for a participant?*
- *How do these targets break down by plan component?*
- *Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.*
- *What is the status of each paysheet within the payment batches?*
- *What are the rules effective as of the given date in the hierarchy?*
- *What are the results of the collected transactions before the crediting process?*

Incentive Compensation Participant Manager

Code Name

ORA_CN_INCENTIVE_COMPENSATION_PARTICIPANT_MANAGER_ABSTRACT

Duty Roles

This job role is related to the following duty roles:

- *Incentive Compensation Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *Incentive Compensation - Attainments Real Time*
- *Incentive Compensation - Compensation Plan Assignments Real Time*
- *Incentive Compensation - Credits Real Time*
- *Incentive Compensation - Disputes Real Time*

- *Incentive Compensation - Earning and Attainment Summary Real Time*
- *Incentive Compensation - Earnings Real Time*
- *Incentive Compensation - Participant Balances Real Time*
- *Incentive Compensation - Participant Compensation Plan Real Time*
- *Incentive Compensation - Participant Detail Real Time*
- *Incentive Compensation - Participant Interval Goals Real Time*
- *Incentive Compensation - Participant Period Goals Real Time*
- *Incentive Compensation - Pay Group Assignments Real Time*
- *Incentive Compensation - Payments Real Time*
- *Incentive Compensation - Paysheet Summary Real Time*
- *Incentive Compensation - Performance and Earnings Summary Real Time*
- *Incentive Compensation - Rules Real Time*
- *Incentive Compensation - Transactions Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Were there credit or rollup errors that must be fixed?*
- *Is the dispute load balanced between my analysts? Asked by compensation managers.*
- *Who got paid what amount and from where, at the detail level?*
- *What is the total quota by performance measure for the period across the organization?*
- *What is the current status of the payment batches? Are they paid, reviewed, or frozen?*
- *How does the performance measure attainment compare with a participant's personalized goal across his directs?*
- *What are the various attainment attributes associated with my credits?*
- *To what country and business unit does the participant belong?*
- *Which participants are assigned to which plans?*
- *When was a given participant assigned to a specific pay group?*
- *What are the credit rules which a credit receiver is assigned to?*
- *How much credit did a participant receive for their sales transactions?*
- *How much credit did my team receive for their attainment?*
- *Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.*
- *Which of my direct reports' attainment or earnings are below the wanted performance expectation?*
- *Why wasn't I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.*
- *What is the total quota across the organization by performance measure for the period or across periods?*

- *Which participants are assigned to a given pay group?*
- *What type of assignment does a participant have to a plan?*
- *Does the participant have an individualized target incentive for the plan?*
- *Are we on track in achieving quota this period or quarter?*
- *How are these targets individualized across the participants.*
- *What are the targets and goals settings for an individual?*
- *What is the total quota by performance measure for the interval across the organization?*
- *What pay groups are in the application? What are their types and descriptions?*
- *What are the criteria for a rule including the inherited criteria from the ancestors?*
- *Are participants correctly credited?*
- *What are my compensation plan incentive targets?*
- *Are my individualized performance measure goals set properly?*
- *Who is assigned to a given plan?*
- *As a participant manager, what are the targets and goals settings for my direct reports?*
- *What is the participant's home currency or cost center?*
- *Is the participant active? And for which dates?*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching?*
- *Has the participant accepted the assignment to the plan?*
- *How do they compare to the base goals set on the measure?*
- *What is the total quota across the organization by performance measure for the interval?*
- *As a participant manager, which pay groups do my direct reports belong to?*
- *What is my cost of compensation by participant, plan component, plan, and frequencies?*
- *How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?*
- *How do participants' plan component earnings compare with their personalized target incentives?*
- *Do I have to realign quota based on current attainment levels?*
- *What is the total quota by performance measure for the period across the organization? Validate quota levels.*
- *What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?*
- *What are the assignment start and end dates for a participant?*
- *How do these targets break down by plan component?*
- *Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.*
- *What is the status of each paysheet within the payment batches?*

- *What are the rules effective as of the given date in the hierarchy?*
- *What are the results of the collected transactions before the crediting process?*

Incentive Compensation Plan Administrator

Code Name

ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

- *Incentive Compensation Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *Incentive Compensation - Attainments Real Time*
- *Incentive Compensation - Compensation Plan Assignments Real Time*
- *Incentive Compensation - Credits Real Time*
- *Incentive Compensation - Disputes Real Time*
- *Incentive Compensation - Earning and Attainment Summary Real Time*
- *Incentive Compensation - Earnings Real Time*
- *Incentive Compensation - Participant Balances Real Time*
- *Incentive Compensation - Participant Compensation Plan Real Time*
- *Incentive Compensation - Participant Detail Real Time*
- *Incentive Compensation - Participant Interval Goals Real Time*
- *Incentive Compensation - Participant Period Goals Real Time*
- *Incentive Compensation - Pay Group Assignments Real Time*
- *Incentive Compensation - Payments Real Time*
- *Incentive Compensation - Paysheet Summary Real Time*
- *Incentive Compensation - Performance and Earnings Summary Real Time*
- *Incentive Compensation - Rules Real Time*
- *Incentive Compensation - Transactions Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Were there credit or rollup errors that must be fixed?*
- *Is the dispute load balanced between my analysts? Asked by compensation managers.*
- *Who got paid what amount and from where, at the detail level?*
- *What is the total quota by performance measure for the period across the organization?*
- *What is the current status of the payment batches? Are they paid, reviewed, or frozen?*
- *How does the performance measure attainment compare with a participant's personalized goal across his directs?*
- *What are the various attainment attributes associated with my credits?*
- *To what country and business unit does the participant belong?*
- *Which participants are assigned to which plans?*
- *When was a given participant assigned to a specific pay group?*
- *What are the credit rules which a credit receiver is assigned to?*
- *How much credit did a participant receive for their sales transactions?*
- *How much credit did my team receive for their attainment?*
- *Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.*
- *Which of my direct reports' attainment or earnings are below the wanted performance expectation?*
- *Why wasn't I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.*
- *What is the total quota across the organization by performance measure for the period or across periods?*
- *Which participants are assigned to a given pay group?*
- *What type of assignment does a participant have to a plan?*
- *Does the participant have an individualized target incentive for the plan?*
- *Are we on track in achieving quota this period or quarter?*
- *How are these targets individualized across the participants.*
- *What are the targets and goals settings for an individual?*
- *What is the total quota by performance measure for the interval across the organization?*
- *What pay groups are in the application? What are their types and descriptions?*
- *What are the criteria for a rule including the inherited criteria from the ancestors?*
- *Are participants correctly credited?*
- *What are my compensation plan incentive targets?*
- *Are my individualized performance measure goals set properly?*
- *Who is assigned to a given plan?*
- *As a participant manager, what are the targets and goals settings for my direct reports?*

- *What is the participant's home currency or cost center?*
- *Is the participant active? And for which dates?*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching?*
- *Has the participant accepted the assignment to the plan?*
- *How do they compare to the base goals set on the measure?*
- *What is the total quota across the organization by performance measure for the interval?*
- *As a participant manager, which pay groups do my direct reports belong to?*
- *What is my cost of compensation by participant, plan component, plan, and frequencies?*
- *How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?*
- *How do participants' plan component earnings compare with their personalized target incentives?*
- *Do I have to realign quota based on current attainment levels?*
- *What is the total quota by performance measure for the period across the organization? Validate quota levels.*
- *What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?*
- *What are the assignment start and end dates for a participant?*
- *How do these targets break down by plan component?*
- *Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.*
- *What is the status of each paysheet within the payment batches?*
- *What are the rules effective as of the given date in the hierarchy?*
- *What are the results of the collected transactions before the crediting process?*

Internal Help Desk Administrator

Code Name

ORA_SVC_INTERNAL_HELP_DESK_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

- *Internal Help Desk Administrator Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM/Help Desk - Case Management Real Time*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Help Desk - Internal Help Desk Queue Resources Real Time*
- *Help Desk - Internal Service Request Action Plan Actions Real Time*
- *Help Desk - Internal Service Request Conversation Messages Real Time*
- *Help Desk - Internal Service Request Messages Real Time*
- *Help Desk - Internal Service Request Relationships Real Time*
- *Help Desk - Internal Service Request Resource Real Time*
- *Help Desk - Internal Service Request Summary*
- *Help Desk - Internal Service Requests Lifecycle*
- *Help Desk - Internal Service Requests Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Are agents making themselves available for certain channels and not for others?*
- *What are the Internal SRs waiting on my customers?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *How many emails came from known versus unknown contacts?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *Was the assigned agent overloaded with other work?*
- *How are we doing on Internal SR resolution times between current and past months? What are the reasons for any degradations?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the status of our aging SRs? Are there any outliers that require intervention?*
- *Which of my team's cases have been open for more than 15 days?*
- *When was the last, a SmartText was used?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How long is it taking for offers to be made to agents?*

- *What is the current distribution of active and inactive agents across queues?*
- *Was an Help Desk request sitting in a queue longer than the average time for all other SRs?*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *What is the impact of linking knowledge articles to Help Desk Requests? Has it led to reduced Request resolution times and reopenings?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *What is the incidence of participation of my resource team in Internal Help Desk Requests over a period? How many open Requests are they a part of, presently?*
- *What are the help desk requests that are waiting for an agent response?*
- *Do we see any patterns in message traffic and resolution times?*
- *What Smarttexts have not been used even once?*
- *What are the Cases (target) 'blocked by' this particular Request (source)?*
- *What Internal Help Desk request, if resolved, will also resolve my dependent requests?*
- *What are the most popular channels used for internal conversations?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Show me all the conversation messages together with the conversation message subject and body and the sender and recipient details for a focused set of requests*
- *How many emails are we receiving over time?*
- *As an agent am I spreading myself too thin by being part of one too many Internal Help Desk Request teams?*
- *How long was an Help Desk request unassigned and how long did it sit in each queue?*
- *Was the Help Desk request queue modified or the Help Desk request resource owner modified at any point?*
- *Do some Help Desk request categories imply higher difficulties (going by the actual time agents spend on such Help Desk requests)?*
- *Who are my agents that have the most pending Internal SRs?*
- *Are we seeing an increasing trend of blocking issues limiting speedy resolution of Internal Help Desk Requests?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What Request categories have a higher percentage of non-compliant Help Desk Requests open?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *For a given service queue, how many agents are available to take chats?*
- *How long did it take to assign the Help Desk request to the correct queue?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents, and so on?*
- *Was the assigned agent overloaded with other work (based on the average number of Help desk Requests assigned to the agent)?*

- *What are the cases that have not updated a case in the past 10 days? Who owns them?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *Can the variation in Help Desk Request resolution times between team members be attributable to sub-optimal queue assignments?*
- *Where are the outliers when it comes to compliance?*
- *What is the incidence of agents linking knowledge articles to Help Desk Requests?*
- *How many Internal SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are critical?*
- *What are the average handle times?*
- *What are the open critical Internal SRs that my team is working on currently? How many of these are escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *What are the cases that have not been actioned since reopening?*
- *What Internal Help Desk Requests escalate the Requests assigned to my team?*
- *Is there scope for a better resource load balance keeping in consideration the Help Desk Request throughput across queues?*
- *By being part of the Internal Help Desk Request team, how many Request resolutions has my resource team been able to influence during the past period?*
- *Do we see a pattern in the average number of messages per closed Help Desk Request going up in recent months? What factors are contributing to this surge?*
- *Did the Help Desk request get assigned to the wrong queue/team?*
- *Did the Help Desk request have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *How many Internal SRs have been waiting on my agents action for more than 24 hours? Which of these are critical or escalated?*
- *What is the reopen rate for Internal SRs owned by my team? Who has the highest reopen rate? Is there a training issue?*
- *On an average, how many days do each of my team members take to close a case?*
- *How many Requests are blocked by this open Internal HelpD esk Request?*
- *Are internal conversations taking place across high cost channels?*

Internal Help Desk Agent

Code Name

ORA_SVC_INTERNAL_HELP_DESK_AGENT_JOB

Duty Roles

This job role is related to the following duty roles:

- *Internal Help Desk Agent Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Help Desk - Internal Help Desk Queue Resources Real Time*
- *Help Desk - Internal Service Request Action Plan Actions Real Time*
- *Help Desk - Internal Service Request Conversation Messages Real Time*
- *Help Desk - Internal Service Request Messages Real Time*
- *Help Desk - Internal Service Request Relationships Real Time*
- *Help Desk - Internal Service Request Resource Real Time*
- *Help Desk - Internal Service Request Summary*
- *Help Desk - Internal Service Requests Lifecycle*
- *Help Desk - Internal Service Requests Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Are agents making themselves available for certain channels and not for others?*
- *What are the Internal SRs waiting on my customers?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *Was the assigned agent overloaded with other work?*
- *How are we doing on Internal SR resolution times between current and past months? What are the reasons for any degradations?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the status of our aging SRs? Are there any outliers that require intervention?*
- *When was the last, a SmartText was used?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How long is it taking for offers to be made to agents?*
- *What is the current distribution of active and inactive agents across queues?*

- *Was an Help Desk request sitting in a queue longer than the average time for all other SRs?*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *What is the impact of linking knowledge articles to Help Desk Requests? Has it led to reduced Request resolution times and reopenings?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *What is the incidence of participation of my resource team in Internal Help Desk Requests over a period? How many open Requests are they a part of, presently?*
- *What are the help desk requests that are waiting for an agent response?*
- *Do we see any patterns in message traffic and resolution times?*
- *What Smarttexts have not been used even once?*
- *What are the Cases (target) 'blocked by' this particular Request (source)?*
- *What Internal Help Desk request, if resolved, will also resolve my dependent requests?*
- *What are the most popular channels used for internal conversations?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Show me all the conversation messages together with the conversation message subject and body and the sender and recipient details for a focused set of requests*
- *As an agent am I spreading myself too thin by being part of one too many Internal Help Desk Request teams?*
- *How long was an Help Desk request unassigned and how long did it sit in each queue?*
- *Was the Help Desk request queue modified or the Help Desk request resource owner modified at any point?*
- *Do some Help Desk request categories imply higher difficulties (going by the actual time agents spend on such Help Desk requests)?*
- *Who are my agents that have the most pending Internal SRs?*
- *Are we seeing an increasing trend of blocking issues limiting speedy resolution of Internal Help Desk Requests?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What Request categories have a higher percentage of non-compliant Help Desk Requests open?*
- *What are the rates for agents declining work offers?*
- *For a given service queue, how many agents are available to take chats?*
- *How long did it take to assign the Help Desk request to the correct queue?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents, and so on?*
- *Was the assigned agent overloaded with other work (based on the average number of Help desk Requests assigned to the agent)?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *Can the variation in Help Desk Request resolution times between team members be attributable to sub-optimal queue assignments?*
- *Where are the outliers when it comes to compliance?*
- *What is the incidence of agents linking knowledge articles to Help Desk Requests?*

- *How many Internal SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are critical?*
- *What are the average handle times?*
- *What are the open critical Internal SRs that my team is working on currently? How many of these are escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *What Internal Help Desk Requests escalate the Requests assigned to my team?*
- *Is there scope for a better resource load balance keeping in consideration the Help Desk Request throughput across queues?*
- *By being part of the Internal Help Desk Request team, how many Request resolutions has my resource team been able to influence during the past period?*
- *Do we see a pattern in the average number of messages per closed Help Desk Request going up in recent months? What factors are contributing to this surge?*
- *Did the Help Desk request get assigned to the wrong queue/team?*
- *Did the Help Desk request have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *How many Internal SRs have been waiting on my agents action for more than 24 hours? Which of these are critical or escalated?*
- *What is the reopen rate for Internal SRs owned by my team? Who has the highest reopen rate? Is there a training issue?*
- *How many Requests are blocked by this open Internal HelpD esk Request?*
- *Are internal conversations taking place across high cost channels?*

Internal Help Desk Manager

Code Name

ORA_SVC_INTERNAL_HELP_DESK_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Internal Help Desk Manager Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM/Help Desk - Inbound Messages Real Time*

- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Help Desk - Internal Help Desk Queue Resources Real Time*
- *Help Desk - Internal Service Request Action Plan Actions Real Time*
- *Help Desk - Internal Service Request Conversation Messages Real Time*
- *Help Desk - Internal Service Request Messages Real Time*
- *Help Desk - Internal Service Request Relationships Real Time*
- *Help Desk - Internal Service Request Resource Real Time*
- *Help Desk - Internal Service Request Summary*
- *Help Desk - Internal Service Requests Lifecycle*
- *Help Desk - Internal Service Requests Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Are agents making themselves available for certain channels and not for others?*
- *What are the Internal SRs waiting on my customers?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *How many emails came from known versus unknown contacts?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *Was the assigned agent overloaded with other work?*
- *How are we doing on Internal SR resolution times between current and past months? What are the reasons for any degradations?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the status of our aging SRs? Are there any outliers that require intervention?*
- *When was the last, a SmartText was used?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How long is it taking for offers to be made to agents?*
- *What is the current distribution of active and inactive agents across queues?*
- *Was an Help Desk request sitting in a queue longer than the average time for all other SRs?*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *What is the impact of linking knowledge articles to Help Desk Requests? Has it led to reduced Request resolution times and reopenings?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*

- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *What is the incidence of participation of my resource team in Internal Help Desk Requests over a period? How many open Requests are they a part of, presently?*
- *What are the help desk requests that are waiting for an agent response?*
- *Do we see any patterns in message traffic and resolution times?*
- *What Smarttexts have not been used even once?*
- *What are the Cases (target) 'blocked by' this particular Request (source)?*
- *What Internal Help Desk request, if resolved, will also resolve my dependent requests?*
- *What are the most popular channels used for internal conversations?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Show me all the conversation messages together with the conversation message subject and body and the sender and recipient details for a focused set of requests*
- *How many emails are we receiving over time?*
- *As an agent am I spreading myself too thin by being part of one too many Internal Help Desk Request teams?*
- *How long was an Help Desk request unassigned and how long did it sit in each queue?*
- *Was the Help Desk request queue modified or the Help Desk request resource owner modified at any point?*
- *Do some Help Desk request categories imply higher difficulties (going by the actual time agents spend on such Help Desk requests)?*
- *Who are my agents that have the most pending Internal SRs?*
- *Are we seeing an increasing trend of blocking issues limiting speedy resolution of Internal Help Desk Requests?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What Request categories have a higher percentage of non-compliant Help Desk Requests open?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *For a given service queue, how many agents are available to take chats?*
- *How long did it take to assign the Help Desk request to the correct queue?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents, and so on?*
- *Was the assigned agent overloaded with other work (based on the average number of Help desk Requests assigned to the agent)?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *Can the variation in Help Desk Request resolution times between team members be attributable to sub-optimal queue assignments?*
- *Where are the outliers when it comes to compliance?*
- *What is the incidence of agents linking knowledge articles to Help Desk Requests?*
- *How many Internal SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are critical?*

- *What are the average handle times?*
- *What are the open critical Internal SRs that my team is working on currently? How many of these are escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *What Internal Help Desk Requests escalate the Requests assigned to my team?*
- *Is there scope for a better resource load balance keeping in consideration the Help Desk Request throughput across queues?*
- *By being part of the Internal Help Desk Request team, how many Request resolutions has my resource team been able to influence during the past period?*
- *Do we see a pattern in the average number of messages per closed Help Desk Request going up in recent months? What factors are contributing to this surge?*
- *Did the Help Desk request get assigned to the wrong queue/team?*
- *Did the Help Desk request have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *How many Internal SRs have been waiting on my agents action for more than 24 hours? Which of these are critical or escalated?*
- *What is the reopen rate for Internal SRs owned by my team? Who has the highest reopen rate? Is there a training issue?*
- *How many Requests are blocked by this open Internal HelpD esk Request?*
- *Are internal conversations taking place across high cost channels?*

Knowledge Analyst

Code Name

ORA_CSO_KNOWLEDGE_ANALYST_JOB

Duty Roles

This job role is related to the following duty roles:

- *Knowledge Management Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *Knowledge Management - Article Category Real Time*
- *Knowledge Management - Article Links Real Time*
- *Knowledge Management - Article Product Real Time*

- *Knowledge Management - Article Rating Real Time*
- *Knowledge Management - Article Real Time*
- *Knowledge Management - Article Search Historical*
- *Knowledge Management - Article Search Question Tokens Historical*
- *Knowledge Management - Article Search Questions Historical*
- *Knowledge Management - Article Summary Historical*
- *Knowledge Management - Article User Group Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Which articles are linked to a category?*
- *Which users created the link to an article?*
- *What types of ratings are assigned articles?*
- *Which articles are published or unpublished?*
- *How are customers are finding knowledge base content*
- *Which employees interacted with the articles?*
- *What are the locales, content types, and authors of the articles in the database?*
- *How are customers finding and using knowledgebase content?*
- *Which articles are linked to the maximum number of service requests?*
- *What content in the knowledge base is satisfying users' needs?*
- *What content rating effectively resolves users' questions?*
- *How many articles are available in the knowledgebase?*
- *How do knowledge managers view article search historical metrics?*
- *How do knowledge managers view article historical metrics?*
- *How many articles are consumed by a particular user group during a specified period?*
- *Which article versions are linked to service requests?*
- *Which articles are linked to a product?*
- *How are articles in the knowledge base ranked in popularity?*
- *What articles are not satisfying users' needs?*
- *How many concept tokens as associated to articles?*
- *How do knowledge managers view search article metrics?*
- *How are articles are ranked in popularity?*
- *How do Knowledge managers view information on article historical metrics?*
- *Which user groups area associated to an article?*
- *Which category contains the highest number of knowledge articles?*

- *How many links exist between services requests and knowledge articles?*
- *Which products are associated with the most number of knowledge articles?*
- *Which articles require updates?*
- *Which employee in a user group created the most or least articles?*

Knowledge Manager

Code Name

ORA_CSO_KNOWLEDGE_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Knowledge Management Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *Knowledge Management - Article Category Real Time*
- *Knowledge Management - Article Links Real Time*
- *Knowledge Management - Article Product Real Time*
- *Knowledge Management - Article Rating Real Time*
- *Knowledge Management - Article Real Time*
- *Knowledge Management - Article Search Historical*
- *Knowledge Management - Article Search Question Tokens Historical*
- *Knowledge Management - Article Search Questions Historical*
- *Knowledge Management - Article Summary Historical*
- *Knowledge Management - Article User Group Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Which articles are linked to a category?*
- *Which users created the link to an article?*

- *What types of ratings are assigned articles?*
- *Which articles are published or unpublished?*
- *How are customers are finding knowledge base content*
- *Which employees interacted with the articles?*
- *What are the locales, content types, and authors of the articles in the database?*
- *How are customers finding and using knowledgebase content?*
- *Which articles are linked to the maximum number of service requests?*
- *What content in the knowledge base is satisfying users' needs?*
- *What content rating effectively resolves users' questions?*
- *How many articles are available in the knowledgebase?*
- *How do knowledge managers view article search historical metrics?*
- *How do knowledge managers view article historical metrics?*
- *How many articles are consumed by a particular user group during a specified period?*
- *Which article versions are linked to service requests?*
- *Which articles are linked to a product?*
- *How are articles in the knowledge base ranked in popularity?*
- *What articles are not satisfying users' needs?*
- *How many concept tokens as associated to articles?*
- *How do knowledge managers view search article metrics?*
- *How are articles are ranked in popularity?*
- *How do Knowledge managers view information on article historical metrics?*
- *Which user groups area associated to an article?*
- *Which category contains the highest number of knowledge articles?*
- *How many links exist between services requests and knowledge articles?*
- *Which products are associated with the most number of knowledge articles?*
- *Which articles require updates?*
- *Which employee in a user group created the most or least articles?*

Marketing Analyst

Code Name

ORA_MKT_MARKETING_ANALYST_JOB

Duty Roles

This job role is related to the following duty roles:

- *Marketing Administrative Transaction Analysis Duty*
- *Marketing Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - Marketing Web Activities*
- *Marketing - CRM Leads*
- *Marketing - CRM Leads and Opportunities Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *What are the top 10 products associated to the Leads in the system?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many Leads are associated for a given Opportunity?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *What are the sources of the Leads created in the current quarter?*
- *What are the Leads that are converted into Opportunities?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How many Leads are unassigned in the system?*
- *How many Opportunities were created from a given Lead?*
- *How many touch points have there been for a certain account or prospect?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*

- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *Who are the top Sales representatives by their Lead conversion ratio?*

Marketing Manager

Code Name

ORA_MKT_MARKETING_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Marketing Managerial Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *Marketing - CRM Leads*
- *Marketing - CRM Leads and Opportunities Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *What are the top 10 products associated to the Leads in the system?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *How many Leads are associated for a given Opportunity?*
- *What are the sources of the Leads created in the current quarter?*
- *What are the Leads that are converted into Opportunities?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How many Leads are unassigned in the system?*

- *How many Opportunities were created from a given Lead?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *Who are the top Sales representatives by their Lead conversion ratio?*

Marketing Operations Manager

Code Name

ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Marketing Operational Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *Marketing - CRM Leads*
- *Marketing - CRM Leads and Opportunities Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *What are the top 10 products associated to the Leads in the system?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *How many Leads are associated for a given Opportunity?*
- *What are the sources of the Leads created in the current quarter?*

- *What are the Leads that are converted into Opportunities?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How many Leads are unassigned in the system?*
- *How many Opportunities were created from a given Lead?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *Who are the top Sales representatives by their Lead conversion ratio?*

Marketing VP

Code Name

ORA_MKT_MARKETING_VP_JOB

Duty Roles

This job role is related to the following duty roles:

- *Marketing Executive Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *Marketing - CRM Leads*
- *Marketing - CRM Leads and Opportunities Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *What are the top 10 products associated to the Leads in the system?*

- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *How many Leads are associated for a given Opportunity?*
- *What are the sources of the Leads created in the current quarter?*
- *What are the Leads that are converted into Opportunities?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How many Leads are unassigned in the system?*
- *How many Opportunities were created from a given Lead?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *Who are the top Sales representatives by their Lead conversion ratio?*

Next Gen Human Resource Help Desk Administrator

Code Name

ORA_SVC_HUMAN_RESOURCE_HELP_DESK_ADMINISTRATOR_NG_JOB

Duty Roles

This job role is related to the following duty roles:

- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM/Help Desk - Case Management Real Time*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Help Desk - HR Help Desk Queue Resources Real Time*

- *Help Desk - HR Service Request Action Plan Actions Real Time*
- *Help Desk - HR Service Request Conversation Messages Real Time*
- *Help Desk - HR Service Request Messages Real Time*
- *Help Desk - HR Service Request Resource Real Time*
- *Help Desk - HR Service Request Summary*
- *Help Desk - HR Service Requests Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Are agents making themselves available for certain channels and not for others?*
- *As an agent am I spreading myself too thin by being part of one too many HR Help Desk Request teams?*
- *What are the HR SRs that are waiting on my customers?*
- *What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *Are we keeping the number of non-compliant Help Desk Requests in check for those with Affected Parties?*
- *What employee organization files the most requests with affected parties? Which one has the most open, the highest resolution times?*
- *How many emails came from known versus unknown contacts?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *What is the delay in estimated completion dates?*
- *Do we see a pattern in the average number of messages per closed Help Desk request going up in recent months? What factors are contributing to this surge?*
- *What is the incidence of participation of my resource team in HR Help Desk Requests over a period? How many open Requests are they a part of, presently?*
- *How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *Which of my team's cases have been open for more than 15 days?*
- *When was the last, a SmartText was used?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *What is the current distribution of active and inactive agents across queues?*
- *What are the open critical HR SRs that my team is working on currently? How many of these are escalated?*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *What is the impact of linking knowledge articles to Help Desk Requests? Has it led to reduced Request resolution times and reopenings?*

- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *What are the help desk requests that are waiting for an agent response?*
- *Do we see any patterns in message traffic and resolution times?*
- *What Smarttexts have not been used even once?*
- *What are the most popular channels used for internal conversations?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *How many emails are we receiving over time?*
- *How many action plans are open and how long have they been open?*
- *Who are my agents that have the most pending HR SRs?*
- *What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What Request categories have a higher percentage of non-compliant Help Desk Requests open?*
- *What is the current count of inbound email requests by status and mailbox?*
- *For a given service queue, how many agents are available to take chats?*
- *Are we responding to help desk request messages in a timely manner?*
- *What are the cases that have not updated a case in the past 10 days? Who owns them?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *Can the variation in Help Desk Request resolution times between team members be attributable to sub-optimal queue assignments?*
- *Where are the outliers when it comes to compliance?*
- *What is the incidence of agents linking knowledge articles to Help Desk Requests?*
- *Show me all the conversation messages together with the conversation message subject, body, sender and recipient details for a focused set of requests*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *What are the cases that have not been actioned since reopening?*
- *Is there scope for a better resource load balance keeping in consideration the Help Desk Request throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *By being part of the HR Help Desk Request team, how many Request resolutions has my resource team been able to influence during the past period?*
- *How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *On an average, how many days do each of my team members take to close a case?*

- *Are internal conversations taking place across high cost channels?*

Next Gen Human Resource Help Desk Agent

Code Name

ORA_SVC_HUMAN_RESOURCE_HELP_DESK_AGENT_NG_JOB

Duty Roles

This job role is related to the following duty roles:

- *Next Gen HR Help Desk Agent Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Help Desk - HR Help Desk Queue Resources Real Time*
- *Help Desk - HR Service Request Action Plan Actions Real Time*
- *Help Desk - HR Service Request Conversation Messages Real Time*
- *Help Desk - HR Service Request Messages Real Time*
- *Help Desk - HR Service Request Resource Real Time*
- *Help Desk - HR Service Request Summary*
- *Help Desk - HR Service Requests Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Are agents making themselves available for certain channels and not for others?*
- *As an agent am I spreading myself too thin by being part of one too many HR Help Desk Request teams?*
- *What are the HR SRs that are waiting on my customers?*
- *What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *Are we keeping the number of non-compliant Help Desk Requests in check for those with Affected Parties?*

- *What employee organization files the most requests with affected parties? Which one has the most open, the highest resolution times?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *What is the delay in estimated completion dates?*
- *Do we see a pattern in the average number of messages per closed Help Desk request going up in recent months? What factors are contributing to this surge?*
- *What is the incidence of participation of my resource team in HR Help Desk Requests over a period? How many open Requests are they a part of, presently?*
- *How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *When was the last, a SmartText was used?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *What is the current distribution of active and inactive agents across queues?*
- *What are the open critical HR SRs that my team is working on currently? How many of these are escalated?*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *What is the impact of linking knowledge articles to Help Desk Requests? Has it led to reduced Request resolution times and reopenings?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *What are the help desk requests that are waiting for an agent response?*
- *Do we see any patterns in message traffic and resolution times?*
- *What Smarttexts have not been used even once?*
- *What are the most popular channels used for internal conversations?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *How many action plans are open and how long have they been open?*
- *Who are my agents that have the most pending HR SRs?*
- *What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What Request categories have a higher percentage of non-compliant Help Desk Requests open?*
- *For a given service queue, how many agents are available to take chats?*
- *Are we responding to help desk request messages in a timely manner?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *Can the variation in Help Desk Request resolution times between team members be attributable to sub-optimal queue assignments?*
- *Where are the outliers when it comes to compliance?*
- *What is the incidence of agents linking knowledge articles to Help Desk Requests?*

- *Show me all the conversation messages together with the conversation message subject, body, sender and recipient details for a focused set of requests*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *Is there scope for a better resource load balance keeping in consideration the Help Desk Request throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *By being part of the HR Help Desk Request team, how many Request resolutions has my resource team been able to influence during the past period?*
- *How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *Are internal conversations taking place across high cost channels?*

Next Gen Human Resource Help Desk Manager

Code Name

ORA_SVC_HUMAN_RESOURCE_HELP_DESK_MANAGER_NG_JOB

Duty Roles

This job role is related to the following duty roles:

- *Next Gen HR Help Desk Manager Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Help Desk - HR Help Desk Queue Resources Real Time*
- *Help Desk - HR Service Request Action Plan Actions Real Time*
- *Help Desk - HR Service Request Conversation Messages Real Time*
- *Help Desk - HR Service Request Messages Real Time*
- *Help Desk - HR Service Request Resource Real Time*

- *Help Desk - HR Service Request Summary*
- *Help Desk - HR Service Requests Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Are agents making themselves available for certain channels and not for others?*
- *As an agent am I spreading myself too thin by being part of one too many HR Help Desk Request teams?*
- *What are the HR SRs that are waiting on my customers?*
- *What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *Are we keeping the number of non-compliant Help Desk Requests in check for those with Affected Parties?*
- *What employee organization files the most requests with affected parties? Which one has the most open, the highest resolution times?*
- *How many emails came from known versus unknown contacts?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *What is the delay in estimated completion dates?*
- *Do we see a pattern in the average number of messages per closed Help Desk request going up in recent months? What factors are contributing to this surge?*
- *What is the incidence of participation of my resource team in HR Help Desk Requests over a period? How many open Requests are they a part of, presently?*
- *How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *When was the last, a SmartText was used?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *What is the current distribution of active and inactive agents across queues?*
- *What are the open critical HR SRs that my team is working on currently? How many of these are escalated?*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *What is the impact of linking knowledge articles to Help Desk Requests? Has it led to reduced Request resolution times and reopenings?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *What are the help desk requests that are waiting for an agent response?*
- *Do we see any patterns in message traffic and resolution times?*

- *What Smarttexts have not been used even once?*
- *What are the most popular channels used for internal conversations?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *How many emails are we receiving over time?*
- *How many action plans are open and how long have they been open?*
- *Who are my agents that have the most pending HR SRs?*
- *What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What Request categories have a higher percentage of non-compliant Help Desk Requests open?*
- *What is the current count of inbound email requests by status and mailbox?*
- *For a given service queue, how many agents are available to take chats?*
- *Are we responding to help desk request messages in a timely manner?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *Can the variation in Help Desk Request resolution times between team members be attributable to sub-optimal queue assignments?*
- *Where are the outliers when it comes to compliance?*
- *What is the incidence of agents linking knowledge articles to Help Desk Requests?*
- *Show me all the conversation messages together with the conversation message subject, body, sender and recipient details for a focused set of requests*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *Is there scope for a better resource load balance keeping in consideration the Help Desk Request throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *By being part of the HR Help Desk Request team, how many Request resolutions has my resource team been able to influence during the past period?*
- *How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *Are internal conversations taking place across high cost channels?*

Partner Administrator

Code Name

ORA_ZPM_PARTNER_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

- *Incentive Compensation Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Incentive Compensation - Attainments Real Time*
- *Incentive Compensation - Compensation Plan Assignments Real Time*
- *Incentive Compensation - Credits Real Time*
- *Incentive Compensation - Disputes Real Time*
- *Incentive Compensation - Earning and Attainment Summary Real Time*
- *Incentive Compensation - Earnings Real Time*
- *Incentive Compensation - Participant Balances Real Time*
- *Incentive Compensation - Participant Compensation Plan Real Time*

- *Incentive Compensation - Participant Detail Real Time*
- *Incentive Compensation - Participant Interval Goals Real Time*
- *Incentive Compensation - Participant Period Goals Real Time*
- *Incentive Compensation - Pay Group Assignments Real Time*
- *Incentive Compensation - Payments Real Time*
- *Incentive Compensation - Paysheet Summary Real Time*
- *Incentive Compensation - Performance and Earnings Summary Real Time*
- *Incentive Compensation - Rules Real Time*
- *Incentive Compensation - Transactions Real Time*
- *Marketing - CRM Leads*
- *Partners - CRM Leads and Opportunities Real Time*
- *Partners - CRM Opportunities and Products Real Time*
- *Partners - CRM Partner Assessments*
- *Partners - CRM Partner Classification*
- *Partners - CRM Partner Contact*
- *Partners - CRM Partner Overview*
- *Partners - CRM Partner Program Benefits*
- *Partners - CRM Partner Resource*
- *Partners - CRM Partner Territory*
- *Partners - CRM Program Enrollments*
- *Partners - CRM Programs*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*

- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*

- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*
- *Service - CRM Survey Requests Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Were there credit or rollup errors that must be fixed?*
- *Is the dispute load balanced between my analysts? Asked by compensation managers.*
- *Who got paid what amount and from where, at the detail level?*
- *What is the total quota by performance measure for the period across the organization?*
- *What is the current status of the payment batches? Are they paid, reviewed, or frozen?*
- *How does the performance measure attainment compare with a participant's personalized goal across his directs?*
- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*

- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *What are the top 10 products associated to the Leads in the system?*
- *How many Partners' team is a given Resource part of?*
- *How many Leads are part of the Campaign?*
- *What are the various attainment attributes associated with my credits?*
- *To what country and business unit does the participant belong?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*

- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What is the potential revenue of leads by partners?*
- *What is the quarterly revenue trend for a specific product/product group by partner?*
- *How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?*
- *What is total number of Partners assigned to a specific classification for this period?*
- *Who all is part of the Partner Resource Team for a given Partner and what is their role?*

- *Which Program has the highest number of Enrollments?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *Which participants are assigned to which plans?*
- *When was a given participant assigned to a specific pay group?*
- *What are the credit rules which a credit receiver is assigned to?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*

- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *What is the number of partners in a specific classification within a defined geographic region?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *How much credit did a participant receive for their sales transactions?*
- *How much credit did my team receive for their attainment?*
- *Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.*
- *Which of my direct reports' attainment or earnings are below the wanted performance expectation?*
- *Why wasn't I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.*
- *What is the total quota across the organization by performance measure for the period or across periods?*
- *Which participants are assigned to a given pay group?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*

- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*

- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *How are the Partners classified?*
- *How many Programs were created in the last quarter?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *What type of assignment does a participant have to a plan?*
- *Does the participant have an individualized target incentive for the plan?*
- *Are we on track in achieving quota this period or quarter?*
- *How are these targets individualized across the participants.*
- *What are the targets and goals settings for an individual?*
- *What is the total quota by performance measure for the interval across the organization?*
- *What pay groups are in the application? What are their types and descriptions?*
- *What are the criteria for a rule including the inherited criteria from the ancestors?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *How many emails are we receiving over time?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*

- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*

- *What is the average deal size by Product groups?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *Are participants correctly credited?*
- *What are my compensation plan incentive targets?*
- *Are my individualized performance measure goals set properly?*
- *Who is assigned to a given plan?*
- *As a participant manager, what are the targets and goals settings for my direct reports?*
- *What is the participant's home currency or cost center?*
- *Is the participant active? And for which dates?*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *What are the SRs that are waiting on my customers?*
- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*

- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*
- *What are the open Opportunities associated to a given Partner?*
- *What is the number of leads by partners for a specific product group?*
- *What is the distribution of Partner Opportunities by sales stages?*
- *How many Partners is a Contact is associated to?*
- *What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?*
- *How many Enrollments are going o expire in the next quarter?*
- *What are the Programs that Partners have enrolled into?*
- *How many Programs are owned by the team with their expiration date?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*

- *How many responses received for a given campaign?*
- *Has the participant accepted the assignment to the plan?*
- *How do they compare to the base goals set on the measure?*
- *What is the total quota across the organization by performance measure for the interval?*
- *As a participant manager, which pay groups do my direct reports belong to?*
- *What is my cost of compensation by participant, plan component, plan, and frequencies?*
- *How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?*
- *How do participants' plan component earnings compare with their personalized target incentives?*
- *Do I have to realign quota based on current attainment levels?*
- *What is the total quota by performance measure for the period across the organization? Validate quota levels.*
- *What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*

- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What is the revenue generated by Partners per Customer?*
- *What are the number of Partner contacts by Partner?*
- *What is the number of Partner Contacts that are also resources and users?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *What are the assignment start and end dates for a participant?*
- *How do these targets break down by plan component?*
- *Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.*
- *What is the status of each paysheet within the payment batches?*
- *What are the rules effective as of the given date in the hierarchy?*
- *What are the results of the collected transactions before the crediting process?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*

- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*
- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *What are the top ten Partners by Revenue during the past quarter/year?*

- *What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? Submitted e.g. Partner Performance?*
- *What are the Partners created in the system for a given time period?*
- *How many Enrollments were created/submitted/expired/terminated in the last month?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Partner Sales Manager

Code Name

ORA_ZPM_PARTNER_SALES_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Partner Org Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*

- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Marketing - CRM Leads*
- *Partners - CRM Leads and Opportunities Real Time*
- *Partners - CRM Opportunities and Products Real Time*
- *Partners - CRM Partner Assessments*
- *Partners - CRM Partner Classification*
- *Partners - CRM Partner Contact*
- *Partners - CRM Partner Overview*
- *Partners - CRM Partner Program Benefits*
- *Partners - CRM Partner Resource*
- *Partners - CRM Partner Territory*
- *Partners - CRM Program Enrollments*
- *Partners - CRM Programs*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*

- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*

- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*
- *Service - CRM Survey Requests Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*

- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *What are the top 10 products associated to the Leads in the system?*
- *How many Partners' team is a given Resource part of?*
- *How many Leads are part of the Campaign?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*

- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What is the potential revenue of leads by partners?*
- *What is the quarterly revenue trend for a specific product/product group by partner?*
- *How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?*
- *What is total number of Partners assigned to a specific classification for this period?*
- *Who all is part of the Partner Resource Team for a given Partner and what is their role?*
- *Which Program has the highest number of Enrollments?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*

- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*

- *What is the number of partners in a specific classification within a defined geographic region?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*

- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *How are the Partners classified?*
- *How many Programs were created in the last quarter?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *How many emails are we receiving over time?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*

- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*

- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*
- *What is the average deal size by Product groups?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *What are the SRs that are waiting on my customers?*
- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*

- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*
- *What are the open Opportunities associated to a given Partner?*
- *What is the number of leads by partners for a specific product group?*
- *What is the distribution of Partner Opportunities by sales stages?*
- *How many Partners is a Contact is associated to?*
- *What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?*
- *How many Enrollments are going o expire in the next quarter?*
- *What are the Programs that Partners have enrolled into?*
- *How many Programs are owned by the team with their expiration date?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*

- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*

- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What is the revenue generated by Partners per Customer?*
- *What are the number of Partner contacts by Partner?*
- *What is the number of Partner Contacts that are also resources and users?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*
- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*

- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *What are the top ten Partners by Revenue during the past quarter/year?*
- *What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? Submitted e.g. Partner Performance?*
- *What are the Partners created in the system for a given time period?*
- *How many Enrollments were created/submitted/expired/terminated in the last month?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Partner Sales Representative

Code Name

ORA_ZPM_PARTNER_SALES_REPRESENTATIVE_JOB

Duty Roles

This job role is related to the following duty roles:

- *Partner Org Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*

- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Marketing - CRM Leads*
- *Partners - CRM Leads and Opportunities Real Time*
- *Partners - CRM Opportunities and Products Real Time*
- *Partners - CRM Partner Assessments*
- *Partners - CRM Partner Classification*
- *Partners - CRM Partner Contact*
- *Partners - CRM Partner Overview*
- *Partners - CRM Partner Program Benefits*
- *Partners - CRM Partner Resource*
- *Partners - CRM Partner Territory*
- *Partners - CRM Program Enrollments*
- *Partners - CRM Programs*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*

- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*

- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*
- *Service - CRM Survey Requests Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*

- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *What are the top 10 products associated to the Leads in the system?*
- *How many Partners' team is a given Resource part of?*
- *How many Leads are part of the Campaign?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*

- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What is the potential revenue of leads by partners?*
- *What is the quarterly revenue trend for a specific product/product group by partner?*
- *How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?*
- *What is total number of Partners assigned to a specific classification for this period?*
- *Who all is part of the Partner Resource Team for a given Partner and what is their role?*
- *Which Program has the highest number of Enrollments?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*

- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*

- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *What is the number of partners in a specific classification within a defined geographic region?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*

- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *How are the Partners classified?*
- *How many Programs were created in the last quarter?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*

- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *How many emails are we receiving over time?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*

- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*
- *What is the average deal size by Product groups?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *What are the SRs that are waiting on my customers?*

- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*
- *What are the open Opportunities associated to a given Partner?*
- *What is the number of leads by partners for a specific product group?*
- *What is the distribution of Partner Opportunities by sales stages?*
- *How many Partners is a Contact is associated to?*
- *What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?*
- *How many Enrollments are going o expire in the next quarter?*
- *What are the Programs that Partners have enrolled into?*
- *How many Programs are owned by the team with their expiration date?*

- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What are the total number of Contact Relationships between two Contact?*

- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What is the revenue generated by Partners per Customer?*
- *What are the number of Partner contacts by Partner?*
- *What is the number of Partner Contacts that are also resources and users?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*

- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *What are the top ten Partners by Revenue during the past quarter/year?*
- *What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? Submitted e.g. Partner Performance?*
- *What are the Partners created in the system for a given time period?*
- *How many Enrollments were created/submitted/expired/terminated in the last month?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Sales Administrator

Code Name

ORA_ZBS_SALES_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

- *CRM Administrative Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Case Action Plan Actions Real Time*
- *CRM/Help Desk - Case Management Real Time*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Marketing - CRM Leads*
- *Marketing - CRM Leads and Opportunities Real Time*
- *Partners - CRM Leads and Opportunities Real Time*
- *Partners - CRM Opportunities and Products Real Time*

- *Partners - CRM Partner Assessments*
- *Partners - CRM Partner Classification*
- *Partners - CRM Partner Contact*
- *Partners - CRM Partner Overview*
- *Partners - CRM Partner Resource*
- *Partners - CRM Partner Territory*
- *Partners - CRM Program Enrollments*
- *Partners - CRM Programs*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*

- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*

- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*

- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *What are the top 10 products associated to the Leads in the system?*
- *How many Partners' team is a given Resource part of?*
- *How many Leads are part of the Campaign?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*

- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *Which of my team's cases have been open for more than 15 days?*
- *When was the last, a SmartText was used?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What is the potential revenue of leads by partners?*
- *What is the quarterly revenue trend for a specific product/product group by partner?*
- *How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?*
- *What is total number of Partners assigned to a specific classification for this period?*
- *Who all is part of the Partner Resource Team for a given Partner and what is their role?*
- *Which Program has the highest number of Enrollments?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*

- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*

- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *How many Leads are associated for a given Opportunity?*
- *What is the number of partners in a specific classification within a defined geographic region?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*

- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *What Smarttexts have not been used even once?*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *How are the Partners classified?*
- *How many Programs were created in the last quarter?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *How many emails are we receiving over time?*

- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*

- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*
- *What are the Leads that are converted into Opportunities?*
- *What is the average deal size by Product groups?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*

- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *What are the cases that have not updated a case in the past 10 days? Who owns them?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*
- *How many Opportunities were created from a given Lead?*
- *What are the open Opportunities associated to a given Partner?*
- *What is the number of leads by partners for a specific product group?*
- *What is the distribution of Partner Opportunities by sales stages?*

- *How many Partners is a Contact is associated to?*
- *What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?*
- *How many Enrollments are going o expire in the next quarter?*
- *What are the Programs that Partners have enrolled into?*
- *How many Programs are owned by the team with their expiration date?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*

- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *What are the cases that have not been actioned since reopening?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What is the breakdown of open action plans by Action Plan Action Owner?*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What is the revenue generated by Partners per Customer?*
- *What are the number of Partner contacts by Partner?*
- *What is the number of Partner Contacts that are also resources and users?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*

- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*
- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *On an average, how many days do each of my team members take to close a case?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *What are the top ten Partners by Revenue during the past quarter/year?*
- *What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? Submitted e.g. Partner Performance?*
- *What are the Partners created in the system for a given time period?*
- *How many Enrollments were created/submitted/expired/terminated in the last month?*

- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Sales Analyst

Code Name

ORA_ZSP_SALES_ANALYST_JOB

Duty Roles

This job role is related to the following duty roles:

- *Sales Operational Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - Marketing Web Activities*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*

Business Questions

This job role secures access to data that can answer the following business questions:

- *What are my web activities for the accounts and leads for a sales user's territory?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *What are the Products associated with the Deals?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *What are all the Campaigns assigned to an Opportunity?*

- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *How many touch points have there been for a certain account or prospect?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*

Sales Lead Qualifier

Code Name

ORA_MKL_SALES_LEAD_QUALIFIER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Marketing Lead Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *Marketing - CRM Leads*
- *Marketing - CRM Leads and Opportunities Real Time*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Resource*

- *Sales - CRM Lead Territory*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *Who all are the Contacts associated to the Lead?*
- *What are the top 10 products associated to the Leads in the system?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many Leads are associated for a given Opportunity?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *What are the sources of the Leads created in the current quarter?*
- *What are the Leads that are converted into Opportunities?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*

- *How many Leads is a Contact associated to?*
- *How many Leads are unassigned in the system?*
- *How many Opportunities were created from a given Lead?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*

Sales Manager

Code Name

ORA_ZBS_SALES_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Marketing Lead Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*

- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Marketing - CRM Leads*
- *Marketing - CRM Leads and Opportunities Real Time*
- *Partners - CRM Partner Territory*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*

- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*

- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Survey Requests Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*

- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *What are the top 10 products associated to the Leads in the system?*
- *How many Leads are part of the Campaign?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*

- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *When was the last, a SmartText was used?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*

- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *How many Leads are associated for a given Opportunity?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*

- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *What Smarttexts have not been used even once?*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*

- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *What is the opportunity information captured in the note to an opportunity?*

- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*
- *What are the Leads that are converted into Opportunities?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*

- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *Does seasonality impact response rates?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*

- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*
- *How many Opportunities were created from a given Lead?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*

- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*

- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*
- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Sales Representative

Code Name

ORA_ZBS_SALES_REPRESENTATIVE_JOB

Duty Roles

This job role is related to the following duty roles:

- *Marketing Lead Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Marketing - CRM Leads*
- *Marketing - CRM Leads and Opportunities Real Time*
- *Partners - CRM Partner Territory*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*

- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*

- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*

- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *What are the top 10 products associated to the Leads in the system?*
- *How many Leads are part of the Campaign?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*

- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *When was the last, a SmartText was used?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*

- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*

- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *How many Leads are associated for a given Opportunity?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*

- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *What Smarttexts have not been used even once?*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*

- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*

- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*
- *What are the Leads that are converted into Opportunities?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*

- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*
- *How many Opportunities were created from a given Lead?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*

- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What Partners are assigned to specific geographic territories?*

- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*
- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*

- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Sales Restricted User

Code Name

ORA_ZBS_SALES_RESTRICTED_USER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Marketing Lead Transaction Analysis Duty*
- *Sales Campaign Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*

- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Marketing - CRM Leads*
- *Marketing - CRM Leads and Opportunities Real Time*
- *Partners - CRM Partner Territory*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*

- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*

- *Service - CRM Service Requests Real Time*
- *Service - CRM Survey Requests Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*

- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *What are the top 10 products associated to the Leads in the system?*
- *How many Leads are part of the Campaign?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *When was the last, a SmartText was used?*
- *Do specific team members excel in response times or quality of interactions?*

- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*

- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *How many Leads are associated for a given Opportunity?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*

- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *What Smarttexts have not been used even once?*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*

- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*

- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*
- *What are the Leads that are converted into Opportunities?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*

- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *Does seasonality impact response rates?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*

- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*
- *How many Opportunities were created from a given Lead?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*

- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*

- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Sales VP

Code Name

ORA_ZBS_SALES_VP_JOB

Duty Roles

This job role is related to the following duty roles:

- *Marketing Lead Transaction Analysis Duty*

- *Sales Campaign Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Marketing - CRM Leads*
- *Marketing - CRM Leads and Opportunities Real Time*
- *Partners - CRM Partner Territory*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*

- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*

- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Survey Requests Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*

- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *What are the top 10 products associated to the Leads in the system?*
- *How many Leads are part of the Campaign?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*

- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *When was the last, a SmartText was used?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*

- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*

- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *How many Leads are associated for a given Opportunity?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*

- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *What Smarttexts have not been used even once?*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*

- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*

- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*
- *What are the Leads that are converted into Opportunities?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *Does seasonality impact response rates?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*

- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*
- *How many Opportunities were created from a given Lead?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*

- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*

- *Who are all the Contacts assigned to the Assets?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*
- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*

- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Subscription Specialist

Code Name

ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB

Duty Roles

This job role is related to the following duty roles:

- *Subscription Management Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *Subscription Management - Covered Levels Real Time*
- *Subscription Management - Subscription Billing Real Time*
- *Subscription Management - Subscription Relationships Real Time*
- *Subscription Management - Subscriptions Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Which covered levels expired without renewal in the last month?*
- *What is the projected billing for the next 6 months?*
- *What's the total contract value (TCV) in the last one year?*
- *What's the number of subscriptions by status and date range?*
- *Which customers have covered levels worth more then $50k that are expiring in 30 days?*
- *What are all the assets covered for a particular customer?*
- *How much MRR was renewed each month in the last 6 months?*
- *Which products are most frequently upgraded to or downgraded from?*

- *What is the MRR lost each month due to suspensions in the last 6 months?*
- *How many subscriptions were terminated in the last year?*
- *How does the usage of a particular subscription product trend?*
- *How many subscriptions are expiring in the next quarter?*
- *What is the Net MRR change due to amendments?*
- *What's the total MRR?*
- *What is the discount that was provided for a particular customer or product?*
- *What is the trend of successful, outstanding and churned renewals in the last 6 months?*
- *Which customers or coverage products deliver the most revenue?*
- *What is the Net Billing for the last 6 months?*
- *What is the Net MRR change due to amendments where full credit was issued?*
- *How many subscriptions were renewed the last quarter?*

Supplier Contract Administrator

Code Name

ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

- *Enterprise Contracts Transaction Analysis Duty Role*

Subject Areas

This job role secures access to the following subject areas:

- *Enterprise Contracts - Contracts Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How is my contract team loaded?*
- *Show me all the contracts that have a nonstandard clause.*
- *What contracts have a specific policy deviation?*

- *Which contracts are related to my given contract?*
- *How many days on average did a resource work on a contract assigned to them in the last quarter?*
- *What's the primary reason for contract closure in the last year?*
- *How many contracts might get affected if I modify the Payment clause?*
- *Show me all the contracts that have a particular deliverable due.*
- *How many days on average did a resource organization work on a contract assigned to them in the last quarter?*
- *Show me the user status progression for contracts within a given date range.*

Supplier Contract Manager

Code Name

ORA_OKC_SUPPLIER_CONTRACT_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- *Enterprise Contracts Transaction Analysis Duty Role*

Subject Areas

This job role secures access to the following subject areas:

- *Enterprise Contracts - Contracts Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How is my contract team loaded?*
- *Show me all the contracts that have a nonstandard clause.*
- *What contracts have a specific policy deviation?*
- *Which contracts are related to my given contract?*
- *How many days on average did a resource work on a contract assigned to them in the last quarter?*
- *What's the primary reason for contract closure in the last year?*
- *How many contracts might get affected if I modify the Payment clause?*
- *Show me all the contracts that have a particular deliverable due.*

- *How many days on average did a resource organization work on a contract assigned to them in the last quarter?*
- *Show me the user status progression for contracts within a given date range.*

Supplier Contract Team Member

Code Name

ORA_OKC_SUPPLIER_CONTRACT_TEAM_MEMBER_ABSTRACT

Duty Roles

This job role is related to the following duty roles:

- *Enterprise Contracts Transaction Analysis Duty Role*

Subject Areas

This job role secures access to the following subject areas:

- *Enterprise Contracts - Contracts Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How is my contract team loaded?*
- *Show me all the contracts that have a nonstandard clause.*
- *What contracts have a specific policy deviation?*
- *Which contracts are related to my given contract?*
- *How many days on average did a resource work on a contract assigned to them in the last quarter?*
- *What's the primary reason for contract closure in the last year?*
- *How many contracts might get affected if I modify the Payment clause?*
- *Show me all the contracts that have a particular deliverable due.*
- *How many days on average did a resource organization work on a contract assigned to them in the last quarter?*
- *Show me the user status progression for contracts within a given date range.*

5 Duty Roles

Overview

For each duty role in this chapter, links are provided for more detailed information about the job roles, subject areas, and business questions associated with the duty role.

CRM Administrative Transaction Analysis Duty

Code Name

FBI_CRM_ADMINISTRATIVE_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Sales Administrator*

Subject Areas

This duty role secures access to the following subject areas:

- *Sales - CRM All Contacts Addresses*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*

CRM OTBI Report Performance Transactional Analysis Duty

Code Name

FBI_USER_SYSTEM_PERFORMANCE_TRANSACTION_ANALYSIS_DUTY

Job Roles

No applicable job roles

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - CRM Reporting Performance*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Which reports are running poorly?*
- *Which reports need maintenance?*
- *Which reports are running well?*

Case Manager Transaction Analysis Duty

Code Name

FBI_CASE_MANAGER_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Case Manager*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM/Help Desk - Case Action Plan Actions Real Time*
- *CRM/Help Desk - Case Management Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Which of my team's cases have been open for more than 15 days?*
- *What is the delay in estimated completion dates?*
- *What are the cases that have not updated a case in the past 10 days? Who owns them?*
- *What are the cases that have not been actioned since reopening?*
- *What is the breakdown of open action plans by Action Plan Action Owner?*
- *On an average, how many days do each of my team members take to close a case?*
- *Are there action plans tracking late to an overall target completion date?*

Case Worker Transaction Analysis Duty

Code Name

FBI_CASE_WORKER_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Case Worker*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM/Help Desk - Case Action Plan Actions Real Time*
- *CRM/Help Desk - Case Management Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Which of my team's cases have been open for more than 15 days?*
- *What is the delay in estimated completion dates?*
- *What are the cases that have not updated a case in the past 10 days? Who owns them?*
- *What are the cases that have not been actioned since reopening?*
- *What is the breakdown of open action plans by Action Plan Action Owner?*
- *On an average, how many days do each of my team members take to close a case?*
- *Are there action plans tracking late to an overall target completion date?*

Enterprise Contracts Transaction Analysis Duty Role

Code Name

FBI_ENTERPRISE_CONTRACTS_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Customer Contract Administrator*
- *Customer Contract Manager*
- *Customer Contract Team Member*
- *Enterprise Contract Administrator*
- *Enterprise Contract Manager*
- *Enterprise Contract Team Member*
- *Supplier Contract Administrator*
- *Supplier Contract Manager*
- *Supplier Contract Team Member*

Subject Areas

This duty role secures access to the following subject areas:

- *Enterprise Contracts - Contracts Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *How is my contract team loaded?*
- *Show me all the contracts that have a nonstandard clause.*
- *What contracts have a specific policy deviation?*
- *Which contracts are related to my given contract?*
- *How many days on average did a resource work on a contract assigned to them in the last quarter?*
- *What's the primary reason for contract closure in the last year?*
- *How many contracts might get affected if I modify the Payment clause?*
- *Show me all the contracts that have a particular deliverable due.*
- *How many days on average did a resource organization work on a contract assigned to them in the last quarter?*
- *Show me the user status progression for contracts within a given date range.*

HR Help Desk Administrator Transaction Analysis Duty

Code Name

FBI_HR_HELP_DESK_ADMIN_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Human Resource Help Desk Administrator*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - CRM Activity Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*

- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Help Desk - HR Service Requests Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the HR SRs that are waiting on my customers?*
- *What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*

- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *What are the open critical HR SRs that my team is working on currently? How many of these are escalated?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*

- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *How many emails are we receiving over time?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*

- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *Who are my agents that have the most pending HR SRs?*
- *What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*

- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *What are the average handle times?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*

HR Help Desk Agent Transaction Analysis Duty

Code Name

FBI_HR_HELP_DESK_AGENT_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Human Resource Help Desk Agent*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - CRM Activity Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Help Desk - HR Service Requests Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*

- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the HR SRs that are waiting on my customers?*
- *What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*

- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *What are the open critical HR SRs that my team is working on currently? How many of these are escalated?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *What is the average length of time of an interaction, by agent and channel?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*

- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *Who are my agents that have the most pending HR SRs?*
- *What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *What are the rates for agents declining work offers?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*

- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *What are the average handle times?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*

HR Help Desk Manager Transaction Analysis Duty

Code Name

FBI_HR_HELP_DESK_MANAGER_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Human Resource Help Desk Manager*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - CRM Activity Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Help Desk - HR Service Requests Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the HR SRs that are waiting on my customers?*
- *What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*

- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *What are the open critical HR SRs that my team is working on currently? How many of these are escalated?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*

- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *How many emails are we receiving over time?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *Who are my agents that have the most pending HR SRs?*
- *What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*

- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *What are the average handle times?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*

- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*

Incentive Compensation Transaction Analysis Duty

Code Name

FBI_INCENTIVE_COMPENSATION_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*

- *Partner Administrator*

Subject Areas

This duty role secures access to the following subject areas:

- *Incentive Compensation - Attainments Real Time*
- *Incentive Compensation - Compensation Plan Assignments Real Time*
- *Incentive Compensation - Credits Real Time*
- *Incentive Compensation - Disputes Real Time*
- *Incentive Compensation - Earning and Attainment Summary Real Time*
- *Incentive Compensation - Earnings Real Time*
- *Incentive Compensation - Participant Balances Real Time*
- *Incentive Compensation - Participant Compensation Plan Real Time*
- *Incentive Compensation - Participant Detail Real Time*
- *Incentive Compensation - Participant Interval Goals Real Time*
- *Incentive Compensation - Participant Period Goals Real Time*
- *Incentive Compensation - Pay Group Assignments Real Time*
- *Incentive Compensation - Payments Real Time*
- *Incentive Compensation - Paysheet Summary Real Time*
- *Incentive Compensation - Performance and Earnings Summary Real Time*
- *Incentive Compensation - Rules Real Time*
- *Incentive Compensation - Transactions Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Were there credit or rollup errors that must be fixed?*
- *Is the dispute load balanced between my analysts? Asked by compensation managers.*
- *Who got paid what amount and from where, at the detail level?*
- *What is the total quota by performance measure for the period across the organization?*
- *What is the current status of the payment batches? Are they paid, reviewed, or frozen?*
- *How does the performance measure attainment compare with a participant's personalized goal across his directs?*
- *What are the various attainment attributes associated with my credits?*
- *To what country and business unit does the participant belong?*
- *Which participants are assigned to which plans?*
- *When was a given participant assigned to a specific pay group?*

- *What are the credit rules which a credit receiver is assigned to?*
- *How much credit did a participant receive for their sales transactions?*
- *How much credit did my team receive for their attainment?*
- *Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.*
- *Which of my direct reports' attainment or earnings are below the wanted performance expectation?*
- *Why wasn't I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.*
- *What is the total quota across the organization by performance measure for the period or across periods?*
- *Which participants are assigned to a given pay group?*
- *What type of assignment does a participant have to a plan?*
- *Does the participant have an individualized target incentive for the plan?*
- *Are we on track in achieving quota this period or quarter?*
- *How are these targets individualized across the participants.*
- *What are the targets and goals settings for an individual?*
- *What is the total quota by performance measure for the interval across the organization?*
- *What pay groups are in the application? What are their types and descriptions?*
- *What are the criteria for a rule including the inherited criteria from the ancestors?*
- *Are participants correctly credited?*
- *What are my compensation plan incentive targets?*
- *Are my individualized performance measure goals set properly?*
- *Who is assigned to a given plan?*
- *As a participant manager, what are the targets and goals settings for my direct reports?*
- *What is the participant's home currency or cost center?*
- *Is the participant active? And for which dates?*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.*
- *Is the company on track to attain its goals? Who is lagging and might require coaching?*
- *Has the participant accepted the assignment to the plan?*
- *How do they compare to the base goals set on the measure?*
- *What is the total quota across the organization by performance measure for the interval?*
- *As a participant manager, which pay groups do my direct reports belong to?*
- *What is my cost of compensation by participant, plan component, plan, and frequencies?*
- *How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?*
- *How do participants' plan component earnings compare with their personalized target incentives?*

- *Do I have to realign quota based on current attainment levels?*
- *What is the total quota by performance measure for the period across the organization? Validate quota levels.*
- *What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?*
- *What are the assignment start and end dates for a participant?*
- *How do these targets break down by plan component?*
- *Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.*
- *What is the status of each paysheet within the payment batches?*
- *What are the rules effective as of the given date in the hierarchy?*
- *What are the results of the collected transactions before the crediting process?*

Internal Help Desk Administrator Transaction Analysis Duty

Code Name

FBI_INTERNAL_HELP_DESK_ADMINISTRATOR_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Internal Help Desk Administrator*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM/Help Desk - Case Management Real Time*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Help Desk - Internal Help Desk Queue Resources Real Time*
- *Help Desk - Internal Service Request Action Plan Actions Real Time*
- *Help Desk - Internal Service Request Conversation Messages Real Time*

- *Help Desk - Internal Service Request Messages Real Time*
- *Help Desk - Internal Service Request Relationships Real Time*
- *Help Desk - Internal Service Request Resource Real Time*
- *Help Desk - Internal Service Request Summary*
- *Help Desk - Internal Service Requests Lifecycle*
- *Help Desk - Internal Service Requests Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Are agents making themselves available for certain channels and not for others?*
- *What are the Internal SRs waiting on my customers?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *How many emails came from known versus unknown contacts?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *Was the assigned agent overloaded with other work?*
- *How are we doing on Internal SR resolution times between current and past months? What are the reasons for any degradations?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the status of our aging SRs? Are there any outliers that require intervention?*
- *Which of my team's cases have been open for more than 15 days?*
- *When was the last, a SmartText was used?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How long is it taking for offers to be made to agents?*
- *What is the current distribution of active and inactive agents across queues?*
- *Was an Help Desk request sitting in a queue longer than the average time for all other SRs?*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *What is the impact of linking knowledge articles to Help Desk Requests? Has it led to reduced Request resolution times and reopenings?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *What is the incidence of participation of my resource team in Internal Help Desk Requests over a period? How many open Requests are they a part of, presently?*

- *What are the help desk requests that are waiting for an agent response?*
- *Do we see any patterns in message traffic and resolution times?*
- *What Smarttexts have not been used even once?*
- *What are the Cases (target) 'blocked by' this particular Request (source)?*
- *What Internal Help Desk request, if resolved, will also resolve my dependent requests?*
- *What are the most popular channels used for internal conversations?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Show me all the conversation messages together with the conversation message subject and body and the sender and recipient details for a focused set of requests*
- *How many emails are we receiving over time?*
- *As an agent am I spreading myself too thin by being part of one too many Internal Help Desk Request teams?*
- *How long was an Help Desk request unassigned and how long did it sit in each queue?*
- *Was the Help Desk request queue modified or the Help Desk request resource owner modified at any point?*
- *Do some Help Desk request categories imply higher difficulties (going by the actual time agents spend on such Help Desk requests)?*
- *Who are my agents that have the most pending Internal SRs?*
- *Are we seeing an increasing trend of blocking issues limiting speedy resolution of Internal Help Desk Requests?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What Request categories have a higher percentage of non-compliant Help Desk Requests open?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *For a given service queue, how many agents are available to take chats?*
- *How long did it take to assign the Help Desk request to the correct queue?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents, and so on?*
- *Was the assigned agent overloaded with other work (based on the average number of Help desk Requests assigned to the agent)?*
- *What are the cases that have not updated a case in the past 10 days? Who owns them?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *Can the variation in Help Desk Request resolution times between team members be attributable to sub-optimal queue assignments?*
- *Where are the outliers when it comes to compliance?*
- *What is the incidence of agents linking knowledge articles to Help Desk Requests?*
- *How many Internal SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are critical?*
- *What are the average handle times?*
- *What are the open critical Internal SRs that my team is working on currently? How many of these are escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *What are the cases that have not been actioned since reopening?*

- *What Internal Help Desk Requests escalate the Requests assigned to my team?*
- *Is there scope for a better resource load balance keeping in consideration the Help Desk Request throughput across queues?*
- *By being part of the Internal Help Desk Request team, how many Request resolutions has my resource team been able to influence during the past period?*
- *Do we see a pattern in the average number of messages per closed Help Desk Request going up in recent months? What factors are contributing to this surge?*
- *Did the Help Desk request get assigned to the wrong queue/team?*
- *Did the Help Desk request have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *How many Internal SRs have been waiting on my agents action for more than 24 hours? Which of these are critical or escalated?*
- *What is the reopen rate for Internal SRs owned by my team? Who has the highest reopen rate? Is there a training issue?*
- *On an average, how many days do each of my team members take to close a case?*
- *How many Requests are blocked by this open Internal HelpD esk Request?*
- *Are internal conversations taking place across high cost channels?*

Internal Help Desk Agent Transaction Analysis Duty

Code Name

FBI_INTERNAL_HELP_DESK_AGENT_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Internal Help Desk Agent*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Help Desk - Internal Help Desk Queue Resources Real Time*
- *Help Desk - Internal Service Request Action Plan Actions Real Time*

- *Help Desk - Internal Service Request Conversation Messages Real Time*
- *Help Desk - Internal Service Request Messages Real Time*
- *Help Desk - Internal Service Request Relationships Real Time*
- *Help Desk - Internal Service Request Resource Real Time*
- *Help Desk - Internal Service Request Summary*
- *Help Desk - Internal Service Requests Lifecycle*
- *Help Desk - Internal Service Requests Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Are agents making themselves available for certain channels and not for others?*
- *What are the Internal SRs waiting on my customers?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *Was the assigned agent overloaded with other work?*
- *How are we doing on Internal SR resolution times between current and past months? What are the reasons for any degradations?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the status of our aging SRs? Are there any outliers that require intervention?*
- *When was the last, a SmartText was used?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How long is it taking for offers to be made to agents?*
- *What is the current distribution of active and inactive agents across queues?*
- *Was an Help Desk request sitting in a queue longer than the average time for all other SRs?*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *What is the impact of linking knowledge articles to Help Desk Requests? Has it led to reduced Request resolution times and reopenings?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *What is the incidence of participation of my resource team in Internal Help Desk Requests over a period? How many open Requests are they a part of, presently?*
- *What are the help desk requests that are waiting for an agent response?*
- *Do we see any patterns in message traffic and resolution times?*
- *What Smarttexts have not been used even once?*

- *What are the Cases (target) 'blocked by' this particular Request (source)?*
- *What Internal Help Desk request, if resolved, will also resolve my dependent requests?*
- *What are the most popular channels used for internal conversations?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Show me all the conversation messages together with the conversation message subject and body and the sender and recipient details for a focused set of requests*
- *As an agent am I spreading myself too thin by being part of one too many Internal Help Desk Request teams?*
- *How long was an Help Desk request unassigned and how long did it sit in each queue?*
- *Was the Help Desk request queue modified or the Help Desk request resource owner modified at any point?*
- *Do some Help Desk request categories imply higher difficulties (going by the actual time agents spend on such Help Desk requests)?*
- *Who are my agents that have the most pending Internal SRs?*
- *Are we seeing an increasing trend of blocking issues limiting speedy resolution of Internal Help Desk Requests?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What Request categories have a higher percentage of non-compliant Help Desk Requests open?*
- *What are the rates for agents declining work offers?*
- *For a given service queue, how many agents are available to take chats?*
- *How long did it take to assign the Help Desk request to the correct queue?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents, and so on?*
- *Was the assigned agent overloaded with other work (based on the average number of Help desk Requests assigned to the agent)?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *Can the variation in Help Desk Request resolution times between team members be attributable to sub-optimal queue assignments?*
- *Where are the outliers when it comes to compliance?*
- *What is the incidence of agents linking knowledge articles to Help Desk Requests?*
- *How many Internal SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are critical?*
- *What are the average handle times?*
- *What are the open critical Internal SRs that my team is working on currently? How many of these are escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *What Internal Help Desk Requests escalate the Requests assigned to my team?*
- *Is there scope for a better resource load balance keeping in consideration the Help Desk Request throughput across queues?*
- *By being part of the Internal Help Desk Request team, how many Request resolutions has my resource team been able to influence during the past period?*
- *Do we see a pattern in the average number of messages per closed Help Desk Request going up in recent months? What factors are contributing to this surge?*

- *Did the Help Desk request get assigned to the wrong queue/team?*
- *Did the Help Desk request have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *How many Internal SRs have been waiting on my agents action for more than 24 hours? Which of these are critical or escalated?*
- *What is the reopen rate for Internal SRs owned by my team? Who has the highest reopen rate? Is there a training issue?*
- *How many Requests are blocked by this open Internal HelpD esk Request?*
- *Are internal conversations taking place across high cost channels?*

Internal Help Desk Manager Transaction Analysis Duty

Code Name

FBI_INTERNAL_HELP_DESK_MANAGER_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Internal Help Desk Manager*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Help Desk - Internal Help Desk Queue Resources Real Time*
- *Help Desk - Internal Service Request Action Plan Actions Real Time*
- *Help Desk - Internal Service Request Conversation Messages Real Time*
- *Help Desk - Internal Service Request Messages Real Time*
- *Help Desk - Internal Service Request Relationships Real Time*
- *Help Desk - Internal Service Request Resource Real Time*
- *Help Desk - Internal Service Request Summary*
- *Help Desk - Internal Service Requests Lifecycle*

- *Help Desk - Internal Service Requests Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Are agents making themselves available for certain channels and not for others?*
- *What are the Internal SRs waiting on my customers?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *How many emails came from known versus unknown contacts?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *Was the assigned agent overloaded with other work?*
- *How are we doing on Internal SR resolution times between current and past months? What are the reasons for any degradations?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the status of our aging SRs? Are there any outliers that require intervention?*
- *When was the last, a SmartText was used?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How long is it taking for offers to be made to agents?*
- *What is the current distribution of active and inactive agents across queues?*
- *Was an Help Desk request sitting in a queue longer than the average time for all other SRs?*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *What is the impact of linking knowledge articles to Help Desk Requests? Has it led to reduced Request resolution times and reopenings?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *What is the incidence of participation of my resource team in Internal Help Desk Requests over a period? How many open Requests are they a part of, presently?*
- *What are the help desk requests that are waiting for an agent response?*
- *Do we see any patterns in message traffic and resolution times?*
- *What Smarttexts have not been used even once?*
- *What are the Cases (target) 'blocked by' this particular Request (source)?*
- *What Internal Help Desk request, if resolved, will also resolve my dependent requests?*
- *What are the most popular channels used for internal conversations?*

- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Show me all the conversation messages together with the conversation message subject and body and the sender and recipient details for a focused set of requests*
- *How many emails are we receiving over time?*
- *As an agent am I spreading myself too thin by being part of one too many Internal Help Desk Request teams?*
- *How long was an Help Desk request unassigned and how long did it sit in each queue?*
- *Was the Help Desk request queue modified or the Help Desk request resource owner modified at any point?*
- *Do some Help Desk request categories imply higher difficulties (going by the actual time agents spend on such Help Desk requests)?*
- *Who are my agents that have the most pending Internal SRs?*
- *Are we seeing an increasing trend of blocking issues limiting speedy resolution of Internal Help Desk Requests?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What Request categories have a higher percentage of non-compliant Help Desk Requests open?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *For a given service queue, how many agents are available to take chats?*
- *How long did it take to assign the Help Desk request to the correct queue?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents, and so on?*
- *Was the assigned agent overloaded with other work (based on the average number of Help desk Requests assigned to the agent)?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *Can the variation in Help Desk Request resolution times between team members be attributable to sub-optimal queue assignments?*
- *Where are the outliers when it comes to compliance?*
- *What is the incidence of agents linking knowledge articles to Help Desk Requests?*
- *How many Internal SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are critical?*
- *What are the average handle times?*
- *What are the open critical Internal SRs that my team is working on currently? How many of these are escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *What Internal Help Desk Requests escalate the Requests assigned to my team?*
- *Is there scope for a better resource load balance keeping in consideration the Help Desk Request throughput across queues?*
- *By being part of the Internal Help Desk Request team, how many Request resolutions has my resource team been able to influence during the past period?*
- *Do we see a pattern in the average number of messages per closed Help Desk Request going up in recent months? What factors are contributing to this surge?*
- *Did the Help Desk request get assigned to the wrong queue/team?*

- *Did the Help Desk request have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *How many Internal SRs have been waiting on my agents action for more than 24 hours? Which of these are critical or escalated?*
- *What is the reopen rate for Internal SRs owned by my team? Who has the highest reopen rate? Is there a training issue?*
- *How many Requests are blocked by this open Internal HelpD esk Request?*
- *Are internal conversations taking place across high cost channels?*

Knowledge Management Transaction Analysis Duty

Code Name

FBI_KNOWLEDGE_MANAGEMENT_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Knowledge Analyst*
- *Knowledge Manager*

Subject Areas

This duty role secures access to the following subject areas:

- *Knowledge Management - Article Category Real Time*
- *Knowledge Management - Article Links Real Time*
- *Knowledge Management - Article Product Real Time*
- *Knowledge Management - Article Rating Real Time*
- *Knowledge Management - Article Real Time*
- *Knowledge Management - Article Search Historical*
- *Knowledge Management - Article Search Question Tokens Historical*
- *Knowledge Management - Article Search Questions Historical*
- *Knowledge Management - Article Summary Historical*
- *Knowledge Management - Article User Group Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Which articles are linked to a category?*
- *Which users created the link to an article?*
- *What types of ratings are assigned articles?*
- *Which articles are published or unpublished?*
- *How are customers are finding knowledge base content*
- *Which employees interacted with the articles?*
- *What are the locales, content types, and authors of the articles in the database?*
- *How are customers finding and using knowledgebase content?*
- *Which articles are linked to the maximum number of service requests?*
- *What content in the knowledge base is satisfying users' needs?*
- *What content rating effectively resolves users' questions?*
- *How many articles are available in the knowledgebase?*
- *How do knowledge managers view article search historical metrics?*
- *How do knowledge managers view article historical metrics?*
- *How many articles are consumed by a particular user group during a specified period?*
- *Which article versions are linked to service requests?*
- *Which articles are linked to a product?*
- *How are articles in the knowledge base ranked in popularity?*
- *What articles are not satisfying users' needs?*
- *How many concept tokens as associated to articles?*
- *How do knowledge managers view search article metrics?*
- *How are articles are ranked in popularity?*
- *How do Knowledge managers view information on article historical metrics?*
- *Which user groups area associated to an article?*
- *Which category contains the highest number of knowledge articles?*
- *How many links exist between services requests and knowledge articles?*
- *Which products are associated with the most number of knowledge articles?*
- *Which articles require updates?*
- *Which employee in a user group created the most or least articles?*

Marketing Administrative Transaction Analysis Duty

Code Name

FBI_MARKETING_ADMINISTRATIVE_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Marketing Analyst*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - Marketing Web Activities*
- *Marketing - CRM Leads*
- *Marketing - CRM Leads and Opportunities Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *What are the top 10 products associated to the Leads in the system?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many Leads are associated for a given Opportunity?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *What are the sources of the Leads created in the current quarter?*
- *What are the Leads that are converted into Opportunities?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How many Leads are unassigned in the system?*
- *How many Opportunities were created from a given Lead?*
- *How many touch points have there been for a certain account or prospect?*

- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *Who are the top Sales representatives by their Lead conversion ratio?*

Marketing Corporate Transaction Analysis Duty

Code Name

FBI_MARKETING_CORPORATE_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Corporate Marketing Manager*

Subject Areas

This duty role secures access to the following subject areas:

- *Marketing - CRM Leads*
- *Marketing - CRM Leads and Opportunities Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *What are the top 10 products associated to the Leads in the system?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *How many Leads are associated for a given Opportunity?*
- *What are the sources of the Leads created in the current quarter?*
- *What are the Leads that are converted into Opportunities?*

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- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How many Leads are unassigned in the system?*
- *How many Opportunities were created from a given Lead?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *Who are the top Sales representatives by their Lead conversion ratio?*

Marketing Executive Transaction Analysis Duty

Code Name

FBI_MARKETING_EXECUTIVE_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Marketing VP*

Subject Areas

This duty role secures access to the following subject areas:

- *Marketing - CRM Leads*
- *Marketing - CRM Leads and Opportunities Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *What are the top 10 products associated to the Leads in the system?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*

- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *How many Leads are associated for a given Opportunity?*
- *What are the sources of the Leads created in the current quarter?*
- *What are the Leads that are converted into Opportunities?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How many Leads are unassigned in the system?*
- *How many Opportunities were created from a given Lead?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *Who are the top Sales representatives by their Lead conversion ratio?*

Marketing Lead Transaction Analysis Duty

Code Name

FBI_MARKETING_LEAD_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Real Time*

- *CRM - CRM Activity Resource Real Time*
- *Marketing - CRM Leads*
- *Marketing - CRM Leads and Opportunities Real Time*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *Who all are the Contacts associated to the Lead?*
- *What are the top 10 products associated to the Leads in the system?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many Leads are associated for a given Opportunity?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *What are the sources of the Leads created in the current quarter?*
- *What are the Leads that are converted into Opportunities?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*

- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How many Leads is a Contact associated to?*
- *How many Leads are unassigned in the system?*
- *How many Opportunities were created from a given Lead?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*

Marketing Managerial Transaction Analysis Duty

Code Name

FBI_MARKETING_MANAGERIAL_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Marketing Manager*

Subject Areas

This duty role secures access to the following subject areas:

- *Marketing - CRM Leads*
- *Marketing - CRM Leads and Opportunities Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *What are the top 10 products associated to the Leads in the system?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *How many Leads are associated for a given Opportunity?*
- *What are the sources of the Leads created in the current quarter?*
- *What are the Leads that are converted into Opportunities?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How many Leads are unassigned in the system?*
- *How many Opportunities were created from a given Lead?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *Who are the top Sales representatives by their Lead conversion ratio?*

Marketing Operational Transaction Analysis Duty

Code Name

FBI_MARKETING_OPERATIONAL_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Marketing Operations Manager*

Subject Areas

This duty role secures access to the following subject areas:

- *Marketing - CRM Leads*

- *Marketing - CRM Leads and Opportunities Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *What are the top 10 products associated to the Leads in the system?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *How many Leads are associated for a given Opportunity?*
- *What are the sources of the Leads created in the current quarter?*
- *What are the Leads that are converted into Opportunities?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How many Leads are unassigned in the system?*
- *How many Opportunities were created from a given Lead?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *Who are the top Sales representatives by their Lead conversion ratio?*

Marketing Transaction Analysis Duty

Code Name

FBI_MARKETING_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Marketing Analyst*

Subject Areas

This duty role secures access to the following subject areas:

- *Marketing - CRM Leads*
- *Marketing - CRM Leads and Opportunities Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *What are the top 10 products associated to the Leads in the system?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *How many Leads are associated for a given Opportunity?*
- *What are the sources of the Leads created in the current quarter?*
- *What are the Leads that are converted into Opportunities?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How many Leads are unassigned in the system?*
- *How many Opportunities were created from a given Lead?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *Who are the top Sales representatives by their Lead conversion ratio?*

Next Gen HR Help Desk Administrator Transaction Analysis Duty

Code Name

FBI_HR_HELP_DESK_ADMIN_NG_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Next Gen Human Resource Help Desk Administrator*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM/Help Desk - Case Management Real Time*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Help Desk - HR Help Desk Queue Resources Real Time*
- *Help Desk - HR Service Request Action Plan Actions Real Time*
- *Help Desk - HR Service Request Conversation Messages Real Time*
- *Help Desk - HR Service Request Messages Real Time*
- *Help Desk - HR Service Request Resource Real Time*
- *Help Desk - HR Service Request Summary*
- *Help Desk - HR Service Requests Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Are agents making themselves available for certain channels and not for others?*
- *As an agent am I spreading myself too thin by being part of one too many HR Help Desk Request teams?*
- *What are the HR SRs that are waiting on my customers?*
- *What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *Are we keeping the number of non-compliant Help Desk Requests in check for those with Affected Parties?*
- *What employee organization files the most requests with affected parties? Which one has the most open, the highest resolution times?*
- *How many emails came from known versus unknown contacts?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *What is the delay in estimated completion dates?*
- *Do we see a pattern in the average number of messages per closed Help Desk request going up in recent months? What factors are contributing to this surge?*

- *What is the incidence of participation of my resource team in HR Help Desk Requests over a period? How many open Requests are they a part of, presently?*
- *How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *Which of my team's cases have been open for more than 15 days?*
- *When was the last, a SmartText was used?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *What is the current distribution of active and inactive agents across queues?*
- *What are the open critical HR SRs that my team is working on currently? How many of these are escalated?*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *What is the impact of linking knowledge articles to Help Desk Requests? Has it led to reduced Request resolution times and reopenings?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *What are the help desk requests that are waiting for an agent response?*
- *Do we see any patterns in message traffic and resolution times?*
- *What Smarttexts have not been used even once?*
- *What are the most popular channels used for internal conversations?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *How many emails are we receiving over time?*
- *How many action plans are open and how long have they been open?*
- *Who are my agents that have the most pending HR SRs?*
- *What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What Request categories have a higher percentage of non-compliant Help Desk Requests open?*
- *What is the current count of inbound email requests by status and mailbox?*
- *For a given service queue, how many agents are available to take chats?*
- *Are we responding to help desk request messages in a timely manner?*
- *What are the cases that have not updated a case in the past 10 days? Who owns them?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *Can the variation in Help Desk Request resolution times between team members be attributable to sub-optimal queue assignments?*
- *Where are the outliers when it comes to compliance?*
- *What is the incidence of agents linking knowledge articles to Help Desk Requests?*

- *Show me all the conversation messages together with the conversation message subject, body, sender and recipient details for a focused set of requests*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *What are the cases that have not been actioned since reopening?*
- *Is there scope for a better resource load balance keeping in consideration the Help Desk Request throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *By being part of the HR Help Desk Request team, how many Request resolutions has my resource team been able to influence during the past period?*
- *How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *On an average, how many days do each of my team members take to close a case?*
- *Are internal conversations taking place across high cost channels?*

Next Gen HR Help Desk Agent Transaction Analysis Duty

Code Name

FBI_HR_HELP_DESK_AGENT_NG_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Next Gen Human Resource Help Desk Agent*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Help Desk - HR Help Desk Queue Resources Real Time*
- *Help Desk - HR Service Request Action Plan Actions Real Time*

- *Help Desk - HR Service Request Conversation Messages Real Time*
- *Help Desk - HR Service Request Messages Real Time*
- *Help Desk - HR Service Request Resource Real Time*
- *Help Desk - HR Service Request Summary*
- *Help Desk - HR Service Requests Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Are agents making themselves available for certain channels and not for others?*
- *As an agent am I spreading myself too thin by being part of one too many HR Help Desk Request teams?*
- *What are the HR SRs that are waiting on my customers?*
- *What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *Are we keeping the number of non-compliant Help Desk Requests in check for those with Affected Parties?*
- *What employee organization files the most requests with affected parties? Which one has the most open, the highest resolution times?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *What is the delay in estimated completion dates?*
- *Do we see a pattern in the average number of messages per closed Help Desk request going up in recent months? What factors are contributing to this surge?*
- *What is the incidence of participation of my resource team in HR Help Desk Requests over a period? How many open Requests are they a part of, presently?*
- *How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *When was the last, a SmartText was used?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *What is the current distribution of active and inactive agents across queues?*
- *What are the open critical HR SRs that my team is working on currently? How many of these are escalated?*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *What is the impact of linking knowledge articles to Help Desk Requests? Has it led to reduced Request resolution times and reopenings?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *What are the help desk requests that are waiting for an agent response?*
- *Do we see any patterns in message traffic and resolution times?*

- *What Smarttexts have not been used even once?*
- *What are the most popular channels used for internal conversations?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *How many action plans are open and how long have they been open?*
- *Who are my agents that have the most pending HR SRs?*
- *What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What Request categories have a higher percentage of non-compliant Help Desk Requests open?*
- *For a given service queue, how many agents are available to take chats?*
- *Are we responding to help desk request messages in a timely manner?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *Can the variation in Help Desk Request resolution times between team members be attributable to sub-optimal queue assignments?*
- *Where are the outliers when it comes to compliance?*
- *What is the incidence of agents linking knowledge articles to Help Desk Requests?*
- *Show me all the conversation messages together with the conversation message subject, body, sender and recipient details for a focused set of requests*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *Is there scope for a better resource load balance keeping in consideration the Help Desk Request throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *By being part of the HR Help Desk Request team, how many Request resolutions has my resource team been able to influence during the past period?*
- *How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *Are internal conversations taking place across high cost channels?*

Next Gen HR Help Desk Manager Transaction Analysis Duty

Code Name

FBI_HR_HELP_DESK_MANAGER_NG_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Next Gen Human Resource Help Desk Manager*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Help Desk - HR Help Desk Queue Resources Real Time*
- *Help Desk - HR Service Request Action Plan Actions Real Time*
- *Help Desk - HR Service Request Conversation Messages Real Time*
- *Help Desk - HR Service Request Messages Real Time*
- *Help Desk - HR Service Request Resource Real Time*
- *Help Desk - HR Service Request Summary*
- *Help Desk - HR Service Requests Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Are agents making themselves available for certain channels and not for others?*
- *As an agent am I spreading myself too thin by being part of one too many HR Help Desk Request teams?*
- *What are the HR SRs that are waiting on my customers?*
- *What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *Are we keeping the number of non-compliant Help Desk Requests in check for those with Affected Parties?*
- *What employee organization files the most requests with affected parties? Which one has the most open, the highest resolution times?*
- *How many emails came from known versus unknown contacts?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *What is the delay in estimated completion dates?*
- *Do we see a pattern in the average number of messages per closed Help Desk request going up in recent months? What factors are contributing to this surge?*

- *What is the incidence of participation of my resource team in HR Help Desk Requests over a period? How many open Requests are they a part of, presently?*
- *How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *When was the last, a SmartText was used?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *What is the current distribution of active and inactive agents across queues?*
- *What are the open critical HR SRs that my team is working on currently? How many of these are escalated?*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *What is the impact of linking knowledge articles to Help Desk Requests? Has it led to reduced Request resolution times and reopenings?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *What are the help desk requests that are waiting for an agent response?*
- *Do we see any patterns in message traffic and resolution times?*
- *What Smarttexts have not been used even once?*
- *What are the most popular channels used for internal conversations?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *How many emails are we receiving over time?*
- *How many action plans are open and how long have they been open?*
- *Who are my agents that have the most pending HR SRs?*
- *What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What Request categories have a higher percentage of non-compliant Help Desk Requests open?*
- *What is the current count of inbound email requests by status and mailbox?*
- *For a given service queue, how many agents are available to take chats?*
- *Are we responding to help desk request messages in a timely manner?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *Can the variation in Help Desk Request resolution times between team members be attributable to sub-optimal queue assignments?*
- *Where are the outliers when it comes to compliance?*
- *What is the incidence of agents linking knowledge articles to Help Desk Requests?*
- *Show me all the conversation messages together with the conversation message subject, body, sender and recipient details for a focused set of requests*

- *How are SR transfers contributing to overall latency/resolution delays?*
- *How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *Is there scope for a better resource load balance keeping in consideration the Help Desk Request throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *By being part of the HR Help Desk Request team, how many Request resolutions has my resource team been able to influence during the past period?*
- *How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *Are internal conversations taking place across high cost channels?*

OTBI Performance Transactional Analysis Duty

Code Name

FBI_Performance_Transactional_Analysis_Duty

Job Roles

This duty role is related to the following job roles:

- *Application Implementation Consultant*
- *IT Security Manager*

Subject Areas

This duty role secures access to the following subject areas:

- *OTBI Performance Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *What are the most commonly used OTBI subject areas?*
- *What are the least-used OTBI subject areas?*
- *Which subject areas have large data volume?*

- *Which analyses reached OTBI max row limit?*
- *What is the database SQL execution time and row count?*
- *Which analyses have low usage because of poor performance?*
- *Which analyses have the longest response time?*
- *Which analyses have high data row count?*
- *Which subject areas have slow performance?*
- *What are the long-running analyses in the past month?*
- *What is the OTBI execution time histogram in the past month?*
- *What are the common execution errors in the past month?*
- *How many analyses and dashboards failed in the past month?*

OTBI Usage Transactional Analysis Duty

Code Name

FBI_Usage_Transactional_Analysis_Duty

Job Roles

This duty role is related to the following job roles:

- *Application Implementation Consultant*
- *IT Security Manager*

Subject Areas

This duty role secures access to the following subject areas:

- *OTBI Usage Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Who are the top OTBI users?*
- *How many ad-hoc OTBI analyses have been run in the past month?*
- *What is the weekly OTBI analysis usage trend?*
- *What is the execution history of dashboard X in the past month?*

- *How many OTBI SOAP web services have been run in the past month?*
- *How many users run OTBI analyses?*
- *How many custom OTBI analyses have been run in the past month?*
- *Which analyses have low usage in the past month?*
- *How many predefined OTBI analyses have been run in the past month?*
- *What are the most frequently-run OTBI analyses?*

Partner Channel Administrative Transaction Analysis Duty

Code Name

FBI_PARTNER_CHANNEL_ADMINISTRATIVE_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Portal Administrator*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*

- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Marketing - CRM Leads*
- *Partners - CRM Leads and Opportunities Real Time*
- *Partners - CRM Opportunities and Products Real Time*
- *Partners - CRM Partner Assessments*
- *Partners - CRM Partner Classification*
- *Partners - CRM Partner Contact*
- *Partners - CRM Partner Overview*
- *Partners - CRM Partner Program Benefits*
- *Partners - CRM Partner Resource*
- *Partners - CRM Partner Territory*
- *Partners - CRM Program Enrollments*
- *Partners - CRM Programs*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*

- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*

- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *Which types of Lead orchestration steps are reps skipping the most?*

- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *What are the top 10 products associated to the Leads in the system?*
- *How many Partners' team is a given Resource part of?*
- *How many Leads are part of the Campaign?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*

- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What is the potential revenue of leads by partners?*
- *What is the quarterly revenue trend for a specific product/product group by partner?*
- *How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?*
- *What is total number of Partners assigned to a specific classification for this period?*
- *Who all is part of the Partner Resource Team for a given Partner and what is their role?*
- *Which Program has the highest number of Enrollments?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*

- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*

- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *What is the number of partners in a specific classification within a defined geographic region?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*

- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *How are the Partners classified?*
- *How many Programs were created in the last quarter?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *How many emails are we receiving over time?*

- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*

- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*
- *What is the average deal size by Product groups?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*

- *What are the SRs that are waiting on my customers?*
- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*
- *What are the open Opportunities associated to a given Partner?*
- *What is the number of leads by partners for a specific product group?*
- *What is the distribution of Partner Opportunities by sales stages?*
- *How many Partners is a Contact is associated to?*
- *What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?*
- *How many Enrollments are going o expire in the next quarter?*
- *What are the Programs that Partners have enrolled into?*

- *How many Programs are owned by the team with their expiration date?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*

- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What is the revenue generated by Partners per Customer?*
- *What are the number of Partner contacts by Partner?*
- *What is the number of Partner Contacts that are also resources and users?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*

- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *What are the top ten Partners by Revenue during the past quarter/year?*
- *What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? Submitted e.g. Partner Performance?*
- *What are the Partners created in the system for a given time period?*
- *How many Enrollments were created/submitted/expired/terminated in the last month?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Partner Channel Transaction Analysis Duty

Code Name

FBI_PARTNER_CHANNEL_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Channel Account Manager*
- *Channel Partner Manager*
- *Channel Sales Director*
- *Channel Sales Manager*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Marketing - CRM Leads*
- *Partners - CRM Leads and Opportunities Real Time*
- *Partners - CRM Opportunities and Products Real Time*
- *Partners - CRM Partner Assessments*
- *Partners - CRM Partner Classification*
- *Partners - CRM Partner Contact*

- *Partners - CRM Partner Overview*
- *Partners - CRM Partner Program Benefits*
- *Partners - CRM Partner Resource*
- *Partners - CRM Partner Territory*
- *Partners - CRM Program Enrollments*
- *Partners - CRM Programs*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*

- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*

- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*

- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *What are the top 10 products associated to the Leads in the system?*
- *How many Partners' team is a given Resource part of?*
- *How many Leads are part of the Campaign?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*

- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What is the potential revenue of leads by partners?*
- *What is the quarterly revenue trend for a specific product/product group by partner?*
- *How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?*
- *What is total number of Partners assigned to a specific classification for this period?*
- *Who all is part of the Partner Resource Team for a given Partner and what is their role?*
- *Which Program has the highest number of Enrollments?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*

- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *What is the number of partners in a specific classification within a defined geographic region?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*

- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*

- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *How are the Partners classified?*
- *How many Programs were created in the last quarter?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *How many emails are we receiving over time?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*

- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*

- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*
- *What is the average deal size by Product groups?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*

- *Which Territories have exceeded their Quotes in the current Quarter?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*
- *What are the open Opportunities associated to a given Partner?*
- *What is the number of leads by partners for a specific product group?*
- *What is the distribution of Partner Opportunities by sales stages?*
- *How many Partners is a Contact is associated to?*
- *What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?*
- *How many Enrollments are going o expire in the next quarter?*
- *What are the Programs that Partners have enrolled into?*
- *How many Programs are owned by the team with their expiration date?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*

- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*

- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What is the revenue generated by Partners per Customer?*
- *What are the number of Partner contacts by Partner?*
- *What is the number of Partner Contacts that are also resources and users?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*
- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*

- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *What are the top ten Partners by Revenue during the past quarter/year?*
- *What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? Submitted e.g. Partner Performance?*
- *What are the Partners created in the system for a given time period?*
- *How many Enrollments were created/submitted/expired/terminated in the last month?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Partner Org Transaction Analysis Duty

Code Name

FBI_PARTNER_ORG_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Partner Administrator*

- *Partner Sales Manager*
- *Partner Sales Representative*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *Marketing - CRM Leads*
- *Partners - CRM Leads and Opportunities Real Time*
- *Partners - CRM Opportunities and Products Real Time*
- *Partners - CRM Partner Assessments*
- *Partners - CRM Partner Classification*
- *Partners - CRM Partner Contact*
- *Partners - CRM Partner Overview*
- *Partners - CRM Partner Program Benefits*
- *Partners - CRM Partner Resource*
- *Partners - CRM Partner Territory*
- *Partners - CRM Program Enrollments*
- *Partners - CRM Programs*
- *Sales - CRM Account Relationship*

- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*

- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*
- *Service - CRM Survey Requests Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*

- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *What are the top 10 products associated to the Leads in the system?*
- *How many Partners' team is a given Resource part of?*
- *How many Leads are part of the Campaign?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*

- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*

- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What is the potential revenue of leads by partners?*
- *What is the quarterly revenue trend for a specific product/product group by partner?*
- *How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?*
- *What is total number of Partners assigned to a specific classification for this period?*
- *Who all is part of the Partner Resource Team for a given Partner and what is their role?*
- *Which Program has the highest number of Enrollments?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*

- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *What is the number of partners in a specific classification within a defined geographic region?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*

- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*

- *How are the Partners classified?*
- *How many Programs were created in the last quarter?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *How many emails are we receiving over time?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*

- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*
- *What is the average deal size by Product groups?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*

- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *What are the SRs that are waiting on my customers?*
- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*

- *What are the open Opportunities associated to a given Partner?*
- *What is the number of leads by partners for a specific product group?*
- *What is the distribution of Partner Opportunities by sales stages?*
- *How many Partners is a Contact is associated to?*
- *What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?*
- *How many Enrollments are going o expire in the next quarter?*
- *What are the Programs that Partners have enrolled into?*
- *How many Programs are owned by the team with their expiration date?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*

- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What is the revenue generated by Partners per Customer?*
- *What are the number of Partner contacts by Partner?*
- *What is the number of Partner Contacts that are also resources and users?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*

- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*
- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *What are the top ten Partners by Revenue during the past quarter/year?*
- *What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? Submitted e.g. Partner Performance?*
- *What are the Partners created in the system for a given time period?*
- *How many Enrollments were created/submitted/expired/terminated in the last month?*
- *What are the objectives that have not met the target value set?*

- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Receivables Customer Transaction Analysis Duty

Code Name

FBI_RECEIVABLES_CUSTOMER_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Accounts Receivable Manager*
- *Accounts Receivable Specialist*

Subject Areas

This duty role secures access to the following subject areas:

- *Sales - CRM Account Relationship*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *What are the total number of Relationships for a given Account?*

Sales Administrative Transaction Analysis Duty

Code Name

FBI_SALES_ADMINISTRATIVE_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Sales Administrator*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Case Action Plan Actions Real Time*
- *CRM/Help Desk - Case Management Real Time*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Marketing - CRM Leads*
- *Marketing - CRM Leads and Opportunities Real Time*
- *Partners - CRM Leads and Opportunities Real Time*
- *Partners - CRM Opportunities and Products Real Time*
- *Partners - CRM Partner Assessments*
- *Partners - CRM Partner Classification*
- *Partners - CRM Partner Contact*
- *Partners - CRM Partner Overview*
- *Partners - CRM Partner Resource*

- *Partners - CRM Partner Territory*
- *Partners - CRM Program Enrollments*
- *Partners - CRM Programs*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*

- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *Which types of Lead orchestration steps are reps skipping the most?*
- *How to compare the performance of Lead Orchestrations?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*

- *What are the top 10 products associated to the Leads in the system?*
- *How many Partners' team is a given Resource part of?*
- *How many Leads are part of the Campaign?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *Which of my team's cases have been open for more than 15 days?*
- *When was the last, a SmartText was used?*
- *Do specific team members excel in response times or quality of interactions?*

- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What is the potential revenue of leads by partners?*
- *What is the quarterly revenue trend for a specific product/product group by partner?*
- *How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?*
- *What is total number of Partners assigned to a specific classification for this period?*
- *Who all is part of the Partner Resource Team for a given Partner and what is their role?*
- *Which Program has the highest number of Enrollments?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*

- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *How many Leads are associated for a given Opportunity?*
- *What is the number of partners in a specific classification within a defined geographic region?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*

- *What are the Assets that are expiring in the next quarter?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *What Smarttexts have not been used even once?*
- *Which types of Opportunity orchestration steps are reps skipping the most?*

- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *How are the Partners classified?*
- *How many Programs were created in the last quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *How many emails are we receiving over time?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*

- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the sources of the Leads created in the current quarter?*

- *What are the Leads that are converted into Opportunities?*
- *What is the average deal size by Product groups?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *What are the cases that have not updated a case in the past 10 days? Who owns them?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *How does orchestration impact lead conversion to opportunity quarter over quarter?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*

- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Leads are unassigned in the system?*
- *How many Opportunities were created from a given Lead?*
- *What are the open Opportunities associated to a given Partner?*
- *What is the number of leads by partners for a specific product group?*
- *What is the distribution of Partner Opportunities by sales stages?*
- *How many Partners is a Contact is associated to?*
- *What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?*
- *How many Enrollments are going o expire in the next quarter?*
- *What are the Programs that Partners have enrolled into?*
- *How many Programs are owned by the team with their expiration date?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*

- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *What are the cases that have not been actioned since reopening?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What is the breakdown of open action plans by Action Plan Action Owner?*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*

- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *How many Leads are converted in the current quarter?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*
- *What is the revenue generated by Partners per Customer?*
- *What are the number of Partner contacts by Partner?*
- *What is the number of Partner Contacts that are also resources and users?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*
- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *On an average, how many days do each of my team members take to close a case?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*

- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *What are the top ten Partners by Revenue during the past quarter/year?*
- *What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? Submitted e.g. Partner Performance?*
- *What are the Partners created in the system for a given time period?*
- *How many Enrollments were created/submitted/expired/terminated in the last month?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Sales CRM Sales Activity Transaction Analysis Duty

Code Name

FBI_SALES_CRM_SALES_ACTIVITY_TRANSACTION_ANALYSIS_DUTY

Job Roles

No applicable job roles

Subject Areas

This duty role secures access to the following subject areas:

- *Sales - CRM Resource Territory*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *What are all the Territories assigned to Resources/Employees?*
- *How many territories are assigned to a Resource/Employee?*

Sales Campaign Transaction Analysis Duty

Code Name

FBI_SALES_CAMPAIGN_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - Marketing Web Activities*
- *Marketing - CRM Leads and Opportunities Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many Leads are associated for a given Opportunity?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *What are the Leads that are converted into Opportunities?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *How many Opportunities were created from a given Lead?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*

Sales Executive Transaction Analysis Duty

Code Name

FBI_SALES_EXECUTIVE_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Sales VP*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Marketing - CRM Leads and Opportunities Real Time*
- *Partners - CRM Partner Territory*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*

- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*

- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Survey Requests Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*

- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *How many Leads are part of the Campaign?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*

- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *When was the last, a SmartText was used?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*

- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*

- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *How many Leads are associated for a given Opportunity?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*

- *What Smarttexts have not been used even once?*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*

- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*

- *What are the Leads that are converted into Opportunities?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *Does seasonality impact response rates?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*

- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Opportunities were created from a given Lead?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*

- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*

- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*
- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Sales Managerial Transaction Analysis Duty

Code Name

FBI_SALES_MANAGERIAL_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Sales Manager*
- *Sales Restricted User*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM - Marketing Web Activities*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Marketing - CRM Leads and Opportunities Real Time*
- *Partners - CRM Partner Territory*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*

- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*

- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Survey Requests Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*

- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *How many Leads are part of the Campaign?*
- *What are my web activities for the accounts and leads for a sales user's territory?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*

- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *When was the last, a SmartText was used?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*

- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*
- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*

- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *How many Leads are associated for a given Opportunity?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*

- *What Smarttexts have not been used even once?*
- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*

- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*

- *What are the Leads that are converted into Opportunities?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*
- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *Does seasonality impact response rates?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*

- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Opportunities were created from a given Lead?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *How many touch points have there been for a certain account or prospect?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*

- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*
- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*

- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*
- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Sales Operational Transaction Analysis Duty

Code Name

FBI_SALES_OPERATIONAL_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Sales Analyst*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - Marketing Web Activities*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *What are my web activities for the accounts and leads for a sales user's territory?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *What are the Products associated with the Deals?*
- *What are the activities that are synched from Eloqua into CX Sales?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *What web activities are associated with leads, contacts, customers, campaigns, and the signed-in sales user resource hierarchy?*
- *What are all the Campaigns assigned to an Opportunity?*
- *What are my interactions for leads generated and synched from Eloqua to CX Sales?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *How many touch points have there been for a certain account or prospect?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*

- *What are all the Opportunities resulted from a Campaign?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*

Sales Transaction Analysis Duty

Code Name

FBI_SALES_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Sales Representative*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Marketing - CRM Leads and Opportunities Real Time*

- *Partners - CRM Partner Territory*
- *Sales - CRM Account Relationship*
- *Sales - CRM All Contact Contact Point*
- *Sales - CRM All Contacts Addresses*
- *Sales - CRM Asset*
- *Sales - CRM Asset Contact*
- *Sales - CRM Asset Resource*
- *Sales - CRM Business Plan Objective Split*
- *Sales - CRM Campaign Members*
- *Sales - CRM Campaign Opportunity*
- *Sales - CRM Contact Note*
- *Sales - CRM Contact Relationship*
- *Sales - CRM Contact Resource*
- *Sales - CRM Contacts*
- *Sales - CRM Customer Classification*
- *Sales - CRM Customer Note*
- *Sales - CRM Customer Overview*
- *Sales - CRM Customers*
- *Sales - CRM Customers and Contacts Real Time*
- *Sales - CRM Deal Registration*
- *Sales - CRM Deal Registration Product*
- *Sales - CRM Forecasting*
- *Sales - CRM Forecasting and Pipeline Revenue Real Time*
- *Sales - CRM Historical Forecasting*
- *Sales - CRM Historical Pipeline*
- *Sales - CRM Lead Assessments*
- *Sales - CRM Lead Contact*
- *Sales - CRM Lead Product*
- *Sales - CRM Lead Resource*
- *Sales - CRM Lead Territory*
- *Sales - CRM MDF Budget*
- *Sales - CRM MDF Claim*
- *Sales - CRM MDF Claim Settlement*
- *Sales - CRM MDF Request*
- *Sales - CRM Opportunities and Products Real Time*
- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*

- *Sales - CRM Opportunity Contact*
- *Sales - CRM Opportunity Note*
- *Sales - CRM Opportunity Partner*
- *Sales - CRM Opportunity Resource*
- *Sales - CRM Opportunity Sales Stage Snapshot*
- *Sales - CRM Opportunity Territory*
- *Sales - CRM Partner Relationship*
- *Sales - CRM Pipeline*
- *Sales - CRM Primary Contact Addresses*
- *Sales - CRM Primary Contact Contact Point*
- *Sales - CRM Quota Management*
- *Sales - CRM Quote Lines*
- *Sales - CRM Quotes*
- *Sales - CRM Resource*
- *Sales - CRM Resource Territory*
- *Sales - CRM Sales Account Assessments*
- *Sales - CRM Sales Account Resource*
- *Sales - CRM Sales Account Territory*
- *Sales - CRM Territory Resource*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*

- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top 10 open opportunities? What are the target close dates and revenues for these?*
- *What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?*
- *How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How actively (# of Activities) are the Sales reps engaged with customers?*
- *What regions are my customers clustered in?*
- *Who are the 'new' customers, created in the past 6 months?*
- *What are the contact - points (phone, email, address, etc.) of key contacts?*
- *Who are the Employees/Resource for the Deals that are submitted in the current month?*
- *How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?*
- *What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?*
- *What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?*
- *Who all are the Contacts associated to the Lead?*
- *What were the approved amounts vs the settled claim totals for the last 4 quarters?*
- *How many Leads are part of the Campaign?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*

- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *How did the Opportunity evolve over time?*
- *What is the value trend of high value opportunities? Do they show a positive or negative trend?*
- *What is the Territory Quota vs/ Actual?*
- *How is the Quota attainment rate for the sales team?*
- *What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?*
- *When was the last, a SmartText was used?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How many Leads and Opportunities are Open for a given Customer in the Current quarter?*
- *Who are my teams top Customers?*
- *What are the Deals submitted by the Partners in the current quarter with the Deal size?*
- *What are the Products associated with the Deals?*
- *How many Leads are open for a given Product?*
- *What was the currency conversion rate applied to a specific claim?*
- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*

- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *What is the current distribution of active and inactive agents across queues?*
- *How many Resources are assigned to an Opportunity?*
- *How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)*
- *What are all the Territories assigned to Opportunities?*
- *What is the buying trend of our biggest customers?*
- *Who are the top competitors and what is the revenue exposure to them?*
- *What is the Hire date of the resources in an Organization?*
- *What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?*
- *What are the Accounts under the sales team, by territory?*
- *Do the sales territories need rebalancing?*
- *What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *How to gauge the pending effort required to progress the opportunity?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *How is the Revenue spread for a given Customer hierarchy?*
- *What are my most active accounts? Who owns them and where are these located?*
- *How is my Revenue distributed across Customer geographies?*
- *How is the Deal Amount split between the products associated to the Deal Registration Lines?*
- *Do forecasts rely on revenues from a few customers? What is the dependency profile?*
- *How to forecasts trend across periods?*
- *What forecasts have changed over time and are impacting my total quarterly revenue?*
- *What is the channel performance vs channel forecast?*

- *Are the Approved Claims fully allocated or are the Channel partners not spending to approval?*
- *How do wins and losses trend quarterly for a specific product line?*
- *How many Contacts are assigned to an Opportunity?*
- *Who are all the Contacts assigned to Opportunities?*
- *How many Leads are associated for a given Opportunity?*
- *What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?*
- *What are the Assets that are expiring in the next quarter?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Does this Partner have subsidiaries?*
- *What are the partner I have from this Partner, including all subsidiaries?*
- *What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?*
- *How many new Resources are created in the current quarter?*
- *How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)*
- *On which sales accounts is a given sales representative a member of the account team?*
- *Who are the resources assigned for a particular territory?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *What Smarttexts have not been used even once?*

- *Which types of Opportunity orchestration steps are reps skipping the most?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *How many new contacts are created in the system in the current month?*
- *Who are all the contacts for key customers and what are their roles?*
- *Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?*
- *What are all the Opportunities created as a result of Deal closure by a particular resource/team?*
- *Are the Leads supporting products that appeal to certain customers by size of company?*
- *Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?*
- *What are the top ten products by revenue during the past quarter/year?*
- *What products are often lost to key competitors? Is there a pattern?*
- *What are the responses for different Opportunity for an Assessment submitted?*
- *What are all the Campaigns assigned to an Opportunity?*
- *What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?*
- *What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?*
- *How are the business plan objectives split?*
- *How many Leads do not have Contact?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*

- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *What is the opportunity information captured in the note to an opportunity?*
- *Who are all the Resources assigned to Opportunities?*
- *What are the SIC codes associated with a Partner, and with all associated Partners?*
- *Are there any up sell/cross sell opportunities?*
- *How is each member on the team performing on deal size, account coverage, and win rate?*
- *Is overall pipeline healthy enough to meet sales goals?*
- *What is the contact point information of the primary contact for all active opportunities in the current quarter?*
- *What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?*
- *Against how many Opportunities, were the Quotes submitted in this month?*
- *What is the total Quotes revenue for the current month?*
- *How many times a Quote is revised before it gets approved?*
- *Who has submitted the highest number of Quotes in the current month?*
- *What are all the Territories assigned to Resources/Employees?*
- *How can I analyze the impact of orchestration in closing opportunities and revenue generation?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *Does this Contact have subsidiaries?*
- *For given set of Customers, what percentage of my revenue is exposed to competition?*
- *Who manages my top accounts?*
- *What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?*
- *Do Forecast rely on Revenue from few Products?*
- *Who are the Resources assigned to the Leads created in any given time period?*
- *What are the Leads assigned to me/my team member?*
- *How many territories is the Lead part of?*
- *How many outstanding claims in the current sales period assigned to a given Channel user?*
- *What are total number of Claims in the current quarter?*
- *Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?*
- *What is the open/closed revenue for each of the product groups in the selected geography?*
- *What are the Leads that are converted into Opportunities?*
- *What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?*

- *What is the QoQ growth for Assets by Products?*
- *Who are all the resources assigned to the Assets?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *Are the sales reps moving their opportunities fast enough?*
- *What are the top stalled opportunities and who are the sales reps working on these?*
- *What Resources will not be able to meet the Quotas in the current quarter?*
- *Which Territories have exceeded their Quotes in the current Quarter?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *How to analyze and proactively identify representatives facing issues that cause them to struggle to complete the sales objectives?*
- *How does orchestration impact the time spent in various opportunity sales stages?*
- *How to compare the performance of Opportunity Orchestrations?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *What is the additional information updated in the Notes for a Contact?*
- *What are all the contacts created in the system by Geography?*
- *How are the customers classified?*
- *What is the additional information updated in the Notes for a Customer?*

- *What are the top 10 products for all the Deals submitted in the current quarter?*
- *Are revenues getting closed in line with their forecast figures? To what extent do they deviate?*
- *What were the forecast revenues for the same period, last year? How did it compare with closed revenues?*
- *Are too many deals being pushed out to the subsequent fiscal quarters?*
- *How many Leads is a Contact associated to?*
- *What are my claimed vs unclaimed MDF totals?*
- *What is the Campaign ROI (return on investment)?*
- *Was an MDF claim rejected? What was the reason the claim was rejected?*
- *What is the revenue lost to competition for a specific product/product group?*
- *How many Opportunities were created from a given Lead?*
- *What are the total number of Relationships for a given Account?*
- *What is the primary contact and non-primary contact pointe for all active opportunities in the current quarter?*
- *How many Assets are created in a particular time period?*
- *What are the target v/s actual number of the split objectives?*
- *How many responses received for a given campaign?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *What is the average time the Opportunity is in a particular sales stage?*
- *How many Territories are assigned to an Opportunity?*
- *Is the sales team converting leads to opportunities fast enough?*
- *What are the most likely reasons that the Opportunities are lost against our key competitors?*
- *What are all addresses associated with the primary contact for all active opportunities in the current quarter?*

- *What are the Quotas assigned to the team and the Actuals?*
- *What quotes are associated with my opportunities, what are the quoteline items, and the associated products?*
- *What are the user preferences for the Users created in the system?*
- *How many territories are assigned to a Resource/Employee?*
- *What are the sales accounts owned by the Sales team?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What are the total number of Contact Relationships between two Contact?*
- *What are the top ten accounts by revenue in the last quarter?*
- *What are the names of the customers that a Sales team owns? Who are the key contacts?*
- *What are the top 10 Deals created in the current quarter by their Deal size?*
- *Does the forecast versus pipeline trend show a healthy picture?*
- *Is there a team or group who are over or underperforming vs forecast?*
- *What forecasts have seen changes in the quantities ordered vs the quantities planned?*
- *How are product revenues trending month over month?*
- *What are the higher value deals that have been moved out?*
- *How many Opportunities associated to a Campaign?*
- *Who approved an MDF claim? What are the start and end dates of that claim?*
- *What are all the Opportunities resulted from a Campaign?*
- *What Partners are assigned to specific geographic territories?*
- *How many Territories is a Partner part of?*
- *What are the top 10 Products by Asset count?*
- *Who are all the Contacts assigned to the Assets?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How many Partners are assigned to an Opportunity?*
- *Who are all the Partners assigned to Opportunities?*
- *What are the total number of Relationships between two Partners?*
- *What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?*

- *What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?*
- *Who are the Partner resources in the system and which Partner Organization they belong to?*
- *What are the sales accounts that a given Sales representative owns?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *How can I analyze the impact of orchestraton in my teams's opportunity closing and revenue generation?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*
- *What are the Resources are associated to this contact?*
- *Who are the Primary owners of the Contacts for contacts created in the last quarter?*
- *What are my best performing product lines by customer geographies?*
- *What is the relative mix of forecast revenues by the various sales channels in a specific territory?*
- *What are the Opportunity Revenue line details contributing the most to the Forecast?*
- *What are the historical monthly trend of closed revenue by current territories?*
- *Are the Leads associated with certain products?*
- *What are all the Territories the Lead is part of?*
- *What are the objectives that have not met the target value set?*
- *What are all the Leads/Contacts (Campaign Members) associated to the Campaign?*

Security Transaction Analysis Duty

Code Name

FBI_SECURITY_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *IT Security Manager*

Subject Areas

This duty role secures access to the following subject areas:

- *Security - Audit Real Time*
- *Security - Roles and Privileges Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Can I view and edit a particular page? If yes, which functional security policy do I need to provide to a user who needs similar access?*
- *Which roles were added with a specific functional security policy, and who added them?*
- *What are all the data security privileges that a specific user added?*
- *Why am I not able to view certain subject areas with my login credentials?*
- *Which data security policy would provide access to the data I need to see?*
- *I have not added a specific role to a user, but the user seems to have this job role. Can I trace how has this been inherited by the user?*

Service Administrative Transaction Analysis Duty

Code Name

FBI_SERVICE_ADMINISTRATIVE_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Customer Relationship Management Application Administrator*
- *Sales Administrator*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*

- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM/Help Desk - Case Action Plan Actions Real Time*
- *CRM/Help Desk - Case Management Real Time*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*

- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *Which of my team's cases have been open for more than 15 days?*

- *When was the last, a SmartText was used?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*

- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *What Smarttexts have not been used even once?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *How many emails are we receiving over time?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*

- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *What are the cases that have not updated a case in the past 10 days? Who owns them?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *Are certain channels more effective in generating positive customer responses?*

- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *What are the cases that have not been actioned since reopening?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *What is the breakdown of open action plans by Action Plan Action Owner?*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *On an average, how many days do each of my team members take to close a case?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*

- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*

Service Managerial Transaction Analysis Duty

Code Name

FBI_SERVICE_MANAGERIAL_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Customer Service Manager*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*

- *CRM - CRM Work Orders Real Time*
- *CRM/Help Desk - Inbound Messages Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Social Post Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *How is survey request trending compared to SR resolutions during the same period?*
- *Are survey request frequencies meeting our norms?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *How do interactions affect the progression of leads through the sales funnel?*

- *How many emails came from known versus unknown contacts?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*
- *When was the last, a SmartText was used?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*

- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *How does response differ for various service teams? Do some teams obtain better response rates?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *How many messages resulted in new service request creation versus update to existing service request?*
- *Is the Service organization effectively handling new emails in the appropriate timeframe?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*
- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *Are survey requests being sent per plan across teams, service categories, products, account regions?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*

- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *What Smarttexts have not been used even once?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *How many emails are we receiving over time?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*
- *Does the survey request activity show a declining trend?*
- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*

- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What is the current count of inbound email requests by status and mailbox?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *How many social posts came from known versus unknown contacts?*
- *Does seasonality impact response rates?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*
- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*

- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do we need to adjust our survey template to improve response rates?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*

Service Transaction Analysis Duty

Code Name

FBI_SERVICE_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Customer Service Representative*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Lead Real Time*
- *CRM - CRM Interaction Opportunity Real Time*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Service Request Summary*
- *CRM - CRM Work Orders Real Time*
- *CRM/Help Desk - Omni Channel Events Real Time*
- *CRM/Help Desk - Omni Channel Queue Resource Availability Real Time*
- *CRM/Help Desk - Service Request SmartText Usages Real Time*
- *Service - CRM Customer Coverage Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Action Plan Actions Real Time*
- *Service - CRM Service Request Conversation Messages Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *How often are communications being transferred between agents?*
- *What product lines have a higher percentage of non-compliant SRs open?*
- *How do the number of activities in a region and their average SR resolution rates by quarter compare?*
- *What is the interactions activity level across channels and agents? How do they compare across time periods?*
- *Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?*
- *Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)*
- *Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?*
- *How is tag usage across agents and resource teams? Which teams perform better than others?*
- *Are agents making themselves available for certain channels and not for others?*
- *What are the top/bottom 10 Smarttexts used during the last week/month/quarter?*
- *How do interactions affect the progression of leads through the sales funnel?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?*
- *To what extent has the number of customer coverages increased between two given dates?*
- *Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?*
- *What is the delay in estimated completion dates?*
- *Did the SR get assigned to the wrong queue/team?*
- *Was an SR sitting in a queue longer than the average time for all other SRs?*
- *Was the assigned agent overloaded with other work?*
- *Was the SR queue modified or SR resource owner modified at any point?*
- *Are there currently service requests that have missed the target milestone and require escalation?*
- *What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?*
- *Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?*
- *How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?*
- *What is the prevalence of SR transfers for an agent/manager/group/product/location?*
- *What are the popular reasons for SRs to be transferred? Is there a pattern?*
- *What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?*
- *Who are the agents available to take up requests and what is their current workload (number of chats they are presently handling)?*

- *When was the last, a SmartText was used?*
- *Do specific team members excel in response times or quality of interactions?*
- *What are the most preferred communication channels for customer interactions?*
- *Are there seasonal trends or patterns in customer engagements?*
- *Do internal conversation message volumes and higher turnaround time of requests go together?*
- *How is the percentage of compliant SRs trending month over month, quarter over quarter?*
- *How many distinct customer contacts does an agent interact with through a given channel during a specific period?*
- *How many times has the customer communicated with the contact center on this particular service request and what channels did they use?*
- *Do customers contact us more often to solve issues or to seek answers to questions?*
- *How long is it taking for offers to be made to agents?*
- *Was there a lot of time spent waiting on customers to respond to more information, documents and so on?*
- *Are we responding to customer messages in a timely manner?*
- *How does my team perform in meeting first response milestones versus resolution milestones?*
- *How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?*
- *Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?*
- *Is our resolution performance for escalated issues worse or better than non escalated issues?*
- *What is the current distribution of active and inactive agents across queues?*
- *Show me all the conversation messages together with the conversation message subject, body, sender, and recipient details for a focused set of requests*
- *How many Private vs Public SmartTexts are used by Customer Service representatives in Service Requests?*
- *How effective are our customer engagement strategies?*
- *Which types of activities and interactions lead to the highest customer engagement?*
- *Are there specific interactions that coincide with higher campaign conversion rates?*
- *Are there specific types of interactions that contribute to lead generation?*
- *How is the sales team nurturing leads through various interactions?*
- *Which team members or sales representatives are most effective at managing leads?*
- *What is the average length of time of an interaction, by agent and channel?*
- *How many were compliant and non-compliant when I, as an agent review my own completed work orders?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *Are there currently work requests that have a long acceptance time? What are the agent utilization rates?*
- *What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?*
- *As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?*
- *What managers have teams averaging the most activities?*

- *What are our issue resolution rates for low and high cost channels?*
- *How often are my agents able to resolve issues using a low cost channel like chat?*
- *What percent of communications are resolved the first time? What is the most commonly used channel?*
- *Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/ escalated issues?*
- *Who are my agents that have the most pending SRs?*
- *How does the aging profile of SRs look like? Are there any outliers calling for intervention?*
- *What is the overall satisfaction levels of our customers with regards to issue resolutions?*
- *What are the response scores for customer where we have not met SLA's?*
- *Which of our product lines most frequently receive suggestions for product improvements?*
- *How are agents handling various work types, for example, are some agents declining incoming billing issues?*
- *Show me a list of open escalated requests with a count of incoming and outbound conversation messages and the last conversation message dates*
- *What Smarttexts have not been used even once?*
- *Which types of Lead or Opportunity orchestration Step-Activities are reps skipping the most?*
- *How do customer interactions correlate with the success of marketing campaigns?*
- *How long, on average, does it take to close an opportunity from the initial interaction?*
- *How can we optimize the sales process based on interaction insights?*
- *Are there areas where team members require additional training for more effective interactions?*
- *What are the most popular channels used for internal conversations?*
- *Are we keeping the number of non-compliant SRs in check for our most valuable customers?*
- *What are the associated activities related to my upcoming appointment and task?*
- *What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?*
- *How can I identify neglected but strategic accounts to guide my team to focus on these?*
- *What are the activity levels in specific regions?*
- *How often do communications cross channels to get to resolution?*
- *Across what channels do such non-SR interactions most often occur?*
- *On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?*
- *Are my team resources optimally deployed across service queues to maximize productivity?*
- *What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?*
- *Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?*
- *How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?*
- *How many open SRs are linked to each tag?*
- *What are the open critical SRs that my team is working on currently? How many of these are escalated?*
- *What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?*

- *Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?*
- *Which team members or sales representatives are most active in terms of interactions?*
- *Are there any bottlenecks or inefficiencies in our activity management processes?*
- *Which sales team members are most effective in managing opportunities?*
- *How many interactions, on average, does it require to resolve an issue?*
- *Where are the outliers when it comes to compliance?*
- *How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?*
- *What are the rates for agents declining work offers?*
- *Who has completed the most activity objectives?*
- *I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?*
- *How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?*
- *Is my team following the norm that an SR must be opened (or updated) for every customer communication?*
- *What percentage of service requests involve at least one interaction?*
- *How often do communications cross channels before they are resolved?*
- *For a given service queue, how many agents are available to take chats?*
- *Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?*
- *Are our processes inefficient or preventing agents from meeting milestones?*
- *By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?*
- *As an agent am I spreading myself too thin by being part of one too many SR teams?*
- *What are the SRs that are waiting on my customers?*
- *What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?*
- *Which SmartTexts were not used in the last month/quarter/year?*
- *Are certain channels more effective in generating positive customer responses?*
- *Which interactions have the highest impact on closing opportunities successfully?*
- *What types of interactions lead to higher engagement and response rates?*
- *Are there preferred channels that customers use to contact us for specific service issue categories and product areas?*
- *What are the number of interactions by channel, agent, and time period?*
- *How frequently do agents link articles to SRs?*
- *What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings ?*
- *How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?*
- *What are the average handle times?*
- *What are the follow-up tasks I need to do on a particular customer?*

- *How many contacts were not favored with a positive outcome with a given agent?*
- *What are the activity objectives for the current period?*
- *How long did it take to assign the SR to the correct queue?*
- *How long was an SR unassigned and how long did it sit in each queue?*
- *How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?*
- *How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?*
- *How are SR transfers contributing to overall latency/resolution delays?*
- *Do one or more of the agents in my team need training to improve customer communication skills?*
- *Gain insights into why some opportunities are won while others are lost based on interactions*
- *Are there any workload balancing issues on my team? Are a few members performing most of the activities?*
- *What channels are the most effective for resolving issues with a single interaction?*
- *Are agents prematurely updating SRs as Resolved to make their numbers look better?*
- *How many new coverages begin in the ensuing month?*
- *Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?*
- *Are there action plans tracking late to an overall target completion date?*
- *What is the breakdown of open action plans by category?*
- *Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?*
- *What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?*
- *Are we seeing an issue regarding compliance rates with certain tags?*
- *How can I identify the missing activities that could be used to optimize and guide the reps better?*
- *Are internal conversations taking place across high cost channels?*
- *How have interactions evolved over a period?*
- *Which lead interactions are most successful in moving leads toward conversion?*
- *How do interactions correlate with the progression of sales opportunities?*
- *Which interactions are most influential in advancing opportunities through the sales pipeline?*
- *What interaction patterns indicate healthy or at-risk opportunities?*
- *How can we analyze the sales cycle length based on interactions and help shorten the sales cycle?*
- *Do certain interaction patterns correlate with more accurate forecasts?*

Subscription Management Transaction Analysis Duty

Code Name

FBI_SUBSCRIPTION_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Subscription Specialist*

Subject Areas

This duty role secures access to the following subject areas:

- *Subscription Management - Covered Levels Real Time*
- *Subscription Management - Subscription Billing Real Time*
- *Subscription Management - Subscription Relationships Real Time*
- *Subscription Management - Subscriptions Real Time*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Which covered levels expired without renewal in the last month?*
- *What is the projected billing for the next 6 months?*
- *What's the total contract value (TCV) in the last one year?*
- *What's the number of subscriptions by status and date range?*
- *Which customers have covered levels worth more then $50k that are expiring in 30 days?*
- *What are all the assets covered for a particular customer?*
- *How much MRR was renewed each month in the last 6 months?*
- *Which products are most frequently upgraded to or downgraded from?*
- *What is the MRR lost each month due to suspensions in the last 6 months?*
- *How many subscriptions were terminated in the last year?*
- *How does the usage of a particular subscription product trend?*
- *How many subscriptions are expiring in the next quarter?*
- *What is the Net MRR change due to amendments?*
- *What's the total MRR?*
- *What is the discount that was provided for a particular customer or product?*
- *What is the trend of successful, outstanding and churned renewals in the last 6 months?*
- *Which customers or coverage products deliver the most revenue?*
- *What is the Net Billing for the last 6 months?*
- *What is the Net MRR change due to amendments where full credit was issued?*

- *How many subscriptions were renewed the last quarter?*

User System Usage Transaction Analysis Duty

Code Name

FBI_USER_SYSTEM_USAGE_TRANSACTION_ANALYSIS_DUTY

Job Roles

No applicable job roles

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - CRM Click History*
- *CRM - CRM Reporting Usage*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Which types of reports and subject areas are the users in your organization are looking at?*
- *Which analytics should you prioritize and which can be phased out to optimize resources?*
- *What areas of the application are used by users in specific geographic region or resource hierarchies?*
- *How important are analytics to your team, and how much do they use them?*
- *What areas of the application are users viewing or not viewing?*
- *How are the areas of the application performing?*
- *Which users are using the application the most or least based on clicks?*
- *What are the most and least popular reports and which analytics are important to your team?*

User System Usage Transaction Analysis Duty

Code Name

FBI_USER_SYSTEM_USAGE_TRANSACTION_ANALYSYS_DUTY

Job Roles

No applicable job roles

Subject Areas

This duty role secures access to the following subject areas:

- *User System Usage*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Which department has the highest number of Active users?*
- *How is the user activity split across Channel (Web/Mobile/Mail)?*
- *Who are the top 10 active users of the system?*
- *Users belonging to what job title are most active in the system?*
- *Who are the users who have not logged in the system in the last week?*