Oracle

Sales Cloud

Subject Areas for Transactional Business Intelligence in Sales

13 (update 18C)
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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- Community: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.
- Guides and Videos: Go to the Oracle Help Center to find guides and videos.
- Training: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

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<th>Convention</th>
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<tr>
<td>boldface</td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td>monospace</td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
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Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.

Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 Introduction

Subject Areas: Overview

This guide contains information about Transactional Business Intelligence subject areas, their associated job and duty roles, and the business questions that they provide answers to. For your reference:

- Subject areas are the building blocks of your analytics and reports based upon them. Analytics are built by choosing an appropriate subject area that has information that answers the business question you’re analyzing. Technically, subject areas are a grouping of information pieces called data objects that relate to each other in a particular context.

- Job roles are associated with duty roles, and together control access to subject areas.
2 Subject Areas

Overview

This chapter provides information on the subject areas with data you maintain in Oracle Sales 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 Activity Contact Real Time

Description

This subject area provides information on all the contacts associated with an activity.

Contact dimension in this subject area refers to both primary and non primary contacts.

This subject area can be combined with any other subject area that has an Activity dimension when the report grain is at the level of an activity.

Business Questions

This subject area can answer the following business questions:

- Are there any Activities without the Contact information?
- Who are the contacts assigned to the Activities and the associated Customer for these Contact?
• How many contacts have been assigned to the Activities?

Job Roles

The following job roles secure access to this subject area:

• Channel Account Manager
• Channel Operations Manager
• 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 > Sales > Activity

Time Reporting
This subject area does not support historical reporting.
This subject area has no anchoring date.

Transactional Grain
This subject area returns data at the grain of Activity-Contact.

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

CRM - CRM Activity Objective Real Time

Description
This subject area provides information on all the objectives defined on an activity.

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

Business Questions
This subject area can answer the following business questions:

- Who has achieved the most Activities vs Objectives?
- What are the latest revisions to activity objectives?
- What are the activity objectives for this current period?

Job Roles
The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
Subject Areas for Transactional Business Intelligence in Sales

Chapter 2

Subject Areas

- 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 > Sales > Activity

Time Reporting

This subject area does not support historical reporting.
This subject area has no anchoring date.

Transactional Grain

This subject area returns data at the grain of Activity-Objective.

Special Considerations
This subject area is an alias of "Sales CRM Activity Objectve".

**CRM - CRM Activity Real Time**

**Description**

This subject area provides information on the activities created by the sales teams for Accounts, Opportunities or any other objects.

Employee dimension refers to the primary resource when the Activity and Contact is the primary contact of the activity.

The subject area supports analyses for various activity types in both task and appointment functions.

**Business Questions**

This subject area can answer the following business questions:

- *What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?*
- *What are the Strategic accounts that have not had any Activities/Visits in last quarter?*
- *Are there any work load balancing issues, with a few members performing most of the sales activities?*
- *What are my urgent/overdue tasks for this period to plan the week/month accordingly?*
- *How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?*
- *Who are the top/bottom 10 Sales Representatives by their Activities?*
- *What are the activities for a given Sales rep for today to plan the day ahead?*

**Job Roles**

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
Subject Areas for Transactional Business Intelligence in Sales

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- 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 > Sales > Activity

Time Reporting

This subject area supports latest status of Activities.

Time dimension is linked to Activity Sort Date Sort Date in case of a) Call report -> Actual Start Date b) Task -> Due Date c) Appointment -> Actual Start Date.

Transactional Grain

This subject area returns data at the grain of Activity.

Special Considerations

This subject area is an alias of “Sales CRM Sales Activity Real Time”.

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CRM - CRM Activity Resource Real Time

Description

This subject area provides information on all the resources associated with an activity.

The Resources dimension in this SA refers to both primary and non primary resources.

This subject area can be combined with any other subject area that has an Activity dimension when the report grain is at the level of an activity.

Business Questions

This subject area can answer the following business questions:

- What managers have teams averaging the most activities?
- What is the relationship between activities in a region and their revenue by quarter?
- How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
- For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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 > Sales > Activity

**Time Reporting**

This subject area does not support historical reporting.

This subject area has no anchoring date.

**Transactional Grain**

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

**Special Considerations**

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

**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:

- How many Leads are unassigned in the system?
- Who is the Primary Contact and Resource assigned for a given Lead?
- What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?
- How many Leads are converted in the current quarter?
- What are the top 10 products associated to the Leads in the system?
- Who are the top Sales representatives by their Lead conversion ratio?
- How many Leads were rejected in the last quarter and what were the reason for those?
- What are the sources of the Leads created in the current quarter?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?

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
Subject Areas for Transactional Business Intelligence in Sales

Chapter 2

Subject Areas

- 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

Primary Navigation

Navigator > Sales > Leads

Time Reporting

This subject area supports latest status of the Leads.
Time dimension is linked to 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:

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

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

This subject area does not support historical reporting.
This subject area has no anchoring date.

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.

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 are the open Opportunities associated to a given Partner?
- What is the potential revenue of leads by partners?
- 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 Operations Manager
- 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 > Partner Management > Partners

Time Reporting
This subject area does not support historical reporting.
This subject area has no anchoring date.

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 associated 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 revenue generated by Partners per Customer?
• What is the distribution of Partner Opportunities by sales stages?
• 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 Operations Manager
• 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 > Partner Management > Partners

Time Reporting

This subject area supports the latest status of the Opportunity and Product.

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 associated at the Opportunity level.

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:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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
This subject area supports the latest status of the Partner Assessment.
Time dimension is linked to Partner Assessment 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:

- How are the Partners classified?
- 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?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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 > Partner Management > Partners

Time Reporting

This subject area does not support historical reporting.

This subject area has no anchoring date.

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:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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 > Partner Management > Partners

Time Reporting
This subject area does not support historical reporting.
This subject area has no anchoring date.

Transactional Grain
This subject area returns the data at the grain of Partner-Contact.

Special Considerations
None.

Partners - CRM Partner Overview

Description
This subject area provides information on 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 Operations Manager
- 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

This subject area supports the latest status of the Partners.
Time dimension is linked to Partner 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 the 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 Tiers

Description

This subject area provides information on the tiers that are assigned for a given program.
This subject area can be combined with any other subject area that has Program dimension when the results are needed at level of program grain.

Business Questions

This subject area can answer the following business questions:

- For a given Partner Tier, what are the active Programs available in the system?
- What are the Partner tiers that a Particular program supports?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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

This subject area does not support historical reporting.

This subject area has no anchoring date.

Transactional Grain

This subject area returns the data at the grain of a Program-Tier.
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:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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 > Partner Management > Partners

Time Reporting
This subject area does not support historical reporting.
This subject area has no anchoring date.

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:

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

Job Roles
The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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 > Partner Management > Partners

**Time Reporting**

This subject area does not support historical reporting.

This subject area has no anchoring date.

**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:

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

Job Roles

The following job roles secure access to this subject area:

• Channel Account Manager
• Channel Operations Manager
• 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 > Enrollments

Time Reporting

This subject area supports the latest status of the Program Enrollments.

Time dimension is linked to 1) Program Enrollment Approved date 2) Program Enrollments Creation date 3) Program Enrollments Expired date 4) Program Enrollments Submitted date 5) Program Enrollments Terminated 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 are owned by the team with their expiration date?
- How many Programs were created in the last quarter?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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
This subject area supports the latest status of the Partner Programs.
Time dimension is linked to 1) Program Created date 2) Program Start date 3) Program End date.

Transactional Grain
This subject area returns the data at the grain 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:
- What are the total number of Relationships for a given Account?
- What are the Customers from this account, including all subsidiaries?
- Does this account have subsidiaries?

Job Roles
The following job roles secure access to this subject area:
- Channel Account Manager
- Channel Operations Manager
• 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

This subject area does not support historical reporting.

This subject area has no anchoring date.

Transactional Grain

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

Special Considerations

None.
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?
- How many Assets are created in a particular time period?
- What are the top 10 Products by Asset count?
- What is the QoQ growth for Assets by Products?

Job Roles
The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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
Subject Areas

- 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
This subject area supports the latest status of the Asset.
Time dimension is linked to 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?
The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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

This subject area does not support historical reporting.

This subject area has no anchoring date.

Transactional Grain

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

Special Considerations
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 Operations Manager
• 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
This subject area does not support historical reporting.  
This subject area has no anchoring date.

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 plan objectives have not met the target values?  
• What the Business plans owned by the team?  
• What are the Business plan objectives and what are their target v/s actual value?  
• How many Business plans were created in the System in the last quarter and for what Partner or Account?

Job Roles
The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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 > Business Plans

Time Reporting

This subject area supports the latest status of the Business Plan and Objectives.

Time dimension is linked to Business Plan Objective 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 Operations Manager
- 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 > Business Plans

Time Reporting
This subject area supports the latest status of the Business Plan Objective and Objective Splits.
Time dimension is linked to Objective Split 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 do not have Contact?
• How many responses received for a given campaign?
• How many Leads are part of the 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 Operations Manager
- Channel Partner Manager
- 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

This subject area supports the latest status of the Campaign and Campaign Members.

Time dimension is linked to 1) Campaign Created date 2) Campaign End date 3) Campaign Start 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 a campaign and the associated opportunities.

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

Job Roles
The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- Channel Partner Manager
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
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**
This subject area supports the latest status of the Campaign and Campaign Opportunities.
Time dimension is linked to 1) Campaign Created date 2) Campaign End date 3) Campaign Start 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 Operations Manager
- 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

This subject area does not support historical reporting.

This subject area has no anchoring date.

Transactional Grain

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

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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
Subject Areas for Transactional Business Intelligence in Sales

Chapter 2

Subject Areas

- Partner Channel Transaction Analysis Duty
- 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

This subject area does not support historical reporting.

This subject area has no anchoring 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 a Contact 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 a Contact dimension when the results are needed at the level of a Contact.

Business Questions

This subject area can answer the following business questions:

- For a given Contact, who all are the Resources/Employees that are part of the Contact team members?
- What all Contact team members is a given Employee part of?
Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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

This subject area does not support historical reporting.

This subject area has no anchoring date.

Transactional Grain

This subject area returns the data at the grain of 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:

- What are all the contacts created in the system by Geography?
- How many new contacts are created in the system in the current month?
- 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 Operations Manager
- 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
This subject area supports the latest status of the Contacts.
Time dimension is linked to 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 Operations Manager
- 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

This subject area does not support historical reporting.

This subject area has no anchoring date.

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 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 Operations Manager
• 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
Oracle Sales Cloud

Subject Areas for Transactional Business Intelligence in Sales

Chapter 2

Subject Areas

- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Primary Navigation

Navigator > Sales > Accounts

Time Reporting

This subject area does not support historical reporting.

This subject area has no anchoring date.

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 is my Revenue distributed across Customer geographies?
- 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?
- Where are the white spaces for me to sell a specific product?
- What are the top ten accounts by revenue in the last quarter?
- What are my most active accounts? Who owns them and where are these located?
- How actively (# of Activities) are the Sales reps engaged with customers?
Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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

This subject area supports the latest status of the Customers and their Opportunities.

Time dimension is linked to Opportunity Effective 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.

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:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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
This subject area supports the latest status of the Customers.
Time dimension is linked to 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 names of the customers that a Sales team owns? Who are the key contacts?
- What are the contact - points (phone, email, address, etc.) of key contacts?
- Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?
- Who are all the contacts for key customers and what are their roles?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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
This subject area supports the latest status of the Customers and Contact relationship.
Time dimension is linked to Customer Contact Profile Start 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:

- 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?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• 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 Operations Manager
• 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

This subject area supports the latest status of the Deals.

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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
This subject area supports the latest status of the Deals.
Time dimension is linked to Deal Submitted 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?
- Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
Subject Areas for Transactional Business Intelligence in Sales

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Subject Areas

• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• Does the forecast versus pipeline trend show a healthy picture?
• How to forecasts trend across periods?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?

Job Roles

The following job roles secure access to this subject area:

• Channel Account Manager
• Channel Operations Manager
• 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

This subject area supports the latest status of the Forecast and Forecast items.
Time dimension is linked to Forecast Item Effective 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 Operations Manager
- 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

This subject area supports the latest status of the Forecast and Forecast Revenue items.

Time dimension is linked to Forecast Item Effective 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:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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

This subject area supports the historical reporting of the Forecast.
Time dimension is linked to Forecast Item Effective 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:

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

Job Roles
The following job roles secure access to this subject area:

• Channel Account Manager
• Channel Operations Manager
• 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
This subject area supports the historical reporting of the Opportunity.
Time dimension is linked to Opportunity Effective 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, you must have run the required SS jobs in Oracle Sales Cloud so that transaction data has been snapshot and stored with your required frequency. The dimension entities that are snapshot for historical analysis are Opportunity (via 'Historical Opportunity') and Revenue (via 'Historical Revenue'). So, you will notice that 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 the data associated at the Opportunity level.

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 Operations Manager
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Subject Areas for Transactional Business Intelligence in Sales

Chapter 2

Subject Areas

• 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

This subject area supports the latest status of the Lead Assessment.
Time dimension is linked to 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:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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
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
This subject area does not support historical reporting.
This subject area has no anchoring date.

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:

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

Job Roles

The following job roles secure access to this subject area:

• Channel Account Manager
• Channel Operations Manager
• 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

This subject area supports latest status of the Leads.

Time dimension is linked to 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:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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

This subject area does not support historical reporting.

This subject area has no anchoring date.

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 Operations Manager
- 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
This subject area does not support historical reporting.
This subject area has no anchoring date.

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:

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

Job Roles
The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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
This subject area supports the latest status of the MDF Budgets.
Time dimension is linked to 1)MDF Budget Activation date 2) MDF Budget 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:

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

Job Roles

The following job roles secure access to this subject area:

- **Channel Account Manager**
- **Channel Operations Manager**
- **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
This subject area supports the latest status of the MDF Claims.
Time dimension is linked to 1) MDF Claim Approved date 2) MDF Claim 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:

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

Job Roles
The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Subject Areas for Transactional Business Intelligence in Sales

Chapter 2

Subject Areas

- 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

This subject area supports the latest status of the MDF Claim Settlement.
Time dimension is linked to 1) MDF Claim Settlement transaction 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**

This subject area can answer the following business questions:

- What are the total number of MDF Requests in the current quarter?
- What is the Fund Request available amount?
- What are the Fund request approved amount for the current quarter?
- Who has approved/rejected the MDF Requests?
- What are the Fund Requests and their statuses?

**Job Roles**

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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
This subject area supports the latest status of the MDF Request.
Time dimension is linked to 1) MDF Request Approved date 2) MDF Request Submitted date.

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

Special Considerations
None.

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:

- Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
- What is the revenue lost to competition for a specific product/product group?
- 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 do wins and losses trend quarterly for a specific product line?
- What is the open/closed revenue for each of the product groups in the selected geography?

Job Roles
The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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

This subject area supports the latest status of the Opportunity.

Time dimension is linked to Time: Opportunity Effective Date Secondary Dates: Opportunity Close 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.

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 Operations Manager
• 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
This subject area supports the latest status of the Opportunity Assessment.
Time dimension is linked to Opportunity Assessment 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 associated 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 Operations Manager
- 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
This subject area does not support historical reporting.
This subject area has no anchoring date.

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:

- Who are all the Contacts assigned to Opportunities?
- How many Contacts are assigned to an Opportunity?

Job Roles
The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
Subject Areas for Transactional Business Intelligence in Sales

Chapter 2

Subject Areas

- 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

This subject area does not support historical reporting.
This subject area has no anchoring date.

Transactional Grain

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

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 Operations Manager
- 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
This subject area does not support historical reporting.
This subject area has no anchoring date.

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:

- Who are all the Resources assigned to Opportunities?
- How many Resources are assigned to an Opportunity?

Job Roles
The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
Subject Areas for Transactional Business Intelligence in Sales

Chapter 2

Subject Areas

- Partner Administrator
- Partner Sales 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

This subject area does not support historical reporting.

This subject area has no anchoring date.

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 revenue amount change over time? (or any other Opportunity attributes)*
- *How did the Opportunity evolve over time?*
- *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 Operations Manager*
- *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
• PartnerOrg 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
This subject area provides historical reporting on the Opportunity sales stages to see how they changed over time.
Time dimension is linked to Stage Snapshot Date.

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 SS 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:

• How many Territories are assigned to an Opportunity?
Subject Areas

What are all the Territories assigned to Opportunities?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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

This subject area does not support historical reporting.

This subject area has no anchoring date.

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 Operations Manager
- 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
This subject area does not support historical reporting.
This subject area has no anchoring date.

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 stalled opportunities and who are the sales reps working on these?
- What are the most likely reasons that the Opportunities are lost against our key competitors?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• Who are the top competitors and what is the revenue exposure to them?
• Is the sales team converting leads to opportunities fast enough?
• What is the buying trend of our biggest customers?
• How is each member on the team performing on deal size, account coverage, and win rate?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• Are the sales reps moving their opportunities fast enough?

Job Roles

The following job roles secure access to this subject area:

• Channel Account Manager
• Channel Operations Manager
• 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
This subject area supports the latest status of the Opportunity.
Time dimension is linked to Time: Opportunity Effective Date Secondary Dates: Opportunity Close 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 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:

- Which Territories have exceeded their Quotes in the current Quarter?
- What are the Quotas assigned to the team and the Actuals?
- How is the Quota attainment rate for the sales team?
- What is the Territory Quota vs/ Actual?
- What Resources will not be able to meet the Quotas in the current quarter?
Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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

This subject area supports the latest status of the Quotas.

Time dimension is linked to Enterprise Calendar.

Transactional Grain

This subject area returns the data at the grain of a Quota.
Special Considerations

None.

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?
- Who has submitted the highest number of Quotes in the current month?
- How many times a Quote is revised before it gets approved?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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 > Quotes

Time Reporting

This subject area supports the latest status of the Quotes.

Time dimension is linked to Quotes Creation 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:

- 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?
- What is the Hire date of the resources in an Organization?

### Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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

This subject area supports the latest status of the Resource.
Time dimension is linked to 1) Resource Hire date 2) Resource creation 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 helps you provide information on the resource activities in the system.

The subject area helps determine whether a resource was active or not for a particular day and the channel they used.

### Business Questions

This subject area can answer the following business questions:

- **Resources belonging to what job title are most active in the system?**
- **How is the resource activity split across Channel (Web/Mobile/Mail)?**
- **Which department has the highest number of Active resources?**
- **Who are the top 10 active resources of the system?**
- **Who are the resources who have not logged in the system in the last week?**

### Job Roles

The following job roles secure access to this subject area:

- **Not assigned to predefined job roles**

### Duty Roles

The following duty roles secure access to this subject area:

- **User System Usage Transaction Analysis Duty**
Primary Navigation
Navigator > Resource Directory

Time Reporting
This subject area supports the reporting on Resource Activity in the system over a period of time.
Time dimension is linked to Calendar date.

Transactional Grain
This subject area returns the data at the grain of the Resource.

Special Considerations
1) Considering the sensitivity of the data, the access to the User System Usage subject area is restricted to the BI duty role.
2) BI Administrator would have access to this subject area. 3) The system would record the User activity data only when the profile option FND_TRACK_USER_ACTIVITY is enabled. Please refer the documentation on User adoption data reporting for details. 4) This subject area has been designed to show activities for all Time Period and Users. The reason it was designed this way is to allow customer to look at time period where there have been user activities, as well as those months where there were no activities. For this reason, when a custom report is built that includes a Time Period at either Year or Month, customer must restrict the report result by specific time period, i.e. for the current year. Without this filter, the report will show result for the complete 100 years in the Time dimension that OSC supports, which may not be the result that the customer is looking for. For the best performance, it is recommended that customer. i) Add filter for a specific year. ii) Avoid reporting by Date. Instead the report should use Month or Quarter. iii) Consider filtering the report by group of users, instead of individual users. For best performance, we recommend that the user apply filter on # of Active Days fact > 0 so that the report would show up the positive reporting (unless negative reporting is the requirement).

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:

• How many territories are assigned to a Resource/Employee?
Subject Areas for Transactional Business Intelligence in Sales

Chapter 2

Subject Areas

• What are all the Territories assigned to Resources/Employees?

Job Roles

The following job roles secure access to this subject area:

• Channel Account Manager
• Channel Operations Manager
• 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

This subject area does not support historical reporting.

This subject area has no anchoring date.

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:

- What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
- How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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
This subject area supports the latest status of the Account Assessment.
Time dimension is linked to Account Assessment 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 resoruces 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 sales accounts that a given Sales representative owns?
- What are the sales accounts owned by the Sales team?
- 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?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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
This subject area does not support historical reporting.
This subject area has no anchoring date.

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 Operations Manager
- 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

This subject area does not support historical reporting.

This subject area has no anchoring date.

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:

- *Who are the resources assigned for a particular territory?*
- *Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?*

**Job Roles**

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- 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
This subject area does not support historical reporting.
This subject area has no anchoring date.

Transactional Grain
This subject area returns the data at the grain of Territory-Resource.

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:

- *How is the user activity split across Channel (Web/Mobile-Mail)?*
- *Which department has the highest number of Active users?*
- *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?*
- *Who are the top 10 active users of the system?*

Job Roles
The following job roles secure access to this subject area:

- *Not assigned to predefined 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 supports the reporting on User Activity in the system over a period of time. Time dimension is linked to Calendar date.

Transactional Grain

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

Special Considerations

1) Considering the sensitivity of the data, the access to the User System Usage subject area is restricted to the BI duty role [User System SA Access](#) 2) BI Administrator would have access to this subject area. 3) The system would record the User activity data only when the profile option FND_TRACK_USER_ACTIVITY is enabled. Please refer the documentation on User adoption data reporting for details. 4) This subject area has been designed to show activities for all Time Period and Users. The reason it was designed this way is to allow customer to look at time period where there have been user activities, as well as those months where there were no activities. For this reason, when a custom report is built that includes aTime Period at either Year or Month, customer must restrict the report result by specific time period. i.e. for the current year. Without this filter, the report will show result for the complete 100 years in the Time dimension that OSC supports, which may not be the result that the customer is looking for. For the best performance, it is recommended that customer. i) Add filter for a specific year. ii) Avoid reporting by Date. Instead the report should use Month or Quarter. iii) Consider filtering the report by group of users, instead of individual users. For best performance, we recommend that the user apply filter on # of Active Days fact > 0 so that the report would show up the positive reporting (unless negative reporting is the requirement).


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.

Who are the contacts assigned to the Activities and the associated Customer for these Contact?

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 Operations Manager**
- **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**
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 have been assigned to the Activities?

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 Operations Manager
- 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

Are there any Activities without the Contact information?

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 Operations Manager
- 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 this 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 Operations Manager
- 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
What are the latest revisions to 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 Operations Manager
- 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
Who has achieved the most Activities vs 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 Operations Manager**
- **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 work load balancing issues, with a few members performing most of the sales 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 Operations Manager
- 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
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 Accounts that are being heavily pursued? Does this align with our business priorities and goals?

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 Operations Manager
• 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

Who are the top/bottom 10 Sales Representatives by their 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 Operations Manager**
- **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**
What are the activities for a given Sales rep for today to plan the day ahead?

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 Operations Manager
- 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
What are my urgent/overdue tasks for this period to plan the week/month accordingly?

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 Operations Manager**
- **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**
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 are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?

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 Operations Manager
• 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 Strategic accounts that have not had any Activities/Visits in last quarter?

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 Operations Manager
- 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
For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?

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 Operations Manager
- 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
How many Activities are performed by Sales Manager/her team in the last week/month/quarter?

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 Operations Manager
- 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
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 Operations Manager
- Channel Sales Manager
Oracle Sales Cloud

Subject Areas for Transactional Business Intelligence in Sales

Chapter 3

Business Questions

- 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 relationship between activities in a region and their revenue by quarter?

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 Operations Manager
- 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 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:

- 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
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:

- 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

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:

• 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
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:

• 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
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:

- 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

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:

• 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
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:

- 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
Subject Areas for Transactional Business Intelligence in Sales

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- *Marketing Lead Transaction Analysis Duty*
- *Marketing Managerial Transaction Analysis Duty*
- *Marketing Operational Transaction Analysis Duty*
- *Marketing 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:

- *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*
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:

- 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
What are the Leads that are coverted 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
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 Partner tiers that a Particular program supports?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Partners - CRM Partner Program Tiers

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
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
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

For a given Partner Tier, what are the active Programs available in the system?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Partners - CRM Partner Program Tiers

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
- 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
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 Operations Manager
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative

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

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

### 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*

### 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 Operations Manager*
Subject Areas for Transactional Business Intelligence in Sales

Chapter 3

Business Questions

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

**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**

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

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

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

What is the average deal size by Product groups?

Subject Areas
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 Operations Manager*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
• Channel Sales Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative

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

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 Operations Manager
• Channel Sales Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative

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

What are the responses by different Partners for an Assessment 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 Operations Manager
• 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
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 Operations Manager
- 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
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 Operations Manager
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative

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

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 Operations Manager
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative

**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

**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 Operations Manager
Subject Areas for Transactional Business Intelligence in Sales

Chapter 3

Business Questions

• Channel Sales Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative

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

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 Operations Manager
• Channel Sales Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative

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
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 Operations Manager
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative

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

How many Partners is a Contact is associated to?
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 Operations Manager
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative

**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

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

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
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 Operations Manager*
• *Channel Sales Manager*
• *Partner Administrator*
• *Partner Sales Manager*
• *Partner Sales Representative*

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*

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 Operations Manager
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative

**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

**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 Operations Manager
- Channel Sales Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative

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

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 Operations Manager
• 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 are going to 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 Operations Manager
- 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 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 Operations Manager
- 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 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 Operations Manager
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
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 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 Operations Manager
- 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 Operations Manager
- 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:

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

- Channel Account Manager
- Channel Operations Manager
- 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 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:

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

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- 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 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**

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *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 the Business plans 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

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- 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 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

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- 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 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 Operations Manager
- 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 Operations Manager
- 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?**
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 Operations Manager
- 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 Operations Manager**
- **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 a given Contact, who all are the Resources/Employees that are part of the Contact team members?

**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 Operations Manager
- 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 all Contact team members is a given Employee part of?

**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 Operations Manager
- 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 Operations Manager
- 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 Operations Manager**
- **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 Operations Manager
- 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 Operations Manager*
- *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**
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 Operations Manager
- 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 Operations Manager
- 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 Operations Manager*
- *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 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 Operations Manager
- 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 Operations Manager
- 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

**Where are the white spaces for me to sell a specific product?**

**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 Operations Manager
- 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?
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 Operations Manager
- 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 Operations Manager
- 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 Operations Manager
- 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 Operations Manager
- 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 Operations Manager**
- **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 manages my top accounts?**

**Subject Areas**
Subject Areas for Transactional Business Intelligence in Sales

Chapter 3

Business Questions

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 Operations Manager
- 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 '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 Operations Manager**
- **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 Operations Manager
- 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 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 Operations Manager
- 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 for key customers and what are their roles?
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 Operations Manager
- 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 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 Operations Manager
- 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 Operations Manager*
- *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 Operations Manager
- 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 Operations Manager
- 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 Operations Manager
- 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 Operations Manager
- 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 Operations Manager*
- *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*
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 Operations Manager
- 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 Operations Manager
• 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
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 Operations Manager**
- **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**
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 Operations Manager
- 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
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 Operations Manager
- 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
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 Operations Manager
- 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 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 Operations Manager
• 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
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 Operations Manager
- 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 Operations Manager
• 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
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 Operations Manager
- 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
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 Operations Manager
- 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
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 Operations Manager
- 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
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 Operations Manager**
- **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**
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 Operations Manager
- 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
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 Operations Manager
- 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
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 Operations Manager
- 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 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 Operations Manager*
- *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 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 Operations Manager
- 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 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 Operations Manager
- 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 Operations Manager
- 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
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 Operations Manager**
- **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**
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 Operations Manager
- 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
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 Operations Manager
- 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 Operations Manager
• 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 Operations Manager**
• **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**
Subject Areas for Transactional Business Intelligence in Sales

Chapter 3

Business Questions

• 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 Operations Manager
• 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 Operations Manager
• 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 Operations Manager
• 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

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 Operations Manager
- 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 Operations Manager
• 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
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 Operations Manager*
- *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*
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 Operations Manager
- 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
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 Operations Manager**
- **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**
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 Operations Manager
- 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 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 Operations Manager**
• **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**
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 Operations Manager
- 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
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 Operations Manager
- 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
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 Operations Manager
- 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
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 Operations Manager
- 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
What are the total number of MDF Requests in the current quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM MDF Request

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
- Partner Administrator
- Partner Sales 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
What is the Fund Request available amount?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM MDF Request

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
- Partner Administrator
- Partner Sales 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
What are the Fund request approved amount for the current quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM MDF Request

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
- Partner Administrator
- Partner Sales 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 Fund Requests and their statuses?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Sales - CRM MDF Request

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
• Partner Administrator
• Partner Sales 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 has approved/rejected the MDF Requests?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

• Sales - CRM MDF Request

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
• Partner Administrator
• Partner Sales 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
Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)

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 Operations Manager
- 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
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 Operations Manager
- 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
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 Operations Manager**
- **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**
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 Operations Manager
- 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
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 Operations Manager*
- *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*
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 Operations Manager
- 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 Operations Manager
- 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
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 Operations Manager
- 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
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 Operations Manager
- 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 Operations Manager
• 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 Operations Manager
• 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 Operations Manager
• 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
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 Operations Manager
- 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 Operations Manager
• 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 Operations Manager
• 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 Operations Manager
• 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 Operations Manager
• 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
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 Operations Manager
- 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 Operations Manager
• 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
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 Operations Manager
- 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
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 Operations Manager
- 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
**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 Operations Manager
- 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 Operations Manager
• 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 Operations Manager
• 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
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 Operations Manager
- 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 Operations Manager
• 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
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 Operations Manager
- 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
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 Operations Manager
- 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
Subject Areas for Transactional Business Intelligence in Sales

Chapter 3

Business Questions

- 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 Operations Manager
- 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 Operations Manager
- 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 Operations Manager
• 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
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 Operations Manager
- 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
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 Operations Manager
- 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
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 Operations Manager**
- **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**
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 Operations Manager
- 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
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 Operations Manager
- 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
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 Operations Manager
- 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
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 Operations Manager
- 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 Operations Manager
- 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 Operations Manager
- 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 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 Operations Manager*
- *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 Operations Manager*
- *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 Operations Manager
- 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 Operations Manager**
- **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 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 Operations Manager
- 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 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 Operations Manager**
- **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 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 Operations Manager
- 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 Operations Manager
- 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
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 Operations Manager
- 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
Subject Areas for Transactional Business Intelligence in Sales

Chapter 3

Business Questions

- **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 Operations Manager**
- **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**
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 Operations Manager*
- *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*
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 Operations Manager
- 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
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 Operations Manager**
- **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**
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 Operations Manager**
- **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**
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 Operations Manager
- 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 Operations Manager
• 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
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 Operations Manager
- 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
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 Operations Manager*
- *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*
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 Operations Manager
- 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
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
The following job roles secure access to the data related to this business question:

- Not assigned to predefined 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
The following job roles secure access to the data related to this business question:

- Not assigned to predefined 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

The following job roles secure access to the data related to this business question:

- Not assigned to predefined 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
The following job roles secure access to the data related to this business question:

- **Not assigned to predefined 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
The following job roles secure access to the data related to this business question:

- Not assigned to predefined 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 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 Operations Manager
- Channel Partner Manager
- 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 Operations Manager
- Channel Partner Manager
- 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 Operations Manager
- Channel Partner Manager
- 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 Operations Manager
- Channel Partner Manager
- 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 Operations Manager
- Channel Partner Manager
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
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 Operations Manager**
- **Channel Partner Manager**
- **Channel Sales Manager**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**
- **Sales Manager**
- **Sales Representative**
- **Sales Restricted User**
- **Sales VP**

Duty Roles

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

The following job roles secure access to the data related to this business question:

- Not assigned to predefined 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 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**

The following job roles secure access to the data related to this business question:

- *Not assigned to predefined 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 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**

The following job roles secure access to the data related to this business question:

- *Not assigned to predefined job roles*

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- *User System Usage Transaction Analysis Duty*
Resources 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:

- Sales - CRM Resource System Usage

Job Roles
The following job roles secure access to the data related to this business question:

- Not assigned to predefined 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 resource activity split across Channel (Web/ Mobile-Mail)?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Resource System Usage

Job Roles

The following job roles secure access to the data related to this business question:

- *Not assigned to predefined job roles*

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- *User System Usage 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 Operations Manager*
- *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 Operations Manager
- 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 Operations Manager
- 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 Operations Manager
• 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
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.

Channel Account Manager

Code Name

ORA_ZPM_CHANNEL_ACCOUNT_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 Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource 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 Program Tiers
• Partners - CRM Partner Resource
Partners - CRM Partner Territory
Partners - CRM Program Enrollments
Partners - CRM Programs
Sales - CRM Account Relationship
Sales - CRM Asset Contact
Sales - CRM Asset Resource
Sales - CRM Asset
Sales - CRM Asset Contact
Sales - CRM Asset Resource
Sales - CRM Business Plan
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
**Job Roles**

- *Sales - CRM Opportunity Assessments*
- *Sales - CRM Opportunity Campaign*
- *Sales - CRM Opportunity Contact*
- *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 Quota Management*
- *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*

**Business Questions**

This job role secures access to data that can answer the following business questions:

- **Who has achieved the most Activities vs Objectives?**
- **What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?**
- **What are the Strategic accounts that have not had any Activities/Visits in last quarter?**
- **For a given Partner Tier, what are the active Programs available in the system?**
- **What is the quarterly revenue trend for a specific product/product group by partner?**
- **What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?**
- **How many Territories is a Partner part of?**
- **How many Enrollments were created/submitted/expired/terminated in the last month?**
- **What are the total number of Relationships for a given Account?**
- **What Business plan objectives have not met the target values?**
- **For a given Contact, who all are the Resources/Employees that are part of the Contact team members?**
- **Who manages my top accounts?**
- **Who are the 'new' customers, created in the past 6 months?**
- **What are the Deals submitted by the Partners in the current quarter with the Deal size?**
- **What are the historical monthly trend of closed revenue by current territories?**
• Are the Leads supporting products that appeal to certain customers by size of company?
• 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 the total number of MDF Requests in the current quarter?
• What is the Fund Request available amount?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How many Territories are assigned to an Opportunity?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• Who are the top competitors and what is the revenue exposure to them?
• Which Territories have exceeded their Quotes in the current Quarter?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the sales accounts that a given Sales representative owns?
• What are the total number of Contact Relationships between two Contact?
• How many Opportunities associated to a Campaign?
• What managers have teams averaging the most activities?
• What is the average deal size by Product groups?
• What is the number of Partner Contacts that are also resources and users?
• What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?
• How many Programs are owned by the team with their expiration date?
• How are the business plan objectives split?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• Is there a team or group who are over or underperforming vs forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• How many Leads are open for a given Product?
• Who approved an MDF claim? What are the start and end dates of that claim?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
• What is the revenue lost to competition for a specific product/product group?
• What are the responses for different Opportunity for an Assessment submitted?
• What are all the Territories assigned to Opportunities?
• Is the sales team converting leads to opportunities fast enough?
• How many territories are assigned to a Resource/Employee?
• What are the sales accounts owned by the Sales team?
• What is the relationship between activities in a region and their revenue by quarter?
• What is the revenue generated by Partners per Customer?
• What is the distribution of Partner Opportunities by sales stages?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• How are the Partners classified?
• What are the number of Partner contacts by Partner?
• Who all is part of the Partner Resource Team for a given Partner and what is their role?
• What are the Customers from this account, including all subsidiaries?
• Who are all the Contacts assigned to the Assets?
• What are all the contacts created in the system by Geography?
• How many new contacts are created in the system in the current month?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the top 10 products for all the Deals submitted in the current quarter?
• What forecasts have changed over time and are impacting my total quarterly revenue?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• What are the Quotas assigned to the team and the Actuals?
• How is the Quota attainment rate for the sales team?
• How many new Resources are created in the current quarter?
• What are the Accounts under the sales team, by territory?
• Do the sales territories need rebalancing?
• Are there any work load balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• How many Partners’ team is a given Resource part of?
• How many Programs were created in the last quarter?
• What are the Assets that are expiring in the next quarter?
• How is my Revenue distributed across Customer geographies?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• Do Forecast rely on Revenue from few Products?
What forecasts have seen changes in the quantities ordered vs the quantities planned?

How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?

What are my claimed vs unclaimed MDF totals?

What are total number of Claims in the current quarter?

Who are all the Contacts assigned to Opportunities?

Who are all the Resources assigned to Opportunities?

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 is the Territory Quota vs/ Actual?

What Resources will not be able to meet the Quotas in the current quarter?

How many Leads do not have Contact?

Against how many Opportunities, were the Quotes submitted in this month?

What is the total Quotes revenue for the current month?

Who has submitted the highest number of Quotes in the current month?

What are the latest revisions to activity objectives?

What are the open Opportunities associated to a given Partner?

What is the potential revenue of leads by partners?

What is the number of leads by partners for a specific product group?

What are the Programs that Partners have enrolled into?

What the Business plans owned by the team?

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?

Where are the white spaces for me to sell a specific product?

Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?

What are the Products associated with the Deals?

What is the relative mix of forecast revenues by the various sales channels in a specific territory?

Are the Leads associated with certain products?

What are the Leads assigned to me/my team member?

What are all the Territories the Lead is part of?

What are the Fund request approved amount for the current quarter?

Who has approved/rejected the MDF Requests?

What products are often lost to key competitors? Is there a pattern?

How many Contacts are assigned to an Opportunity?

How many Resources are assigned to an Opportunity?

How is each member on the team performing on deal size, account coverage, and win rate?
• What are all the Territories assigned to Resources/Employees?
• How many responses received for a given campaign?
• What is the Campaign ROI (return on investment)?
• How many times a Quote is revised before it gets approved?
• Are there any Activities without the Contact information?
• What are the activity objectives for this current period?
• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
• What is total number of Partners assigned to a specific classification for this period?
• What are the Partners created in the system for a given time period?
• What Partners are assigned to specific geographic territories?
• How many Enrollments are going to expire in the next quarter?
• What is the additional information updated in the Notes for a Contact?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• What are the top ten accounts by revenue in the last quarter?
• What regions are my customers clustered in?
• Who are all the contacts for key customers and what are their roles?
• 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?
• How to forecasts trend across periods?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• How are product revenues trending month over month?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• How many Leads is a Contact associated to?
• Who are the Resources assigned to the Leads created in any given time period?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What was the currency conversion rate applied to a specific claim?
• How did the Opportunity evolve over time?
• What are the total number of Relationships between two Partners?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
• Who are the resources assigned for a particular territory?
• How many Leads are part of the Campaign?
• Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• What are the Partner tiers that a particular program supports?
• What are the top ten Partners by Revenue during the past quarter/year?
• Does this account have subsidiaries?
• How many Assets are created in a particular time period?
• What are the top 10 Products by Asset count?
• What are the Business plan objectives and what are their target v/s actual value?
• What are the target v/s actual number of the split objectives?
• What are the objectives that have not met the target value set?
• What all Contact team members is a given Employee part of?
• What is the additional information updated in the Notes for a Customer?
• What are my most active accounts? Who owns them and where are these located?
• Who are my teams top Customers?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• 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?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the Fund Requests and their statuses?
• Are the sales reps moving their opportunities fast enough?
• 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?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Does this Contact have subsidiaries?
• Who are the contacts assigned to the Activities and the associated Customer for these Contact?
• How many contacts have been assigned to the Activities?
• For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
• What is the number of partners in a specific classification within a defined geographic region?
• How many Partners is a Contact associated to?
• Which Program has the highest number of Enrollments?
• What is the QoQ growth for Assets by Products?
• Who are all the resources assigned to the Assets?
• How many Business plans were created in the System in the last quarter and for what Partner or Account?
• How are the customers classified?
• How actively (# of Activities) are the Sales reps engaged with customers?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• What are my best performing product lines by customer geographies?
• What is the channel performance vs channel forecast?
• What are the higher value deals that have been moved out?
• How do wins and losses trend quarterly for a specific product line?
• What is the open/closed revenue for each of the product groups in the selected geography?
• What are all the Campaigns assigned to an Opportunity?
• What are all the Opportunities resulted from a Campaign?
• What is the average time the Opportunity is in a particular sales stage?
• What is the Hire date of the resources in an Organization?
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• On which sales accounts is a given sales representative a member of the account team?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• 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:

• Partner Channel Administrative Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource 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 Program Tiers
• Partners - CRM Partner Resource
• Partners - CRM Partner Territory
• Partners - CRM Program Enrollments
• Partners - CRM Programs
• Sales - CRM Account Relationship
• Sales - CRM Asset
• Sales - CRM Asset Contact
• Sales - CRM Asset Resource
• Sales - CRM Business Plan
• 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
Business Questions

This job role secures access to data that can answer the following business questions:

- Who has achieved the most Activities vs Objectives?
- What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
- What are the Strategic accounts that have not had any Activities/Visits in last quarter?
- For a given Partner Tier, what are the active Programs available in the system?
- What is the quarterly revenue trend for a specific product/product group by partner?
- What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
• How many Territories is a Partner part of?
• How many Enrollments were created/submitted/expired/terminated in the last month?
• What are the total number of Relationships for a given Account?
• What Business plan objectives have not met the target values?
• For a given Contact, who all are the Resources/Employees that are part of the Contact team members?
• Who manages my top accounts?
• Who are the ‘new’ customers, created in the past 6 months?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• What are the historical monthly trend of closed revenue by current territories?
• Are the Leads supporting products that appeal to certain customers by size of company?
• 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 the total number of MDF Requests in the current quarter?
• What is the Fund Request available amount?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How many Territories are assigned to an Opportunity?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• Who are the top competitors and what is the revenue exposure to them?
• Which Territories have exceeded their Quotes in the current Quarter?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the sales accounts that a given Sales representative owns?
• What are the total number of Contact Relationships between two Contact?
• How many Opportunities associated to a Campaign?
• What managers have teams averaging the most activities?
• What is the average deal size by Product groups?
• What is the number of Partner Contacts that are also resources and users?
• What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?
• How many Programs are owned by the team with their expiration date?
• How are the business plan objectives split?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• Is there a team or group who are over or underperforming vs forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• How many Leads are open for a given Product?
• Who approved an MDF claim? What are the start and end dates of that claim?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
• What is the revenue lost to competition for a specific product/product group?
• What are the responses for different Opportunity for an Assessment submitted?
• What are all the Territories assigned to Opportunities?
• Is the sales team converting leads to opportunities fast enough?
• How many territories are assigned to a Resource/Employee?
• What are the sales accounts owned by the Sales team?
• What is the relationship between activities in a region and their revenue by quarter?
• What is the revenue generated by Partners per Customer?
• What is the distribution of Partner Opportunities by sales stages?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• How are the Partners classified?
• What are the number of Partner contacts by Partner?
• Who all is part of the Partner Resource Team for a given Partner and what is their role?
• What are the Customers from this account, including all subsidiaries?
• Who are all the Contacts assigned to the Assets?
• What are all the contacts created in the system by Geography?
• How many new contacts are created in the system in the current month?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the top 10 products for all the Deals submitted in the current quarter?
• What forecasts have changed over time and are impacting my total quarterly revenue?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• What are the Quotas assigned to the team and the Actuals?
• How is the Quota attainment rate for the sales team?
• How many new Resources are created in the current quarter?
• What are the Accounts under the sales team, by territory?
• Do the sales territories need rebalancing?
• Are there any work load balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• How many Partners’ team is a given Resource part of?
• How many Programs were created in the last quarter?
• What are the Assets that are expiring in the next quarter?
• How is my Revenue distributed across Customer geographies?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• Do Forecast rely on Revenue from few Products?
• What forecasts have seen changes in the quantities ordered vs the quantities planned?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Who are all the Contacts assigned to Opportunities?
• Who are all the Resources assigned to Opportunities?
• 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 is the Territory Quota vs/ Actual?
• What Resources will not be able to meet the Quotas in the current quarter?
• How many Leads do not have Contact?
• Against how many Opportunities, were the Quotes submitted in this month?
• What is the total Quotes revenue for the current month?
• Who has submitted the highest number of Quotes in the current month?
• What are the latest revisions to activity objectives?
• What are the open Opportunities associated to a given Partner?
• What is the potential revenue of leads by partners?
• What is the number of leads by partners for a specific product group?
• What are the Programs that Partners have enrolled into?
• What the Business plans owned by the team?
• 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?
• Where are the white spaces for me to sell a specific product?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
• What are the Products associated with the Deals?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?

• Are the Leads associated with certain products?

• What are the Leads assigned to me/my team member?

• What are all the Territories the Lead is part of?

• What are the Fund request approved amount for the current quarter?

• Who has approved/rejected the MDF Requests?

• What products are often lost to key competitors? Is there a pattern?

• How many Contacts are assigned to an Opportunity?

• How many Resources are assigned to an Opportunity?

• How is each member on the team performing on deal size, account coverage, and win rate?

• What are all the Territories assigned to Resources/Employees?

• How many responses received for a given campaign?

• What is the Campaign ROI (return on investment)?

• How many times a Quote is revised before it gets approved?

• Are there any Activities without the Contact information?

• What are the activity objectives for this current period?

• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?

• What is the total number of Partners assigned to a specific classification for this period?

• What are the Partners created in the system for a given time period?

• What Partners are assigned to specific geographic territories?

• How many Enrollments are going to expire in the next quarter?

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

• Who are the Primary owners of the Contacts for contacts created in the last quarter?

• What are the top ten accounts by revenue in the last quarter?

• What regions are my customers clustered in?

• Who are all the contacts for key customers and what are their roles?

• 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?

• How to forecasts trend across periods?

• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?

• What are the Opportunity Revenue line details contributing the most to the Forecast?

• How are product revenues trending month over month?

• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?

• How many Leads is a Contact associated to?

• Who are the Resources assigned to the Leads created in any given time period?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What was the currency conversion rate applied to a specific claim?
• How did the Opportunity evolve over time?
• What are the total number of Relationships between two Partners?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
• Who are the resources assigned for a particular territory?
• How many Leads are part of the Campaign?
• Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• What are the Partner tiers that a Particular program supports?
• What are the top ten Partners by Revenue during the past quarter/year?
• Does this account have subsidiaries?
• How many Assets are created in a particular time period?
• What are the top 10 Products by Asset count?
• What are the Business plan objectives and what are their target v/s actual value?
• What are the target v/s actual number of the split objectives?
• What are the objectives that have not met the target value set?
• What all Contact team members is a given Employee part of?
• What is the additional information updated in the Notes for a Customer?
• What are my most active accounts? Who owns them and where are these located?
• Who are my teams top Customers?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• 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?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the Fund Requests and their statuses?
• Are the sales reps moving their opportunities fast enough?
• 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?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Does this Contact have subsidiaries?
• Who are the contacts assigned to the Activities and the associated Customer for these Contact?
• How many contacts have been assigned to the Activities?
• For all the Account/Oppportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
• What is the number of partners in a specific classification within a defined geographic region?
• How many Partners is a Contact is associated to?
• Which Program has the highest number of Enrollments?
• What is the QoQ growth for Assets by Products?
• Who are all the resources assigned to the Assets?
• How many Business plans were created in the System in the last quarter and for what Partner or Account?
• How are the customers classified?
• How actively (# of Activities) are the Sales reps engaged with customers?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• What are my best performing product lines by customer geographies?
• What is the channel performance vs channel forecast?
• What are the higher value deals that have been moved out?
• How do wins and losses trend quarterly for a specific product line?
• What is the open/closed revenue for each of the product groups in the selected geography?
• What are all the Campaigns assigned to an Opportunity?
• What are all the Opportunities resulted from a Campaign?
• What is the average time the Opportunity is in a particular sales stage?
• What is the Hire date of the resources in an Organization?
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• On which sales accounts is a given sales representative a member of the account team?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• 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:

- Sales - CRM Campaign Members
- Sales - CRM Campaign Opportunity

**Business Questions**

This job role secures access to data that can answer the following business questions:

- How many Opportunities associated to a Campaign?
- How many Leads do not have Contact?
- How many responses received for a given campaign?
- What is the Campaign ROI (return on investment)?
- How many Leads are part of the Campaign?
- 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:

- Partner Channel Transaction Analysis Duty

**Subject Areas**

This job role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource 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 Program Tiers
• Partners - CRM Partner Resource
• Partners - CRM Partner Territory
• Partners - CRM Program Enrollments
• Partners - CRM Programs
• Sales - CRM Account Relationship
• Sales - CRM Asset
• Sales - CRM Asset Contact
• Sales - CRM Asset Resource
• Sales - CRM Business Plan
• 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 Partner
• Sales - CRM Opportunity Resource
• Sales - CRM Opportunity Sales Stage Snapshot
• Sales - CRM Opportunity Territory
• Sales - CRM Partner Relationship
• Sales - CRM Pipeline
• Sales - CRM Quota Management
• 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

Business Questions

This job role secures access to data that can answer the following business questions:

• Who has achieved the most Activities vs Objectives?
• What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
• What are the Strategic accounts that have not had any Activities/Visits in last quarter?
• For a given Partner Tier, what are the active Programs available in the system?
• What is the quarterly revenue trend for a specific product/product group by partner?
• What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
• How many Territories is a Partner part of?
• How many Enrollments were created/submitted/expired/terminated in the last month?
• What are the total number of Relationships for a given Account?
• What Business plan objectives have not met the target values?
• For a given Contact, who all are the Resources/Employees that are part of the Contact team members?
• Who manages my top accounts?
• Who are the ‘new’ customers, created in the past 6 months?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• What are the historical monthly trend of closed revenue by current territories?
• Are the Leads supporting products that appeal to certain customers by size of company?
• 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 the total number of MDF Requests in the current quarter?
• What is the Fund Request available amount?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How many Territories are assigned to an Opportunity?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• Who are the top competitors and what is the revenue exposure to them?
• Which Territories have exceeded their Quotes in the current Quarter?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the sales accounts that a given Sales representative owns?
• What are the total number of Contact Relationships between two Contact?
• How many Opportunities associated to a Campaign?
• What managers have teams averaging the most activities?
• What is the average deal size by Product groups?
• What is the number of Partner Contacts that are also resources and users?
• What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?
• How many Programs are owned by the team with their expiration date?
• How are the business plan objectives split?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• Is there a team or group who are over or underperforming vs forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• How many Leads are open for a given Product?
• Who approved an MDF claim? What are the start and end dates of that claim?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
• What is the revenue lost to competition for a specific product/product group?
• What are the responses for different Opportunity for an Assessment submitted?
• What are all the Territories assigned to Opportunities?
• Is the sales team converting leads to opportunities fast enough?
• How many territories are assigned to a Resource/Employee?
• What are the sales accounts owned by the Sales team?
• What is the relationship between activities in a region and their revenue by quarter?
• What is the revenue generated by Partners per Customer?
• What is the distribution of Partner Opportunities by sales stages?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• How are the Partners classified?
• What are the number of Partner contacts by Partner?
• Who all is part of the Partner Resource Team for a given Partner and what is their role?
• What are the Customers from this account, including all subsidiaries?
• Who are all the Contacts assigned to the Assets?
• What are all the contacts created in the system by Geography?
• How many new contacts are created in the system in the current month?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the top 10 products for all the Deals submitted in the current quarter?
• What forecasts have changed over time and are impacting my total quarterly revenue?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• What are the Quotas assigned to the team and the Actuals?
• How is the Quota attainment rate for the sales team?
• How many new Resources are created in the current quarter?
• What are the Accounts under the sales team, by territory?
• Do the sales territories need rebalancing?
• Are there any workload balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• How many Partners’ team is a given Resource part of?
• How many Programs were created in the last quarter?
• What are the Assets that are expiring in the next quarter?
• How is my Revenue distributed across Customer geographies?
• What are the contact-points (phone, email, address, etc.) of key contacts?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• Do Forecast rely on Revenue from few Products?
• What forecasts have seen changes in the quantities ordered vs the quantities planned?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Who are all the Contacts assigned to Opportunities?
• Who are all the Resources assigned to Opportunities?
• 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 is the Territory Quota vs Actual?
• What Resources will not be able to meet the Quotas in the current quarter?
• Against how many Opportunities, were the Quotes submitted in this month?
• What is the total Quotes revenue for the current month?
• Who has submitted the highest number of Quotes in the current month?
• What are the latest revisions to activity objectives?
• What are the open Opportunities associated to a given Partner?
• What is the potential revenue of leads by partners?
• What is the number of leads by partners for a specific product group?
• What are the Programs that Partners have enrolled into?
• What the Business plans owned by the team?
• 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?
• Where are the white spaces for me to sell a specific product?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?  
• What are the Products associated with the Deals?  
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?  
• Are the Leads associated with certain products?  
• What are the Leads assigned to me/my team member?  
• What are all the Territories the Lead is part of?  
• What are the Fund request approved amount for the current quarter?  
• Who has approved/rejected the MDF Requests?  
• What products are often lost to key competitors? Is there a pattern?  
• How many Contacts are assigned to an Opportunity?  
• How many Resources are assigned to an Opportunity?  
• How is each member on the team performing on deal size, account coverage, and win rate?  
• What are all the Territories assigned to Resources/Employees?  
• How many responses received for a given campaign?  
• What is the Campaign ROI (return on investment)?  
• How many times a Quote is revised before it gets approved?  
• Are there any Activities without the Contact information?  
• What are the activity objectives for this current period?  
• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?  
• What is total number of Partners assigned to a specific classification for this period?  
• What are the Partners created in the system for a given time period?  
• What Partners are assigned to specific geographic territories?  
• How many Enrollments are going to expire in the next quarter?  
• What is the additional information updated in the Notes for a Contact?  
• Who are the Primary owners of the Contacts for contacts created in the last quarter?  
• What are the top ten accounts by revenue in the last quarter?  
• What regions are my customers clustered in?  
• Who are all the contacts for key customers and what are their roles?  
• 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?  
• How to forecasts trend across periods?  
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?  
• What are the Opportunity Revenue line details contributing the most to the Forecast?  
• How are product revenues trending month over month?  
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• How many Leads is a Contact associated to?
• Who are the Resources assigned to the Leads created in any given time period?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What was the currency conversion rate applied to a specific claim?
• How did the Opportunity evolve over time?
• What are the total number of Relationships between two Partners?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?
• Who are the resources assigned for a particular territory?
• How many Leads are part of the Campaign?
• Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• What are the Partner tiers that a Particular program supports?
• What are the top ten Partners by Revenue during the past quarter/year?
• Does this account have subsidiaries?
• How many Assets are created in a particular time period?
• What are the top 10 Products by Asset count?
• What are the Business plan objectives and what are their target v/s actual value?
• What are the target v/s actual number of the split objectives?
• What are the objectives that have not met the target value set?
• What all Contact team members is a given Employee part of?
• What is the additional information updated in the Notes for a Customer?
• What are my most active accounts? Who owns them and where are these located?
• Who are my teams top Customers?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• 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?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the Fund Requests and their statuses?
• Are the sales reps moving their opportunities fast enough?
• 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?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)

• Does this Contact have subsidiaries?

• Who are the contacts assigned to the Activities and the associated Customer for these Contact?

• How many contacts have been assigned to the Activities?

• For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?

• What is the number of partners in a specific classification within a defined geographic region?

• How many Partners is a Contact is associated to?

• Which Program has the highest number of Enrollments?

• What is the QoQ growth for Assets by Products?

• Who are all the resources assigned to the Assets?

• How many Business plans were created in the System in the last quarter and for what Partner or Account?

• How are the customers classified?

• How actively (# of Activities) are the Sales reps engaged with customers?

• For given set of Customers, what percentage of my revenue is exposed to competition?

• What are my best performing product lines by customer geographies?

• What is the channel performance vs channel forecast?

• What are the higher value deals that have been moved out?

• How do wins and losses trend quarterly for a specific product line?

• What is the open/closed revenue for each of the product groups in the selected geography?

• What are all the Campaigns assigned to an Opportunity?

• What are all the Opportunities resulted from a Campaign?

• What is the average time the Opportunity is in a particular sales stage?

• What is the Hire date of the resources in an Organization?

• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?

• On which sales accounts is a given sales representative a member of the account team?

• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?

• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
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:

- *How many Leads are unassigned in the system?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What are the Leads that are converted into Opportunities?*
- *How many Opportunities were created from a given Lead?*
- *What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?*
- *How many Leads are converted in the current quarter?*
- *What are the top 10 products associated to the Leads in the system?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *How many Leads are associated for a given Opportunity?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *What are the sources of the Leads created in the current quarter?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*

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 Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Real Time*
- *CRM - CRM Activity Resource Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *Who has achieved the most Activities vs Objectives?*
- *What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?*
- *What are the Strategic accounts that have not had any Activities/Visits in last quarter?*
- *What managers have teams averaging the most activities?*
- *What is the relationship between activities in a region and their revenue by quarter?*
- *Are there any work load balancing issues, with a few members performing most of the sales activities?*
- *What are my urgent/overdue tasks for this period to plan the week/month accordingly?*
- *How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?*
- *What are the latest revisions to activity objectives?*
- *Are there any Activities without the Contact information?*
- *What are the activity objectives for this current period?*
- *How many Activities are performed by Sales Manager/her team in the last week/month/quarter?*
- *Who are the top/bottom 10 Sales Representatives by their Activities?*
- *What are the activities for a given Sales rep for today to plan the day ahead?*
- *Who are the contacts assigned to the Activities and the associated Customer for these Contact?*
- *How many contacts have been assigned to the Activities?*
- *For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?*
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 Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- Who has achieved the most Activities vs Objectives?
- What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
- What are the Strategic accounts that have not had any Activities/Visits in last quarter?
- What managers have teams averaging the most activities?
- What is the relationship between activities in a region and their revenue by quarter?
- Are there any work load balancing issues, with a few members performing most of the sales activities?
- What are my urgent/overdue tasks for this period to plan the week/month accordingly?
- How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
- What are the latest revisions to activity objectives?
- Are there any Activities without the Contact information?
- What are the activity objectives for this current period?
- How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
• Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• Who are the contacts assigned to the Activities and the associated Customer for these Contact?
• How many contacts have been assigned to the Activities?
• For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?

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 Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time

Business Questions
This job role secures access to data that can answer the following business questions:

• Who has achieved the most Activities vs Objectives?
• What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
• What are the Strategic accounts that have not had any Activities/Visits in last quarter?
• What managers have teams averaging the most activities?
• What is the relationship between activities in a region and their revenue by quarter?
• Are there any work load balancing issues, with a few members performing most of the sales activities?
What are my urgent/overdue tasks for this period to plan the week/month accordingly?

How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?

What are the latest revisions to activity objectives?

Are there any Activities without the Contact information?

What are the activity objectives for this current period?

How many Activities are performed by Sales Manager/her team in the last week/month/quarter?

Who are the top/bottom 10 Sales Representatives by their Activities?

What are the activities for a given Sales rep for today to plan the day ahead?

Who are the contacts assigned to the Activities and the associated Customer for these Contact?

How many contacts have been assigned to the Activities?

For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?

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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:

- 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:

- How many Leads are unassigned in the system?
营销经理

代码名称

ORA_MKT_MARKETING_MANAGER_JOB

职责角色

此角色与以下职责角色相关联：

- Marketing Managerial Transaction Analysis Duty

主题领域

此角色可以访问以下主题领域：

- Marketing - CRM Leads
- Marketing - CRM Leads and Opportunities Real Time

业务问题

此角色可以访问数据，以回答以下业务问题：

- How many Leads are unassigned in the system?
- Who is the Primary Contact and Resource assigned for a given Lead?
• What are the Leads that are coverted into Opportunities?
• How many Opportunities were created from a given Lead?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• How many Leads are converted in the current quarter?
• What are the top 10 products associated to the Leads in the system?
• Who are the top Sales representatives by their Lead conversion ratio?
• How many Leads are associated for a given Opportunity?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the sources of the Leads created in the current quarter?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?

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:

• How many Leads are unassigned in the system?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What are the Leads that are coverted into Opportunities?
• How many Opportunities were created from a given Lead?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• How many Leads are converted in the current quarter?
• What are the top 10 products associated to the Leads in the system?
• Who are the top Sales representatives by their Lead conversion ratio?
• How many Leads are associated for a given Opportunity?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the sources of the Leads created in the current quarter?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?

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:

• How many Leads are unassigned in the system?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What are the Leads that are converted into Opportunities?
• How many Opportunities were created from a given Lead?
Chapter 4

Job Roles

- What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
- How many Leads are converted in the current quarter?
- What are the top 10 products associated to the Leads in the system?
- Who are the top Sales representatives by their Lead conversion ratio?
- How many Leads are associated for a given Opportunity?
- How many Leads were rejected in the last quarter and what were the reason for those?
- What are the sources of the Leads created in the current quarter?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?

Not assigned to predefined job roles

Code Name

na

Duty Roles

This job role is related to the following duty roles:

- User System Usage Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- Sales - CRM Resource System Usage
- User System Usage

Business Questions

This job role secures access to data that can answer the following business questions:

- Resources belonging to what job title are most active in the system?
- How is the user activity split across Channel (Web/Mobile/Mail)?
- Which department has the highest number of Active users?
- Users belonging to what job title are most active in the system?
- How is the resource activity split across Channel (Web/Mobile/Mail)?
• Who are the users who have not logged in the system in the last week?
• Which department has the highest number of Active resources?
• Who are the top 10 active resources of the system?
• Who are the resources who have not logged in the system in the last week?
• Who are the top 10 active users of the system?

Partner Administrator

Code Name

ORA_ZPM_PARTNER_ADMINISTRATOR_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 Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource 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 Program Tiers
• Partners - CRM Partner Resource
• Partners - CRM Partner Territory
• Partners - CRM Program Enrollments
• Partners - CRM Programs
• Sales - CRM Account Relationship
• Sales - CRM Asset
• Sales - CRM Asset Contact
• Sales - CRM Asset Resource
• Sales - CRM Business Plan
• 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 Partner
• Sales - CRM Opportunity Resource
• Sales - CRM Opportunity Sales Stage Snapshot
• Sales - CRM Opportunity Territory
• Sales - CRM Partner Relationship
• Sales - CRM Pipeline
• Sales - CRM Quota Management
• 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

Business Questions

This job role secures access to data that can answer the following business questions:

• **Who has achieved the most Activities vs Objectives?**
• **What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?**
• **What are the Strategic accounts that have not had any Activities/Visits in last quarter?**
• **For a given Partner Tier, what are the active Programs available in the system?**
• **What is the quarterly revenue trend for a specific product/product group by partner?**
• **What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?**
• **How many Territories is a Partner part of?**
• **How many Enrollments were created/submitted/expired/terminated in the last month?**
• **What are the total number of Relationships for a given Account?**
• **What Business plan objectives have not met the target values?**
• **For a given Contact, who all are the Resources/Employees that are part of the Contact team members?**
• **Who manages my top accounts?**
• **Who are the ‘new’ customers, created in the past 6 months?**
• **What are the Deals submitted by the Partners in the current quarter with the Deal size?**
• **What are the historical monthly trend of closed revenue by current territories?**
• **Are the Leads supporting products that appeal to certain customers by size of company?**
• **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 the total number of MDF Requests in the current quarter?
- What is the Fund Request available amount?
- How many Partners are assigned to an Opportunity?
- Who are all the Partners assigned to Opportunities?
- How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
- How many Territories are assigned to an Opportunity?
- What are the top stalled opportunities and who are the sales reps working on these?
- What are the most likely reasons that the Opportunities are lost against our key competitors?
- What are the top 10 open opportunities? What are the target close dates and revenues for these?
- Who are the top competitors and what is the revenue exposure to them?
- Which Territories have exceeded their Quotes in the current Quarter?
- What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
- What are the sales accounts that a given Sales representative owns?
- What are the total number of Contact Relationships between two Contact?
- How many Opportunities associated to a Campaign?
- What managers have teams averaging the most activities?
- What is the average deal size by Product groups?
- What is the number of Partner Contacts that are also resources and users?
- What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?
- How many Programs are owned by the team with their expiration date?
- How are the business plan objectives split?
- What are the names of the customers that a Sales team owns? Who are the key contacts?
- Do forecasts rely on revenues from a few customers? What is the dependency profile?
- Is there a team or group who are over or underperforming vs forecast?
- Are too many deals being pushed out to the subsequent fiscal quarters?
- How many Leads are open for a given Product?
- Who approved an MDF claim? What are the start and end dates of that claim?
- Was an MDF claim rejected? What was the reason the claim was rejected?
- Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
- What is the revenue lost to competition for a specific product/product group?
- What are the responses for different Opportunity for an Assessment submitted?
- What are all the Territories assigned to Opportunities?
- Is the sales team converting leads to opportunities fast enough?
- How many territories are assigned to a Resource/Employee?
- What are the sales accounts owned by the Sales team?
- What is the relationship between activities in a region and their revenue by quarter?
• What is the revenue generated by Partners per Customer?
• What is the distribution of Partner Opportunities by sales stages?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• How are the Partners classified?
• What are the number of Partner contacts by Partner?
• Who all is part of the Partner Resource Team for a given Partner and what is their role?
• What are the Customers from this account, including all subsidiaries?
• Who are all the Contacts assigned to the Assets?
• What are all the contacts created in the system by Geography?
• How many new contacts are created in the system in the current month?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the top 10 products for all the Deals submitted in the current quarter?
• What forecasts have changed over time and are impacting my total quarterly revenue?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• What are the Quotas assigned to the team and the Actuals?
• How is the Quota attainment rate for the sales team?
• How many new Resources are created in the current quarter?
• What are the Accounts under the sales team, by territory?
• Do the sales territories need rebalancing?
• Are there any work load balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• How many Partners’ team is a given Resource part of?
• How many Programs were created in the last quarter?
• What are the Assets that are expiring in the next quarter?
• How is my Revenue distributed across Customer geographies?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• Do Forecast rely on Revenue from few Products?
• What forecasts have seen changes in the quantities ordered vs the quantities planned?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Who are all the Contacts assigned to Opportunities?
• Who are all the Resources assigned to Opportunities?
• 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 is the Territory Quota vs Actual?
• What Resources will not be able to meet the Quotas in the current quarter?
• How many Leads do not have Contact?
• Against how many Opportunities, were the Quotes submitted in this month?
• What is the total Quotes revenue for the current month?
• Who has submitted the highest number of Quotes in the current month?
• What are the latest revisions to activity objectives?
• What are the open Opportunities associated to a given Partner?
• What is the potential revenue of leads by partners?
• What is the number of leads by partners for a specific product group?
• What are the Programs that Partners have enrolled into?
• What the Business plans owned by the team?
• 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?
• Where are the white spaces for me to sell a specific product?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
• What are the Products associated with the Deals?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• Are the Leads associated with certain products?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• What are the Fund request approved amount for the current quarter?
• Who has approved/rejected the MDF Requests?
• What products are often lost to key competitors? Is there a pattern?
• How many Contacts are assigned to an Opportunity?
• How many Resources are assigned to an Opportunity?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are all the Territories assigned to Resources/Employees?
• How many responses received for a given campaign?
• What is the Campaign ROI (return on investment)?
• How many times a Quote is revised before it gets approved?
• Are there any Activities without the Contact information?
• What are the activity objectives for this current period?
• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
• What is total number of Partners assigned to a specific classification for this period?
• What are the Partners created in the system for a given time period?
• What Partners are assigned to specific geographic territories?
• How many Enrollments are going to expire in the next quarter?
• What is the additional information updated in the Notes for a Contact?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• What are the top ten accounts by revenue in the last quarter?
• What regions are my customers clustered in?
• Who are all the contacts for key customers and what are their roles?
• 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?
• How to forecasts trend across periods?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• How are product revenues trending month over month?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• How many Leads is a Contact associated to?
• Who are the Resources assigned to the Leads created in any given time period?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What was the currency conversion rate applied to a specific claim?
• How did the Opportunity evolve over time?
• What are the total number of Relationships between two Partners?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
• Who are the resources assigned for a particular territory?
• How many Leads are part of the Campaign?
- Who are the top/bottom 10 Sales Representatives by their Activities?
- What are the activities for a given Sales rep for today to plan the day ahead?
- What are the Partner tiers that a Particular program supports?
- What are the top ten Partners by Revenue during the past quarter/year?
- Does this account have subsidiaries?
- How many Assets are created in a particular time period?
- What are the top 10 Products by Asset count?
- What are the Business plan objectives and what are their target v/s actual value?
- What are the target v/s actual number of the split objectives?
- What are the objectives that have not met the target value set?
- What all Contact team members is a given Employee part of?
- What is the additional information updated in the Notes for a Customer?
- What are my most active accounts? Who owns them and where are these located?
- Who are my teams top Customers?
- What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
- 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?
- Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
- What are the Fund Requests and their statuses?
- Are the sales reps moving their opportunities fast enough?
- 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?
- How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
- Does this Contact have subsidiaries?
- Who are the contacts assigned to the Activities and the associated Customer for these Contact?
- How many contacts have been assigned to the Activities?
- For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
- What is the number of partners in a specific classification within a defined geographic region?
- How many Partners is a Contact is associated to?
- Which Program has the highest number of Enrollments?
- What is the QoQ growth for Assets by Products?
- Who are all the resources assigned to the Assets?
- How many Business plans were created in the System in the last quarter and for what Partner or Account?
- How are the customers classified?
- How actively (# of Activities) are the Sales reps engaged with customers?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• What are my best performing product lines by customer geographies?
• What is the channel performance vs channel forecast?
• What are the higher value deals that have been moved out?
• How do wins and losses trend quarterly for a specific product line?
• What is the open/closed revenue for each of the product groups in the selected geography?
• What are all the Campaigns assigned to an Opportunity?
• What are all the Opportunities resulted from a Campaign?
• What is the average time the Opportunity is in a particular sales stage?
• What is the Hire date of the resources in an Organization?
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• On which sales accounts is a given sales representative a member of the account team?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• 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 Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource 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 Program Tiers
• Partners - CRM Partner Resource
• Partners - CRM Partner Territory
• Partners - CRM Program Enrollments
• Partners - CRM Programs
• Sales - CRM Account Relationship
• Sales - CRM Asset
• Sales - CRM Asset Contact
• Sales - CRM Asset Resource
• Sales - CRM Business Plan
• 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 Partner
Sales - CRM Opportunity Resource
Sales - CRM Opportunity Sales Stage Snapshot
Sales - CRM Opportunity Territory
Sales - CRM Partner Relationship
Sales - CRM Pipeline
Sales - CRM Quota Management
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

Business Questions
This job role secures access to data that can answer the following business questions:

- **Who has achieved the most Activities vs Objectives?**
- **What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?**
- **What are the Strategic accounts that have not had any Activities/Visits in last quarter?**
- **For a given Partner Tier, what are the active Programs available in the system?**
- **What is the quarterly revenue trend for a specific product/product group by partner?**
- **What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?**
- **How many Territories is a Partner part of?**
- **How many Enrollments were created/submitted/expired/terminated in the last month?**
• What are the total number of Relationships for a given Account?
• What Business plan objectives have not met the target values?
• For a given Contact, who all are the Resources/Employees that are part of the Contact team members?
• Who manages my top accounts?
• Who are the 'new' customers, created in the past 6 months?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• What are the historical monthly trend of closed revenue by current territories?
• Are the Leads supporting products that appeal to certain customers by size of company?
• 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 the total number of MDF Requests in the current quarter?
• What is the Fund Request available amount?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How many Territories are assigned to an Opportunity?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• Who are the top competitors and what is the revenue exposure to them?
• Which Territories have exceeded their Quotes in the current Quarter?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the sales accounts that a given Sales representative owns?
• What are the total number of Contact Relationships between two Contact?
• How many Opportunities associated to a Campaign?
• What managers have teams averaging the most activities?
• What is the average deal size by Product groups?
• What is the number of Partner Contacts that are also resources and users?
• What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?
• How many Programs are owned by the team with their expiration date?
• How are the business plan objectives split?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• Is there a team or group who are over or underperforming vs forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• How many Leads are open for a given Product?
• Who approved an MDF claim? What are the start and end dates of that claim?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
• What is the revenue lost to competition for a specific product/product group?
• What are the responses for different Opportunity for an Assessment submitted?
• What are all the Territories assigned to Opportunities?
• Is the sales team converting leads to opportunities fast enough?
• How many territories are assigned to a Resource/Employee?
• What are the sales accounts owned by the Sales team?
• What is the relationship between activities in a region and their revenue by quarter?
• What is the revenue generated by Partners per Customer?
• What is the distribution of Partner Opportunities by sales stages?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• How are the Partners classified?
• What are the number of Partner contacts by Partner?
• Who all is part of the Partner Resource Team for a given Partner and what is their role?
• What are the Customers from this account, including all subsidiaries?
• Who are all the Contacts assigned to the Assets?
• What are all the contacts created in the system by Geography?
• How many new contacts are created in the system in the current month?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the top 10 products for all the Deals submitted in the current quarter?
• What forecasts have changed over time and are impacting my total quarterly revenue?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• What are the Quotas assigned to the team and the Actuals?
• How is the Quota attainment rate for the sales team?
• How many new Resources are created in the current quarter?
• What are the Accounts under the sales team, by territory?
• Do the sales territories need rebalancing?
• Are there any work load balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• How many Partners‘ team is a given Resource part of?
• How many Programs were created in the last quarter?
• What are the Assets that are expiring in the next quarter?
• How is my Revenue distributed across Customer geographies?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• Do Forecast rely on Revenue from few Products?
• What forecasts have seen changes in the quantities ordered vs the quantities planned?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Who are all the Contacts assigned to Opportunities?
• Who are all the Resources assigned to Opportunities?
• 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 is the Territory Quota vs/ Actual?
• What Resources will not be able to meet the Quotas in the current quarter?
• Against how many Opportunities, were the Quotes submitted in this month?
• How many Leads do not have Contact?
• What is the total Quotes revenue for the current month?
• Who has submitted the highest number of Quotes in the current month?
• What are the latest revisions to activity objectives?
• What are the open Opportunities associated to a given Partner?
• What is the potential revenue of leads by partners?
• What is the number of leads by partners for a specific product group?
• What are the Programs that Partners have enrolled into?
• What are the Business plans owned by the team?
• 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?
• Where are the white spaces for me to sell a specific product?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
• What are the Products associated with the Deals?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• Are the Leads associated with certain products?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• What are the Fund request approved amount for the current quarter?
• Who has approved/rejected the MDF Requests?
• What products are often lost to key competitors? Is there a pattern?
• How many Contacts are assigned to an Opportunity?
• How many Resources are assigned to an Opportunity?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are all the Territories assigned to Resources/Employees?
• How many responses received for a given campaign?
• What is the Campaign ROI (return on investment)?
• How many times a Quote is revised before it gets approved?
• Are there any Activities without the Contact information?
• What are the activity objectives for this current period?
• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
• What is total number of Partners assigned to a specific classification for this period?
• What are the Partners created in the system for a given time period?
• What Partners are assigned to specific geographic territories?
• How many Enrollments are going to expire in the next quarter?
• What is the additional information updated in the Notes for a Contact?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• What are the top ten accounts by revenue in the last quarter?
• What regions are my customers clustered in?
• Who are all the contacts for key customers and what are their roles?
• 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?
• How do forecasts trend across periods?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• How are product revenues trending month over month?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• How many Leads is a Contact associated to?
• Who are the Resources assigned to the Leads created in any given time period?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What was the currency conversion rate applied to a specific claim?
• How did the Opportunity evolve over time?
• What are the total number of Relationships between two Partners?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
• Who are the resources assigned for a particular territory?
• How many Leads are part of the Campaign?
• Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• What are the Partner tiers that a Particular program supports?
• What are the top ten Partners by Revenue during the past quarter/year?
• Does this account have subsidiaries?
• How many Assets are created in a particular time period?
• What are the top 10 Products by Asset count?
• What are the Business plan objectives and what are their target v/s actual value?
• What are the target v/s actual number of the split objectives?
• What are the objectives that have not met the target value set?
• What all Contact team members is a given Employee part of?
• What is the additional information updated in the Notes for a Customer?
• What are my most active accounts? Who owns them and where are these located?
• Who are my teams top Customers?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• 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?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the Fund Requests and their statuses?
• Are the sales reps moving their opportunities fast enough?
• 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?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Does this Contact have subsidiaries?
• Who are the contacts assigned to the Activities and the associated Customer for these Contact?
• How many contacts have been assigned to the Activities?
• For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
• What is the number of partners in a specific classification within a defined geographic region?
• How many Partners is a Contact associated to?
• Which Program has the highest number of Enrollments?
• What is the QoQ growth for Assets by Products?
• Who are all the resources assigned to the Assets?
• How many Business plans were created in the System in the last quarter and for what Partner or Account?
• How are the customers classified?
• How actively (# of Activities) are the Sales reps engaged with customers?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• What are my best performing product lines by customer geographies?
• What is the channel performance vs channel forecast?
• What are the higher value deals that have been moved out?
• How do wins and losses trend quarterly for a specific product line?
• What is the open/closed revenue for each of the product groups in the selected geography?
• What are all the Campaigns assigned to an Opportunity?
• What are all the Opportunities resulted from a Campaign?
• What is the average time the Opportunity is in a particular sales stage?
• What is the Hire date of the resources in an Organization?
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• On which sales accounts is a given sales representative a member of the account team?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• 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 Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource 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 Program Tiers
- Partners - CRM Partner Resource
- Partners - CRM Partner Territory
- Partners - CRM Program Enrollments
- Partners - CRM Programs
- Sales - CRM Account Relationship
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan
- 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 Partner
• Sales - CRM Opportunity Resource
• Sales - CRM Opportunity Sales Stage Snapshot
• Sales - CRM Opportunity Territory
• Sales - CRM Partner Relationship
• Sales - CRM Pipeline
• Sales - CRM Quota Management
• 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
Business Questions

This job role secures access to data that can answer the following business questions:

- Who has achieved the most Activities vs Objectives?
- What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
- What are the Strategic accounts that have not had any Activities/Visits in last quarter?
- For a given Partner Tier, what are the active Programs available in the system?
- What is the quarterly revenue trend for a specific product/product group by partner?
- What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
- How many Territories is a Partner part of?
- How many Enrollments were created/submitted/expired/terminated in the last month?
- What are the total number of Relationships for a given Account?
- What Business plan objectives have not met the target values?
- For a given Contact, who all are the Resources/Employees that are part of the Contact team members?
- Who manages my top accounts?
- Who are the ‘new’ customers, created in the past 6 months?
- What are the Deals submitted by the Partners in the current quarter with the Deal size?
- What are the historical monthly trend of closed revenue by current territories?
- Are the Leads supporting products that appeal to certain customers by size of company?
- 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 the total number of MDF Requests in the current quarter?
- What is the Fund Request available amount?
- How many Partners are assigned to an Opportunity?
- Who are all the Partners assigned to Opportunities?
- How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
- How many Territories are assigned to an Opportunity?
- What are the top stalled opportunities and who are the sales reps working on these?
- What are the most likely reasons that the Opportunities are lost against our key competitors?
- What are the top 10 open opportunities? What are the target close dates and revenues for these?
- Who are the top competitors and what is the revenue exposure to them?
- Which Territories have exceeded their Quotes in the current Quarter?
- What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
- What are the sales accounts that a given Sales representative owns?
- What are the total number of Contact Relationships between two Contact?
• How many Opportunities associated to a Campaign?
• What managers have teams averaging the most activities?
• What is the average deal size by Product groups?
• What is the number of Partner Contacts that are also resources and users?
• What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?
• How many Programs are owned by the team with their expiration date?
• How are the business plan objectives split?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• Is there a team or group who are over or underperforming vs forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• How many Leads are open for a given Product?
• Who approved an MDF claim? What are the start and end dates of that claim?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
• What is the revenue lost to competition for a specific product/product group?
• What are the responses for different Opportunity for an Assessment submitted?
• What are all the Territories assigned to Opportunities?
• Is the sales team converting leads to opportunities fast enough?
• How many territories are assigned to a Resource/Employee?
• What are the sales accounts owned by the Sales team?
• What is the relationship between activities in a region and their revenue by quarter?
• What is the revenue generated by Partners per Customer?
• What is the distribution of Partner Opportunities by sales stages?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• How are the Partners classified?
• What are the number of Partner contacts by Partner?
• Who all is part of the Partner Resource Team for a given Partner and what is their role?
• What are the Customers from this account, including all subsidiaries?
• Who are all the Contacts assigned to the Assets?
• What are all the contacts created in the system by Geography?
• How many new contacts are created in the system in the current month?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the top 10 products for all the Deals submitted in the current quarter?
• What forecasts have changed over time and are impacting my total quarterly revenue?
What are the top ten products by revenue during the past quarter/year?
What is the buying trend of our biggest customers?
What are the Quotas assigned to the team and the Actuals?
How is the Quota attainment rate for the sales team?
How many new Resources are created in the current quarter?
What are the Accounts under the sales team, by territory?
Do the sales territories need rebalancing?
Are there any workload balancing issues, with a few members performing most of the sales activities?
What are my urgent/overdue tasks for this period to plan the week/month accordingly?
How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
How many Partners’ teams are a given Resource part of?
How many Programs were created in the last quarter?
What are the Assets that are expiring in the next quarter?
How is my Revenue distributed across Customer geographies?
What are the contact points (phone, email, address, etc.) of key contacts?
How is the Deal Amount split between the products associated to the Deal Registration Lines?
Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
Do Forecast rely on Revenue from few Products?
What forecasts have seen changes in the quantities ordered vs the quantities planned?
How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
What are my claimed vs unclaimed MDF totals?
What are total number of Claims in the current quarter?
Who are all the Contacts assigned to Opportunities?
Who are all the Resources assigned to Opportunities?
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 is the Territory Quota vs/ Actual?
What Resources will not be able to meet the Quotas in the current quarter?
How many Leads do not have Contact?
Against how many Opportunities, were the Quotes submitted in this month?
What is the total Quotes revenue for the current month?
Who has submitted the highest number of Quotes in the current month?
What are the latest revisions to activity objectives?
What are the open Opportunities associated to a given Partner?
Job Roles

• What is the potential revenue of leads by partners?
• What is the number of leads by partners for a specific product group?
• What are the Programs that Partners have enrolled into?
• What the Business plans owned by the team?
• 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?
• Where are the white spaces for me to sell a specific product?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
• What are the Products associated with the Deals?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• Are the Leads associated with certain products?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• What are the Fund request approved amount for the current quarter?
• Who has approved/rejected the MDF Requests?
• What products are often lost to key competitors? Is there a pattern?
• How many Contacts are assigned to an Opportunity?
• How many Resources are assigned to an Opportunity?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are all the Territories assigned to Resources/Employees?
• How many responses received for a given campaign?
• What is the Campaign ROI (return on investment)?
• How many times a Quote is revised before it gets approved?
• Are there any Activities without the Contact information?
• What are the activity objectives for this current period?
• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
• What is total number of Partners assigned to a specific classification for this period?
• What are the Partners created in the system for a given time period?
• What Partners are assigned to specific geographic territories?
• How many Enrollments are going to expire in the next quarter?
• What is the additional information updated in the Notes for a Contact?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• What are the top ten accounts by revenue in the last quarter?
• What regions are my customers clustered in?
• Who are all the contacts for key customers and what are their roles?
• 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?
• How to forecasts trend across periods?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• How are product revenues trending month over month?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• How many Leads is a Contact associated to?
• Who are the Resources assigned to the Leads created in any given time period?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What was the currency conversion rate applied to a specific claim?
• How did the Opportunity evolve over time?
• What are the total number of Relationships between two Partners?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
• Who are the resources assigned for a particular territory?
• How many Leads are part of the Campaign?
• Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• What are the Partner tiers that a Particular program supports?
• What are the top ten Partners by Revenue during the past quarter/year?
• Does this account have subsidiaries?
• How many Assets are created in a particular time period?
• What are the top 10 Products by Asset count?
• What are the Business plan objectives and what are their target v/s actual value?
• What are the target v/s actual number of the split objectives?
• What are the objectives that have not met the target value set?
• What all Contact team members is a given Employee part of?
• What is the additional information updated in the Notes for a Customer?
• What are my most active accounts? Who owns them and where are these located?
• Who are my teams top Customers?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
- 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?
- Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
- What are the Fund Requests and their statuses?
- Are the sales reps moving their opportunities fast enough?
- 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?
- How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
- Does this Contact have subsidiaries?
- Who are the contacts assigned to the Activities and the associated Customer for these Contact?
- How many contacts have been assigned to the Activities?
- For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
- What is the number of partners in a specific classification within a defined geographic region?
- How many Partners is a Contact is associated to?
- Which Program has the highest number of Enrollments?
- What is the QoQ growth for Assets by Products?
- Who are all the resources assigned to the Assets?
- How many Business plans were created in the System in the last quarter and for what Partner or Account?
- How are the customers classified?
- How actively (# of Activities) are the Sales reps engaged with customers?
- For given set of Customers, what percentage of my revenue is exposed to competition?
- What are my best performing product lines by customer geographies?
- What is the channel performance vs channel forecast?
- What are the higher value deals that have been moved out?
- How do wins and losses trend quarterly for a specific product line?
- What is the open/closed revenue for each of the product groups in the selected geography?
- What are all the Campaigns assigned to an Opportunity?
- What are all the Opportunities resulted from a Campaign?
- What is the average time the Opportunity is in a particular sales stage?
- What is the Hire date of the resources in an Organization?
- How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
- On which sales accounts is a given sales representative a member of the account team?
- Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• 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:

• Sales Administrative Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• Marketing - CRM Leads
• Marketing - CRM Leads and Opportunities Real Time
• Partners - CRM Partner Assessments
• Partners - CRM Partner Overview
• Partners - CRM Partner Program Tiers
• Partners - CRM Program Enrollments
• Partners - CRM Programs
• Sales - CRM Account Relationship
• Sales - CRM Asset
• Sales - CRM Asset Contact
• Sales - CRM Asset Resource
• Sales - CRM Business Plan
• 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 Partner
• Sales - CRM Opportunity Resource
• Sales - CRM Opportunity Sales Stage Snapshot
• Sales - CRM Opportunity Territory
• Sales - CRM Partner Relationship
• Sales - CRM Pipeline
• Sales - CRM Quota Management
• 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

Business Questions

This job role secures access to data that can answer the following business questions:

• Who has achieved the most Activities vs Objectives?
• What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
• What are the Strategic accounts that have not had any Activities/Visits in last quarter?
• How many Leads are unassigned in the system?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What are the Leads that are coverted into Opportunities?
• How many Opportunities were created from a given Lead?
• For a given Partner Tier, what are the active Programs available in the system?
• What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
• How many Enrollments were created/submitted/expired/terminated in the last month?
• What are the total number of Relationships for a given Account?
• What Business plan objectives have not met the target values?
• For a given Contact, who all are the Resources/Employees that are part of the Contact team members?
• Who manages my top accounts?
• Who are the 'new' customers, created in the past 6 months?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• What are the historical monthly trend of closed revenue by current territories?
• Are the Leads supporting products that appeal to certain customers by size of company?
• 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 the total number of MDF Requests in the current quarter?
• What is the Fund Request available amount?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How many Territories are assigned to an Opportunity?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• Who are the top competitors and what is the revenue exposure to them?
• Which Territories have exceeded their Quotes in the current Quarter?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the sales accounts that a given Sales representative owns?
• What are the total number of Contact Relationships between two Contact?
• How many Opportunities associated to a Campaign?
• What managers have teams averaging the most activities?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• How many Leads are converted in the current quarter?
• What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?
• How many Programs are owned by the team with their expiration date?
• How are the business plan objectives split?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• Are there a team or group who are over or underperforming vs forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• How many Leads are open for a given Product?
• Who approved an MDF claim? What are the start and end dates of that claim?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
• What is the revenue lost to competition for a specific product/product group?
• What are the responses for different Opportunity for an Assessment submitted?
• What are all the Territories assigned to Opportunities?
• Is the sales team converting leads to opportunities fast enough?
• How many territories are assigned to a Resource/Employee?
• What are the sales accounts owned by the Sales team?
• What is the relationship between activities in a region and their revenue by quarter?
• What are the top 10 products associated to the Leads in the system?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• What are the Customers from this account, including all subsidiaries?
• Who are all the Contacts assigned to the Assets?
• What are all the contacts created in the system by Geography?
• How many new contacts are created in the system in the current month?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the top 10 products for all the Deals submitted in the current quarter?
• What forecasts have changed over time and are impacting my total quarterly revenue?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• What are the Quotas assigned to the team and the Actuals?
• How is the Quota attainment rate for the sales team?
• How many new Resources are created in the current quarter?
• What are the Accounts under the sales team, by territory?
• Do the sales territories need rebalancing?
• Are there any work load balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• Who are the top Sales representatives by their Lead conversion ratio?
• How many Programs were created in the last quarter?
• What are the Assets that are expiring in the next quarter?
• How is my Revenue distributed across Customer geographies?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• Do Forecast rely on Revenue from few Products?
• What forecasts have seen changes in the quantities ordered vs the quantities planned?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Who are all the Contacts assigned to Opportunities?
• Who are all the Resources assigned to Opportunities?
• 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 is the Territory Quota vs/ Actual?
• What Resources will not be able to meet the Quotas in the current quarter?
• How many Leads do not have Contact?
• Against how many Opportunities, were the Quotes submitted in this month?
• What is the total Quotes revenue for the current month?
• Who has submitted the highest number of Quotes in the current month?
• What are the latest revisions to activity objectives?
• How many Leads are associated for a given Opportunity?
• What are the Programs that Partners have enrolled into?
• What the Business plans owned by the team?
• 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?
• Where are the white spaces for me to sell a specific product?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
• What are the Products associated with the Deals?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• Are the Leads associated with certain products?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• What are the Fund request approved amount for the current quarter?
• Who has approved/rejected the MDF Requests?
• What products are often lost to key competitors? Is there a pattern?
• How many Contacts are assigned to an Opportunity?
• How many Resources are assigned to an Opportunity?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are all the Territories assigned to Resources/Employees?
• How many responses received for a given campaign?
• What is the Campaign ROI (return on investment)?
• How many times a Quote is revised before it gets approved?
• Are there any Activities without the Contact information?
• What are the activity objectives for this current period?
• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the Partners created in the system for a given time period?
• How many Enrollments are going to expire in the next quarter?
• What is the additional information updated in the Notes for a Contact?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?


- What are the top ten accounts by revenue in the last quarter?
- What regions are my customers clustered in?
- Who are all the contacts for key customers and what are their roles?
- 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?
- How to forecasts trend across periods?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
- What are the Opportunity Revenue line details contributing the most to the Forecast?
- How are product revenues trending month over month?
- What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
- How many Leads is a Contact associated to?
- Who are the Resources assigned to the Leads created in any given time period?
- Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
- What were the approved amounts vs the settled claim totals for the last 4 quarters?
- What was the currency conversion rate applied to a specific claim?
- How did the Opportunity evolve over time?
- What are the total number of Relationships between two Partners?
- Are there any up sell/cross sell opportunities?
- Is overall pipeline healthy enough to meet sales goals?
- What is the value trend of high value opportunities? Do they show a positive or negative trend?
- What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
- Who are the resources assigned for a particular territory?
- How many Leads are part of the Campaign?
- Who are the top/bottom 10 Sales Representatives by their Activities?
- What are the activities for a given Sales rep for today to plan the day ahead?
- What are the Partner tiers that a Particular program supports?
- Does this account have subsidiaries?
- How many Assets are created in a particular time period?
- What are the top 10 Products by Asset count?
- What are the Business plan objectives and what are their target v/s actual value?
- What are the target v/s actual number of the split objectives?
- What are the objectives that have not met the target value set?
- What all Contact team members is a given Employee part of?
- What is the additional information updated in the Notes for a Customer?
• What are my most active accounts? Who owns them and where are these located?
• Who are my teams top Customers?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• 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?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the Fund Requests and their statuses?
• Are the sales reps moving their opportunities fast enough?
• 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?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Does this Contact have subsidiaries?
• Who are the contacts assigned to the Activities and the associated Customer for these Contact?
• How many contacts have been assigned to the Activities?
• For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
• What are the sources of the Leads created in the current quarter?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
• Which Program has the highest number of Enrollments?
• What is the QoQ growth for Assets by Products?
• Who are all the resources assigned to the Assets?
• How many Business plans were created in the System in the last quarter and for what Partner or Account?
• How are the customers classified?
• How actively (# of Activities) are the Sales reps engaged with customers?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• What are my best performing product lines by customer geographies?
• What is the channel performance vs channel forecast?
• What are the higher value deals that have been moved out?
• How do wins and losses trend quarterly for a specific product line?
• What is the open/closed revenue for each of the product groups in the selected geography?
• What are all the Campaigns assigned to an Opportunity?
• What are all the Opportunities resulted from a Campaign?
• What is the average time the Opportunity is in a particular sales stage?
• What is the Hire date of the resources in an Organization?
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• On which sales accounts is a given sales representative a member of the account team?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• 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:

• Sales - CRM Deal Registration Product
• Sales - CRM Opportunity Campaign
• Sales - CRM Opportunity Partner
• Sales - CRM Quotes

Business Questions

This job role secures access to data that can answer the following business questions:

• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• What are the top 10 products for all the Deals submitted in the current quarter?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• Against how many Opportunities, were the Quotes submitted in this month?
• What is the total Quotes revenue for the current month?
• Who has submitted the highest number of Quotes in the current month?
• What are the Products associated with the Deals?
• How many times a Quote is revised before it gets approved?
• What are all the Campaigns assigned to an Opportunity?
• What are all the Opportunities resulted from a Campaign?

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 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:

• What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
• What are the Strategic accounts that have not had any Activities/Visits in last quarter?
• How many Leads are unassigned in the system?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What are the Leads that are converted into Opportunities?
• How many Opportunities were created from a given Lead?
• How many territories is the Lead part of?
• What managers have teams averaging the most activities?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• How many Leads are converted in the current quarter?
• What is the relationship between activities in a region and their revenue by quarter?
• What are the top 10 products associated to the Leads in the system?
• Are there any work load balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• Who are the top Sales representatives by their Lead conversion ratio?
• How many Leads are associated for a given Opportunity?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• Are there any Activities without the Contact information?
• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
• How many Leads were rejected in the last quarter and what were the reason for those?
• Who are the Resources assigned to the Leads created in any given time period?
• Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• Who all are the Contacts associated to the Lead?
• Who are the contacts assigned to the Activities and the associated Customer for these Contact?
• How many contacts have been assigned to the Activities?
• For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
• What are the sources of the Leads created in the current quarter?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
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 Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- Marketing - CRM Leads
- Marketing - CRM Leads and Opportunities Real Time
- Partners - CRM Partner Assessments
- Partners - CRM Program Enrollments
- Sales - CRM Account Relationship
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan
- 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 Partner
• Sales - CRM Opportunity Resource
• Sales - CRM Opportunity Sales Stage Snapshot
• Sales - CRM Opportunity Territory
• Sales - CRM Partner Relationship
• Sales - CRM Pipeline
• Sales - CRM Quota Management
• 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

Business Questions

This job role secures access to data that can answer the following business questions:

• Who has achieved the most Activities vs Objectives?
• What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
• What are the Strategic accounts that have not had any Activities/Visits in last quarter?
• How many Leads are unassigned in the system?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What are the Leads that are coverted into Opportunities?
• How many Opportunities were created from a given Lead?
• What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
• How many Enrollments were created/submitted/expired/terminated in the last month?
• What are the total number of Relationships for a given Account?
• What Business plan objectives have not met the target values?
• For a given Contact, who all are the Resources/Employees that are part of the Contact team members?
• Who manages my top accounts?
• Who are the 'new' customers, created in the past 6 months?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• What are the historical monthly trend of closed revenue by current territories?
• Are the Leads supporting products that appeal to certain customers by size of company?
• 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 the total number of MDF Requests in the current quarter?
• What is the Fund Request available amount?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How many Territories are assigned to an Opportunity?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• Who are the top competitors and what is the revenue exposure to them?
• Which Territories have exceeded their Quotes in the current Quarter?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the sales accounts that a given Sales representative owns?
• What are the total number of Contact Relationships between two Contact?
• How many Opportunities associated to a Campaign?
• What managers have teams averaging the most activities?
• What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?
• How many Leads are converted in the current quarter?
• How are the business plan objectives split?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• Is there a team or group who are over or underperforming vs forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• How many Leads are open for a given Product?
• Who approved an MDF claim? What are the start and end dates of that claim?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
• What is the revenue lost to competition for a specific product/product group?
• What are the responses for different Opportunity for an Assessment submitted?
• What are all the Territories assigned to Opportunities?
• Is the sales team converting leads to opportunities fast enough?
• How many territories are assigned to a Resource/Employee?
• What are the sales accounts owned by the Sales team?
• What is the relationship between activities in a region and their revenue by quarter?
• What are the top 10 products associated to the Leads in the system?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• What are the Customers from this account, including all subsidiaries?
• Who are all the Contacts assigned to the Assets?
• What are all the contacts created in the system by Geography?
• How many new contacts are created in the system in the current month?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the top 10 products for all the Deals submitted in the current quarter?
• What forecasts have changed over time and are impacting my total quarterly revenue?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• What are the Quotas assigned to the team and the Actuals?
• How is the Quota attainment rate for the sales team?
• How many new Resources are created in the current quarter?
• What are the Accounts under the sales team, by territory?
• Do the sales territories need rebalancing?
• Are there any work load balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• Who are the top Sales representatives by their Lead conversion ratio?
• What are the Assets that are expiring in the next quarter?
• How is my Revenue distributed across Customer geographies?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• Do Forecast rely on Revenue from few Products?
• What forecasts have seen changes in the quantities ordered vs the quantities planned?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Who are all the Contacts assigned to Opportunities?
• Who are all the Resources assigned to Opportunities?
• 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 is the Territory Quota vs/ Actual?
• What Resources will not be able to meet the Quotas in the current quarter?
• How many Leads do not have Contact?
• Against how many Opportunities, were the Quotes submitted in this month?
• What is the total Quotes revenue for the current month?
• Who has submitted the highest number of Quotes in the current month?
• What are the latest revisions to activity objectives?
• How many Leads are associated for a given Opportunity?
• What are the Programs that Partners have enrolled into?
• What the Business plans owned by the team?
• 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?
• Where are the white spaces for me to sell a specific product?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?
• What are the Products associated with the Deals?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• Are the Leads associated with certain products?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• What are the Fund request approved amount for the current quarter?
• Who has approved/rejected the MDF Requests?
• What products are often lost to key competitors? Is there a pattern?
• How many Contacts are assigned to an Opportunity?
• How many Resources are assigned to an Opportunity?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are all the Territories assigned to Resources/Employees?
• How many responses received for a given campaign?
• What is the Campaign ROI (return on investment)?
• How many times a Quote is revised before it gets approved?
• Are there any Activities without the Contact information?
• What are the activity objectives for this current period?
• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
• How many Leads were rejected in the last quarter and what were the reason for those?
• How many Enrollments are going to expire in the next quarter?
• What is the additional information updated in the Notes for a Contact?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• What are the top ten accounts by revenue in the last quarter?
• What regions are my customers clustered in?
• Who are all the contacts for key customers and what are their roles?
• 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?
• How to forecasts trend across periods?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• How are product revenues trending month over month?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• How many Leads is a Contact associated to?
• Who are the Resources assigned to the Leads created in any given time period?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What was the currency conversion rate applied to a specific claim?
• How did the Opportunity evolve over time?
• What are the total number of Relationships between two Partners?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
• Who are the resources assigned for a particular territory?
• How many Leads are part of the Campaign?
• Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• Does this account have subsidiaries?
• How many Assets are created in a particular time period?
• What are the top 10 Products by Asset count?
• What are the Business plan objectives and what are their target v/s actual value?
• What are the target v/s actual number of the split objectives?
• What are the objectives that have not met the target value set?
• What all Contact team members is a given Employee part of?
• What is the additional information updated in the Notes for a Customer?
• What are my most active accounts? Who owns them and where are these located?
• Who are my teams top Customers?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• 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?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the Fund Requests and their statuses?
• Are the sales reps moving their opportunities fast enough?
• 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?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Does this Contact have subsidiaries?
• Who are the contacts assigned to the Activities and the associated Customer for these Contact?
• How many contacts have been assigned to the Activities?
• For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
• What are the sources of the Leads created in the current quarter?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
• Which Program has the highest number of Enrollments?
• What is the QoQ growth for Assets by Products?
• Who are all the resources assigned to the Assets?
• How many Business plans were created in the System in the last quarter and for what Partner or Account?
• How are the customers classified?
• How actively (# of Activities) are the Sales reps engaged with customers?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• What are my best performing product lines by customer geographies?
• What is the channel performance vs channel forecast?
• What are the higher value deals that have been moved out?
• How do wins and losses trend quarterly for a specific product line?
• What is the open/closed revenue for each of the product groups in the selected geography?
• What are all the Campaigns assigned to an Opportunity?
• What are all the Opportunities resulted from a Campaign?
• What is the average time the Opportunity is in a particular sales stage?
• What is the Hire date of the resources in an Organization?
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• On which sales accounts is a given sales representative a member of the account team?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• 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 Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- Marketing - CRM Leads
- Marketing - CRM Leads and Opportunities Real Time
- Partners - CRM Partner Assessments
- Partners - CRM Program Enrollments
- Sales - CRM Account Relationship
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan
- 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 Partner
• Sales - CRM Opportunity Resource
• Sales - CRM Opportunity Sales Stage Snapshot
• Sales - CRM Opportunity Territory
• Sales - CRM Partner Relationship
• Sales - CRM Pipeline
• Sales - CRM Quota Management
• 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

Business Questions

This job role secures access to data that can answer the following business questions:

• **Who has achieved the most Activities vs Objectives?**
• **What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?**
• **What are the Strategic accounts that have not had any Activities/Visits in last quarter?**
• **How many Leads are unassigned in the system?**
• **Who is the Primary Contact and Resource assigned for a given Lead?**
• **What are the Leads that are converted into Opportunities?**
• **How many Opportunities were created from a given Lead?**
- What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
- How many Enrollments were created/submitted/expired/terminated in the last month?
- What are the total number of Relationships for a given Account?
- What Business plan objectives have not met the target values?
- For a given Contact, who all are the Resources/Employees that are part of the Contact team members?
- Who manages my top accounts?
- Who are the ‘new’ customers, created in the past 6 months?
- What are the Deals submitted by the Partners in the current quarter with the Deal size?
- What are the historical monthly trend of closed revenue by current territories?
- Are the Leads supporting products that appeal to certain customers by size of company?
- 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 the total number of MDF Requests in the current quarter?
- What is the Fund Request available amount?
- How many Partners are assigned to an Opportunity?
- Who are all the Partners assigned to Opportunities?
- How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
- How many Territories are assigned to an Opportunity?
- What are the top stalled opportunities and who are the sales reps working on these?
- What are the most likely reasons that the Opportunities are lost against our key competitors?
- What are the top 10 open opportunities? What are the target close dates and revenues for these?
- Who are the top competitors and what is the revenue exposure to them?
- Which Territories have exceeded their Quotes in the current Quarter?
- What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
- What are the sales accounts that a given Sales representative owns?
- What are the total number of Contact Relationships between two Contact?
- How many Opportunities associated to a Campaign?
- What managers have teams averaging the most activities?
- What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
- How many Leads are converted in the current quarter?
- How are the business plan objectives split?
- What are the names of the customers that a Sales team owns? Who are the key contacts?
- Do forecasts rely on revenues from a few customers? What is the dependency profile?
- Is there a team or group who are over or underperforming vs forecast?
- Are too many deals being pushed out to the subsequent fiscal quarters?
• How many Leads are open for a given Product?
• Who approved an MDF claim? What are the start and end dates of that claim?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
• What is the revenue lost to competition for a specific product/product group?
• What are the responses for different Opportunity for an Assessment submitted?
• What are all the Territories assigned to Opportunities?
• Is the sales team converting leads to opportunities fast enough?
• How many territories are assigned to a Resource/Employee?
• What are the sales accounts owned by the Sales team?
• What is the relationship between activities in a region and their revenue by quarter?
• What are the top 10 products associated to the Leads in the system?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• What are the Customers from this account, including all subsidiaries?
• Who are all the Contacts assigned to the Assets?
• What are all the contacts created in the system by Geography?
• How many new contacts are created in the system in the current month?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the top 10 products for all the Deals submitted in the current quarter?
• What forecasts have changed over time and are impacting my total quarterly revenue?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• What are the Quotas assigned to the team and the Actuals?
• How is the Quota attainment rate for the sales team?
• How many new Resources are created in the current quarter?
• What are the Accounts under the sales team, by territory?
• Do the sales territories need rebalancing?
• Are there any workload balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• Who are the top Sales representatives by their Lead conversion ratio?
• What are the Assets that are expiring in the next quarter?
• How is my Revenue distributed across Customer geographies?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• Do Forecast rely on Revenue from few Products?
• What forecasts have seen changes in the quantities ordered vs the quantities planned?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Who are all the Contacts assigned to Opportunities?
• Who are all the Resources assigned to Opportunities?
• 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 is the Territory Quota vs/ Actual?
• What Resources will not be able to meet the Quotas in the current quarter?
• How many Leads do not have Contact?
• Against how many Opportunities, were the Quotes submitted in this month?
• What is the total Quotes revenue for the current month?
• Who has submitted the highest number of Quotes in the current month?
• What are the latest revisions to activity objectives?
• How many Leads are associated for a given Opportunity?
• What are the Programs that Partners have enrolled into?
• What are all the Territories the Lead is part of?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• Are the Leads associated with certain products?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• What are the Fund request approved amount for the current quarter?
• Who has approved/rejected the MDF Requests?
• What products are often lost to key competitors? Is there a pattern?
• How many Contacts are assigned to an Opportunity?
• How many Resources are assigned to an Opportunity?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are all the Territories assigned to Resources/Employees?
• How many responses received for a given campaign?
• What is the Campaign ROI (return on investment)?
• How many times a Quote is revised before it gets approved?
• Are there any Activities without the Contact information?
• What are the activity objectives for this current period?
• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
• How many Leads were rejected in the last quarter and what were the reason for those?
• How many Enrollments are going to expire in the next quarter?
• What is the additional information updated in the Notes for a Contact?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• What are the top ten accounts by revenue in the last quarter?
• What regions are my customers clustered in?
• Who are all the contacts for key customers and what are their roles?
• 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?
• How to forecasts trend across periods?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• How are product revenues trending month over month?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• How many Leads is a Contact associated to?
• Who are the Resources assigned to the Leads created in any given time period?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What was the currency conversion rate applied to a specific claim?
• How did the Opportunity evolve over time?
• What are the total number of Relationships between two Partners?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
• Who are the resources assigned for a particular territory?
• How many Leads are part of the Campaign?
• Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• Does this account have subsidiaries?
• How many Assets are created in a particular time period?
• What are the top 10 Products by Asset count?
• What are the Business plan objectives and what are their target v/s actual value?
• What are the target v/s actual number of the split objectives?
• What are the objectives that have not met the target value set?
• What all Contact team members is a given Employee part of?
• What is the additional information updated in the Notes for a Customer?
• What are my most active accounts? Who owns them and where are these located?
• Who are my teams top Customers?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• 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?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the Fund Requests and their statuses?
• Are the sales reps moving their opportunities fast enough?
• 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?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Does this Contact have subsidiaries?
• Who are the contacts assigned to the Activities and the associated Customer for these Contact?
• How many contacts have been assigned to the Activities?
• For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
• What are the sources of the Leads created in the current quarter?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
• Which Program has the highest number of Enrollments?
• What is the QoQ growth for Assets by Products?
• Who are all the resources assigned to the Assets?
• How many Business plans were created in the System in the last quarter and for what Partner or Account?
• How are the customers classified?
• How actively (# of Activities) are the Sales reps engaged with customers?
For given set of Customers, what percentage of my revenue is exposed to competition?

What are my best performing product lines by customer geographies?

What is the channel performance vs channel forecast?

What are the higher value deals that have been moved out?

How do wins and losses trend quarterly for a specific product line?

What is the open/closed revenue for each of the product groups in the selected geography?

What are all the Campaigns assigned to an Opportunity?

What are all the Opportunities resulted from a Campaign?

What is the average time the Opportunity is in a particular sales stage?

What is the Hire date of the resources in an Organization?

How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?

On which sales accounts is a given sales representative a member of the account team?

Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?

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 Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• Marketing - CRM Leads
• Marketing - CRM Leads and Opportunities Real Time
• Partners - CRM Partner Assessments
• Partners - CRM Program Enrollments
• Sales - CRM Account Relationship
• Sales - CRM Asset
• Sales - CRM Asset Contact
• Sales - CRM Asset Resource
• Sales - CRM Business Plan
• 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 Partner**
• **Sales - CRM Opportunity Resource**
• **Sales - CRM Opportunity Sales Stage Snapshot**
• **Sales - CRM Opportunity Territory**
• **Sales - CRM Partner Relationship**
• **Sales - CRM Pipeline**
• **Sales - CRM Quota Management**
• **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**

**Business Questions**

This job role secures access to data that can answer the following business questions:

- **Who has achieved the most Activities vs Objectives?**
- **What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?**
- **What are the Strategic accounts that have not had any Activities/Visits in last quarter?**
- **How many Leads are unassigned in the system?**
- **Who is the Primary Contact and Resource assigned for a given Lead?**
- **What are the Leads that are converted into Opportunities?**
- **How many Opportunities were created from a given Lead?**
- **What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?**
- **How many Enrollments were created/submitted/expired/terminated in the last month?**
- **What are the total number of Relationships for a given Account?**
- **What Business plan objectives have not met the target values?**
- **For a given Contact, who all are the Resources/Employees that are part of the Contact team members?**
- **Who manages my top accounts?**
• Who are the ‘new’ customers, created in the past 6 months?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• What are the historical monthly trend of closed revenue by current territories?
• Are the Leads supporting products that appeal to certain customers by size of company?
• 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 the total number of MDF Requests in the current quarter?
• What is the Fund Request available amount?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How many Territories are assigned to an Opportunity?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• Who are the top competitors and what is the revenue exposure to them?
• Which Territories have exceeded their Quotes in the current Quarter?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the sales accounts that a given Sales representative owns?
• What are the total number of Contact Relationships between two Contact?
• How many Opportunities associated to a Campaign?
• What managers have teams averaging the most activities?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• How many Leads are converted in the current quarter?
• How are the business plan objectives split?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• Is there a team or group who are over or underperforming vs forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• How many Leads are open for a given Product?
• Who approved an MDF claim? What are the start and end dates of that claim?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
• What is the revenue lost to competition for a specific product/product group?
• What are the responses for different Opportunity for an Assessment submitted?
• What are all the Territories assigned to Opportunities?
• Is the sales team converting leads to opportunities fast enough?
• How many territories are assigned to a Resource/Employee?
• What are the sales accounts owned by the Sales team?
• What is the relationship between activities in a region and their revenue by quarter?
• What are the top 10 products associated to the Leads in the system?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• What are the Customers from this account, including all subsidiaries?
• Who are all the Contacts assigned to the Assets?
• What are all the contacts created in the system by Geography?
• How many new contacts are created in the system in the current month?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the top 10 products for all the Deals submitted in the current quarter?
• What forecasts have changed over time and are impacting my total quarterly revenue?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• What are the Quotas assigned to the team and the Actuals?
• How is the Quota attainment rate for the sales team?
• How many new Resources are created in the current quarter?
• What are the Accounts under the sales team, by territory?
• Do the sales territories need rebalancing?
• Are there any work load balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• Who are the top Sales representatives by their Lead conversion ratio?
• What are the Assets that are expiring in the next quarter?
• How is my Revenue distributed across Customer geographies?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• Do Forecast rely on Revenue from few Products?
• What forecasts have seen changes in the quantities ordered vs the quantities planned?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Who are all the Contacts assigned to Opportunities?
• Who are all the Resources assigned to Opportunities?
• 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 is the Territory Quota vs/ Actual?
• What Resources will not be able to meet the Quotas in the current quarter?
• How many Leads do not have Contact?
• Against how many Opportunities, were the Quotes submitted in this month?
• What is the total Quotes revenue for the current month?
• Who has submitted the highest number of Quotes in the current month?
• What are the latest revisions to activity objectives?
• How many Leads are associated for a given Opportunity?
• What are the Programs that Partners have enrolled into?
• What are the Business plans owned by the team?
• 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?
• Where are the white spaces for me to sell a specific product?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?
• What are the Products associated with the Deals?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• Are the Leads associated with certain products?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• What are the Fund request approved amount for the current quarter?
• Who has approved/rejected the MDF Requests?
• What products are often lost to key competitors? Is there a pattern?
• How many Contacts are assigned to an Opportunity?
• How many Resources are assigned to an Opportunity?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are all the Territories assigned to Resources/Employees?
• How many responses received for a given campaign?
• What is the Campaign ROI (return on investment)?
• How many times a Quote is revised before it gets approved?
• Are there any Activities without the Contact information?
• What are the activity objectives for this current period?
• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
• How many Leads were rejected in the last quarter and what were the reason for those?
• How many Enrollments are going to expire in the next quarter?
• What is the additional information updated in the Notes for a Contact?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• What are the top ten accounts by revenue in the last quarter?
• What regions are my customers clustered in?
• Who are all the contacts for key customers and what are their roles?
• 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?
• How to forecast trend across periods?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• How are product revenues trending month over month?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• How many Leads is a Contact associated to?
• Who are the Resources assigned to the Leads created in any given time period?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What was the currency conversion rate applied to a specific claim?
• How did the Opportunity evolve over time?
• What are the total number of Relationships between two Partners?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
• Who are the resources assigned for a particular territory?
• How many Leads are part of the Campaign?
• Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• Does this account have subsidiaries?
• How many Assets are created in a particular time period?
• What are the top 10 Products by Asset count?
• What are the Business plan objectives and what are their target v/s actual value?
• What are the target v/s actual number of the split objectives?
• What are the objectives that have not met the target value set?
• What all Contact team members is a given Employee part of?
• What is the additional information updated in the Notes for a Customer?
• What are my most active accounts? Who owns them and where are these located?
• Who are my teams top Customers?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• 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?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the Fund Requests and their statuses?
• Are the sales reps moving their opportunities fast enough?
• 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?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Does this Contact have subsidiaries?
• Who are the contacts assigned to the Activities and the associated Customer for these Contact?
• How many contacts have been assigned to the Activities?
• For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
• What are the sources of the Leads created in the current quarter?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
• Which Program has the highest number of Enrollments?
• What is the QoQ growth for Assets by Products?
• Who are all the resources assigned to the Assets?
• How many Business plans were created in the System in the last quarter and for what Partner or Account?
• How are the customers classified?
• How actively (# of Activities) are the Sales reps engaged with customers?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• What are my best performing product lines by customer geographies?
• What is the channel performance vs channel forecast?
• What are the higher value deals that have been moved out?
• How do wins and losses trend quarterly for a specific product line?
• What is the open/closed revenue for each of the product groups in the selected geography?
• What are all the Campaigns assigned to an Opportunity?
• What are all the Opportunities resulted from a Campaign?
• What is the average time the Opportunity is in a particular sales stage?
• What is the Hire date of the resources in an Organization?
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• On which sales accounts is a given sales representative a member of the account team?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• 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 Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• Marketing - CRM Leads
• Marketing - CRM Leads and Opportunities Real Time
• Partners - CRM Partner Assessments
• Partners - CRM Program Enrollments
• Sales - CRM Account Relationship
• Sales - CRM Asset
• Sales - CRM Asset Contact
• Sales - CRM Asset Resource
• Sales - CRM Business Plan
• 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 Partner
Subject Areas for Transactional Business Intelligence in Sales

Chapter 4

Job Roles

- Sales - CRM Opportunity Resource
- Sales - CRM Opportunity Sales Stage Snapshot
- Sales - CRM Opportunity Territory
- Sales - CRM Partner Relationship
- Sales - CRM Pipeline
- Sales - CRM Quota Management
- 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

Business Questions

This job role secures access to data that can answer the following business questions:

- **Who has achieved the most Activities vs Objectives?**
- **What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?**
- **What are the Strategic accounts that have not had any Activities/Visits in last quarter?**
- **How many Leads are unassigned in the system?**
- **Who is the Primary Contact and Resource assigned for a given Lead?**
- **What are the Leads that are coverted into Opportunities?**
- **How many Opportunities were created from a given Lead?**
- **What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?**
- **How many Enrollments were created/submitted/expired/terminated in the last month?**
- **What are the total number of Relationships for a given Account?**
- **What Business plan objectives have not met the target values?**
- **For a given Contact, who all are the Resources/Employees that are part of the Contact team members?**
- **Who manages my top accounts?**
- **Who are the 'new' customers, created in the past 6 months?**
- **What are the Deals submitted by the Partners in the current quarter with the Deal size?**
- **What are the historical monthly trend of closed revenue by current territories?**
- **Are the Leads supporting products that appeal to certain customers by size of company?**
- **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 the total number of MDF Requests in the current quarter?
• What is the Fund Request available amount?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How many Territories are assigned to an Opportunity?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• Who are the top competitors and what is the revenue exposure to them?
• Which Territories have exceeded their Quotes in the current Quarter?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the sales accounts that a given Sales representative owns?
• What are the total number of Contact Relationships between two Contact?
• How many Opportunities associated to a Campaign?
• What managers have teams averaging the most activities?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• How many Leads are converted in the current quarter?
• How are the business plan objectives split?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• Is there a team or group who are over or underperforming vs forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• How many Leads are open for a given Product?
• Who approved an MDF claim? What are the start and end dates of that claim?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
• What is the revenue lost to competition for a specific product/product group?
• What are the responses for different Opportunity for an Assessment submitted?
• What are all the Territories assigned to Opportunities?
• Is the sales team converting leads to opportunities fast enough?
• How many territories are assigned to a Resource/Employee?
• What are the sales accounts owned by the Sales team?
• What is the relationship between activities in a region and their revenue by quarter?
• What are the top 10 products associated to the Leads in the system?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• What are the Customers from this account, including all subsidiaries?
• Who are all the Contacts assigned to the Assets?
• What are all the contacts created in the system by Geography?
• How many new contacts are created in the system in the current month?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the top 10 products for all the Deals submitted in the current quarter?
• What forecasts have changed over time and are impacting my total quarterly revenue?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• What are the Quotas assigned to the team and the Actuals?
• How is the Quota attainment rate for the sales team?
• How many new Resources are created in the current quarter?
• What are the Accounts under the sales team, by territory?
• Do the sales territories need rebalancing?
• Are there any work load balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• Who are the top Sales representatives by their Lead conversion ratio?
• What are the Assets that are expiring in the next quarter?
• How is my Revenue distributed across Customer geographies?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• Do Forecast rely on Revenue from few Products?
• What forecasts have seen changes in the quantities ordered vs the quantities planned?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Who are all the Contacts assigned to Opportunities?
• Who are all the Resources assigned to Opportunities?
• 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 is the Territory Quota vs/ Actual?
• What Resources will not be able to meet the Quotas in the current quarter?
• How many Leads do not have Contact?
• Against how many Opportunities, were the Quotes submitted in this month?
• What is the total Quotes revenue for the current month?
• Who has submitted the highest number of Quotes in the current month?
• What are the latest revisions to activity objectives?
• How many Leads are associated for a given Opportunity?
• What are the Programs that Partners have enrolled into?
• What is the Business plans owned by the team?
• 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?
• Where are the white spaces for me to sell a specific product?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?
• What are the Products associated with the Deals?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• Are the Leads associated with certain products?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• What are the Fund request approved amount for the current quarter?
• Who has approved/rejected the MDF Requests?
• What products are often lost to key competitors? Is thre a pattern?
• How many Contacts are assigned to an Opportunity?
• How many Resources are assigned to an Opportunity?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are all the Territories assigned to Resources/Employees?
• How many responses received for a given campaign?
• What is the Campaign ROI (return on investment)?
• How many times a Quote is revised before it gets approved?
• Are there any Activities without the Contact information?
• What are the activity objectives for this current period?
• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
• How many Leads were rejected in the last quarter and what were the reason for those?
• How many Enrollments are goingt o expire in the next quarter?
• What is the additional information updated in the Notes for a Contact?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• What are the top ten accounts by revenue in the last quarter?
• What regions are my customers clustered in?
• Who are all the contacts for key customers and what are their roles?
• 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?
• How to forecasts trend across periods?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• How are product revenues trending month over month?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• How many Leads is a Contact associated to?
• Who are the Resources assigned to the Leads created in any given time period?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What was the currency conversion rate applied to a specific claim?
• How did the Opportunity evolve over time?
• What are the total number of Relationships between two Partners?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
• Who are the resources assigned for a particular territory?
• How many Leads are part of the Campaign?
• Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• Does this account have subsidiaries?
• How many Assets are created in a particular time period?
• What are the top 10 Products by Asset count?
• What are the Business plan objectives and what are their target v/s actual value?
• What are the target v/s actual number of the split objectives?
• What are the objectives that have not met the target value set?
• What all Contact team members is a given Employee part of?
• What is the additional information updated in the Notes for a Customer?
• What are my most active accounts? Who owns them and where are they located?
• Who are my team’s top Customers?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
• Who are the Contacts associated to the Lead?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the Fund Requests and their statuses?
• Are the sales reps moving their opportunities fast enough?
• 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?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales – CRM Sales Activity)
• Does this Contact have subsidiaries?
• Who are the contacts assigned to the Activities and the associated Customer for these Contact?
• How many contacts have been assigned to the Activities?
• For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
• What are the sources of the Leads created in the current quarter?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
• Which Program has the highest number of Enrollments?
• What is the QoQ growth for Assets by Products?
• Who are all the resources assigned to the Assets?
• How many Business plans were created in the System in the last quarter and for what Partner or Account?
• How are the customers classified?
• How actively (# of Activities) are the Sales reps engaged with customers?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• What are my best performing product lines by customer geographies?
• What is the channel performance vs channel forecast?
• What are the higher value deals that have been moved out?
• How do wins and losses trend quarterly for a specific product line?
• What is the open/closed revenue for each of the product groups in the selected geography?
• What are all the Campaigns assigned to an Opportunity?
• What are all the Opportunities resulted from a Campaign?
• What is the average time the Opportunity is in a particular sales stage?
• What is the Hire date of the resources in an Organization?
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• **On which sales accounts is a given sales representative a member of the account team?**
• **Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?**
• **What are all the Leads/Contacts (Campaign Members) associated to the Campaign?**
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.

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:

- 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:

- How many Leads are unassigned in the system?
- Who is the Primary Contact and Resource assigned for a given Lead?
- What are the Leads that are converted into Opportunities?
- How many Opportunities were created from a given Lead?
- What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
- How many Leads are converted in the current quarter?
• What are the top 10 products associated to the Leads in the system?
• Who are the top Sales representatives by their Lead conversion ratio?
• How many Leads are associated for a given Opportunity?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the sources of the Leads created in the current quarter?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?

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:

• How many Leads are unassigned in the system?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What are the Leads that are converted into Opportunities?
• How many Opportunities were created from a given Lead?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• How many Leads are converted in the current quarter?
• What are the top 10 products associated to the Leads in the system?
• Who are the top Sales representatives by their Lead conversion ratio?
• How many Leads are associated for a given Opportunity?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the sources of the Leads created in the current quarter?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?

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:
• How many Leads are unassigned in the system?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What are the Leads that are converted into Opportunities?
• How many Opportunities were created from a given Lead?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• How many Leads are converted in the current quarter?
• What are the top 10 products associated to the Leads in the system?
• Who are the top Sales representatives by their Lead conversion ratio?
• How many Leads are associated for a given Opportunity?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the sources of the Leads created in the current quarter?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?

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 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:

• What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
• What are the Strategic accounts that have not had any Activities/Visits in last quarter?
• How many Leads are unassigned in the system?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What are the Leads that are converted into Opportunities?
• How many Opportunities were created from a given Lead?
• How many territories is the Lead part of?
• What managers have teams averaging the most activities?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• How many Leads are converted in the current quarter?
• What is the relationship between activities in a region and their revenue by quarter?
• What are the top 10 products associated to the Leads in the system?
• Are there any workload balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• How many Leads are associated for a given Opportunity?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• Are there any Activities without the Contact information?
• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
• How many Leads were rejected in the last quarter and what were the reason for those?
• How many Leads is a Contact associated to?
• Who are the top Sales representatives by their Lead conversion ratio?
• Who are the Resources assigned to the Leads created in any given time period?
• Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• Who all are the Contacts associated to the Lead?
• Who are the contacts assigned to the Activities and the associated Customer for these Contact?
• How many contacts have been assigned to the Activities?
• For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
• What are the sources of the Leads created in the current quarter?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
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:

- How many Leads are unassigned in the system?
- Who is the Primary Contact and Resource assigned for a given Lead?
- What are the Leads that are converted into Opportunities?
- How many Opportunities were created from a given Lead?
- What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
- How many Leads are converted in the current quarter?
- What are the top 10 products associated to the Leads in the system?
- Who are the top Sales representatives by their Lead conversion ratio?
- How many Leads are associated for a given Opportunity?
- How many Leads were rejected in the last quarter and what were the reason for those?
- What are the sources of the Leads created in the current quarter?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?

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:

- How many Leads are unassigned in the system?
- Who is the Primary Contact and Resource assigned for a given Lead?
- What are the Leads that are converted into Opportunities?
- How many Opportunities were created from a given Lead?
- What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
- How many Leads are converted in the current quarter?
- What are the top 10 products associated to the Leads in the system?
- Who are the top Sales representatives by their Lead conversion ratio?
- How many Leads are associated for a given Opportunity?
- How many Leads were rejected in the last quarter and what were the reason for those?
- What are the sources of the Leads created in the current quarter?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?

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:

- *How many Leads are unassigned in the system?*
- *Who is the Primary Contact and Resource assigned for a given Lead?*
- *What are the Leads that are converted into Opportunities?*
- *How many Opportunities were created from a given Lead?*
- *What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?*
- *How many Leads are converted in the current quarter?*
- *What are the top 10 products associated to the Leads in the system?*
- *Who are the top Sales representatives by their Lead conversion ratio?*
- *How many Leads are associated for a given Opportunity?*
- *How many Leads were rejected in the last quarter and what were the reason for those?*
- *What are the sources of the Leads created in the current quarter?*
- *Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?*

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 Operations Manager

Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource 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 Program Tiers
- Partners - CRM Partner Resource
- Partners - CRM Partner Territory
- Partners - CRM Program Enrollments
- Partners - CRM Programs
- Sales - CRM Account Relationship
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan
- 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 Partner
• Sales - CRM Opportunity Resource
• Sales - CRM Opportunity Sales Stage Snapshot
• Sales - CRM Opportunity Territory
• Sales - CRM Partner Relationship
• Sales - CRM Pipeline
• Sales - CRM Quota Management
• 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
Business Questions

This duty role secures access to data that can answer the following business questions:

- Who has achieved the most Activities vs Objectives?
- What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
- What are the Strategic accounts that have not had any Activities/Visits in last quarter?
- For a given Partner Tier, what are the active Programs available in the system?
- What is the quarterly revenue trend for a specific product/product group by partner?
- What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
- How many Territories is a Partner part of?
- How many Enrollments were created/submitted/expired/terminated in the last month?
- What are the total number of Relationships for a given Account?
- What Business plan objectives have not met the target values?
- For a given Contact, who all are the Resources/Employees that are part of the Contact team members?
- Who manages my top accounts?
- Who are the 'new' customers, created in the past 6 months?
- What are the Deals submitted by the Partners in the current quarter with the Deal size?
- What are the historical monthly trend of closed revenue by current territories?
- Are the Leads supporting products that appeal to certain customers by size of company?
- 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 the total number of MDF Requests in the current quarter?
- What is the Fund Request available amount?
- How many Partners are assigned to an Opportunity?
- Who are all the Partners assigned to Opportunities?
- How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
- How many Territories are assigned to an Opportunity?
- What are the top stalled opportunities and who are the sales reps working on these?
- What are the most likely reasons that the Opportunities are lost against our key competitors?
- What are the top 10 open opportunities? What are the target close dates and revenues for these?
- Who are the top competitors and what is the revenue exposure to them?
- Which Territories have exceeded their Quotes in the current Quarter?
- What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
- What are the sales accounts that a given Sales representative owns?
- What are the total number of Contact Relationships between two Contact?
• How many Opportunities associated to a Campaign?
• What managers have teams averaging the most activities?
• What is the average deal size by Product groups?
• What is the number of Partner Contacts that are also resources and users?
• What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?
• How many Programs are owned by the team with their expiration date?
• How are the business plan objectives split?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• Is there a team or group who are over or underperforming vs forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• How many Leads are open for a given Product?
• Who approved an MDF claim? What are the start and end dates of that claim?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
• What is the revenue lost to competition for a specific product/product group?
• What are the responses for different Opportunity for an Assessment submitted?
• What are all the Territories assigned to Opportunities?
• Is the sales team converting leads to opportunities fast enough?
• How many territories are assigned to a Resource/Employee?
• What are the sales accounts owned by the Sales team?
• What is the relationship between activities in a region and their revenue by quarter?
• What is the revenue generated by Partners per Customer?
• What is the distribution of Partner Opportunities by sales stages?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• How are the Partners classified?
• What are the number of Partner contacts by Partner?
• Who all is part of the Partner Resource Team for a given Partner and what is their role?
• What are the Customers from this account, including all subsidiaries?
• Who are all the Contacts assigned to the Assets?
• What are all the contacts created in the system by Geography?
• How many new contacts are created in the system in the current month?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the top 10 products for all the Deals submitted in the current quarter?
• What forecasts have changed over time and are impacting my total quarterly revenue?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• What are the Quotas assigned to the team and the Actuals?
• How is the Quota attainment rate for the sales team?
• How many new Resources are created in the current quarter?
• What are the Accounts under the sales team, by territory?
• Do the sales territories need rebalancing?
• Are there any work load balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• How many Partners’ team is a given Resource part of?
• How many Programs were created in the last quarter?
• What are the Assets that are expiring in the next quarter?
• How is my Revenue distributed across Customer geographies?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• Do Forecast rely on Revenue from few Products?
• What forecasts have seen changes in the quantities ordered vs the quantities planned?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Who are all the Contacts assigned to Opportunities?
• Who are all the Resources assigned to Opportunities?
• 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 is the Territory Quota vs/ Actual?
• What Resources will not be able to meet the Quotas in the current quarter?
• How many Leads do not have Contact?
• Against how many Opportunities, were the Quotes submitted in this month?
• What is the total Quotes revenue for the current month?
• Who has submitted the highest number of Quotes in the current month?
• What are the latest revisions to activity objectives?
• What are the open Opportunities associated to a given Partner?
• What is the potential revenue of leads by partners?
• What is the number of leads by partners for a specific product group?
• What are the Programs that Partners have enrolled into?
• What the Business plans owned by the team?
• 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?
• Where are the white spaces for me to sell a specific product?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?
• What are the Products associated with the Deals?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• Are the Leads associated with certain products?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• What are the Fund request approved amount for the current quarter?
• Who has approved/rejected the MDF Requests?
• What products are often lost to key competitors? Is there a pattern?
• How many Contacts are assigned to an Opportunity?
• How many Resources are assigned to an Opportunity?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are all the Territories assigned to Resources/Employees?
• How many responses received for a given campaign?
• What is the Campaign ROI (return on investment)?
• How many times a Quote is revised before it gets approved?
• Are there any Activities without the Contact information?
• What are the activity objectives for this current period?
• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
• What is total number of Partners assigned to a specific classification for this period?
• What are the Partners created in the system for a given time period?
• What Partners are assigned to specific geographic territories?
• How many Enrollments are going to expire in the next quarter?
• What is the additional information updated in the Notes for a Contact?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• What are the top ten accounts by revenue in the last quarter?
• What regions are my customers clustered in?
• Who are all the contacts for key customers and what are their roles?
• 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?
• How to forecasts trend across periods?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• How are product revenues trending month over month?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• How many Leads is a Contact associated to?
• Who are the Resources assigned to the Leads created in any given time period?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What was the currency conversion rate applied to a specific claim?
• How did the Opportunity evolve over time?
• What are the total number of Relationships between two Partners?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
• Who are the resources assigned for a particular territory?
• How many Leads are part of the Campaign?
• Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• What are the Partner tiers that a Particular program supports?
• What are the top ten Partners by Revenue during the past quarter/year?
• Does this account have subsidiaries?
• How many Assets are created in a particular time period?
• What are the top 10 Products by Asset count?
• What are the Business plan objectives and what are their target v/s actual value?
• What are the target v/s actual number of the split objectives?
• What are the objectives that have not met the target value set?
• What all Contact team members is a given Employee part of?
• What is the additional information updated in the Notes for a Customer?
• What are my most active accounts? Who owns them and where are these located?
• Who are my teams top Customers?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• 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?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the Fund Requests and their statuses?
• Are the sales reps moving their opportunities fast enough?
• 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?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Does this Contact have subsidiaries?
• Who are the contacts assigned to the Activities and the associated Customer for these Contact?
• How many contacts have been assigned to the Activities?
• For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
• What is the number of partners in a specific classification within a defined geographic region?
• How many Partners is a Contact is associated to?
• Which Program has the highest number of Enrollments?
• What is the QoQ growth for Assets by Products?
• Who are all the resources assigned to the Assets?
• How many Business plans were created in the System in the last quarter and for what Partner or Account?
• How are the customers classified?
• How actively (# of Activities) are the Sales reps engaged with customers?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• What are my best performing product lines by customer geographies?
• What is the channel performance vs channel forecast?
• What are the higher value deals that have been moved out?
• How do wins and losses trend quarterly for a specific product line?
• What is the open/closed revenue for each of the product groups in the selected geography?
• What are all the Campaigns assigned to an Opportunity?
• What are all the Opportunities resulted from a Campaign?
• What is the average time the Opportunity is in a particular sales stage?
• What is the Hire date of the resources in an Organization?
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• On which sales accounts is a given sales representative a member of the account team?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• 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 Manager

Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Resource 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 Program Tiers
- Partners - CRM Partner Resource
- Partners - CRM Partner Territory
- Partners - CRM Program Enrollments
- Partners - CRM Programs
- Sales - CRM Account Relationship
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
• Sales - CRM Business Plan
• 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 Partner
• Sales - CRM Opportunity Resource
• Sales - CRM Opportunity Sales Stage Snapshot
• Sales - CRM Opportunity Territory
• Sales - CRM Partner Relationship
• Sales - CRM Pipeline
• Sales - CRM Quota Management
• 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

Business Questions

This duty role secures access to data that can answer the following business questions:

• Who has achieved the most Activities vs Objectives?
• What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
• What are the Strategic accounts that have not had any Activities/Visits in last quarter?
• For a given Partner Tier, what are the active Programs available in the system?
• What is the quarterly revenue trend for a specific product/product group by partner?
• What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
• How many Territories is a Partner part of?
• How many Enrollments were created/submitted/expired/terminated in the last month?
• What are the total number of Relationships for a given Account?
• What Business plan objectives have not met the target values?
• For a given Contact, who all are the Resources/ Employees that are part of the Contact team members?
• Who manages my top accounts?
• Who are the ‘new’ customers, created in the past 6 months?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• What are the historical monthly trend of closed revenue by current territories?
• Are the Leads supporting products that appeal to certain customers by size of company?
• 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 the total number of MDF Requests in the current quarter?
• What is the Fund Request available amount?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
- How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
- How many Territories are assigned to an Opportunity?
- What are the top stalled opportunities and who are the sales reps working on these?
- What are the most likely reasons that the Opportunities are lost against our key competitors?
- What are the top 10 open opportunities? What are the target close dates and revenues for these?
- Who are the top competitors and what is the revenue exposure to them?
- Which Territories have exceeded their Quotes in the current Quarter?
- What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
- What are the sales accounts that a given Sales representative owns?
- What are the total number of Contact Relationships between two Contact?
- How many Opportunities associated to a Campaign?
- What managers have teams averaging the most activities?
- What is the average deal size by Product groups?
- What is the number of Partner Contacts that are also resources and users?
- What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?
- How many Programs are owned by the team with their expiration date?
- How are the business plan objectives split?
- What are the names of the customers that a Sales team owns? Who are the key contacts?
- Do forecasts rely on revenues from a few customers? What is the dependency profile?
- Is there a team or group who are over or underperforming vs forecast?
- Are too many deals being pushed out to the subsequent fiscal quarters?
- How many Leads are open for a given Product?
- Who approved an MDF claim? What are the start and end dates of that claim?
- Was an MDF claim rejected? What was the reason the claim was rejected?
- Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
- What is the revenue lost to competition for a specific product/product group?
- What are the responses for different Opportunity for an Assessment submitted?
- What are all the Territories assigned to Opportunities?
- Is the sales team converting leads to opportunities fast enough?
- How many territories are assigned to a Resource/Employee?
- What are the sales accounts owned by the Sales team?
- What is the relationship between activities in a region and their revenue by quarter?
- What is the revenue generated by Partners per Customer?
- What is the distribution of Partner Opportunities by sales stages?
- How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• How are the Partners classified?
• What are the number of Partner contacts by Partner?
• Who all is part of the Partner Resource Team for a given Partner and what is their role?
• What are the Customers from this account, including all subsidiaries?
• Who are all the Contacts assigned to the Assets?
• What are all the contacts created in the system by Geography?
• How many new contacts are created in the system in the current month?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the top 10 products for all the Deals submitted in the current quarter?
• What forecasts have changed over time and are impacting my total quarterly revenue?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• What are the Quotas assigned to the team and the Actuals?
• How is the Quota attainment rate for the sales team?
• How many new Resources are created in the current quarter?
• What are the Accounts under the sales team, by territory?
• Do the sales territories need rebalancing?
• Are there any workload balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• How many Partners’ team is a given Resource part of?
• How many Programs were created in the last quarter?
• What are the Assets that are expiring in the next quarter?
• How is my Revenue distributed across Customer geographies?
• What are the contact points (phone, email, address, etc.) of key contacts?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• Do Forecast rely on Revenue from few Products?
• What forecasts have seen changes in the quantities ordered vs the quantities planned?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Who are all the Contacts assigned to Opportunities?
• Who are all the Resources assigned to Opportunities?
• 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 is the Territory Quota vs/ Actual?
• What Resources will not be able to meet the Quotas in the current quarter?
• How many Leads do not have Contact?
• Against how many Opportunities, were the Quotes submitted in this month?
• What is the total Quotes revenue for the current month?
• Who has submitted the highest number of Quotes in the current month?
• What are the latest revisions to activity objectives?
• What are the open Opportunities associated to a given Partner?
• What is the potential revenue of leads by partners?
• What is the number of leads by partners for a specific product group?
• What are the Programs that Partners have enrolled into?
• What the Business plans owned by the team?
• 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?
• Where are the white spaces for me to sell a specific product?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?
• What are the Products associated with the Deals?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• Are the Leads associated with certain products?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• What are the Fund request approved amount for the current quarter?
• Who has approved/rejected the MDF Requests?
• What products are often lost to key competitors? Is there a pattern?
• How many Contacts are assigned to an Opportunity?
• How many Resources are assigned to an Opportunity?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are all the Territories assigned to Resources/Employees?
• How many responses received for a given campaign?
• What is the Campaign ROI (return on investment)?
• How many times a Quote is revised before it gets approved?
• Are there any Activities without the Contact information?
• What are the activity objectives for this current period?
• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
• What is total number of Partners assigned to a specific classification for this period?
• What are the Partners created in the system for a given time period?
• What Partners are assigned to specific geographic territories?
• How many Enrollments are going to expire in the next quarter?
• What is the additional information updated in the Notes for a Contact?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• What are the top ten accounts by revenue in the last quarter?
• What regions are my customers clustered in?
• Who are all the contacts for key customers and what are their roles?
• 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?
• How to forecasts trend across periods?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• How are product revenues trending month over month?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• How many Leads is a Contact associated to?
• Who are the Resources assigned to the Leads created in any given time period?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What was the currency conversion rate applied to a specific claim?
• How did the Opportunity evolve over time?
• What are the total number of Relationships between two Partners?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
• Who are the resources assigned for a particular territory?
• How many Leads are part of the Campaign?
• Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• What are the Partner tiers that a Particular program supports?
• What are the top ten Partners by Revenue during the past quarter/year?
• Does this account have subsidiaries?
- How many Assets are created in a particular time period?
- What are the top 10 Products by Asset count?
- What are the Business plan objectives and what are their target v/s actual value?
- What are the target v/s actual number of the split objectives?
- What are the objectives that have not met the target value set?
- What all Contact team members is a given Employee part of?
- What is the additional information updated in the Notes for a Customer?
- What are my most active accounts? Who owns them and where are these located?
- Who are my teams top Customers?
- What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
- 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?
- Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
- What are the Fund Requests and their statuses?
- Are the sales reps moving their opportunities fast enough?
- 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?
- How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
- Does this Contact have subsidiaries?
- Who are the contacts assigned to the Activities and the associated Customer for these Contact?
- How many contacts have been assigned to the Activities?
- For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
- What is the number of partners in a specific classification within a defined geographic region?
- How many Partners is a Contact is associated to?
- Which Program has the highest number of Enrollments?
- What is the QoQ growth for Assets by Products?
- Who are all the resources assigned to the Assets?
- How many Business plans were created in the System in the last quarter and for what Partner or Account?
- How are the customers classified?
- How actively (# of Activities) are the Sales reps engaged with customers?
- For given set of Customers, what percentage of my revenue is exposed to competition?
- What are my best performing product lines by customer geographies?
- What is the channel performance vs channel forecast?
- What are the higher value deals that have been moved out?
- How do wins and losses trend quarterly for a specific product line?
• What is the open/closed revenue for each of the product groups in the selected geography?
• What are all the Campaigns assigned to an Opportunity?
• What are all the Opportunities resulted from a Campaign?
• What is the average time the Opportunity is in a particular sales stage?
• What is the Hire date of the resources in an Organization?
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• On which sales accounts is a given sales representative a member of the account team?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• 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 Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource 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 Program Tiers
- Partners - CRM Partner Resource
- Partners - CRM Partner Territory
- Partners - CRM Program Enrollments
- Partners - CRM Programs
- Sales - CRM Account Relationship
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan
- 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
Subject Areas for Transactional Business Intelligence in Sales

Chapter 5

Duty Roles

- 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 Partner
- Sales - CRM Opportunity Resource
- Sales - CRM Opportunity Sales Stage Snapshot
- Sales - CRM Opportunity Territory
- Sales - CRM Partner Relationship
- Sales - CRM Pipeline
- Sales - CRM Quota Management
- 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

Business Questions

This duty role secures access to data that can answer the following business questions:

- Who has achieved the most Activities vs Objectives?
- What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
- What are the Strategic accounts that have not had any Activities/Visits in last quarter?
- For a given Partner Tier, what are the active Programs available in the system?
- What is the quarterly revenue trend for a specific product/product group by partner?
- What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
- How many Territories is a Partner part of?
- How many Enrollments were created/submitted/expired/terminated in the last month?
- What are the total number of Relationships for a given Account?
- What Business plan objectives have not met the target values?
- For a given Contact, who all are the Resources/ Employees that are part of the Contact team members?
• Who manages my top accounts?
• Who are the ‘new’ customers, created in the past 6 months?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• What are the historical monthly trend of closed revenue by current territories?
• Are the Leads supporting products that appeal to certain customers by size of company?
• 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 the total number of MDF Requests in the current quarter?
• What is the Fund Request available amount?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How many Territories are assigned to an Opportunity?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• Who are the top competitors and what is the revenue exposure to them?
• Which Territories have exceeded their Quotes in the current Quarter?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the sales accounts that a given Sales representative owns?
• What are the total number of Contact Relationships between two Contact?
• How many Opportunities associated to a Campaign?
• What managers have teams averaging the most activities?
• What is the average deal size by Product groups?
• What is the number of Partner Contacts that are also resources and users?
• What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?
• How many Programs are owned by the team with their expiration date?
• How are the business plan objectives split?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• Is there a team or group who are over or underperforming vs forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• How many Leads are open for a given Product?
• Who approved an MDF claim? What are the start and end dates of that claim?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
• What is the revenue lost to competition for a specific product/product group?
• What are the responses for different Opportunity for an Assessment submitted?
• What are all the Territories assigned to Opportunities?
• Is the sales team converting leads to opportunities fast enough?
• How many territories are assigned to a Resource/Employee?
• What are the sales accounts owned by the Sales team?
• What is the relationship between activities in a region and their revenue by quarter?
• What is the revenue generated by Partners per Customer?
• What is the distribution of Partner Opportunities by sales stages?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• How are the Partners classified?
• What is the number of Partner contacts by Partner?
• Who all is part of the Partner Resource Team for a given Partner and what is their role?
• What are the Customers from this account, including all subsidiaries?
• Who are all the Contacts assigned to the Assets?
• What are all the contacts created in the system by Geography?
• How many new contacts are created in the system in the current month?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the top 10 products for all the Deals submitted in the current quarter?
• What forecasts have changed over time and are impacting my total quarterly revenue?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• What are the Quotas assigned to the team and the Actuals?
• How is the Quota attainment rate for the sales team?
• How many new Resources are created in the current quarter?
• What are the Accounts under the sales team, by territory?
• Do the sales territories need rebalancing?
• Are there any work load balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• How many Partners’ team is a given Resource part of?
• How many Programs were created in the last quarter?
• What are the Assets that are expiring in the next quarter?
• How is my Revenue distributed across Customer geographies?
• What are the contact-points (phone, email, address, etc.) of key contacts?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• Do Forecast rely on Revenue from few Products?
• What forecasts have seen changes in the quantities ordered vs the quantities planned?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Who are all the Contacts assigned to Opportunities?
• Who are all the Resources assigned to Opportunities?
• 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 is the Territory Quota vs/ Actual?
• What Resources will not be able to meet the Quotas in the current quarter?
• How many Leads do not have Contact?
• Against how many Opportunities, were the Quotes submitted in this month?
• What is the total Quotes revenue for the current month?
• Who has submitted the highest number of Quotes in the current month?
• What are the latest revisions to activity objectives?
• What are the open Opportunities associated to a given Partner?
• What is the potential revenue of leads by partners?
• What is the number of leads by partners for a specific product group?
• What are the Programs that Partners have enrolled into?
• What the Business plans owned by the team?
• 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?
• Where are the white spaces for me to sell a specific product?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
• What are the Products associated with the Deals?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• Are the Leads associated with certain products?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• What are the Fund request approved amount for the current quarter?
• Who has approved/rejected the MDF Requests?
• What products are often lost to key competitors? Is there a pattern?
• How many Contacts are assigned to an Opportunity?
• How many Resources are assigned to an Opportunity?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are all the Territories assigned to Resources/Employees?
• How many responses received for a given campaign?
• What is the Campaign ROI (return on investment)?
• How many times a Quote is revised before it gets approved?
• Are there any Activities without the Contact information?
• What are the activity objectives for this current period?
• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
• What is total number of Partners assigned to a specific classification for this period?
• What are the Partners created in the system for a given time period?
• What Partners are assigned to specific geographic territories?
• How many Enrollments are going to expire in the next quarter?
• What is the additional information updated in the Notes for a Contact?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• What are the top ten accounts by revenue in the last quarter?
• What regions are my customers clustered in?
• Who are all the contacts for key customers and what are their roles?
• 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?
• How to forecasts trend across periods?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• How are product revenues trending month over month?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• How many Leads is a Contact associated to?
• Who are the Resources assigned to the Leads created in any given time period?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What was the currency conversion rate applied to a specific claim?
• How did the Opportunity evolve over time?
• What are the total number of Relationships between two Partners?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
• Who are the resources assigned for a particular territory?
• How many Leads are part of the Campaign?
• Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• What are the Partner tiers that a Particular program supports?
• What are the top ten Partners by Revenue during the past quarter/year?
• Does this account have subsidiaries?
• How many Assets are created in a particular time period?
• What are the top 10 Products by Asset count?
• What are the Business plan objectives and what are their target v/s actual value?
• What are the target v/s actual number of the split objectives?
• What are the objectives that have not met the target value set?
• What all Contact team members is a given Employee part of?
• What is the additional information updated in the Notes for a Customer?
• What are my most active accounts? Who owns them and where are these located?
• Who are my teams top Customers?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• 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?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the Fund Requests and their statuses?
• Are the sales reps moving their opportunities fast enough?
• 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?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Does this Contact have subsidiaries?
• Who are the contacts assigned to the Activities and the associated Customer for these Contact?
• How many contacts have been assigned to the Activities?
• For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
• What is the number of partners in a specific classification within a defined geographic region?
• How many Partners is a Contact is associated to?
• Which Program has the highest number of Enrollments?
• What is the QoQ growth for Assets by Products?
• Who are all the resources assigned to the Assets?
• How many Business plans were created in the System in the last quarter and for what Partner or Account?
• How are the customers classified?
• How actively (# of Activities) are the Sales reps engaged with customers?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• What are my best performing product lines by customer geographies?
• What is the channel performance vs channel forecast?
• What are the higher value deals that have been moved out?
• How do wins and losses trend quarterly for a specific product line?
• What is the open/closed revenue for each of the product groups in the selected geography?
• What are all the Campaigns assigned to an Opportunity?
• What are all the Opportunities resulted from a Campaign?
• What is the average time the Opportunity is in a particular sales stage?
• What is the Hire date of the resources in an Organization?
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• On which sales accounts is a given sales representative a member of the account team?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?

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 Activity Contact Real Time**
- **CRM - CRM Activity Objective Real Time**
- **CRM - CRM Activity Real Time**
- **CRM - CRM Activity Resource Real Time**
- **Marketing - CRM Leads**
- **Marketing - CRM Leads and Opportunities Real Time**
- **Partners - CRM Partner Assessments**
- **Partners - CRM Partner Overview**
- **Partners - CRM Partner Program Tiers**
- **Partners - CRM Program Enrollments**
- **Partners - CRM Programs**
- **Sales - CRM Account Relationship**
- **Sales - CRM Asset**
- **Sales - CRM Asset Contact**
- **Sales - CRM Asset Resource**
- **Sales - CRM Business Plan**
- **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**
Subject Areas for Transactional Business Intelligence in Sales

### Duty Roles

- **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 Partner**
- **Sales - CRM Opportunity Resource**
- **Sales - CRM Opportunity Sales Stage Snapshot**
- **Sales - CRM Opportunity Territory**
- **Sales - CRM Partner Relationship**
- **Sales - CRM Pipeline**
- **Sales - CRM Quota Management**
- **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**

### Business Questions

This duty role secures access to data that can answer the following business questions:

- **Who has achieved the most Activities vs Objectives?**
- **What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?**
- **What are the Strategic accounts that have not had any Activities/Visits in last quarter?**
- **How many Leads are unassigned in the system?**
- **Who is the Primary Contact and Resource assigned for a given Lead?**
- **What are the Leads that are coverted into Opportunities?**
• How many Opportunities were created from a given Lead?
• For a given Partner Tier, what are the active Programs available in the system?
• What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
• How many Enrollments were created/submitted/expired/terminated in the last month?
• What are the total number of Relationships for a given Account?
• What Business plan objectives have not met the target values?
• For a given Contact, who all are the Resources/Employees that are part of the Contact team members?
• Who manages my top accounts?
• Who are the ‘new’ customers, created in the past 6 months?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• What are the historical monthly trend of closed revenue by current territories?
• Are the Leads supporting products that appeal to certain customers by size of company?
• 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 the total number of MDF Requests in the current quarter?
• What is the Fund Request available amount?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How many Territories are assigned to an Opportunity?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• Who are the top competitors and what is the revenue exposure to them?
• Which Territories have exceeded their Quotes in the current Quarter?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the sales accounts that a given Sales representative owns?
• What are the total number of Contact Relationships between two Contact?
• How many Opportunities associated to a Campaign?
• What managers have teams averaging the most activities?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• How many Leads are converted in the current quarter?
• What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?
• How many Programs are owned by the team with their expiration date?
• How are the business plan objectives split?
Subject Areas for Transactional Business Intelligence in Sales

Chapter 5

Duty Roles

- What are the names of the customers that a Sales team owns? Who are the key contacts?
- Do forecasts rely on revenues from a few customers? What is the dependency profile?
- Is there a team or group who are over or underperforming vs forecast?
- Are too many deals being pushed out to the subsequent fiscal quarters?
- How many Leads are open for a given Product?
- Who approved an MDF claim? What are the start and end dates of that claim?
- Was an MDF claim rejected? What was the reason the claim was rejected?
- Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
- What is the revenue lost to competition for a specific product/product group?
- What are the responses for different Opportunity for an Assessment submitted?
- What are all the Territories assigned to Opportunities?
- Is the sales team converting leads to opportunities fast enough?
- How many territories are assigned to a Resource/Employee?
- What are the sales accounts owned by the Sales team?
- What is the relationship between activities in a region and their revenue by quarter?
- What are the top 10 products associated to the Leads in the system?
- How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
- What are the Customers from this account, including all subsidiaries?
- Who are all the Contacts assigned to the Assets?
- What are all the contacts created in the system by Geography?
- How many new contacts are created in the system in the current month?
- What are all the Opportunities created as a result of Deal closure by a particular resource/team?
- Who are the Employees/Resource for the Deals that are submitted in the current month?
- What are the top 10 products for all the Deals submitted in the current quarter?
- What forecasts have changed over time and are impacting my total quarterly revenue?
- What are the top ten products by revenue during the past quarter/year?
- What is the buying trend of our biggest customers?
- What are the Quotas assigned to the team and the Actuals?
- How is the Quota attainment rate for the sales team?
- How many new Resources are created in the current quarter?
- What are the Accounts under the sales team, by territory?
- Do the sales territories need rebalancing?
- Are there any workload balancing issues, with a few members performing most of the sales activities?
- What are my urgent/overdue tasks for this period to plan the week/month accordingly?
- How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• Who are the top Sales representatives by their Lead conversion ratio?
• How many Programs were created in the last quarter?
• What are the Assets that are expiring in the next quarter?
• How is my Revenue distributed across Customer geographies?
• What are the contact points (phone, email, address, etc.) of key contacts?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• Do Forecast rely on Revenue from few Products?
• What forecasts have seen changes in the quantities ordered vs the quantities planned?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Who are all the Contacts assigned to Opportunities?
• Who are all the Resources assigned to Opportunities?
• 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 is the Territory Quota vs Actual?
• What Resources will not be able to meet the Quotas in the current quarter?
• Against how many Opportunities, were the Quotes submitted in this month?
• What is the total Quotes revenue for the current month?
• Who has submitted the highest number of Quotes in the current month?
• What are the latest revisions to activity objectives?
• How many Leads are associated for a given Opportunity?
• What are the Programs that Partners have enrolled into?
• What the Business plans owned by the team?
• 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?
• Where are the white spaces for me to sell a specific product?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?
• What are the Products associated with the Deals?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• Are the Leads associated with certain products?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• What are the Fund request approved amount for the current quarter?
• Who has approved/rejected the MDF Requests?
• What products are often lost to key competitors? Is there a pattern?
• How many Contacts are assigned to an Opportunity?
• How many Resources are assigned to an Opportunity?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are all the Territories assigned to Resources/Employees?
• How many responses received for a given campaign?
• What is the Campaign ROI (return on investment)?
• How many times a Quote is revised before it gets approved?
• Are there any Activities without the Contact information?
• What are the activity objectives for this current period?
• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the Partners created in the system for a given time period?
• How many Enrollments are going to expire in the next quarter?
• What is the additional information updated in the Notes for a Contact?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• What are the top ten accounts by revenue in the last quarter?
• What regions are my customers clustered in?
• Who are all the contacts for key customers and what are their roles?
• 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?
• How to forecasts trend across periods?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• How are product revenues trending month over month?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• How many Leads is a Contact associated to?
• Who are the Resources assigned to the Leads created in any given time period?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What was the currency conversion rate applied to a specific claim?
• How did the Opportunity evolve over time?
• What are the total number of Relationships between two Partners?
- Are there any up sell/cross sell opportunities?
- Is overall pipeline healthy enough to meet sales goals?
- What is the value trend of high value opportunities? Do they show a positive or negative trend?
- What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
- Who are the resources assigned for a particular territory?
- How many Leads are part of the Campaign?
- Who are the top/bottom 10 Sales Representatives by their Activities?
- What are the activities for a given Sales rep for today to plan the day ahead?
- What are the Partner tiers that a Particular program supports?
- Does this account have subsidiaries?
- How many Assets are created in a particular time period?
- What are the top 10 Products by Asset count?
- What are the Business plan objectives and what are their target v/s actual value?
- What are the target v/s actual number of the split objectives?
- What are the objectives that have not met the target value set?
- What all Contact team members is a given Employee part of?
- What is the additional information updated in the Notes for a Customer?
- What are my most active accounts? Who owns them and where are these located?
- Who are my teams top Customers?
- What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
- 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?
- Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
- What are the Fund Requests and their statuses?
- Are the sales reps moving their opportunities fast enough?
- 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?
- How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
- Does this Contact have subsidiaries?
- Who are the contacts assigned to the Activities and the associated Customer for these Contact?
- How many contacts have been assigned to the Activities?
- For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
- What are the sources of the Leads created in the current quarter?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- Which Program has the highest number of Enrollments?
• What is the QoQ growth for Assets by Products?
• Who are all the resources assigned to the Assets?
• How many Business plans were created in the System in the last quarter and for what Partner or Account?
• How are the customers classified?
• How actively (# of Activities) are the Sales reps engaged with customers?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• What are my best performing product lines by customer geographies?
• What is the channel performance vs channel forecast?
• What are the higher value deals that have been moved out?
• How do wins and losses trend quarterly for a specific product line?
• What is the open/closed revenue for each of the product groups in the selected geography?
• What are all the Campaigns assigned to an Opportunity?
• What are all the Opportunities resulted from a Campaign?
• What is the average time the Opportunity is in a particular sales stage?
• What is the Hire date of the resources in an Organization?
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• On which sales accounts is a given sales representative a member of the account team?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?

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 Activity Contact Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- Marketing - CRM Leads and Opportunities Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
- What are the Strategic accounts that have not had any Activities/Visits in last quarter?
- What are the Leads that are converted into Opportunities?
- How many Opportunities were created from a given Lead?
- What managers have teams averaging the most activities?
- What is the relationship between activities in a region and their revenue by quarter?
- Are there any work load balancing issues, with a few members performing most of the sales activities?
- What are my urgent/overdue tasks for this period to plan the week/month accordingly?
- How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
- How many Leads are associated for a given Opportunity?
- Are there any Activities without the Contact information?
- How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
- Who are the top/bottom 10 Sales Representatives by their Activities?
- What are the activities for a given Sales rep for today to plan the day ahead?
- Who are the contacts assigned to the Activities and the associated Customer for these Contact?
- How many contacts have been assigned to the Activities?
- For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?

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 Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- Marketing - CRM Leads and Opportunities Real Time
- Partners - CRM Partner Assessments
- Partners - CRM Program Enrollments
- Sales - CRM Account Relationship
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan
- 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 Partner
• Sales - CRM Opportunity Resource
• Sales - CRM Opportunity Sales Stage Snapshot
• Sales - CRM Opportunity Territory
• Sales - CRM Partner Relationship
• Sales - CRM Pipeline
• Sales - CRM Quota Management
• 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

Business Questions

This duty role secures access to data that can answer the following business questions:

• Who has achieved the most Activities vs Objectives?
Duty Roles

- What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
- What are the Strategic accounts that have not had any Activities/Visits in last quarter?
- What are the Leads that are converted into Opportunities?
- How many Opportunities were created from a given Lead?
- What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
- How many Enrollments were created/submitted/expired/terminated in the last month?
- What are the total number of Relationships for a given Account?
- What Business plan objectives have not met the target values?
- For a given Contact, who all are the Resources/Employees that are part of the Contact team members?
- Who manages my top accounts?
- What are the 'new' customers, created in the past 6 months?
- What are the Deals submitted by the Partners in the current quarter with the Deal size?
- What are the historical monthly trend of closed revenue by current territories?
- Are the Leads supporting products that appeal to certain customers by size of company?
- 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 the total number of MDF Requests in the current quarter?
- What is the Fund Request available amount?
- How many Partners are assigned to an Opportunity?
- Who are all the Partners assigned to Opportunities?
- How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
- How many Territories are assigned to an Opportunity?
- What are the top stalled opportunities and who are the sales reps working on these?
- What are the most likely reasons that the Opportunities are lost against our key competitors?
- What are the top 10 open opportunities? What are the target close dates and revenues for these?
- Who are the top competitors and what is the revenue exposure to them?
- Which Territories have exceeded their Quotes in the current Quarter?
- What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
- What are the sales accounts that a given Sales representative owns?
- What are the total number of Contact Relationships between two Contact?
- How many Opportunities associated to a Campaign?
- What managers have teams averaging the most activities?
- How are the business plan objectives split?
- What are the names of the customers that a Sales team owns? Who are the key contacts?
- Do forecasts rely on revenues from a few customers? What is the dependency profile?
• Is there a team or group who are over or underperforming vs forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• How many Leads are open for a given Product?
• Who approved an MDF claim? What are the start and end dates of that claim?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
• What is the revenue lost to competition for a specific product/product group?
• What are the responses for different Opportunity for an Assessment submitted?
• What are all the Territories assigned to Opportunities?
• Is the sales team converting leads to opportunities fast enough?
• How many territories are assigned to a Resource/Employee?
• What are the sales accounts owned by the Sales team?
• What is the relationship between activities in a region and their revenue by quarter?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• What are the Customers from this account, including all subsidiaries?
• Who are all the Contacts assigned to the Assets?
• What are all the contacts created in the system by Geography?
• How many new contacts are created in the system in the current month?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the top 10 products for all the Deals submitted in the current quarter?
• What forecasts have changed over time and are impacting my total quarterly revenue?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• What are the Quotas assigned to the team and the Actuals?
• How is the Quota attainment rate for the sales team?
• How many new Resources are created in the current quarter?
• What are the Accounts under the sales team, by territory?
• Do the sales territories need rebalancing?
• Are there any work load balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• What are the Assets that are expiring in the next quarter?
• How is my Revenue distributed across Customer geographies?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• Do Forecast rely on Revenue from few Products?
• What forecasts have seen changes in the quantities ordered vs the quantities planned?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Who are all the Contacts assigned to Opportunities?
• Who are all the Resources assigned to Opportunities?
• 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 is the Territory Quota vs Actual?
• What Resources will not be able to meet the Quotas in the current quarter?
• How many Leads do not have Contact?
• Against how many Opportunities, were the Quotes submitted in this month?
• What is the total Quotes revenue for the current month?
• Who has submitted the highest number of Quotes in the current month?
• What are the latest revisions to activity objectives?
• How many Leads are associated for a given Opportunity?
• What are the Programs that Partners have enrolled into?
• What the Business plans owned by the team?
• 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?
• Where are the white spaces for me to sell a specific product?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?
• What are the Products associated with the Deals?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• Are the Leads associated with certain products?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• What are the Fund request approved amount for the current quarter?
• Who has approved/rejected the MDF Requests?
• What products are often lost to key competitors? Is there a pattern?
• How many Contacts are assigned to an Opportunity?
- How many Resources are assigned to an Opportunity?
- How is each member on the team performing on deal size, account coverage, and win rate?
- What are all the Territories assigned to Resources/Employees?
- How many responses received for a given campaign?
- What is the Campaign ROI (return on investment)?
- How many times a Quote is revised before it gets approved?
- Are there any Activities without the Contact information?
- What are the activity objectives for this current period?
- How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
- How many Enrollment are going to expire in the next quarter?
- What is the additional information updated in the Notes for a Contact?
- Who are the Primary owners of the Contacts for contacts created in the last quarter?
- What are the top ten accounts by revenue in the last quarter?
- What regions are my customers clustered in?
- Who are all the contacts for key customers and what are their roles?
- 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?
- How to forecasts trend across periods?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
- What are the Opportunity Revenue line details contributing the most to the Forecast?
- How are product revenues trending month over month?
- What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
- How many Leads is a Contact associated to?
- Who are the Resources assigned to the Leads created in any given time period?
- Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
- What were the approved amounts vs the settled claim totals for the last 4 quarters?
- What was the currency conversion rate applied to a specific claim?
- How did the Opportunity evolve over time?
- What are the total number of Relationships between two Partners?
- Are there any up sell/cross sell opportunities?
- Is overall pipeline healthy enough to meet sales goals?
- What is the value trend of high value opportunities? Do they show a positive or negative trend?
- What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
- Who are the resources assigned for a particular territory?
• How many Leads are part of the Campaign?
• Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• Does this account have subsidiaries?
• How many Assets are created in a particular time period?
• What are the top 10 Products by Asset count?
• What are the Business plan objectives and what are their target v/s actual value?
• What are the target v/s actual number of the split objectives?
• What are the objectives that have not met the target value set?
• What all Contact team members is a given Employee part of?
• What is the additional information updated in the Notes for a Customer?
• What are my most active accounts? Who owns them and where are these located?
• Who are my teams top Customers?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• 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?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the Fund Requests and their statuses?
• Are the sales reps moving their opportunities fast enough?
• 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?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Does this Contact have subsidiaries?
• Who are the contacts assigned to the Activities and the associated Customer for these Contact?
• How many contacts have been assigned to the Activities?
• For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
• Which Program has the highest number of Enrollments?
• What is the QoQ growth for Assets by Products?
• Who are all the resources assigned to the Assets?
• How many Business plans were created in the System in the last quarter and for what Partner or Account?
• How are the customers classified?
• How actively (# of Activities) are the Sales reps engaged with customers?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• What are my best performing product lines by customer geographies?
• What is the channel performance vs channel forecast?
• What are the higher value deals that have been moved out?
• How do wins and losses trend quarterly for a specific product line?
• What is the open/closed revenue for each of the product groups in the selected geography?
• What are all the Campaigns assigned to an Opportunity?
• What are all the Opportunities resulted from a Campaign?
• What is the average time the Opportunity is in a particular sales stage?
• What is the Hire date of the resources in an Organization?
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• On which sales accounts is a given sales representative a member of the account team?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• 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 Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• Marketing - CRM Leads and Opportunities Real Time
• Partners - CRM Partner Assessments
• Partners - CRM Program Enrollments
Duty Roles

- Sales - CRM Account Relationship
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan
- 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
Oracle Sales Cloud
Subject Areas for Transactional Business Intelligence in Sales

Chapter 5
Duty Roles

- 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 Quota Management
- 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

Business Questions

This duty role secures access to data that can answer the following business questions:

- Who has achieved the most Activities vs Objectives?
- What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
- What are the Strategic accounts that have not had any Activities/Visits in last quarter?
- What are the Leads that are converted into Opportunities?
- How many Opportunities were created from a given Lead?
- What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
- How many Enrollments were created/submitted/expired/terminated in the last month?
- What are the total number of Relationships for a given Account?
- What Business plan objectives have not met the target values?
- For a given Contact, who all are the Resources/Employees that are part of the Contact team members?
- Who manages my top accounts?
- Who are the 'new' customers, created in the past 6 months?
- What are the Deals submitted by the Partners in the current quarter with the Deal size?
- What are the historical monthly trend of closed revenue by current territories?
- Are the Leads supporting products that appeal to certain customers by size of company?
- 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 the total number of MDF Requests in the current quarter?
• What is the Fund Request available amount?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How many Territories are assigned to an Opportunity?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• Who are the top competitors and what is the revenue exposure to them?
• Which Territories have exceeded their Quotes in the current Quarter?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the sales accounts that a given Sales representative owns?
• What are the total number of Contact Relationships between two Contact?
• How many Opportunities associated to a Campaign?
• What managers have teams averaging the most activities?
• How are the business plan objectives split?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• Is there a team or group who are over or underperforming vs forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• How many Leads are open for a given Product?
• Who approved an MDF claim? What are the start and end dates of that claim?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
• What is the revenue lost to competition for a specific product/product group?
• What are the responses for different Opportunity for an Assessment submitted?
• What are all the Territories assigned to Opportunities?
• Is the sales team converting leads to opportunities fast enough?
• How many territories are assigned to a Resource/Employee?
• What are the sales accounts owned by the Sales team?
• What is the relationship between activities in a region and their revenue by quarter?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• What are the Customers from this account, including all subsidiaries?
• Who are all the Contacts assigned to the Assets?
• What are all the contacts created in the system by Geography?
• How many new contacts are created in the system in the current month?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the top 10 products for all the Deals submitted in the current quarter?
• What forecasts have changed over time and are impacting my total quarterly revenue?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• What are the Quotas assigned to the team and the Actuals?
• How is the Quota attainment rate for the sales team?
• How many new Resources are created in the current quarter?
• What are the Accounts under the sales team, by territory?
• Do the sales territories need rebalancing?
• Are there any work load balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• What are the Assets that are expiring in the next quarter?
• How is my Revenue distributed across Customer geographies?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• Do Forecast rely on Revenue from few Products?
• What forecasts have seen changes in the quantities ordered vs the quantities planned?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Who are all the Contacts assigned to Opportunities?
• Who are all the Resources assigned to Opportunities?
• 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 is the Territory Quota vs/ Actual?
• What Resources will not be able to meet the Quotas in the current quarter?
• How many Leads do not have Contact?
• Against how many Opportunities, were the Quotes submitted in this month?
• What is the total Quotes revenue for the current month?
• Who has submitted the highest number of Quotes in the current month?
• What are the latest revisions to activity objectives?
• How many Leads are associated for a given Opportunity?
• What are the Programs that Partners have enrolled into?
• What the Business plans owned by the team?
• 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?
• Where are the white spaces for me to sell a specific product?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ’X’?
• What are the Products associated with the Deals?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• Are the Leads associated with certain products?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• What are the Fund request approved amount for the current quarter?
• Who has approved/rejected the MDF Requests?
• What products are often lost to key competitors? Is there a pattern?
• How many Contacts are assigned to an Opportunity?
• How many Resources are assigned to an Opportunity?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are all the Territories assigned to Resources/Employees?
• How many responses received for a given campaign?
• What is the Campaign ROI (return on investment)?
• How many times a Quote is revised before it gets approved?
• Are there any Activities without the Contact information?
• What are the activity objectives for this current period?
• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
• What is the additional information updated in the Notes for a Contact?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• What are the top ten accounts by revenue in the last quarter?
• What regions are my customers clustered in?
• Who are all the contacts for key customers and what are their roles?
• 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?
• How to forecasts trend across periods?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• How are product revenues trending month over month?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• How many Leads is a Contact associated to?
• Who are the Resources assigned to the Leads created in any given time period?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What was the currency conversion rate applied to a specific claim?
• How did the Opportunity evolve over time?
• What are the total number of Relationships between two Partners?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
• Who are the resources assigned for a particular territory?
• How many Leads are part of the Campaign?
• Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• Does this account have subsidiaries?
• How many Assets are created in a particular time period?
• What are the top 10 Products by Asset count?
• What are the Business plan objectives and what are their target v/s actual value?
• What are the target v/s actual number of the split objectives?
• What are the objectives that have not met the target value set?
• What all Contact team members is a given Employee part of?
• What is the additional information updated in the Notes for a Customer?
• What are my most active accounts? Who owns them and where are these located?
• Who are my teams top Customers?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• 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?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the Fund Requests and their statuses?
• Are the sales reps moving their opportunities fast enough?
• 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?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Does this Contact have subsidiaries?
• Who are the contacts assigned to the Activities and the associated Customer for these Contact?
• How many contacts have been assigned to the Activities?
• For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
• Which Program has the highest number of Enrollments?
• What is the QoQ growth for Assets by Products?
• Who are all the resources assigned to the Assets?
• How many Business plans were created in the System in the last quarter and for what Partner or Account?
• How are the customers classified?
• How actively (# of Activities) are the Sales reps engaged with customers?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• What are my best performing product lines by customer geographies?
• What is the channel performance vs channel forecast?
• What are the higher value deals that have been moved out?
• How do wins and losses trend quarterly for a specific product line?
• What is the open/closed revenue for each of the product groups in the selected geography?
• What are all the Campaigns assigned to an Opportunity?
• What are all the Opportunities resulted from a Campaign?
• What is the average time the Opportunity is in a particular sales stage?
• What is the Hire date of the resources in an Organization?
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• On which sales accounts is a given sales representative a member of the account team?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• 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:

- Sales - CRM Deal Registration Product
- Sales - CRM Opportunity Campaign
- Sales - CRM Opportunity Partner
- Sales - CRM Quotes

Business Questions

This duty role secures access to data that can answer the following business questions:

- How many Partners are assigned to an Opportunity?
- Who are all the Partners assigned to Opportunities?
- What are the top 10 products for all the Deals submitted in the current quarter?
- How is the Deal Amount split between the products associated to the Deal Registration Lines?
- Against how many Opportunities, were the Quotes submitted in this month?
- What is the total Quotes revenue for the current month?
- Who has submitted the highest number of Quotes in the current month?
- What are the Products associated with the Deals?
- How many times a Quote is revised before it gets approved?
- What are all the Campaigns assigned to an Opportunity?
- What are all the Opportunities resulted from a Campaign?

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 Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- Marketing - CRM Leads and Opportunities Real Time
- Partners - CRM Partner Assessments
- Partners - CRM Program Enrollments
- Sales - CRM Account Relationship
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan
- 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
Subject Areas for Transactional Business Intelligence in Sales

Chapter 5

Duty Roles

- 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 Partner
- Sales - CRM Opportunity Resource
- Sales - CRM Opportunity Sales Stage Snapshot
- Sales - CRM Opportunity Territory
- Sales - CRM Partner Relationship
- Sales - CRM Pipeline
- Sales - CRM Quota Management
- 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

Business Questions

This duty role secures access to data that can answer the following business questions:

- Who has achieved the most Activities vs Objectives?
- What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
- What are the Strategic accounts that have not had any Activities/Visits in last quarter?
• What are the Leads that are converted into Opportunities?

• How many Opportunities were created from a given Lead?

• What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?

• How many Enrollments were created/submitted/expired/terminated in the last month?

• What are the total number of Relationships for a given Account?

• What Business plan objectives have not met the target values?

• For a given Contact, who all are the Resources/Employees that are part of the Contact team members?

• Who manages my top accounts?

• Who are the ‘new’ customers, created in the past 6 months?

• What are the Deals submitted by the Partners in the current quarter with the Deal size?

• What are the historical monthly trend of closed revenue by current territories?

• Are the Leads supporting products that appeal to certain customers by size of company?

• 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 the total number of MDF Requests in the current quarter?

• What is the Fund Request available amount?

• How many Partners are assigned to an Opportunity?

• Who are all the Partners assigned to Opportunities?

• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)

• How many Territories are assigned to an Opportunity?

• What are the top stalled opportunities and who are the sales reps working on these?

• What are the most likely reasons that the Opportunities are lost against our key competitors?

• What are the top 10 open opportunities? What are the target close dates and revenues for these?

• Who are the top competitors and what is the revenue exposure to them?

• Which Territories have exceeded their Quotes in the current Quarter?

• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?

• What are the sales accounts that a given Sales representative owns?

• What are the total number of Contact Relationships between two Contact?

• How many Opportunities associated to a Campaign?

• What managers have teams averaging the most activities?

• How are the business plan objectives split?

• What are the names of the customers that a Sales team owns? Who are the key contacts?

• Do forecasts rely on revenues from a few customers? What is the dependency profile?

• Is there a team or group who are over or underperforming vs forecast?

• Are too many deals being pushed out to the subsequent fiscal quarters?
• How many Leads are open for a given Product?
• Who approved an MDF claim? What are the start and end dates of that claim?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? (White Space Analysis)
• What is the revenue lost to competition for a specific product/product group?
• What are the responses for different Opportunity for an Assessment submitted?
• What are all the Territories assigned to Opportunities?
• Is the sales team converting leads to opportunities fast enough?
• How many territories are assigned to a Resource/Employee?
• What are the sales accounts owned by the Sales team?
• What is the relationship between activities in a region and their revenue by quarter?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• What are the Customers from this account, including all subsidiaries?
• Who are all the Contacts assigned to the Assets?
• What are all the contacts created in the system by Geography?
• How many new contacts are created in the system in the current month?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the top 10 products for all the Deals submitted in the current quarter?
• What forecasts have changed over time and are impacting my total quarterly revenue?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• What are the Quotas assigned to the team and the Actuals?
• How is the Quota attainment rate for the sales team?
• How many new Resources are created in the current quarter?
• What are the Accounts under the sales team, by territory?
• Do the sales territories need rebalancing?
• Are there any work load balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• What are the Assets that are expiring in the next quarter?
• How is my Revenue distributed across Customer geographies?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• *Do Forecast rely on Revenue from few Products?*
• What forecasts have seen changes in the quantities ordered vs the quantities planned?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Who are all the Contacts assigned to Opportunities?
• Who are all the Resources assigned to Opportunities?
• 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 is the Territory Quota vs/ Actual?
• What Resources will not be able to meet the Quotas in the current quarter?
• How many Leads do not have Contact?
• Against how many Opportunities, were the Quotes submitted in this month?
• What is the total Quotes revenue for the current month?
• Who has submitted the highest number of Quotes in the current month?
• What are the latest revisions to activity objectives?
• How many Leads are associated for a given Opportunity?
• What are the Programs that Partners have enrolled into?
• What are the Business plans owned by the team?
• 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?
• Where are the white spaces for me to sell a specific product?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
• What are the Products associated with the Deals?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• Are the Leads associated with certain products?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• What are the Fund request approved amount for the current quarter?
• Who has approved/rejected the MDF Requests?
• What products are often lost to key competitors? Is there a pattern?
• How many Contacts are assigned to an Opportunity?
• How many Resources are assigned to an Opportunity?
• How is each member on the team performing on deal size, account coverage, and win rate?
Oracle Sales Cloud

Subject Areas for Transactional Business Intelligence in Sales

Chapter 5

Duty Roles

- What are all the Territories assigned to Resources/Employees?
- How many responses received for a given campaign?
- What is the Campaign ROI (return on investment)?
- How many times a Quote is revised before it gets approved?
- Are there any Activities without the Contact information?
- What are the activity objectives for this current period?
- How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
- How many Enrollments are going to expire in the next quarter?
- What is the additional information updated in the Notes for a Contact?
- Who are the Primary owners of the Contacts for contacts created in the last quarter?
- What are the top ten accounts by revenue in the last quarter?
- What regions are my customers clustered in?
- Who are all the contacts for key customers and what are their roles?
- 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?
- How to forecasts trend across periods?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
- What are the Opportunity Revenue line details contributing the most to the Forecast?
- How are product revenues trending month over month?
- What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
- How many Leads is a Contact associated to?
- Who are the Resources assigned to the Leads created in any given time period?
- Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
- What were the approved amounts vs the settled claim totals for the last 4 quarters?
- What was the currency conversion rate applied to a specific claim?
- How did the Opportunity evolve over time?
- What are the total number of Relationships between two Partners?
- Are there any up sell/cross sell opportunities?
- Is overall pipeline healthy enough to meet sales goals?
- What is the value trend of high value opportunities? Do they show a positive or negative trend?
- What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
- Who are the resources assigned for a particular territory?
- How many Leads are part of the Campaign?
- Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• Does this account have subsidiaries?
• How many Assets are created in a particular time period?
• What are the top 10 Products by Asset count?
• What are the Business plan objectives and what are their target v/s actual value?
• What are the target v/s actual number of the split objectives?
• What are the objectives that have not met the target value set?
• What all Contact team members is a given Employee part of?
• What is the additional information updated in the Notes for a Customer?
• What are my most active accounts? Who owns them and where are these located?
• Who are my teams top Customers?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• 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?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the Fund Requests and their statuses?
• Are the sales reps moving their opportunities fast enough?
• 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?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Does this Contact have subsidiaries?
• Who are the contacts assigned to the Activities and the associated Customer for these Contact?
• How many contacts have been assigned to the Activities?
• For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?
• Which Program has the highest number of Enrollments?
• What is the QoQ growth for Assets by Products?
• Who are all the resources assigned to the Assets?
• How many Business plans were created in the System in the last quarter and for what Partner or Account?
• How are the customers classified?
• How actively (# of Activities) are the Sales reps engaged with customers?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• What are my best performing product lines by customer geographies?
• What is the channel performance vs channel forecast?
• What are the higher value deals that have been moved out?
• How do wins and losses trend quarterly for a specific product line?
• What is the open/closed revenue for each of the product groups in the selected geography?
• What are all the Campaigns assigned to an Opportunity?
• What are all the Opportunities resulted from a Campaign?
• What is the average time the Opportunity is in a particular sales stage?
• What is the Hire date of the resources in an Organization?
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• On which sales accounts is a given sales representative a member of the account team?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?

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 Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

• Who has achieved the most Activities vs Objectives?
• What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
• What are the Strategic accounts that have not had any Activities/Visits in last quarter?
• What managers have teams averaging the most activities?
• What is the relationship between activities in a region and their revenue by quarter?
• Are there any work load balancing issues, with a few members performing most of the sales activities?
• What are my urgent/overdue tasks for this period to plan the week/month accordingly?
• How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
• What are the latest revisions to activity objectives?
• Are there any Activities without the Contact information?
• What are the activity objectives for this current period?
• How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
• Who are the top/bottom 10 Sales Representatives by their Activities?
• What are the activities for a given Sales rep for today to plan the day ahead?
• Who are the contacts assigned to the Activities and the associated Customer for these Contact?
• How many contacts have been assigned to the Activities?
• For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?

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 Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
Business Questions

This duty role secures access to data that can answer the following business questions:

- Who has achieved the most Activities vs Objectives?
- What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
- What are the Strategic accounts that have not had any Activities/Visits in last quarter?
- What managers have teams averaging the most activities?
- What is the relationship between activities in a region and their revenue by quarter?
- Are there any work load balancing issues, with a few members performing most of the sales activities?
- What are my urgent/overdue tasks for this period to plan the week/month accordingly?
- How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
- What are the latest revisions to activity objectives?
- Are there any Activities without the Contact information?
- What are the activity objectives for this current period?
- How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
- Who are the top/bottom 10 Sales Representatives by their Activities?
- What are the activities for a given Sales rep for today to plan the day ahead?
- Who are the contacts assigned to the Activities and the associated Customer for these Contact?
- How many contacts have been assigned to the Activities?
- For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?

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 Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- Who has achieved the most Activities vs Objectives?
- What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
- What are the Strategic accounts that have not had any Activities/Visits in last quarter?
- What managers have teams averaging the most activities?
- What is the relationship between activities in a region and their revenue by quarter?
- Are there any work load balancing issues, with a few members performing most of the sales activities?
- What are my urgent/overdue tasks for this period to plan the week/month accordingly?
- How are the individuals on the Sales team performing as regards completion of their planned tasks on opportunities closing this quarter?
- What are the latest revisions to activity objectives?
- Are there any Activities without the Contact information?
- What are the activity objectives for this current period?
- How many Activities are performed by Sales Manager/her team in the last week/month/quarter?
- Who are the top/bottom 10 Sales Representatives by their Activities?
- What are the activities for a given Sales rep for today to plan the day ahead?
- Who are the contacts assigned to the Activities and the associated Customer for these Contact?
- How many contacts have been assigned to the Activities?
- For all the Account/Opportunity/Lead/Partner where an Employee is part of the Resource team, what are the activities associated to those?

User System Usage Transaction Analysis Duty

Code Name
Oracle Sales Cloud
Subject Areas for Transactional Business Intelligence in Sales

Chapter 5
Duty Roles

FBI_USER_SYSTEM_USAGE_TRANSACTION_ANALYSYS_DUTY

Job Roles

This duty role is related to the following job roles:

- Not assigned to predefined job roles

Subject Areas

This duty role secures access to the following subject areas:

- Sales - CRM Resource System Usage
- User System Usage

Business Questions

This duty role secures access to data that can answer the following business questions:

- Resources belonging to what job title are most active in the system?
- How is the user activity split across Channel (Web/Mobile/Mail)?
- Which department has the highest number of Active users?
- Users belonging to what job title are most active in the system?
- How is the resource activity split across Channel (Web/Mobile/Mail)?
- Who are the users who have not logged in the system in the last week?
- Which department has the highest number of Active resources?
- Who are the top 10 active resources of the system?
- Who are the resources who have not logged in the system in the last week?
- Who are the top 10 active users of the system?