Oracle CX Sales and B2B Service

Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

22A
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### Contents

#### Get Help

- 1

#### Overview

- Subject Areas Overview

#### Subject Areas

- CRM - CRM Activities with Related Activities
- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Click History
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Reporting Performance
- CRM - CRM Reporting Usage
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Enterprise Contracts - Contracts Real Time
- Help Desk - HR Service Requests Real Time
- Help Desk - Internal Service Requests Real Time
- Incentive Compensation - Attainments Real Time
- Incentive Compensation - Compensation Plan Assignments Real Time
- Incentive Compensation - Credits Real Time
- Incentive Compensation - Disputes Real Time
- Incentive Compensation - Earning and Attainment Summary Real Time
- Incentive Compensation - Earnings Real Time
- Incentive Compensation - Participant Balances Real Time
- Incentive Compensation - Participant Compensation Plan Real Time
- Incentive Compensation - Participant Detail Real Time
Subject Areas for Transactional Business Intelligence in CX
Oracle CX Sales and B2B Service

- Incentive Compensation - Participant Interval Goals Real Time
- Incentive Compensation - Participant Period Goals Real Time
- Incentive Compensation - Pay Group Assignments Real Time
- Incentive Compensation - Payments Real Time
- Incentive Compensation - Paysheet Summary Real Time
- Incentive Compensation - Performance and Earnings Summary Real Time
- Incentive Compensation - Rules Real Time
- Incentive Compensation - Transactions Real Time
- Knowledge Management - Article Category Real Time
- Knowledge Management - Article Links Real Time
- Knowledge Management - Article Product Real Time
- Knowledge Management - Article Rating Real Time
- Knowledge Management - Article Real Time
- Knowledge Management - Article Search Historical
- Knowledge Management - Article Search Question Tokens Historical
- Knowledge Management - Article Search Questions Historical
- Knowledge Management - Article Summary Historical
- Knowledge Management - Article User Group Real Time
- Marketing - CRM Leads
- Marketing - CRM Leads and Opportunities Real Time
- OTBI Performance Real Time
- OTBI Usage 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 Benefits
- Partners - CRM Partner Resource
- Partners - CRM Partner Territory
- Partners - CRM Program Enrollments
- Partners - CRM Programs
- Sales - CRM Account Relationship
- Sales - CRM All Contact Contact Point
- Sales - CRM All Contacts Addresses
- Sales - CRM Asset
<table>
<thead>
<tr>
<th>Subject Area</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales - CRM Asset Contact</td>
<td>103</td>
</tr>
<tr>
<td>Sales - CRM Asset Resource</td>
<td>104</td>
</tr>
<tr>
<td>Sales - CRM Business Plan</td>
<td>106</td>
</tr>
<tr>
<td>Sales - CRM Business Plan Objective Split</td>
<td>107</td>
</tr>
<tr>
<td>Sales - CRM Campaign Members</td>
<td>109</td>
</tr>
<tr>
<td>Sales - CRM Campaign Opportunity</td>
<td>110</td>
</tr>
<tr>
<td>Sales - CRM Contact Note</td>
<td>112</td>
</tr>
<tr>
<td>Sales - CRM Contact Relationship</td>
<td>114</td>
</tr>
<tr>
<td>Sales - CRM Contact Resource</td>
<td>115</td>
</tr>
<tr>
<td>Sales - CRM Contacts</td>
<td>117</td>
</tr>
<tr>
<td>Sales - CRM Customer Classification</td>
<td>118</td>
</tr>
<tr>
<td>Sales - CRM Customer Note</td>
<td>120</td>
</tr>
<tr>
<td>Sales - CRM Customer Overview</td>
<td>121</td>
</tr>
<tr>
<td>Sales - CRM Customers</td>
<td>123</td>
</tr>
<tr>
<td>Sales - CRM Customers and Contacts Real Time</td>
<td>125</td>
</tr>
<tr>
<td>Sales - CRM Deal Registration</td>
<td>127</td>
</tr>
<tr>
<td>Sales - CRM Deal Registration Product</td>
<td>128</td>
</tr>
<tr>
<td>Sales - CRM Forecasting</td>
<td>130</td>
</tr>
<tr>
<td>Sales - CRM Forecasting and Pipeline Revenue Real Time</td>
<td>132</td>
</tr>
<tr>
<td>Sales - CRM Historical Forecasting</td>
<td>133</td>
</tr>
<tr>
<td>Sales - CRM Historical Pipeline</td>
<td>135</td>
</tr>
<tr>
<td>Sales - CRM Lead Assessments</td>
<td>137</td>
</tr>
<tr>
<td>Sales - CRM Lead Contact</td>
<td>139</td>
</tr>
<tr>
<td>Sales - CRM Lead Product</td>
<td>141</td>
</tr>
<tr>
<td>Sales - CRM Lead Resource</td>
<td>142</td>
</tr>
<tr>
<td>Sales - CRM Lead Territory</td>
<td>144</td>
</tr>
<tr>
<td>Sales - CRM MDF Budget</td>
<td>146</td>
</tr>
<tr>
<td>Sales - CRM MDF Claim</td>
<td>147</td>
</tr>
<tr>
<td>Sales - CRM MDF Claim Settlement</td>
<td>149</td>
</tr>
<tr>
<td>Sales - CRM MDF Request</td>
<td>151</td>
</tr>
<tr>
<td>Sales - CRM Object Activity</td>
<td>152</td>
</tr>
<tr>
<td>Sales - CRM Opportunities and Products Real Time</td>
<td>154</td>
</tr>
<tr>
<td>Sales - CRM Opportunity Assessments</td>
<td>155</td>
</tr>
<tr>
<td>Sales - CRM Opportunity Campaign</td>
<td>157</td>
</tr>
<tr>
<td>Sales - CRM Opportunity Contact</td>
<td>159</td>
</tr>
<tr>
<td>Sales - CRM Opportunity Note</td>
<td>160</td>
</tr>
<tr>
<td>Sales - CRM Opportunity Partner</td>
<td>162</td>
</tr>
<tr>
<td>Subject Area</td>
<td>Page</td>
</tr>
<tr>
<td>------------------------------------------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>Sales - CRM Opportunity Resource</td>
<td>164</td>
</tr>
<tr>
<td>Sales - CRM Opportunity Sales Stage Snapshot</td>
<td>165</td>
</tr>
<tr>
<td>Sales - CRM Opportunity Territory</td>
<td>167</td>
</tr>
<tr>
<td>Sales - CRM Partner Relationship</td>
<td>169</td>
</tr>
<tr>
<td>Sales - CRM Pipeline</td>
<td>170</td>
</tr>
<tr>
<td>Sales - CRM Primary Contact Addresses</td>
<td>172</td>
</tr>
<tr>
<td>Sales - CRM Primary Contact Contact Point</td>
<td>174</td>
</tr>
<tr>
<td>Sales - CRM Quota Management</td>
<td>176</td>
</tr>
<tr>
<td>Sales - CRM Quote Lines</td>
<td>177</td>
</tr>
<tr>
<td>Sales - CRM Quotes</td>
<td>179</td>
</tr>
<tr>
<td>Sales - CRM Resource</td>
<td>181</td>
</tr>
<tr>
<td>Sales - CRM Resource System Usage</td>
<td>182</td>
</tr>
<tr>
<td>Sales - CRM Resource Territory</td>
<td>184</td>
</tr>
<tr>
<td>Sales - CRM Sales Account Assessments</td>
<td>186</td>
</tr>
<tr>
<td>Sales - CRM Sales Account Resource</td>
<td>187</td>
</tr>
<tr>
<td>Sales - CRM Sales Account Territory</td>
<td>189</td>
</tr>
<tr>
<td>Sales - CRM Territory Resource</td>
<td>191</td>
</tr>
<tr>
<td>Security - Audit Real Time</td>
<td>192</td>
</tr>
<tr>
<td>Security - Roles and Privileges Real Time</td>
<td>194</td>
</tr>
<tr>
<td>Service - CRM Customer Coverage Real Time</td>
<td>195</td>
</tr>
<tr>
<td>Service - CRM Inbound Messages Real Time</td>
<td>197</td>
</tr>
<tr>
<td>Service - CRM Service Queue Resources Real Time</td>
<td>198</td>
</tr>
<tr>
<td>Service - CRM Service Request Action Plan Actions Real Time</td>
<td>200</td>
</tr>
<tr>
<td>Service - CRM Service Request Lifecycle</td>
<td>202</td>
</tr>
<tr>
<td>Service - CRM Service Request Messages Real Time</td>
<td>205</td>
</tr>
<tr>
<td>Service - CRM Service Request Milestones Real Time</td>
<td>207</td>
</tr>
<tr>
<td>Service - CRM Service Request Resource Real Time</td>
<td>209</td>
</tr>
<tr>
<td>Service - CRM Service Request Tags Real Time</td>
<td>211</td>
</tr>
<tr>
<td>Service - CRM Service Requests Real Time</td>
<td>213</td>
</tr>
<tr>
<td>Service - CRM Social Post Real Time</td>
<td>215</td>
</tr>
<tr>
<td>Service - CRM Survey Requests Real Time</td>
<td>217</td>
</tr>
<tr>
<td>Service - CRM Survey Responses Real Time</td>
<td>219</td>
</tr>
<tr>
<td>Subscription Management - Covered Levels Real Time</td>
<td>221</td>
</tr>
<tr>
<td>Subscription Management - Subscription Billing Real Time</td>
<td>222</td>
</tr>
<tr>
<td>Subscription Management - Subscription Relationships Real Time</td>
<td>223</td>
</tr>
<tr>
<td>Subscription Management - Subscriptions Real Time</td>
<td>224</td>
</tr>
<tr>
<td>User System Usage</td>
<td>225</td>
</tr>
</tbody>
</table>
4 Business Questions

Overview

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 many Leads are unassigned in the system?
What are the sources of the Leads created in the current quarter?
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 top 10 products associated to the Leads in the system?
Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
Who is the Primary Contact and Resource assigned for a given Lead?
What are the Leads that are converted into Opportunities?
How many Leads are associated for a given Opportunity?
How many Opportunities were created from a given Lead?
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 is the revenue generated by Partners per Customer?
What are the top ten Partners by Revenue during the past quarter/year?
What is the average deal size by Product groups?
What is the distribution of Partner Opportunities by sales stages?
What is the quarterly revenue trend for a specific product/product group by partner?
How are the Partners classified?
What is the number of partners in a specific classification within a defined geographic region?
What is total number of Partners assigned to a specific classification for this period?
What are the number of Partner contacts by Partner?
What is the number of Partner Contacts that are also resources and users?
How many Partners is a Contact is associated to?
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?
What Partners are assigned to specific geographic territories?
How many Territories is a Partner part of?
Does this account have subsidiaries?
What are the Customers from this account, including all subsidiaries?
What are the total number of Relationships for a given Account?
What are the top ten accounts by revenue in the last quarter?
How many Leads and Opportunities are Open for a given Customer in the Current quarter? ................................. 265
How is the Revenue spread for a given Customer hierarchy? ......................................................................................... 266
How actively (# of Activities) are the Sales reps engaged with customers? ................................................................   268
What are my most active accounts? Who owns them and where are these located? ................................................   269
For given set of Customers, what percentage of my revenue is exposed to competition? .......................................   270
What are my best performing product lines by customer geographies? ..................................................................................... 271
How is my Revenue distributed across Customer geographies? ..................................................................................... 272
What regions are my customers clustered in? ....................................................................................................................   273
Who are my teams top Customers? ...................................................................................................................................... 274
Who manages my top accounts? ........................................................................................................................................... 275
Who are the ‘new’ customers, created in the past 6 months? ........................................................................................   276
What are the contact - points (phone, email, address, etc.) of key contacts? .............................................................. 277
What are the names of the customers that a Sales team owns? Who are the key contacts? .................................... 279
Who are all the contacts for key customers and what are their roles? .......................................................................... 280
Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’? ........................................................................................................................................................................................................... 281
Are revenues getting closed in line with their forecast figures? To what extent do they deviate? ........................... 282
Do forecasts rely on revenues from a few customers? What is the dependency profile? .......................................... 283
Does the forecast versus pipeline trend show a healthy picture? .................................................................................. 284
How to forecasts trend across periods? ............................................................................................................................... 285
What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota? .......................................................................................................................................................................................... 286
What is the relative mix of forecast revenues by the various sales channels in a specific territory? 287
What were the forecast revenues for the same period, last year? How did it compare with closed revenues? 289
What are the Opportunity Revenue line details contributing the most to the Forecast? ........................................... 290
Do Forecast rely on Revenue from few Products? .............................................................................................................. 291
Is there a team or group who are over or underperforming vs forecast? ..................................................................... 292
What forecasts have changed over time and are impacting my total quarterly revenue? .................................... 293
What forecasts have seen changes in the quantities ordered vs the quantities planned? ........................................ 294
What is the channel performance vs channel forecast? ................................................................................................... 295
Are too many deals being pushed out to the subsequent fiscal quarters? .................................................................. 296
How are product revenues trending month over month? ................................................................................................ 297
How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories? .................................................................................................................................................................................... 298
What are the historical monthly trend of closed revenue by current territories? 299
What are the higher value deals that have been moved out?

ORACLE
What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities? 302
Who all are the Contacts associated to the Lead? 303
How many Leads is a Contact associated to? 304
Are the Leads supporting products that appeal to certain customers by size of company? 305
Are the Leads associated with certain products? 306
How many Leads are open for a given Product? 307
Are the Approved Claims fully allocated or are the Channel partners not spending to approval? 308
What are my claimed vs unclaimed MDF totals? 309
How many outstanding claims in the current sales period assigned to a given Channel user? 310
What are total number of Claims in the current quarter? 312
What were the approved amounts vs the settled claim totals for the last 4 quarters? 313
Who approved an MDF claim? What are the start and end dates of that claim? 314
Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval? 315
Was an MDF claim rejected? What was the reason the claim was rejected? 316
What was the currency conversion rate applied to a specific claim? 317
Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota? 318
How do wins and losses trend quarterly for a specific product line? 319
What are the top ten products by revenue during the past quarter/year? 320
What is the open/closed revenue for each of the product groups in the selected geography? 321
What is the revenue lost to competition for a specific product/product group? 323
What products are often lost to key competitors? Is there a pattern? 324
Are the sales reps moving their opportunities fast enough? 325
Are there any up sell/cross sell opportunities? 326
How is each member on the team performing on deal size, account coverage, and win rate? 327
Is the sales team converting leads to opportunities fast enough? 328
Is overall pipeline healthy enough to meet sales goals? 329
What are the top ten products by revenue during the past quarter/year? 330
What are the most likely reasons that the Opportunities are lost against our key competitors? 331
What are the top 10 open opportunities? What are the target close dates and revenues for these? 332
What is the buying trend of our biggest customers? 334
What is the value trend of high value opportunities? Do they show a positive or negative trend? 335
Who are the top competitors and what is the revenue exposure to them? 336
How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity) 337
On which sales accounts is a given sales representative a member of the account team? 338
What are the sales accounts owned by the Sales team? 339
What are the sales accounts that a given Sales representative owns?  340
What are the Accounts under the sales team, by territory?  341
Do the sales territories need rebalancing?  342
What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?  343

Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?  345
Who are the resources assigned for a particular territory?  346
How many Assets are created in a particular time period?  347
What are the top 10 Products by Asset count?  348
What is the QoQ growth for Assets by Products?  349
What are the Assets that are expiring in the next quarter?  350
Who are all the Contacts assigned to the Assets?  351
Who are all the resources assigned to the Assets?  352
What is the additional information updated in the Notes for a Contact?  353
What are all the contacts created in the system by Geography?  354
Who are the Primary owners of the Contacts for contacts created in the last quarter?  356
How many new contacts are created in the system in the current month?  357
How are the customers classified?  358
What is the additional information updated in the Notes for a Customer?  359
What are the Deals submitted by the Partners in the current quarter with the Deal size?  360
What are all the Opportunities created as a result of Deal closure by a particular resource/team?  361
Who are the Employees/Resource for the Deals that are submitted in the current month?  362
What are the top 10 Deals created in the current quarter by their Deal size?  363
What are the Products associated with the Deals?  364
What are the top 10 products for all the Deals submitted in the current quarter?  365
How is the Deal Amount split between the products associated to the Deal Registration Lines?  366
What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?  368
Who are the Resources assigned to the Leads created in any given time period?  369
What are the Leads assigned to me/my team member?  370
What are all the Territories the Lead is part of?  371
How many territories is the Lead part of?  372
What are the responses for different Opportunity for an Assessment submitted?  373
What are all the Campaigns assigned to an Opportunity?  374
What are all the Opportunities resulted from a Campaign?  376
How many Contacts are assigned to an Opportunity?  377
Who are all the Contacts assigned to Opportunities?  378
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

How many Partners are assigned to an Opportunity? 379
Who are all the Partners assigned to Opportunities? 380
How many Resources are assigned to an Opportunity? 381
Who are all the Resources assigned to Opportunities? 382
How did the Opportunity evolve over time? 383
What is the average time the Opportunity is in a particular sales stage? 384
How did the Opportunity revenue amount change over time? (or any other Opportunity attributes) 385
How many Territories are assigned to an Opportunity? 387
What are all the Territories assigned to Opportunities? 388
What are the Quotas assigned to the team and the Actuals? 389
What is the Territory Quota vs/ Actual? 390
How is the Quota attainment rate for the sales team? 391
What Resources will not be able to meet the Quotas in the current quarter? 392
Which Territories have exceeded their Quotes in the current Quarter? 393
What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction? 394

How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters? 395
How many territories are assigned to a Resource/Employee? 396
What are all the Territories assigned to Resources/Employees? 398
What are the total number of Contact Relationships between two Contact? 399
Does this Contact have subsidiaries? 400
What are the Resources are associated to this contact? 401
How many new Resources are created in the current quarter? 402
What is the Hire date of the resources in an Organization? 403
What are the user preferences for the Users created in the system? 404
Who are the Partner resources in the system and which Partner Organization they belong to? 405
How many Business plans were created in the System in the last quarter and for what Partner or Account? 406
What are the Business plan objectives and what are their target v/s actual value? 407
What Business plans are owned by the team? 407
What Business plan objectives have not met the target values? 408
How are the business plan objectives split? 408
What are the target v/s actual number of the split objectives? 409
What are the objectives that have not met the target value set? 410
What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?submitted e.g. Partner Performance? 411
How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?  
What are the Partners created in the system for a given time period?  
What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?  
How many Enrollments were created/submitted/expired/terminated in the last month?  
How many Enrollments are going to expire in the next quarter?  
Which Program has the highest number of Enrollments?  
What are the Programs that Partners have enrolled into?  
How many Programs were created in the last quarter?  
How many Programs are owned by the team with their expiration date?  
What are the total number of Relationships between two Partners?  
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 all the Leads/Contacts (Campaign Members) associated to the Campaign?  
How many Leads are part of the Campaign?  
How many Leads do not have Contact?  
How many responses received for a given campaign?  
How many Opportunities associated to a Campaign?  
What is the Campaign ROI (return on investment)?  
Against how many Opportunities, were the Quotes submitted in this month?  
What is the total Quotes revenue for the current month?  
How many times a Quote is revised before it gets approved?  
Who has submitted the highest number of Quotes in the current month?  
What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?  
How many contacts were not favored with a positive outcome with a given agent?  
How many distinct customer contacts does an agent interact with through a given channel during a specific period?  
What are the activity objectives for the current period?  
What are the latest revisions to activity objectives?  
Who has completed the most activity objectives?  
What are the activity levels in specific regions?  
What managers have teams averaging the most activities?  
How do the number of activities in a region and their average SR resolution rates by quarter compare?  
How often do communications cross channels to get to resolution?  
How many customer interactions happen without an SR?
Across what channels do such non-SR interactions most often occur?  
Is my team following the norm that an SR must be opened (or updated) for every customer communication?  
How many times has the customer communicated with the contact center on this particular service request and what channels did they use?  
What percentage of service requests involve at least one interaction?  
How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?  
On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?  
What is the interactions activity level across channels and agents? How do they compare across time periods?  
How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?  
Do customers contact us more often to solve issues or to seek answers to questions?  
What channels are the most effective for resolving issues with a single interaction?  
Are agents prematurely updating SRs as Resolved to make their numbers look better?  
How often are my agents able to resolve issues using a low cost channel like chat?  
How many interactions are being lost/abandoned? How does this compare with previous periods?  
As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?  
What are the rates for agents declining work offers?  
Are there currently work requests that have a long acceptance time? What are the agent utilization rates?  
What are the average handle times?  
How long is it taking for offers to be made to agents?  
How often do communications cross channels before they are resolved?  
What percent of communications are resolved the first time? What is the most commonly used channel?  
Are there preferred channels that customers use to contact us for specific service issue categories and product areas?  
What are the number of interactions by channel, agent, and time period?  
How often are communications being transferred between agents?  
How many interactions, on average, does it require to resolve an issue?  
What is the average length of time of an interaction, by agent and channel?  
What product lines have a higher percentage of non-compliant SRs open?  
How is the percentage of compliant SRs trending month over month, quarter over quarter?  
Where are the outliers when it comes to compliance?  
Are we keeping the number of non-compliant SRs in check for our most valuable customers?  
How frequently do agents link articles to SRs?
What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR re-openings?

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

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

How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?

How many showed up as compliant; how many were non-compliant during my review of completed work orders?

How many new coverages begin in the ensuing month?

To what extent has the number of customer coverages increased between two given dates?

Are we equipped to service the increase in coverages?

How many emails are we receiving over time?

What is the current count of inbound email requests by status and mailbox?

How many messages resulted in new service request creation versus update to existing service request?

How many emails came from known versus unknown contacts?

Is the Service organization effectively handling new emails in the appropriate timeframe?

Are my team resources optimally deployed across service queues to maximize productivity?

Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?

Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?

Are there action plans tracking late to an overall target completion date?

What is the delay in estimated completion dates?

What is the breakdown of open action plans by category?

How many action plans are open and how long have they been open?

Are we responding to customer messages in a timely manner?

Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?

What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?

Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?

How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?

Are there currently service requests that have missed the target milestone and require escalation?

Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?

Are our processes inefficient or preventing agents from meeting milestones?

Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
How does my team perform in meeting first response milestones versus resolution milestones? 537
What is the % of open SRs with milestones, that is, have at least one milestone? 539
What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently? 540
By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period? 541
As an agent am I spreading myself too thin by being part of one too many SR teams? 543
What are the open critical SRs that my team is working on currently? How many of these are escalated? 544
How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any? 546
What are the SRs that are waiting on my customers? 547
Who are my agents that have the most pending SRs? 548
How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated? 550
What is the prevalence of SR transfers for an agent/manager/group/product/location? 551
How are SR transfers contributing to overall latency/resolution delays? 553
What are the popular reasons for SRs to be transferred? Is there a pattern? 555
What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue? 557
How does the aging profile of SRs look like? Are there any outliers calling for intervention? 558
How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical? 560
How many social posts came from known versus unknown contacts? 561
Is the Service organization effectively handling new social service requests in the appropriate timeframe? 562
What characteristics do groupings of SR’s based on specific tags (e.g., tag = ‘outage’) exhibit? 563
Do SR’s with specific tags (e.g., tags for specific partners) show higher resolution times? 565
Are we seeing an issue regarding compliance rates with certain tags? 566
How many SRs for product ‘A’ have tag ‘X’ or ‘Y’? How many have the ‘Potential Churn’ tag? 567
How many open SRs are linked to each tag? 569
How is tag usage across agents and resource teams? Which teams perform better than others? 570
What is the opportunity information captured in the note to an opportunity? 572
What is the contact point information of the primary contact for accounts where I’m the owner or on the sales team? 573
What is the contact point information of the primary contact for all active opportunities in the current quarter? 574
What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact? 575
What is the contact point information of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team? 576
What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter? 577
What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications? 579
What are the open critical HR SRs that my team is working on currently? How many of these are escalated? 580
How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations? 581
What are the HR SRs that are waiting on my customers? 582
Who are my agents that have the most pending HR SRs? 583
How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated? 584
What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue? 585
What does the aging profile of HR SRs look like? Are there any outliers calling for intervention? 586
How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical? 587
What are the open critical Internal SRs that my team is working on currently? How many of these are escalated? 588
How are we doing on Internal SR resolution times between current and past months? What are the reasons for any degradations? 589
What are the Internal SRs waiting on my customers? 589
Who are my agents that have the most pending Internal SRs? 590
How many Internal SRs have been waiting on my agents action for more than 24 hours? Which of these are critical or escalated? 591
What is the reopen rate for Internal SRs owned by my team? Who has the highest reopen rate? Is there a training issue? 592
What is the status of our aging SRs? Are there any outliers that require intervention? 593
How many Internal SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are critical? 593
What's the primary reason for contract closure in the last year? 594
What contracts have a specific policy deviation? 595
How is my contract team loaded? 596
How many contracts might get affected if I modify the Payment clause? 597
Which contracts are related to my given contract? 597
Show me all the contracts that have a particular deliverable due. 598
Show me the user status progression for contracts within a given date range. 599
How many days on average did a resource work on a contract assigned to them in the last quarter? 600
How many days on average did a resource organization work on a contract assigned to them in the last quarter?

Show me all the contracts that have a nonstandard clause.

What’s the total contract value (TCV) in the last one year?

What’s the number of subscriptions by status and date range?

What’s the total MRR?

How many subscriptions were renewed the last quarter?

How many subscriptions are expiring in the next quarter?

How many subscriptions were terminated in the last year?

Are there any workload balancing issues on my team? Are a few members performing most of the activities?

I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?

As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?

How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?

How can I identify neglected but strategic accounts to guide my team to focus on these?

How much credit did a participant receive for their sales transactions?

How much credit did my team receive for their attainment?

What are the various attainment attributes associated with my credits?

Which participants are assigned to which plans?

What type of assignment does a participant have to a plan?

What are the assignment start and end dates for a participant?

Has the participant accepted the assignment to the plan?

Does the participant have an individualized target incentive for the plan?

Are participants correctly credited?

Were there credit or rollup errors that must be fixed?

Is the dispute load balanced between my analysts? Asked by compensation managers.

Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.

Are we on track in achieving quota this period or quarter?

Which of my direct reports' attainment or earnings are below the wanted performance expectation?

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

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

What are my compensation plan incentive targets?

How are these targets individualized across the participants.
How do these targets break down by plan component?  
Are my individualized performance measure goals set properly?  
How do they compare to the base goals set on the measure?  
Who is assigned to a given plan?  
What are the targets and goals settings for an individual?  
As a participant manager, what are the targets and goals settings for my direct reports?  
To what country and business unit does the participant belong?  
What is the participant's home currency or cost center?  
Is the participant active? And for which dates?  
What is the total quota across the organization by performance measure for the interval?  
What is the total quota by performance measure for the interval across the organization?  
Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.  
Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.  
What is the total quota across the organization by performance measure for the period or across periods?  
What is the total quota by performance measure for the period across the organization?  
Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.  
Which participants are assigned to a given pay group?  
What pay groups are in the application? What are their types and descriptions?  
When was a given participant assigned to a specific pay group?  
As a participant manager, which pay groups do my direct reports belong to?  
What is my cost of compensation by participant, plan component, plan, and frequencies?  
What is the current status of the payment batches? Are they paid, reviewed, or frozen?  
What is the status of each paysheet within the payment batches?  
How does the performance measure attainment compare with a participant’s personalized goal across his directs?  
How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?  
How do participants’ plan component earnings compare with their personalized target incentives?  
Do I have to realign quota based on current attainment levels?  
What is the total quota by performance measure for the period across the organization? Validate quota levels.  
Is the company on track to attain its goals? Who is lagging and might require coaching?  
What are the rules effective as of the given date in the hierarchy?  
What are the credit rules which a credit receiver is assigned to?
What are the rules which contain the given criteria, for example Sales Channel = Distributor? What are the classification rules which a credit category is assigned to? 654
What are the criteria for a rule including the inherited criteria from the ancestors? 655
What are the results of the collected transactions before the crediting process? 655
What are all addresses associated with the primary contact for accounts I’m the owner of or on the sales team? 656
What are all addresses associated with the primary contact for all active opportunities in the current quarter? 657
What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact? 659
What are all addresses of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team? 660
What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter? 661
What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact? 662
How long did it take to assign the SR to the correct queue? 663
Did the SR get assigned to the wrong queue/team? 665
How long was an SR unassigned and how long did it sit in each queue? 666
Was an SR sitting in a queue longer than the average time for all other SRs? 668
Was the assigned agent overloaded with other work? 669
Was there a lot of time spent waiting on customers to respond to more information, documents and so on? 670
Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)? 672
Was the SR queue modified or SR resource owner modified at any point? 673
Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)? 675
Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)? 676

Does the survey request activity show a declining trend? 678
How is survey request trending compared to SR resolutions during the same period? 679
Do we need to adjust our survey template to improve response rates? 680
Does seasonality impact response rates? 681
How does response differ for various service teams? Do some teams obtain better response rates? 683
Are survey requests being sent per plan across teams, service categories, products, account regions? 684
Are survey request frequencies meeting our norms? 685
Who are the top 10 active resources of the system? 686
How many days was a resource active by channel? 687
<table>
<thead>
<tr>
<th>Question</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>How is the resource activity split across channels (web/mobile/email)?</td>
<td>687</td>
</tr>
<tr>
<td>Which department has the highest number of active resources?</td>
<td>688</td>
</tr>
<tr>
<td>Which region has the highest number of inactive resources?</td>
<td>688</td>
</tr>
<tr>
<td>Who are the resources who have not logged in the system in the last week?</td>
<td>689</td>
</tr>
<tr>
<td>Resources of which job title are most active in the system?</td>
<td>689</td>
</tr>
<tr>
<td>Who are the top 10 active and bottom 10 inactive employees from a user adoption perspective?</td>
<td>690</td>
</tr>
<tr>
<td>How many records were created or updated by a user in a month?</td>
<td>690</td>
</tr>
<tr>
<td>What is the count of records created or updated by object type?</td>
<td>691</td>
</tr>
<tr>
<td>How is the object activity split across channels (web/mobile/email)?</td>
<td>691</td>
</tr>
<tr>
<td>Which times are objects not being created or updated?</td>
<td>692</td>
</tr>
<tr>
<td>Who are the top 10 active users of the system?</td>
<td>692</td>
</tr>
<tr>
<td>Who are the users who have not logged in the system in the last week?</td>
<td>693</td>
</tr>
<tr>
<td>Which department has the highest number of Active users?</td>
<td>693</td>
</tr>
<tr>
<td>Users belonging to what job title are most active in the system?</td>
<td>694</td>
</tr>
<tr>
<td>How is the user activity split across Channel (Web/Mobile/Mail)?</td>
<td>694</td>
</tr>
<tr>
<td>How many users run OTBI analyses?</td>
<td>695</td>
</tr>
<tr>
<td>Who are the top OTBI users?</td>
<td>695</td>
</tr>
<tr>
<td>What is the weekly OTBI analysis usage trend?</td>
<td>696</td>
</tr>
<tr>
<td>What are the most frequently-run OTBI analyses?</td>
<td>697</td>
</tr>
<tr>
<td>How many predefined OTBI analyses have been run in the past month?</td>
<td>697</td>
</tr>
<tr>
<td>How many custom OTBI analyses have been run in the past month?</td>
<td>698</td>
</tr>
<tr>
<td>How many ad-hoc OTBI analyses have been run in the past month?</td>
<td>698</td>
</tr>
<tr>
<td>What is the execution history of dashboard X in the past month?</td>
<td>699</td>
</tr>
<tr>
<td>Which analyses have low usage in the past month?</td>
<td>700</td>
</tr>
<tr>
<td>How many OTBI SOAP web services have been run in the past month?</td>
<td>700</td>
</tr>
<tr>
<td>What are the long-running analyses in the past month?</td>
<td>701</td>
</tr>
<tr>
<td>What is the OTBI execution time histogram in the past month?</td>
<td>701</td>
</tr>
<tr>
<td>Which analyses have the longest response time?</td>
<td>702</td>
</tr>
<tr>
<td>Which analyses have high data row count?</td>
<td>703</td>
</tr>
<tr>
<td>Which analyses reached OTBI max row limit?</td>
<td>703</td>
</tr>
<tr>
<td>What are the common execution errors in the past month?</td>
<td>704</td>
</tr>
<tr>
<td>How many analyses and dashboards failed in the past month?</td>
<td>704</td>
</tr>
<tr>
<td>What are the most commonly used OTBI subject areas?</td>
<td>705</td>
</tr>
<tr>
<td>What are the least-used OTBI subject areas?</td>
<td>706</td>
</tr>
<tr>
<td>Which subject areas have slow performance?</td>
<td>706</td>
</tr>
<tr>
<td>Which subject areas have large data volume?</td>
<td>707</td>
</tr>
<tr>
<td>Which analyses have low usage because of poor performance?</td>
<td>707</td>
</tr>
</tbody>
</table>
What is the database SQL execution time and row count? 708
What is the overall satisfaction levels of our customers with regards to issue resolutions? 709
Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this? 710
What aspects of service delivery are customers most happy about? Which ones are they most unhappy about? 711
What are the response scores for customer where we have not met SLA's? 712
Is our resolution performance for escalated issues worse or better than non escalated issues? 713
Have we kept our strategic customers happy? If not, where can we improve - in timliness, better first time resolution, etc.? 714
Do one or more of the agents in my team need training to improve customer communication skills? 715
What is the most frequent positive feedback we get from our custoemrs? Most frequent negative feedback? 717
Which of our product lines most frequently receive suggestions for product improvements? 718
What areas of the application are users viewing or not viewing? 719
Which users are using the application the most or least based on clicks? 719
How are the areas of the application performing? 720
What areas of the application are used by users in specific geographic region or resource hierarchies? 721
How many articles are available in the knowledgebase? 721
Which articles are published or unpublished? 722
Which employees interacted with the articles? 722
What are the locales, content types, and authors of the articles in the database? 723
How many links exist between services requests and knowledge articles? 724
Which articles are linked to the maximum number of service requests? 724
Which article versions are linked to service requests? 725
Which users created the link to an article? 725
Which category contains the highest number of knowledge articles? 726
Which articles are linked to a category? 727
Which products are associated with the most number of knowledge articles? 727
Which articles are linked to a product? 728
What types of ratings are assigned articles? 728
What content in the knowledge base is satisfying users' needs? 729
What articles are not satisfying users' needs? 730
What content rating effectively resolves users' questions? 730
How do knowledge managers view article historical metrics? 731
How are articles ranked in popularity? 731
Which articles require updates? 732
How are customers finding and using knowledgebase content? 733
How many concept tokens are associated to articles? 733
How do knowledge managers view article search historical metrics?
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

How are customers are finding knowledge base content
How do knowledge managers view search article metrics?
How do Knowledge managers view information on article historical metrics?
How are articles in the knowledge base ranked in popularity?
How many articles are consumed by a particular user group during a specified period?
Which user groups area associated to an article?
Which employee in a user group created the most or least articles?
Which types of reports and subject areas are the users in your organization are looking at?
What are the most and least popular reports and which analytics are important to your team?
How important are analytics to your team, and how much do they use them?
Which analytics should you prioritize and which can be phased out to optimize resources?
Which customers have covered levels worth more then $50k that are expiring in 30 days?
Which customers or coverage products deliver the most revenue?
Which covered levels expired without renewal in the last month?
What are all the assets covered for a particular customer?
What is the Net Billing for the last 6 months?
What is the projected billing for the next 6 months?
How does the usage of a particular subscription product trend?
What is the discount that was provided for a particular customer or product?
What is the Net MRR change due to amendments?
What is the Net MRR change due to amendments where full credit was issued?
Which products are most frequently upgraded to or downgraded from?
What is the trend of successful, outstanding and churned renewals in the last 6 months?
How much MRR was renewed each month in the last 6 months?
What is the MRR lost each month due to suspensions in the last 6 months?
Why am I not able to view certain subject areas with my login credentials?
Which data security policy would provide access to the data I need to see?
Can I view and edit a particular page? If yes, which functional security policy do I need to provide to a user who needs similar access?
I have not added a specific role to a user, but the user seems to have this job role. Can I trace how has this been inherited by the user?
What are all the data security privileges that a specific user added?
Which roles were added with a specific functional security policy, and who added them?
Which reports are running poorly?
Which reports are running well?
Which reports need maintenance?
What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity? 755
What are the associated activities related to my upcoming appointment and task? 756
What are the follow-up tasks I need to do on a particular customer? 758
What are the details on my quotes such as, quote number, quote amount, status, and proposal documents? 759
What quotes are associated with my opportunities, what are the quoteline items, and the associated products? 760
What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items? 761

5 Job Roles 763

Overview 763
Accounts Receivable Manager 763
Accounts Receivable Specialist 764
Application Implementation Consultant 764
Channel Account Manager 766
Channel Administrator 781
Channel Operations Manager 794
Channel Partner Manager 809
Channel Partner Portal Administrator 822
Channel Sales Director 835
Channel Sales Manager 848
Corporate Marketing Manager 863
Customer Contract Administrator 864
Customer Contract Manager 865
Customer Contract Team Member 866
Customer Relationship Management Application Administrator 867
Customer Service Manager 872
Customer Service Representative 877
Enterprise Contract Administrator 882
Enterprise Contract Manager 883
Enterprise Contract Team Member 884
Human Resource Help Desk Administrator 884
Human Resource Help Desk Agent 889
Human Resource Help Desk Manager 893
IT Security Manager 898
Incentive Compensation Analyst 899
Incentive Compensation Manager 902
6 Duty Roles

Overview

CRM Administrative Transaction Analysis Duty

CRM OTBI Report Performance Transactional Analysis Duty

Enterprise Contracts Transaction Analysis Duty Role
<table>
<thead>
<tr>
<th>Subject Area</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Help Desk Administrator Transaction Analysis Duty</td>
<td>1037</td>
</tr>
<tr>
<td>HR Help Desk Agent Transaction Analysis Duty</td>
<td>1042</td>
</tr>
<tr>
<td>HR Help Desk Manager Transaction Analysis Duty</td>
<td>1046</td>
</tr>
<tr>
<td>Incentive Compensation Transaction Analysis Duty</td>
<td>1050</td>
</tr>
<tr>
<td>Internal Help Desk Administrator Transaction Analysis Duty</td>
<td>1053</td>
</tr>
<tr>
<td>Internal Help Desk Agent Transaction Analysis Duty</td>
<td>1054</td>
</tr>
<tr>
<td>Internal Help Desk Manager Transaction Analysis Duty</td>
<td>1055</td>
</tr>
<tr>
<td>Internal Help Desk User Transaction Analysis Duty</td>
<td>1056</td>
</tr>
<tr>
<td>Knowledge Management Transaction Analysis Duty</td>
<td>1057</td>
</tr>
<tr>
<td>Marketing Administrative Transaction Analysis Duty</td>
<td>1059</td>
</tr>
<tr>
<td>Marketing Corporate Transaction Analysis Duty</td>
<td>1060</td>
</tr>
<tr>
<td>Marketing Executive Transaction Analysis Duty</td>
<td>1061</td>
</tr>
<tr>
<td>Marketing Lead Transaction Analysis Duty</td>
<td>1062</td>
</tr>
<tr>
<td>Marketing Managerial Transaction Analysis Duty</td>
<td>1064</td>
</tr>
<tr>
<td>Marketing Operational Transaction Analysis Duty</td>
<td>1065</td>
</tr>
<tr>
<td>Marketing Transaction Analysis Duty</td>
<td>1066</td>
</tr>
<tr>
<td>Next Gen HR Help Desk Administrator Transaction Analysis Duty</td>
<td>1067</td>
</tr>
<tr>
<td>Next Gen HR Help Desk Agent Transaction Analysis Duty</td>
<td>1068</td>
</tr>
<tr>
<td>Next Gen HR Help Desk Manager Transaction Analysis Duty</td>
<td>1069</td>
</tr>
<tr>
<td>Next Gen HR Help Desk User Transaction Analysis Duty</td>
<td>1070</td>
</tr>
<tr>
<td>OTBI Performance Transactional Analysis Duty</td>
<td>1071</td>
</tr>
<tr>
<td>OTBI Usage Transactional Analysis Duty</td>
<td>1072</td>
</tr>
<tr>
<td>Partner Channel Administrative Transaction Analysis Duty</td>
<td>1073</td>
</tr>
<tr>
<td>Partner Channel Transaction Analysis Duty</td>
<td>1086</td>
</tr>
<tr>
<td>Partner Org Transaction Analysis Duty</td>
<td>1100</td>
</tr>
<tr>
<td>Receivables Customer Transaction Analysis Duty</td>
<td>1112</td>
</tr>
<tr>
<td>Sales Administrative Transaction Analysis Duty</td>
<td>1113</td>
</tr>
<tr>
<td>Sales CRM Sales Activity Transaction Analysis Duty</td>
<td>1126</td>
</tr>
<tr>
<td>Sales Campaign Transaction Analysis Duty</td>
<td>1127</td>
</tr>
<tr>
<td>Sales Executive Transaction Analysis Duty</td>
<td>1128</td>
</tr>
<tr>
<td>Sales Managerial Transaction Analysis Duty</td>
<td>1139</td>
</tr>
<tr>
<td>Sales Operational Transaction Analysis Duty</td>
<td>1151</td>
</tr>
<tr>
<td>Sales Transaction Analysis Duty</td>
<td>1152</td>
</tr>
<tr>
<td>Security Transaction Analysis Duty</td>
<td>1163</td>
</tr>
<tr>
<td>Service Administrative Transaction Analysis Duty</td>
<td>1164</td>
</tr>
<tr>
<td>Service Managerial Transaction Analysis Duty</td>
<td>1169</td>
</tr>
<tr>
<td>Service Transaction Analysis Duty</td>
<td>1174</td>
</tr>
<tr>
<td>Subject Area</td>
<td>Page</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>------</td>
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<tr>
<td>Subscription Management Transaction Analysis Duty</td>
<td>1179</td>
</tr>
<tr>
<td>User System Usage Transaction Analysis Duty</td>
<td>1180</td>
</tr>
<tr>
<td>User System Usage Transaction Analysis Duty</td>
<td>1181</td>
</tr>
</tbody>
</table>
Get Help

Get Help in the Applications
Use help icons 📚 to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

Get Support
You can get support at My Oracle Support. For accessible support, visit Oracle Accessibility Learning and Support.

Get Training
Increase your knowledge of Oracle Cloud by taking courses at Oracle University.

Join Our Community
Use Cloud Customer Connect to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, and watch events.

Learn About Accessibility
For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program. Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback
We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to oracle_fusion_applications_help_ww_grp@oracle.com.

Thanks for helping us improve our user assistance!
2 Overview

Subject Areas Overview

Subject areas are the building blocks of your analytics. Your application comes with a variety of prebuilt subject areas right out of the box. This guide provides a list of all the prebuilt subject areas with the following detail:

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

Scheduled ESS Processes

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

Choosing the Right Subject Area

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

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

Now let’s assume you know your subject area. But wait, there could be a prebuilt analytic that uses this subject area. You might take a look at the prebuilt analytics spreadsheet. But if none of those prebuilt analytics work for you, go to BI and click New > Analysis and choose the Sales — CRM Historical Pipeline subject area. You can see the available columns of information you can use to build your analytic. You can add any columns and facts you want, and at any time click the “Results” tab and see how it looks. For more information on subject areas, see How Subject Areas Work.
Exploring Subject Area Components
This guide doesn't detail the dimensions, columns, and facts that make up a subject area. But no problem. You can explore the components right in your application. Here's how:

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

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

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

Related Topics
- List of Scheduled Processes and How to Schedule Them
- List of Prebuilt Analytics
- Deep dive into details on subject areas and columns
- Guide on Creating and Administering Analytics
Chapter 3
Subject Areas

3 Subject Areas

CRM - CRM Activities with Related Activities

Description

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

Business Questions

This subject area can answer the following business questions:

- What are the follow-up tasks I need to do on a particular customer?
- What are the associated activities related to my upcoming appointment and task?
- What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Reports and Analytics

Time Reporting

This subject area reports historical data.

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

Transactional Grain

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

Special Considerations

The subject area requires the FBI_USER_SYSTEM_USAGE_TRANSACTIONAL_DUTY duty role for access.
CRM - CRM Activity Contact Real Time

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Service > Activities

Time Reporting

This subject area doesn't report historical data.
This subject area has no anchoring date.

Transactional Grain

Activity and Contact

Special Considerations

This subject area is an alias of Sales CRM Activity Contact.
CRM - CRM Activity Objective Real Time

Description

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

Business Questions

This subject area can answer the following business questions:

- What are the activity objectives for the current period?
- What are the latest revisions to activity objectives?
- Who has completed the most activity objectives?

Job Roles

The following job roles secure access to this subject area:

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

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Service > Activities

Time Reporting

This subject area doesn't report historical data.
This subject area has no anchoring date.

Transactional Grain

Activity and Objective

Special Considerations

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

CRM - CRM Activity Real Time

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

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

The following duty roles secure access to this subject area:

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

Primary Navigation
Navigator > Service > Activities

Time Reporting
This subject area can report historical data.

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

Transactional Grain
Activity

Special Considerations
This subject area is an alias of Sales CRM Sales Activity.
CRM - CRM Activity Resource Real Time

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 3
Subject Areas

- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation
Navigator > Service > Activities

Time Reporting
This subject area doesn't report historical data.
This subject area has no anchoring date.

Transactional Grain
Activity and Resource

Special Considerations
This subject area is an alias of Sales CRM Activity Resource.
CRM - CRM Click History

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

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

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

Job Roles
No applicable job roles

Duty Roles
The following duty roles secure access to this subject area:

- User System Usage Transaction Analysis Duty

Primary Navigation
Home page > Sales > Usage Insights

Time Reporting
This subject area reports historical data.
Time dimension is linked to User System Usage."Time"."Date".

Transactional Grain
This subject area returns the data at the grain of the User.
Special Considerations

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

CRM - CRM Interaction Aggregate

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles
The following duty roles secure access to this subject area:

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

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

Time Reporting
This subject area reports historical data.
Time dimension is linked to CRM - CRM Interaction Aggregate.Interaction.Creation Date.

Transactional Grain
Aggregated interactions at weekly and monthly level

Special Considerations

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

CRM - CRM Interaction Service Requests Real Time

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

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

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

Time Reporting
This subject area doesn't report historical data.
This subject area has no anchoring date.
Transactional Grain

Interaction and Service Request

Special Considerations

None.

CRM - CRM Interactions Real Time

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 3

Subject Areas

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Service > Service Requests > Service Request Details > Interaction History
Time Reporting
This subject area reports historical data.

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

Transactional Grain

Interaction

Special Considerations

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

CRM - CRM Omni Channel Events Real Time

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

• Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Internal Help Desk Administrator
• Internal Help Desk Agent
• Internal Help Desk Manager
• Internal Help Desk User
• Next Gen Human Resource Help Desk Administrator
• Next Gen Human Resource Help Desk Agent
• Next Gen Human Resource Help Desk Manager
• Next Gen Human Resource Help Desk User
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to this subject area:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Internal Help Desk Administrator Transaction Analysis Duty
• Internal Help Desk Agent Transaction Analysis Duty
• Internal Help Desk Manager Transaction Analysis Duty
• Internal Help Desk User Transaction Analysis Duty
• Next Gen HR Help Desk Administrator Transaction Analysis Duty
• Next Gen HR Help Desk Agent Transaction Analysis Duty
• Next Gen HR Help Desk Manager Transaction Analysis Duty
• Next Gen HR Help Desk User Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

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

Time Reporting
This subject area reports historical data.
Time dimension is linked to "CRM - CRM Omni Channel Events Real Time"."Omni Channel Event"."Start Time".

Transactional Grain
Omni Channel Event

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

CRM - CRM Reporting Performance

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

This subject area can answer the following business questions:

- Which reports are running well?
- Which reports are running poorly?
- Which reports need maintainence?

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to this subject area:

- CRM OTBI Report Performance Transactional Analysis Duty

Primary Navigation

Navigator > Reports and Analytics

Time Reporting

This subject area reports historical data.

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

Transactional Grain

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

Special Considerations

The subject area requires the FBI_USER_SYSTEM_USAGE_TRANSACTIONAL_DUTY duty role for access.

CRM - CRM Reporting Usage

Description

This reporting usage subject area lets you see how your users and teams use OBTI in CRM. This subject area exposes execution metrics around subject areas, analyses, and dashboards. These metrics provide reporting on details like the most popular and unpopular reports and which analytics are important to your users. This reporting gives you powerful
Business Questions

This subject area can answer the following business questions:

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

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to this subject area:

- User System Usage Transaction Analysis Duty

Primary Navigation

Navigator > Reports and Analytics

Time Reporting

This subject area reports historical data.

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

Transactional Grain

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

Special Considerations

The subject area requires the FBI_USER_SYSTEM_USAGE_TRANSACTIONAL_DUTY duty role for access.
CRM - CRM Service Request Summary

Description

Analyses built using this subject area enable customer service managers to obtain a complete picture of service performance, as it relates to interactions, compliance, and knowledge article usage. The analyses built serve to expand the real-time reporting of service interactions, by providing additional summary metrics and prebuilt reports. The added analytic capabilities provide valuable insight, helping service organizations assess the volume and effectiveness of their channel interactions in resolving service issues. Similarly, SR compliance analysis delivers a comprehensive view of SR milestone attainments and compliance. Service managers can gain visibility into the diverse factors affecting compliance, identify patterns for a better understanding of this key area of service performance, and take corrective action. This subject area also helps managers to track the extent to which agents leverage knowledge articles in SRs for issue resolutions.

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
Subject Areas

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

Duty Roles

The following duty roles secure access to this subject area:

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

Navigator > Service > Service Requests

Time Reporting

This subject area reports historical data.

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

Transactional Grain

Service Request

Special Considerations

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

CRM - CRM Work Orders Real Time

Description

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

Business Questions

This subject area can answer the following business questions:

- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
- How many were compliant and non-compliant when I, as an agent review my own completed work orders?
- How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
- How many showed up as compliant; how many were non-compliant during my review of completed work orders?
Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty
Primary Navigation
Navigator > Service > Work Orders

Time Reporting
This subject area reports historical data.
Time dimension is linked to CRM - CRM Work Orders Real Time."CRM Work Order"."Creation Date".

Transactional Grain
Work Order

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

Enterprise Contracts - Contracts Real Time

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

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

• Which contracts are related to my given contract?
• What contracts have a specific policy deviation?
• How many days on average did a resource work on a contract assigned to them in the last quarter?
• Show me all the contracts that have a nonstandard clause.
• Show me all the contracts that have a particular deliverable due.
• How is my contract team loaded?
• How many contracts might get affected if I modify the Payment clause?
• Show me the user status progression for contracts within a given date range.
• What's the primary reason for contract closure in the last year?
• How many days on average did a resource organization work on a contract assigned to them in the last quarter?
Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Enterprise Contracts Transaction Analysis Duty Role

Primary Navigation

Navigator > Contract Management - Contracts

Time Reporting

This subject area doesn't report historical data.
This subject area has no anchoring date.

Transactional Grain

Contract Header

Special Considerations

None.

Help Desk - HR Service Requests Real Time

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- HR Help Desk Administrator Transaction Analysis Duty
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 3

Subject Areas

• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Next Gen HR Help Desk Administrator Transaction Analysis Duty
• Next Gen HR Help Desk Agent Transaction Analysis Duty
• Next Gen HR Help Desk Manager Transaction Analysis Duty
• Next Gen HR Help Desk User Transaction Analysis Duty

Primary Navigation
NA

Time Reporting

This subject area reports historical data.

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

Transactional Grain

HR Service Request

Special Considerations

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

Help Desk - Internal Service Requests Real Time

Description

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

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Internal Help Desk Administrator
- Internal Help Desk Agent
- Internal Help Desk Manager
- Internal Help Desk User

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

NA
Time Reporting

This subject area reports historical data.

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

Transactional Grain

Internal Service Request

Special Considerations

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

Incentive Compensation - Attainments Real Time

Description

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

This subject area supports detailed validation reporting.

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

Business Questions

This subject area can answer the following business questions:

• How much credit did a participant receive for their sales transactions?
• What are the various attainment attributes associated with my credits?
• How much credit did my team receive for their attainment?
The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Incentive Compensation Transaction Analysis Duty

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Attainments

Special Considerations

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

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

• Incentive Compensation Transaction Analysis Duty
Primary Navigation
Navigator > Incentive Compensation

Time Reporting
This subject area doesn't report historical data.
This subject area has no anchoring date.

Transactional Grain
Payment Plan Assignments

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

Incentive Compensation - Credits Real Time

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

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

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

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

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

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

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

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

Duty Roles

The following duty roles secure access to this subject area:

- Incentive Compensation Transaction Analysis Duty

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Credits

Special Considerations

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

Incentive Compensation - Disputes Real Time

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Incentive Compensation Transaction Analysis Duty

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Disputes
Special Considerations

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

Incentive Compensation - Earning and Attainment Summary Real Time

Description

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

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

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

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

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

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

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

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

Business Questions

This subject area can answer the following business questions:

- Which of my direct reports' attainment or earnings are below the wanted performance expectation?
Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Incentive Compensation Transaction Analysis Duty

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Earnings, Attainments

Special Considerations

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

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Incentive Compensation Transaction Analysis Duty

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn’t report historical data.
This subject area has no anchoring date.

Transactional Grain

Earnings

Special Considerations

Incentive Compensation - Earnings Real Time

Incentive Compensation - Participant Balances Real Time

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

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

The following duty roles secure access to this subject area:

- Incentive Compensation Transaction Analysis Duty

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Draw balances

Special Considerations

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

Incentive Compensation - Participant Compensation Plan Real Time

Description

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

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

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

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Incentive Compensation Transaction Analysis Duty

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain
Special Considerations

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

Incentive Compensation - Participant Detail Real Time

Description

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

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

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 3

Subject Areas

- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to this subject area:

- Incentive Compensation Transaction Analysis Duty

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.
This subject area has no anchoring date.

Transactional Grain

Compensation participant

Special Considerations

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

Incentive Compensation - Participant Interval Goals Real Time

Description

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

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

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Incentive Compensation Transaction Analysis Duty

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 3

Subject Areas

Transactional Grain

Participant Interval Goals

Special Considerations

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

Incentive Compensation - Participant Period Goals Real Time

Description

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

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

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

Business Questions

This subject area can answer the following business questions:

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

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

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

Duty Roles

The following duty roles secure access to this subject area:

- Incentive Compensation Transaction Analysis Duty

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn’t report historical data.

This subject area has no anchoring date.

Transactional Grain

Participant Period Goals

Special Considerations

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

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Incentive Compensation Transaction Analysis Duty
Primary Navigation
Navigator > Incentive Compensation

Time Reporting
This subject area doesn’t report historical data.
This subject area has no anchoring date.

Transactional Grain
Pay Group Assignments

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

Incentive Compensation - Payments Real Time

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

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

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

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

• Channel Account Manager
• Channel Operations Manager
• Channel Sales Manager
• Incentive Compensation Analyst
• Incentive Compensation Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 3
Subject Areas

- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to this subject area:

- Incentive Compensation Transaction Analysis Duty

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Payments

Special Considerations

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

Incentive Compensation - Paysheet Summary Real Time

Description

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

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

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Incentive Compensation Transaction Analysis Duty

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn’t report historical data.

This subject area has no anchoring date.

Transactional Grain

Compensation paysheet

Special Considerations

Administrators and analyst users need to have the BU assigned through 'Manage Business Unit Data Access for users' FSM task in order to see data. For further details please review "Configure Administrators to Access..."
Incentive Compensation - Performance and Earnings
Summary Real Time

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

Monitor performance and review incentive results.

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

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

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

- How do participants' plan component earnings compare with their personalized target incentives?
- What are my compensation plan incentive targets?
- How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?
- Do I have to realign quota based on current attainment levels?
- As a participant manager, what are the targets and goals settings for my direct reports?
- What is the total quota by performance measure for the period across the organization? Validate quota levels.
- Is the company on track to attain its goals? Who is lagging and might require coaching?
- How does the performance measure attainment compare with a participant's personalized goal across his directs?
- What is the total quota across the organization by performance measure for the interval?

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

- Channel Account Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Subject Areas

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

Duty Roles

The following duty roles secure access to this subject area:

- Incentive Compensation Transaction Analysis Duty

Primary Navigation

Navigator > Incentive Compensation

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

Transactional Grain

Performance and Earnings Summary

Special Considerations

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

Incentive Compensation - Rules Real Time

Description

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

**Business Questions**

This subject area can answer the following business questions:

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

**Job Roles**

The following job roles secure access to this subject area:

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

**Duty Roles**

The following duty roles secure access to this subject area:

- Incentive Compensation Transaction Analysis Duty

**Primary Navigation**

Navigator > Incentive Compensation

**Time Reporting**

This subject area doesn't report historical data.

This subject area has no anchoring date.
Transactional Grain

Rules

Special Considerations

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

Incentive Compensation - Transactions Real Time

Description

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

Business Questions

This subject area can answer the following business questions:

• What are the results of the collected transactions before the crediting process?

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles
The following duty roles secure access to this subject area:

- Incentive Compensation Transaction Analysis Duty

Primary Navigation
Navigator > Incentive Compensation

Time Reporting
This subject area doesn't report historical data.
This subject area has no anchoring date.

Transactional Grain
Transactions

Special Considerations

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

Knowledge Management - Article Category Real Time

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

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

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

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

- Knowledge Analyst
- Knowledge Manager

**Duty Roles**

The following duty roles secure access to this subject area:

- Knowledge Management Transaction Analysis Duty

**Primary Navigation**

Navigator > Knowledge Management > Authoring

**Time Reporting**

Yes

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

**Transactional Grain**

Article Version - Category

**Special Considerations**

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

**Knowledge Management - Article Links Real Time**

**Description**

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

**Business Questions**

This subject area can answer the following business questions:

- Which articles are linked to the maximum number of service requests?
- Which users created the link to an article?
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 3
Subject Areas

- How many links exist between services requests and knowledge articles?
- Which article versions are linked to service requests?

Job Roles

The following job roles secure access to this subject area:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to this subject area:

- Knowledge Management Transaction Analysis Duty

Primary Navigation

Navigator > Knowledge Management > Authoring

Time Reporting

Yes

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

Transactional Grain

Article Latest Version - Link/SR

Special Considerations

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

Knowledge Management - Article Product Real Time

Description

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

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to this subject area:

- Knowledge Management Transaction Analysis Duty

Primary Navigation

Navigator > Knowledge Management > Authoring

Time Reporting

Yes

Time dimension is linked to NA.

Transactional Grain

Article Version - Product

Special Considerations

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

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to this subject area:

- Knowledge Management Transaction Analysis Duty

Primary Navigation

Navigator > Knowledge Management > Authoring

Time Reporting

Yes

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

Transactional Grain
Special Considerations

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

Knowledge Management - Article Real Time

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to this subject area:

- Knowledge Management Transaction Analysis Duty

Primary Navigation

Navigator > Knowledge Management > Authoring
Time Reporting
Yes
Time dimension is linked to Knowledge Management - Article Real Time."Time","Date".

Transactional Grain
Article Version

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

Knowledge Management - Article Search Historical

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

Business Questions
No applicable business questions

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

- Knowledge Analyst
- Knowledge Manager

Duty Roles
The following duty roles secure access to this subject area:

- Knowledge Management Transaction Analysis Duty

Primary Navigation
Navigator > Knowledge Management > Authoring
Time Reporting
This subject area reports historical data.

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

Transactional Grain

Normalized Question - Department

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

Knowledge Management - Article Search Question Tokens Historical

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

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

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

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

- Knowledge Analyst
- Knowledge Manager

Duty Roles
The following duty roles secure access to this subject area:

- Knowledge Management Transaction Analysis Duty

Primary Navigation
Navigator > Knowledge Management > Authoring

Time Reporting
This subject area reports historical data.

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

Transactional Grain
Normalized Question Token - Department

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

Knowledge Management - Article Search Questions Historical

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

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

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

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

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to this subject area:

- Knowledge Management Transaction Analysis Duty

Primary Navigation

Navigator > Knowledge Management > Authoring

Time Reporting

This subject area reports historical data.

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

Transactional Grain

Raw/Actual Question - Department

Special Considerations

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

Knowledge Management - Article Summary Historical

Description

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

Business Questions

This subject area can answer the following business questions:

- How do Knowledge managers view information on article historical metrics?
- How are articles are ranked in popularity?
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 3

Subject Areas

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

Job Roles

The following job roles secure access to this subject area:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to this subject area:

- Knowledge Management Transaction Analysis Duty

Primary Navigation

Navigator > Knowledge Management > Authoring

Time Reporting

This subject area reports historical data.

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

Transactional Grain

Article Latest Version

Special Considerations

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

Knowledge Management - Article User Group Real Time

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

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

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

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

- Knowledge Analyst
- Knowledge Manager

Duty Roles
The following duty roles secure access to this subject area:

- Knowledge Management Transaction Analysis Duty

Primary Navigation
Navigator > Knowledge Management > Authoring

Time Reporting
Yes
Time dimension is linked to NA.

Transactional Grain
Article Version - User Group

Special Considerations
Employees must be assigned the Resource role to be visible in reports. This subject area is structured as many-to one, so you open your core subject area (for example, Article Real Time), and then add this subject area.
Marketing - CRM Leads

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

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

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

- How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last 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?
- 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?
- What are the sources of the Leads created in the current quarter?
- How many Leads were rejected in the last quarter and what were the reason for those?

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

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation
Navigator > Sales > Leads

Time Reporting
Yes

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

Transactional Grain

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

None.

Marketing - CRM Leads and Opportunities Real Time

Description

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

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

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Corporate Marketing Manager
- Marketing Analyst
- Marketing Manager
- Marketing Operations Manager
- Marketing VP
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Leads

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

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

Special Considerations

None.

OTBI Performance Real Time

Description

Analyze OTBI analysis and dashboard usage and performance, including logical and physical database SQL, execution time, and errors. View the last six months of OTBI usage and performance trends, commonly used subject areas, and
Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Application Implementation Consultant
- IT Security Manager

Duty Roles

The following duty roles secure access to this subject area:

- OTBI Performance Transactional Analysis Duty

Primary Navigation

Not available

Time Reporting

This subject area supports six-month usage history data.

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

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

Special Considerations

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

OTBI Usage Real Time

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Application Implementation Consultant
- IT Security Manager
Duty Roles

The following duty roles secure access to this subject area:

- OTBI Usage Transactional Analysis Duty

Primary Navigation

Not available

Time Reporting

This subject area supports six-month usage history data. Time dimension is linked to "Time". "Report Start Date".

Transactional Grain

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

Special Considerations

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

Partners - CRM Leads and Opportunities Real Time

Description

This subject area provides information on the leads and opportunities as related to partners. Contact and resource refers to the primary contact and primary resources.

Business Questions

This subject area can answer the following business questions:

- What is the number of leads by partners for a specific product group?
- What are the open Opportunities associated to a given Partner?
- What is the potential revenue of leads by partners?
The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Partner Management > Partners

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at multiple grains

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

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

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

Special Considerations
By default, the 'implicit' fact table for this subject area is the Lead Fact. This means that in the absence of any metric, a report would return the data 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 revenue generated by Partners per Customer?
- What is the average deal size by Product groups?
- What is the quarterly revenue trend for a specific product/product group by partner?
- 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 Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator

Duty Roles
The following duty roles secure access to this subject area:

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

**Primary Navigation**

Navigator > Partner Management > Partners

**Time Reporting**

Yes

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

**Transactional Grain**

This subject area returns the data at multiple grains

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

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

**Special Considerations**

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

**Partners - CRM Partner Assessments**

**Description**

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

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

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

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Partner Management > Partners

Time Reporting

Yes

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

Transactional Grain
This subject area returns the data at multiple grains

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

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

Special Considerations

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

Partners - CRM Partner Classification

Description

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

Business Questions

This subject area can answer the following business questions:

- 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 Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Partner Management > Partners

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

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

Special Considerations

None.

Partners - CRM Partner Contact

Description

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

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

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

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

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Partner Management > Partners

Time Reporting

No

Time dimension is linked to NA.

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

Special Considerations
None.

Partners - CRM Partner Overview

Description
This subject area provides information partners.
Partner resource dimension refers to the primary resource on partners and contact is the primary contact of the partner.

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

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

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

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

Duty Roles
The following duty roles secure access to this subject area:

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

Primary Navigation
Navigator > Partner Management > Partners

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

Transactional Grain
This subject area returns the data at multiple grains
a) Partner Facts: Provides information at the grain of a Partner
b) Partner Pipeline Detail Facts: Provides information at the grain of a Partner Opportunity Revenue Line
c) Partner Pipeline Facts: Provides information at thr grain of a Partner Opportunity
d) Service Facts: Provides information at the grain of a Service Request

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

Partners - CRM Partner Program Benefits

Description
This subject area provides information related to Partner Program Benefits.

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

Business Questions
No applicable business questions

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Partners

Time Reporting

There is no time dimension associated to this subject area.

Time dimension is linked to No Anchoring Date.

Transactional Grain

Partner Program

Special Considerations

None.
Partners - CRM Partner Resource

Description

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

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

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

Business Questions

This subject area can answer the following business questions:

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

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 3
Subject Areas

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

Primary Navigation
Navigator > Partner Management > Partners

Time Reporting
No
Time dimension is linked to NA.

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

Special Considerations
None.

Partners - CRM Partner Territory

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

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

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

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

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Partner Management > Partners

Time Reporting

No

Time dimension is linked to NA.

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

Special Considerations

None.

Partners - CRM Program Enrollments

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles
The following duty roles secure access to this subject area:

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

Primary Navigation
Navigator > Partner Management > Enrollments

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

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

Special Considerations
None.

Partners - CRM Programs

Description
This subject area provides information on the programs.

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

- How many Programs were created in the last quarter?
- How many Programs are owned by the team with their expiration date?
The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Partner Management > Programs

Time Reporting

Yes

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

Transactional Grain

This subject area returns the data at the 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:

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

Job Roles

The following job roles secure access to this subject area:

- Accounts Receivable Manager
- Accounts Receivable Specialist
- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Account

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

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

Special Considerations

None.

Sales - CRM All Contact Contact Point

Description

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

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

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

**Job Roles**

The following job roles secure access to this subject area:

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

**Duty Roles**

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
Primary Navigation
Navigator > Sales > Contacts

Time Reporting
None
Time dimension is linked to n/a.

Transactional Grain
Contact Point

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

Sales - CRM All Contacts Addresses

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

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

- What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
- What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

- What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation
Navigator > Sales > Contacts

Time Reporting
No
This subject area has no anchoring date.

**Transactional Grain**

Contact Address

**Special Considerations**

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

**Sales - CRM Asset**

**Description**

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

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

**Business Questions**

This subject area can answer the following business questions:

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

**Job Roles**

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Subject Areas

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Assets

Time Reporting

Yes

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

Transactional Grain

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

Special Considerations

None.
Sales - CRM Asset Contact

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

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

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

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

- Who are all the Contacts assigned to the Assets?

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

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

Duty Roles
The following duty roles secure access to this subject area:

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

Primary Navigation
Navigator > Sales > Assets

Time Reporting
No
Time dimension is linked to NA.

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

Special Considerations
The Sales - CRM Assets Contact subject area is for assets that are tied to a company and the contacts are contacts of the company. To view assets for a person customer, you need to use the Sales - CRM Asset subject area, and then use the Name attribute from the Customer folder to display the contact name.

Sales - CRM Asset Resource

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

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

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

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

- Who are all the resources assigned to the Assets?

### Job Roles

The following job roles secure access to this subject area:

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

### Duty Roles

The following duty roles secure access to this subject area:

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

### Primary Navigation

Navigator > Sales > Assets
Time Reporting
No
Time dimension is linked to NA.

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

Special Considerations
None.

Sales - CRM Business Plan

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

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

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

Job Roles
No applicable job roles

Duty Roles
No applicable duty roles

Primary Navigation
Navigator > Business Plans
Time Reporting

Yes

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

Transactional Grain

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

For analytics where no fact is selected, the implicit fact used is: # of Business Plans Objectives.

Special Considerations

For analytics where no fact is select, the implicit fact used is: # of Business Plans Objectives. If you want to retrieve only the Business Plans level of information, then you must use the # of Business Plans fact in the analytic.

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 objectives that have not met the target value set?
- What are the target v/s actual number of the split objectives?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 3
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 > Partner Management > Partners

Time Reporting

Yes

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

Transactional Grain

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

Special Considerations

None.
Sales - CRM Campaign Members

Description

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

Customer dimension is the Contact's primary customer.

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Campaign

Time Reporting

Yes

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

Transactional Grain

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

Special Considerations

None.

Sales - CRM Campaign Opportunity

Description

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

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

This subject area can answer the following business questions:

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

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
Primary Navigation
Navigator > Sales > Campaign

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

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

Special Considerations
None.

Sales - CRM Contact Note

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

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

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

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

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

• Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
Client Portal Administrator

Channel Sales Director

Channel Sales Manager

Partner Administrator

Partner Sales Manager

Partner Sales Representative

Sales Administrator

Sales Manager

Sales Representative

Sales Restricted User

Sales VP

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Contacts

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

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

Special Considerations

None.
Sales - CRM Contact Relationship

Description

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

Business Questions

This subject area can answer the following business questions:

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

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty

Primary Navigation
Navigator > Sales > Account

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

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

Special Considerations
None.

Sales - CRM Contact Resource

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

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

• What are the Resources are associated to this contact?

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

• Channel Account Manager
• Channel Administrator
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

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

Duty Roles

The following duty roles secure access to this subject area:

• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty

Primary Navigation

Navigator > Sales > Contacts

Time Reporting

Yes

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

Transactional Grain

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

Special Considerations

None.
Sales - CRM Contacts

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 3

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 > Contacts

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

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

Special Considerations
None.

Sales - CRM Customer Classification

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

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

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

- How are the customers classified?

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

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Accounts

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

This subject area returns the data at the grain of a customer-classification.
Special Considerations
None.

Sales - CRM Customer Note

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

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

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

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

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

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

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Accounts

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

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

Special Considerations

None.

Sales - CRM Customer Overview

Description

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

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

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

- What are my best performing product lines by customer geographies?
- 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?
- How actively (# of Activities) are the Sales reps engaged with customers?
- What are my most active accounts? Who owns them and where are these located?
- What are the top ten accounts by revenue in the last quarter?
- For given set of Customers, what percentage of my revenue is exposed to competition?

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
Primary Navigation
Navigator > Sales > Account

Time Reporting
Yes

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

Transactional Grain
This subject area returns the data at multiple grains

a) Activity Facts: Provides information at the grain of Customer Activity
b) Lead Fact: Provides information at the grain of Customer Lead
c) Pipeline Detail Fact: Provides information at the grain of Customer - Opportunity Revenue line
d) Pipeline Fact: Provides information at the grain of Customer-Opportunity
e) Sales Account Fact: Provides information at the grain of Sales Account
f) Sales Cycle Fact: Provides information at the grain of Customer-Opportunity
g) Win Loss Fact: Provides information at the grain of Customer-Opportunity

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

Sales - CRM Customers

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

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

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
Primary Navigation
Navigator > Sales > Account

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

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

Special Considerations
None.

Sales - CRM Customers and Contacts Real Time

Description
This subject area provides information on the Customer and all of the contacts associated to it.
The Contact dimension here refers to the Primary and Non-Primary contacts associated with a customer.
This subject area can be combined with any other subject area that has Customer or Contact as a common dimension.

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

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

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

- Channel Account Manager
- Channel Administrator
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 3
Subject Areas

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Accounts

Time Reporting

Yes

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

Transactional Grain

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

Special Considerations
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?
- 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?
- What are all the Opportunities created as a result of Deal closure by a particular resource/team?

Job Roles

The following job roles secure access to this subject area:

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

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales - Deal Registrations

Time Reporting

Yes

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

Transactional Grain

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

Special Considerations

None.

Sales - CRM Deal Registration Product

Description

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

Business Questions

This subject area can answer the following business questions:

- What are the 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?
Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales - Deal Registrations
Time Reporting
Yes

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

Transactional Grain

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

Special Considerations
None.

Sales - CRM Forecasting

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 3

Subject Areas

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Forecasts

Time Reporting

Yes

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

Transactional Grain

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

Special Considerations

None.
Sales - CRM Forecasting and Pipeline Revenue Real Time

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles
The following duty roles secure access to this subject area:

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

Primary Navigation
Navigator > Sales > Forecasts

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

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

Special Considerations
None.

Sales - CRM Historical Forecasting

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

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

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

- What is the channel performance vs channel forecast?
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

• 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?

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty

Primary Navigation

Navigator > Sales > Forecasts
Time Reporting
Yes
Time dimension is linked to "Sales - CRM Pipeline"."Opportunity"."Created Date".

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

Special Considerations
None.

Sales - CRM Historical Pipeline

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

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

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

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

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

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

When you are reporting on the historical pipeline, historical opportunities that have been deleted from the system at any point will not be returned in the report result.

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

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
Primary Navigation
Navigator > Sales - Opportunities

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

Transactional Grain
This subject area returns the data at multiple grains
a) Historical Pipeline Facts: Provides information at the grain of an Opportunity
b) Historical Pipeline Details Facts: Provides information at the grain of an Opportunity Revenue Line

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

Note that historical opportunities that have been deleted will not be returned in any reports generated.

Sales - CRM Lead Assessments

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

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

**Business Questions**

This subject area can answer the following business questions:

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

**Job Roles**

The following job roles secure access to this subject area:

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

**Duty Roles**

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
Primary Navigation
Navigator > Sales > Leads

Time Reporting
Yes
Time dimension is linked to Sales - CRM Lead Assessment."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 Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Leads

Time Reporting

No

Time dimension is linked to NA.
Transactional Grain

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

Special Considerations

None.

Sales - CRM Lead Product

Description

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

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Leads

Time Reporting

Yes

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

Transactional Grain

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

Special Considerations

None.

Sales - CRM Lead Resource

Description

This subject area provides information on one or more resources associated to the lead.
Employee/Resource dimension refers to the primary and non primary resources associated to the lead.

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

**Business Questions**

This subject area can answer the following business questions:

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

**Job Roles**

The following job roles secure access to this subject area:

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

**Duty Roles**

The following duty roles secure access to this subject area:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

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

Primary Navigation
Navigator > Sales > Leads

Time Reporting
No
Time dimension is linked to NA.

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

Special Considerations
None.

Sales - CRM Lead Territory

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

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

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

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

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

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

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Leads

Time Reporting

No

Time dimension is linked to NA.
Transactional Grain

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

Special Considerations

None.

Sales - CRM MDF Budget

Description

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

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 3

Subject Areas

- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Partner Management > MDF

Time Reporting

Yes

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

Transactional Grain

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

Special Considerations

None.

Sales - CRM MDF Claim

Description

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

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

This subject area can answer the following business questions:

- What are total number of Claims in the current quarter?
- 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 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 Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
Primary Navigation
Navigator > Partner Management > MDF

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

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

Special Considerations
None.

Sales - CRM MDF Claim Settlement

Description
This subject area provides information on the MDF Claim Settlements.
This subject area can be combined with any other subject area that has MDF Claim dimension.

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

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

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

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Subject Areas

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Partner Management > MDF

Time Reporting

Yes

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

Transactional Grain

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

Special Considerations

None.
Sales - CRM MDF Request

Description

This subject area provides information on the MDF Requests.

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

Business Questions

No applicable business questions

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
Oracle CX Sales and B2B Service

Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty

Primary Navigation
Navigator > Partner Management > MDF

Time Reporting
Yes

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

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

Special Considerations
None.

Sales - CRM Object Activity

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

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

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

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

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

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

Job Roles

No applicable job roles

Duty Roles

No applicable duty roles

Primary Navigation

Navigator > Manage Users

Time Reporting

Yes

Time dimension is linked to Object activity date.

Transactional Grain

Object Activity Date / Object / Channel / User

Special Considerations

1. Considering the sensitivity of the data, access to this subject area is restricted to the BI duty role "BI User System SA Access".
2. This subject area captures user activity data only when ESS job Refresh BI Reports Audit Data for User Adoption Reporting is run.
3. Data retention period is configurable when submitting ESS jobs. Default data retention is 13 months.
4. Object creates (inserts) are available by channel (web/mobile/email).
5. Object updates are available for the mobile and email channels. Object updates for the web channel is not yet offered.
6. Proxy is not supported for this subject area.
7. This subject area supports negative reporting at the resource and time level. This allows reporting on which users are not using the system and when the system is not being used.
8. This subject area shows activities for all Time Periods, based on the Employee dimension, to support reporting on Time periods with or without activity. For this reason, if a custom report is built which includes a Time Period at either Year or Month, the report must be filtered by a specific time period. Without such a filter the report will show results for the complete 100 years in the Time dimension.
9. For mail (Microsoft 365) and mobile applications, if reports are run on a given day, data from that day will not show until a period of 24 hours has passed. Running the scheduled process 'Refresh BI Reports Audit Data for User Adoption Reporting' will not change this behavior.
10. For best performance it is recommended to:
   a. Add a time filter for a specific year or month. Time filters should not be longer than one year.
   b. Add a Resource filter, such as Region.
   c. Try to break larger reports into smaller reports.
   d. Filter # of Active Days fact > 0 to report on days with activity, unless negative reporting is the requirement.
Sales - CRM Opportunities and Products Real Time

Description
This subject area provides information on all the Opportunities created in the system. The Contact and Employee dimension in this subject area refers to the Primary Contact and Primary Employee respectively. This subject area can be combined with any other subject areas that have the Opportunity dimension when the results are needed at the level of opportunity grain.

The subject area also provides reporting on Renewals.

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

- What is the open/closed revenue for each of the product groups in the selected geography?
- What is the revenue lost to competition for a specific product/product group?
- Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
- How do wins and losses trend quarterly for a specific product line?
- What products are often lost to key competitors? Is there a pattern?
- What are the top ten products by revenue during the past quarter/year?

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

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

The following duty roles secure access to this subject area:

• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty

Primary Navigation
Navigator > Sales - Opportunities

Time Reporting
Yes

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

Transactional Grain

This subject area returns the data at multiple grains

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

Special Considerations

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

Sales - CRM Opportunity Assessments

Description
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 3

Subject Areas

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

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

Business Questions

This subject area can answer the following business questions:

• What are the responses for different Opportunity for an Assessment submitted?

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
Primary Navigation
Navigator > Sales > Opportunities

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

Transactional Grain
This subject area returns the data at multiple grains
a) Opportunity Assessment Facts: Provides information at the grain of an 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?
The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Opportunities

Time Reporting

No

Time dimension is linked to NA.
Transactional Grain

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

Special Considerations

None.

Sales - CRM Opportunity Contact

Description

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

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

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

Business Questions

This subject area can answer the following business questions:

- 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 Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
Subject Areas

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Opportunities

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

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

Special Considerations

None.

Sales - CRM Opportunity Note

Description
This subject area provides information on Notes associated to an Opportunity.

Use this subject area to report Opportunity Note information such as Note text, author, Created by etc.

Business Questions

This subject area can answer the following business questions:

- What is the opportunity information captured in the note to an opportunity?

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
Primary Navigation
Navigator > Opportunities

Time Reporting
There is no time dimension associated to this subject area.
Time dimension is linked to No Anchoring Date.

Transactional Grain
Opportunity

Special Considerations
None.

Sales - CRM Opportunity Partner

Description
This subject area provides information on all the partners that are associated to an opportunity. Partner here refers to both primary and non primary partners associated to an opportunity.

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

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

• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?

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

• Channel Account Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 3

Subject Areas

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

**Duty Roles**

The following duty roles secure access to this subject area:

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

**Primary Navigation**

Navigator > Sales > Opportunities

**Time Reporting**

No

Time dimension is linked to NA.

**Transactional Grain**

This subject area returns the data at the grain of Opportunity-Partner.
Special Considerations

None.

Sales - CRM Opportunity Resource

Description

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

Employee/Resource here refers to both primary and non primary resources associated to an opportunity.

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

Business Questions

This subject area can answer the following business questions:

- 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 Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Opportunities

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

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

Special Considerations

None.

Sales - CRM Opportunity Sales Stage Snapshot

Description

This subject area provides information on the Opportunity Sales Stage historical data.

Any given Opportunity goes through multiple stages before it is marked as closed in the system. This subject area provides historical data pertaining to the Opportunity sales stages to provide more information on how an Opportunity evolved over time.
Business Questions

This subject area can answer the following business questions:

- How did the Opportunity evolve over time?
- How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
- What is the average time the Opportunity is in a particular sales stage?

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
Primary Navigation
Navigator > Sales > Opportunities

Time Reporting
Yes
Time dimension is linked to NA.

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

Special Considerations
In order to use this subject area, you must have run the required “ESS jobs” in Oracle Sales Cloud so that transaction data has been snapshot and stored with your required frequency.

Sales - CRM Opportunity Territory

Description
This subject area provides information on all the territories associated to an opportunity.

Territory here refers to both primary and non primary resources associated to an opportunity.

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

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

• How many Territories are assigned to an Opportunity?
• What are all the Territories assigned to Opportunities?

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

• Channel Account Manager
• Channel Administrator
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 3

Subject Areas

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Opportunities

Time Reporting

No

Time dimension is linked to NA.

Transactional Grain

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

Special Considerations
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:

- What are the SIC codes associated with a Partner, and with all associated Partners?
- What are the total number of Relationships between two Partners?
- Does this Partner have subsidiaries?
- What are the partner I have from this Partner, including all subsidiaries?

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

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

Duty Roles
The following duty roles secure access to this subject area:

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

Primary Navigation
Navigator > Partner Management > Partners

Time Reporting
No

Time dimension is linked to NA.

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

Special Considerations
None.

Sales - CRM Pipeline

Description
This subject area provides information on all the opportunities created in the system. You can also report on Renewals with this subject area.

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:

- Are the sales reps moving their opportunities fast enough?
- Are there any up sell/cross sell opportunities?
Chapter 3

Subject Areas

Oracle CX Sales and B2B Service

Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
Primary Navigation
Navigator > Sales - Opportunities

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

Transactional Grain
This subject area returns the data at multiple grains
a) Activity Facts: Provides information at the grain of an Opportunity
b) Lead Facts: Provides information at the grain of an Opportunity Revenue Line
c) Pipeline Fact: Provides information at the grain of an Opportunity
d) Pipeline Detail Fact: Provides information at the grain of an Opportunity Revenue line
e) Resource Quota Fact:
f) Sales Cycle Fact: Provides information at the grain of an Opportunity
g) Territory Quota Fact:
h) Win Loss Facts: Provides information at the grain of an Opportunity

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

Sales - CRM Primary Contact Addresses

Description
This subject area is designed to support reporting of different addresses associated with primary contacts. For cross subject area queries, this subject area can be joined with other subject areas where the contact dimension points to the primary contact.

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

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
Primary Navigation
Navigator > Sales > Contacts

Time Reporting
No
This subject area has no anchoring date.

Transactional Grain
Contact Address

Special Considerations
1. This subject area supports address information for primary contact only. Address information for all contacts, including both primary contact and non-primary contacts, is supported by separate subject area Sales - CRM All Contacts Addresses. 2. Separate subject areas exist to report on contact point information such as email address and phone number. These subject areas are “Sales - CRM Primary Contact Contact Point” and “Sales - CRM All Contacts Contact Point”.

Sales - CRM Primary Contact Contact Point

Description
This Subject Area is designed to support reporting of all contact point information (i.e. email's, phone numbers, URL) only for primary contacts. For cross subject area queries, this Subject Area can be joined with other subject areas where the contact dimension points to the primary contact.

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

- What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
- What is the contact point information of the primary contact for all active opportunities in the current quarter?
- What is the contact point information of the primary contact for accounts where I’m the owner or on the sales team?

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

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Contacts

Time Reporting

No

Time dimension is linked to n/a.

Transactional Grain
Special Considerations

1. This subject area supports contact point information for primary contact only. Contact point information for all contacts, including both primary contact and non-primary contacts, is supported by separate subject area Sales - CRM All Contacts Contact Point. 2. Contact points supported in this subject area do not include physical address. Other contact points are supported however, such as email address, phone number and URL.

Sales - CRM Quota Management

Description

This subject area provides information on all the resource and territory quotas.

Business Questions

This subject area can answer the following business questions:

- What 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?
- Which Territories have exceeded their Quotes in the current Quarter?
- 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 Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Quotas

Time Reporting

Yes

Time dimension is linked to "Sales - CRM Quota Management". "Quota Plan"."Creation Date".

Transactional Grain

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

Special Considerations

None.

Sales - CRM Quote Lines

Description

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

Business Questions

This subject area can answer the following business questions:

- What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
- What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
- What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 3

Subject Areas

- Sales Managerial Transaction Analysis Duty
- Sales Operational Transaction Analysis Duty
- Sales Transaction Analysis Duty

Primary Navigation

Navigator > Reports and Analytics

Time Reporting

This subject area reports historical data.

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

Transactional Grain

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

Special Considerations

The subject area requires the FBI_USER_SYSTEM_USAGE_TRANSACTIONAL_DUTY duty role for access.

Sales - CRM Quotes

Description

This subject area provides information on quotes.

This subject area can help you determine from which opportunities a quote is created, as well as how many times a quote is revised, and the associated revenue.

This subject area can be combined with any other subject area that has the Opportunity dimension, when the data is needed at the opportunity Level.

Business Questions

This subject area can answer the following business questions:

- Against how many Opportunities, were the Quotes submitted in this month?
- What is the total Quotes revenue for the current month?
- How many times a Quote is revised before it gets approved?
- Who has submitted the highest number of Quotes in the current month?
Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Quotes

Time Reporting

Yes
Time dimension is linked to "Quotes Creation Date"."Date".

**Transactional Grain**

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

**Special Considerations**

None.

**Sales - CRM Resource**

**Description**

This subject area provides information on all the available resources.

**Business Questions**

This subject area can answer the following business questions:

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

Duty Roles

The following duty roles secure access to this subject area:

• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty

Primary Navigation

Navigator > Resource

Time Reporting

Yes

Time dimension is linked to "Sales - CRM Resource"."Hire Date"."Date" "Sales - CRM Resource"."Resource Created Date"."Date".

Transactional Grain

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

Special Considerations

None.

Sales - CRM Resource System Usage

Description
This subject area provides data for reporting on CRM resource activity (a resource is a person or user).

Use this subject area to report on resource activity by channel, resource activity in time periods, and time periods with no resource activity.

As of 21 A, the Sales - CRM Object Activity and Sales - CRM Resource System Usage subject areas now support the latest CX Sales Mobile application in the mobile channel. The mobile channel now provides reporting for all versions of the CX Sales Mobile application.

With support for User Adoption reporting available in all versions of the CX Sales Mobile application, your organization's user adoption metrics will be accurate as your organization transitions to the latest CX Sales Mobile application.

For mail (Microsoft 365) and mobile applications, if reports are run on a given day, data from that day will not show until a period of 24 hours has passed. Running the scheduled process 'Refresh BI Reports Audit Data for User Adoption Reporting' will not change this behavior.

### Business Questions

This subject area can answer the following business questions:

- Which department has the highest number of active resources?
- Who are the resources who have not logged in the system in the last week?
- Who are the top 10 active resources of the system?
- How many days was a resource active by channel?
- Resources of which job title are most active in the system?
- How is the resource activity split across channels (web/mobile/email)?
- Which region has the highest number of inactive resources?
- Who are the top 10 active and bottom 10 inactive employees from a user adoption perspective?

### Job Roles

No applicable job roles

### Duty Roles

No applicable duty roles

### Primary Navigation

Navigator > Manage Users

### Time Reporting

This subject area supports the reporting of CRM user activity in the system over a period of time. Time dimension is linked to CRM user login date.
Time dimension is linked to NA.

**Transactional Grain**

Login Date / Channel / User

**Special Considerations**

1. Considering the sensitivity of the data, access to this subject area is restricted to the BI duty role BI User System SA Access. 2. The system tracks User activity data only when the profile option FND_TRACK_USER_ACTIVITY is enabled and ESS job Refresh BI Reports Audit Data for User Adoption Reporting is run. 3. To report by resource hierarchy, see the following post in Cloud Customer Connect, "System Usage By Resource Hierarchy", https://cloudcustomerconnect.oracle.com/posts/177c03f749 4. Supports negative reporting at the resource and time level. This allows reporting on which resources are not using the system and when the system is not being used. 5. This subject area shows activities for all Time Periods, based on the Employee dimension, to support reporting on Time periods with or without activities. For this reason, if a custom report is built which includes a Time Period at either Year or Month, the report must be filtered by a specific time period. Without such a filter, the report will show results for the complete 100 years in the Time dimension. 6. For the best performance, it is recommended to: a. Add a time Filter for a specific year or month. Time filters should not be longer than one year. b. Add a Resource filter, such as Region. c. Try to break larger reports into smaller reports. d. Filter # of Active Days fact > 0 to report on days with activity, unless negative reporting is the requirement. 7. For mail (Microsoft 365) and mobile applications, if reports are run on a given day, data from that day will not show until a period of 24 hours has passed. Running the scheduled process ‘Refresh BI Reports Audit Data for User Adoption Reporting' will not change this behavior.

**Sales - CRM Resource Territory**

**Description**

This subject area provides information on all the territories that are associated to an employee/resource.

Territory here refers to both primary and non primary resources associated to an employee.

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

**Business Questions**

This subject area can answer the following business questions:

- *How many territories are assigned to a Resource/Employee?*
- *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 Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation
Navigator > Resource

Time Reporting
No

Time dimension is linked to NA.

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

Special Considerations

None.

Sales - CRM Sales Account Assessments

Description

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

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Accounts

Time Reporting

Yes

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

Transactional Grain

This subject area returns the data at multiple grains

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

Special Considerations

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

Sales - CRM Sales Account Resource

Description
This subject area provides information on a sales account and the role that each resource plays.

The Employee/Resource dimension refers to both primary and non primary resources associated to an Account.

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

**Business Questions**

This subject area can answer the following business questions:

- On which sales accounts is a given sales representative a member of the account team?
- What are the sales accounts owned by the Sales team?
- What are the sales accounts that a given Sales representative owns?
- How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)

**Job Roles**

The following job roles secure access to this subject area:

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

**Duty Roles**

The following duty roles secure access to this subject area:

- Partner Channel Administrative Transaction Analysis Duty
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 3

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 > Accounts

Time Reporting
No
Time dimension is linked to NA.

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

Special Considerations
None.

Sales - CRM Sales Account Territory

Description
This subject area provides information on the Territories associated to an Account.

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

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

- What are the Accounts under the sales team, by territory?
- What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?
- Do the sales territories need rebalancing?
Job Roles

The following job roles secure access to this subject area:

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Accounts

Time Reporting

No

Time dimension is linked to NA.
Transactional Grain

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

Special Considerations

None.

Sales - CRM Territory Resource

Description

This subject area provides information on all the resources associated to a territory.

Employee/Resource dimension in this subject area refers to both primary and non primary resources assigned to a territory.

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Subject Areas

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Sales > Territories

Time Reporting

Yes

Time dimension is linked to Sales - CRM Sales CRM Territory Resource."Employee"."Hire Date".

Transactional Grain

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

Special Considerations

None.

Security - Audit Real Time

Description
Provides real-time information on audit details related to security. For example, when a custom role was created, when roles were assigned to specific users, or when roles were given specific function or data privileges.

**Business Questions**

This subject area can answer the following business questions:

- What are all the data security privileges that a specific user added?
- Which roles were added with a specific functional security policy, and who added them?

**Job Roles**

The following job roles secure access to this subject area:

- IT Security Manager

**Duty Roles**

The following duty roles secure access to this subject area:

- Security Transaction Analysis Duty

**Primary Navigation**

Tools > Security Console

**Time Reporting**

This subject area does not support history data.

**Transactional Grain**

Not applicable.

**Special Considerations**

This subject area can't be used to create a cross-subject area analysis. Don’t mix data from different folders within this subject area either. For example, keep data from the Data Security Policy Audit folder separate from the Instance Set Audit folder. If you need to combine data from different folders, use a union operation or create a report instead of an analysis.
Security - Roles and Privileges Real Time

Description

Provides real-time information about the security setup in the application. This subject area is independent of the pillar and can be used to report on roles and details across pillars like HCM, ERP, SCM and so on.

Use this subject area to report on role categories, roles, functional security policies, data security policies, and the users assigned to the roles.

You can report on the correlation between the objects like the roles that are directly assigned to another role, the roles that are inherited by the virtue of the directly assigned roles, or the functional and data security policies that are directly assigned to the roles.

For a given user, all the roles that have been assigned can also be reported.

Business Questions

This subject area can answer the following business questions:

- Why am I not able to view certain subject areas with my login credentials?
- Can I view and edit a particular page? If yes, which functional security policy do I need to provide to a user who needs similar access?
- I have not added a specific role to a user, but the user seems to have this job role. Can I trace how has this been inherited by the user?
- Which data security policy would provide access to the data I need to see?

Job Roles

The following job roles secure access to this subject area:

- IT Security Manager

Duty Roles

The following duty roles secure access to this subject area:

- Security Transaction Analysis Duty

Primary Navigation

Tools > Security Console
Time Reporting
This subject area does not support history data.

Transactional Grain
Not applicable.

Special Considerations
This subject area is used to report on users, functional security policies, and data security policies all in the correlation of roles. For a role, you can report on functional security policies, or data security policies, or users. If you try to combine all the security objects in a single report, it displays an error message. This subject area can't be used to create a cross subject area report.

Service - CRM Customer Coverage Real Time

Description
Provides the ability to report on the detail of service request coverage. Working from date ranges, this subject area is suitable for cross-subject-area queries to provide customer level detail.

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

• How many new coverages begin in the ensuing month?
• Are we equipped to service the increase in coverages?
• To what extent has the number of customer coverages increased between two given dates?

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

• Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Service > Service Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to Service - CRM Customer Coverage Real Time."Customer Coverage"."Start Date".

Transactional Grain

Coverage
Special Considerations

None.

Service - CRM Inbound Messages Real Time

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

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

The following duty roles secure access to this subject area:

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

Primary Navigation

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

Time Reporting

This subject area reports historical data.

Time dimension is linked to Service - CRM Inbound Messages Real Time."Inbound Message"."Creation Date".

Transactional Grain

Inbound Message

Special Considerations

None.

Service - CRM Service Queue Resources Real Time

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles
The following duty roles secure access to this subject area:

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

Primary Navigation
Navigator > Service > Queues

Time Reporting
This subject area doesn’t report historical data.
This subject area has no anchoring date.

Transactional Grain
Service Queue and Resource

Special Considerations
Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Refresh SVC_BI_QUEUE_RESOURCES table 2. Reporting Hierarchy Generation

Service - CRM Service Request Action Plan Actions Real Time

Description
Enables an analysis that helps customer service managers to obtain a complete picture of action plan enforcement of company policies and procedures. Agents can monitor their own performance regarding action plan completions and delays. Action plan information captures compliance against a predefined set of actions, and analytics highlights metrics around open and closed action plans, delayed actions, and aging of action plans. Real-time reporting built using this subject area provides both summary and detail metrics.

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

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

Duty Roles
The following duty roles secure access to this subject area:

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

Primary Navigation
Navigator > Service > Service Requests > Service Request Details > Action Plans

Time Reporting
This subject area reports historical data.

Time dimension is linked to "Service - CRM Service Request Action Plan Actions Real Time"."Time"."Date".

Transactional Grain
Action Plan and Action

Special Considerations

Service - CRM Service Request Lifecycle

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

**Business Questions**

This subject area can answer the following business questions:

- Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
- Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
- How long did it take to assign the SR to the correct queue?
- Was the assigned agent overloaded with other work?
- Was the SR queue modified or SR resource owner modified at any point?
- Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
- Did the SR get assigned to the wrong queue/team?
- Was an SR sitting in a queue longer than the average time for all other SRs?
- Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
- How long was an SR unassigned and how long did it sit in each queue?

**Job Roles**

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Service > Service Requests

Time Reporting

This subject area reports historical data.

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

Transactional Grain

Audited change to SR

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

Service - CRM Service Request Messages Real Time

Description

Enables analysis of SR messages for service managers to understand message traffic patterns, channel usages, message processing statuses, message types, message origins and assignments, and such other aspects of messaging. Tracking of specific message types that have a bearing on customer satisfaction such as customer entry and response message types to ensure timely response or updates is another key value that can be derived from the analyses created.

Business Questions

This subject area can answer the following business questions:

- What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
- Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
- Are we responding to customer messages in a timely manner?
- Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

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

Time Reporting

This subject area reports historical data.

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

Transactional Grain
Service Request Message

Special Considerations
None.

Service - CRM Service Request Milestones Real Time

Description
Provides the ability to report on the performance of each service agent, and the means to resolve SRs and meet stated targets. A milestone is a specific target set for the resolution of the SR. The information provided in this subject area allows service managers to identify efficient agents, coach, and measure under-performance within the team. It also allows agents to effectively monitor personal performance to meet the milestone targets. Like most others, this is a real-time subject area, allowing up to the moment reporting on SR performance to milestone targets.

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

- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- Are our processes inefficient or preventing agents from meeting milestones?
- Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
- How does my team perform in meeting first response milestones versus resolution milestones?
- Are there currently service requests that have missed the target milestone and require escalation?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- What is the % of open SRs with milestones, that is, have at least one milestone?

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

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Service > Service Requests > Service Request Details > Milestone Details

Time Reporting

This subject area reports historical data.
Time dimension is linked to Service - CRM Service Request Milestones Real Time. "Time"."Date" (Note: This is the Service Request Open Date).

Transactional Grain

Service Request and Coverage Template

Special Considerations

Run the following scheduled processes as needed for initial data load and subsequent refreshes: 1. Monitor Service Request Milestones 2. Refresh Service Categories for Reporting 3. Refresh Denormalized Product Catalog Table for BI 4. Reporting Hierarchy Generation

Service - CRM Service Request Resource Resource Real Time

Description

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

Business Questions

This subject area can answer the following business questions:

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

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Service > Service Requests

Time Reporting

This subject area doesn't report historical data.

This subject area has no anchoring date.

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

**Service - CRM Service Request Tags Real Time**

**Description**
Tags help in identifying SRs with similar characteristics. A tag based analysis of SRs yields valuable insights into support health across the business. Service quality and performance can be measured for SRs with specific tags to spot exceptions, anomalies, trends and patterns. Once the problem is identified, corrective action can be initiated. As an example, if an organization mandates that agents use the tag 'churn' to identify 'at risk' customers, reports and alerts can be created to notify managers when these SR's are reopened or take longer than normal resolution times.

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

- What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
- How is tag usage across agents and resource teams? Which teams perform better than others?
- Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
- Are we seeing an issue regarding compliance rates with certain tags?
- How many SRs for product 'A' have tag 'X' or 'Y'? How many have the ‘Potential Churn’ tag?
- How many open SRs are linked to each tag?

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

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

Duty Roles
The following duty roles secure access to this subject area:

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

Primary Navigation
Navigator > Service > Service Requests

Time Reporting
This subject area reports historical data.
Time dimension is linked to Servivce Request Open Date.
Transactional Grain

Service Request and Tag

Special Considerations

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

Service - CRM Service Requests Real Time

Description

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

Business Questions

This subject area can answer the following business questions:

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

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

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

Duty Roles

The following duty roles secure access to this subject area:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
Primary Navigation
Navigator > Service > Service Requests

Time Reporting
This subject area reports historical data.

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

Transactional Grain
Service Request

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

Service - CRM Social Post Real Time

Description
Provides the ability to develop analyses around social posts created in the context of an SR. Access to the social post channel, associated SR, social post detail, and social post specific metrics supports the development of complex reporting around SR social posts in real-time.

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

- Is the Service organization effectively handling new social service requests in the appropriate timeframe?
- How many social posts came from known versus unknown contacts?

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

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

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Service > Service Requests

Time Reporting

This subject area reports historical data.

Time dimension is linked to Service - CRM Social Post Real Time."Social Post","Social Post Creation Date".

Transactional Grain

Social Post

Special Considerations
None.

Service - CRM Survey Requests Real Time

Description

Use this subject area to obtain insight into survey request activity in the context of a Service Request. Build ad hoc summary reports for a comparison of survey requests sent and SRs resolved over a chosen periodicity such as monthly or quarterly. Analyze survey response percentages against requests sent in relation to service categories, accounts, account regions, products, teams and other key business contexts. Examine request/response performance for survey templates used, to determine if any template changes are necessary.

Note: The subject area can be used for both service and employee help desk survey reporting

Business Questions

This subject area can answer the following business questions:

- How is survey request trending compared to SR resolutions during the same period?
- Are survey request frequencies meeting our norms?
- Do we need to adjust our survey template to improve response rates?
- Does seasonality impact response rates?
- How does response differ for various service teams? Do some teams obtain better response rates?
- Are survey requests being sent per plan across teams, service categories, products, account regions?
- Does the survey request activity show a declining trend?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Human Resource Help Desk Administrator
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Service > Service Requests (Note: No navigation path for survey data as the UI is on external survey tool and data is sourced via REST API)

Time Reporting

This subject area reports historical data.

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

Transactional Grain

Survey Request

Special Considerations
Survey specific data is sourced from an external survey tool of choice via REST API. SR, product, account employee, BU and other service related data are from the Oracle B2B Service application.

Service - CRM Survey Responses Real Time

Description

Once a service request is closed, a survey is sent out to the SR's primary customer contact to respond with their feedback on various aspects of the service experience such as issue resolution, timeliness and agent knowledge and responsiveness. This subject area makes it possible to build insightful reports that help obtain a summarized view of survey responses for the specific questions in a survey. The aggregated response measures serve as a barometer for Service Managers and Executives to gauge how well the team and service organization have been successful in meeting their customer expectations. A comparison of survey response measures across customer regions, products, teams, service categories and other service organizational entities helps in identifying areas for improvements.

Note: The subject area can be used for both service and employee help desk survey reporting.

Business Questions

This subject area can answer the following business questions:

- What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
- Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?
- What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?
- What are the response scores for customer where we have not met SLA's?
- Do one or more of the agents in my team need training to improve customer communication skills?
- Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
- Is our resolution performance for escalated issues worse or better than non escalated issues?
- What is the overall satisfaction levels of our customers with regards to issue resolutions?
- Which of our product lines most frequently receive suggestions for product improvements?

Job Roles

The following job roles secure access to this subject area:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 3

Subject Areas

- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Sales Administrator

Duty Roles

The following duty roles secure access to this subject area:

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

Primary Navigation

Navigator > Service > Service Requests (Note: No navigation path for survey data as the UI is on external survey tool and data is sourced via REST API)

Time Reporting

This subject area reports historical data.

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

Transactional Grain

Survey Question/Answer

Special Considerations

Survey specific data is sourced from an external survey tool of choice via REST API. SR, product, account employee, BU and other service related data are from the Oracle B2B Service application
Subscription Management - Covered Levels Real Time

Description

This subject area provides real time analysis of Subscription Covered Levels by customer, product, status and various dates. This subject area can be combined with any other subject area that has customer dimension, when results are needed at the level of a customer.

Business Questions

This subject area can answer the following business questions:

- Which customers have covered levels worth more than $50k that are expiring in 30 days?
- Which covered levels expired without renewal in the last month?
- What are all the assets covered for a particular customer?
- Which customers or coverage products deliver the most revenue?

Job Roles

The following job roles secure access to this subject area:

- Subscription Specialist

Duty Roles

The following duty roles secure access to this subject area:

- Subscription Management Transaction Analysis Duty

Primary Navigation

Navigator > Subscription Management

Time Reporting

This subject area doesn't report historical data.

Time dimension is linked to this subject area has no anchoring date.

Transactional Grain

Subscription Covered Levels
Subscription Management - Subscription Billing Real Time

Description

This subject area provides real time analysis of Subscription Bill Lines by Customer and Product. “Calendar- Prorated Billing” dimension can be used to analyze trends by monthly, quarterly or yearly rollups. This subject area can be combined with any other subject area that has customer dimension, when results are needed at the level of a customer.

Business Questions

This subject area can answer the following business questions:

- What is the discount that was provided for a particular customer or product?
- What is the projected billing for the next 6 months?
- How does the usage of a particular subscription product trend?
- What is the Net Billing for the last 6 months?

Job Roles

The following job roles secure access to this subject area:

- Subscription Specialist

Duty Roles

The following duty roles secure access to this subject area:

- Subscription Management Transaction Analysis Duty

Primary Navigation

Navigator > Subscription Management

Time Reporting

This subject area doesn’t report historical data.
Time dimension is linked to this subject area has no anchoring date.

Transactional Grain

Subscription Bill Lines

Special Considerations

None

Subscription Management - Subscription Relationships

Real Time

Description

This subject area provides real-time analysis of Subscription Amendments, Renewals, and Suspend/Resume relationships. This subject area can be used to analyze changes to MRR, TCV, Line quantities by analyzing source and target subscriptions in a relationship.

Business Questions

This subject area can answer the following business questions:

- What is the Net MRR change due to amendments?
- What is the trend of successful, outstanding, and churned renewals in the last 6 months?
- What is the MRR lost each month due to suspensions in the last 6 months?
- What is the Net MRR change due to amendments where full credit was issued?
- How much MRR was renewed each month in the last 6 months?
- Which products are most frequently upgraded to or downgraded from?

Job Roles

The following job roles secure access to this subject area:

- Subscription Specialist

Duty Roles
The following duty roles secure access to this subject area:

- Subscription Management Transaction Analysis Duty

Primary Navigation
Navigator > Subscription Management

Time Reporting
This subject area doesn't report historical data.
Time dimension is linked to This subject area has no anchoring date..

Transactional Grain
Subscription relationships

Special Considerations
None

Subscription Management - Subscriptions Real Time

Description
This subject area provides real time analysis of subscriptions by customer, product, status and various dates. This subject area can be combined with any other subject area that has customer dimension, when results are needed at the level of a customer.

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

- How many subscriptions were renewed the last quarter?
- What's the number of subscriptions by status and date range?
- What's the total contract value (TCV) in the last one year?
- What's the total MRR?
- How many subscriptions are expiring in the next quarter?
- How many subscriptions were terminated in the last year?

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

- Subscription Specialist

Duty Roles

The following duty roles secure access to this subject area:

- Subscription Management Transaction Analysis Duty

Primary Navigation

Navigator > Subscription Management

Time Reporting

This subject area doesn't report historical data.
This subject area has no anchoring date.

Transactional Grain

Subscription Products

Special Considerations

None.

User System Usage

Description

This subject area provides information on user activities.

Use this subject area to determine whether a user was active or not for a particular day, and what channel they used to access the system and when they were active.

Business Questions

This subject area can answer the following business questions:

- Who are the top 10 active users of the system?
- How is the user activity split across Channel (Web/Mobile/Mail)?
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

- Who are the users who have not logged in the system in the last week?
- Which department has the highest number of Active users?
- Users belonging to what job title are most active in the system?

Job Roles
No applicable job roles

Duty Roles
The following duty roles secure access to this subject area:

- User System Usage Transaction Analysis Duty

Primary Navigation
Navigator > Manage Users

Time Reporting
This subject area reports historical data.
Time dimension is linked to User System Usage."Time","Date".

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

Special Considerations
Date needs to be considered for computation, one can use the last assigned. This subject area uses the ESS job "Refresh BI Reports Audit Data for User Adoption Reporting" to summarize and aggregate data used for user adoption reporting.
4 Business Questions

Overview

For each business question in this chapter, links are provided for more detailed information about the subject areas, job roles, and duty roles associated with the business question.

What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?

Subject Areas

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

- Marketing - CRM Leads

Job Roles

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

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Corporate Marketing Manager
- Marketing Analyst
- Marketing Manager
- Marketing Operations Manager
- Marketing VP
How many Leads are converted in the current quarter?

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

- Marketing - CRM Leads

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

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

**Duty Roles**

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

- Marketing Administrative Transaction Analysis Duty
- Marketing Corporate Transaction Analysis Duty
- Marketing Executive Transaction Analysis Duty
- Marketing Lead Transaction Analysis Duty
- Marketing Managerial Transaction Analysis Duty
- Marketing Operational Transaction Analysis Duty
- Marketing Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
How many Leads are unassigned in the system?

Subject Areas

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

- Marketing - CRM Leads

Job Roles

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

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

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

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

What are the sources of the Leads created in the current quarter?

Subject Areas

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

- Marketing - CRM Leads

Job Roles

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

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Corporate Marketing Manager
- Marketing Analyst
- Marketing Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Marketing Operations Manager
Marketing VP
Partner Administrator
Partner Sales Manager
Partner Sales Representative
Sales Administrator
Sales Lead Qualifier
Sales Manager
Sales Representative
Sales Restricted User
Sales VP

Duty Roles

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

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

Who are the top Sales representatives by their Lead conversion ratio?

Subject Areas

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

Marketing - CRM Leads
Job Roles

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

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

Duty Roles

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

- Marketing Administrative Transaction Analysis Duty
- Marketing Corporate Transaction Analysis Duty
- Marketing Executive Transaction Analysis Duty
- Marketing Lead Transaction Analysis Duty
- Marketing Managerial Transaction Analysis Duty
- Marketing Operational Transaction Analysis Duty
- Marketing Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
How many Leads were rejected in the last quarter and what were the reason for those?

Subject Areas

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

- *Marketing - CRM Leads*

Job Roles

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

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Corporate Marketing Manager*
- *Marketing Analyst*
- *Marketing Manager*
- *Marketing Operations Manager*
- *Marketing VP*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Lead Qualifier*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*
Duty Roles
The following duty roles secure access to the data related to this business question:

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

What are the top 10 products associated to the Leads in the system?

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

- Marketing - CRM Leads

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

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
Duty Roles

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

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

Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?

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

- Marketing - CRM Leads

Job Roles

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

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

Duty Roles

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

- Marketing Administrative Transaction Analysis Duty
- Marketing Corporate Transaction Analysis Duty
- Marketing Executive Transaction Analysis Duty
- Marketing Lead Transaction Analysis Duty
- Marketing Managerial Transaction Analysis Duty
- Marketing Operational Transaction Analysis Duty
- Marketing Transaction Analysis Duty
Who is the Primary Contact and Resource assigned for a given Lead?

**Subject Areas**

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

- Marketing - CRM Leads

**Job Roles**

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

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Corporate Marketing Manager
- Marketing Analyst
- Marketing Manager
- Marketing Operations Manager
- Marketing VP
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
Duty Roles

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

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

What are the Leads that are converted into Opportunities?

Subject Areas

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

- Marketing - CRM Leads and Opportunities Real Time

Job Roles

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

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

Duty Roles

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

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

How many Leads are associated for a given Opportunity?

Subject Areas

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

• Marketing - CRM Leads and Opportunities Real Time

Job Roles

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

• Corporate Marketing Manager
How many Opportunities were created from a given Lead?

Subject Areas

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

• Marketing - CRM Leads and Opportunities Real Time
Job Roles

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

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

Duty Roles

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

- Marketing Administrative Transaction Analysis Duty
- Marketing Corporate Transaction Analysis Duty
- Marketing Executive Transaction Analysis Duty
- Marketing Lead Transaction Analysis Duty
- Marketing Managerial Transaction Analysis Duty
- Marketing Operational Transaction Analysis Duty
- Marketing Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
What are the open Opportunities associated to a given Partner?

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

- Partners - CRM Leads and Opportunities Real Time

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

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

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

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
What is the potential revenue of leads by partners?

Subject Areas

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

- Partners - CRM Leads and Opportunities Real Time

Job Roles

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

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

Duty Roles

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

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
What is the number of leads by partners for a specific product group?

Subject Areas

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

- Partners - CRM Leads and Opportunities Real Time

Job Roles

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

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

Duty Roles

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

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
What is the revenue generated by Partners per Customer?

Subject Areas

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

- **Partners - CRM Opportunities and Products Real Time**

Job Roles

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

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

Duty Roles

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

- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
- **Partner Org Transaction Analysis Duty**
- **Sales Administrative Transaction Analysis Duty**
What are the top ten Partners by Revenue during the past quarter/year?

Subject Areas

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

- Partners - CRM Opportunities and Products Real Time

Job Roles

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

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

Duty Roles

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

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
What is the average deal size by Product groups?

Subject Areas

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

- Partners - CRM Opportunities and Products Real Time

Job Roles

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

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

Duty Roles

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

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
What is the distribution of Partner Opportunities by sales stages?

Subject Areas

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

- Partners - CRM Opportunities and Products Real Time

Job Roles

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

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

Duty Roles

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

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
What is the quarterly revenue trend for a specific product/product group by partner?

Subject Areas

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

- Partners - CRM Opportunities and Products Real Time

Job Roles

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

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

Duty Roles

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

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
How are the Partners classified?

Subject Areas

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

- Partners - CRM Partner Classification

Job Roles

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

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

Duty Roles

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

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
What is the number of partners in a specific classification within a defined geographic region?

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

- *Partners - CRM Partner Classification*

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

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

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

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
What is total number of Partners assigned to a specific classification for this period?

Subject Areas

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

- Partners - CRM Partner Classification

Job Roles

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

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

Duty Roles

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

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
What are the number of Partner contacts by Partner?

Subject Areas

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

- Partners - CRM Partner Contact

Job Roles

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

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

Duty Roles

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

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
What is the number of Partner Contacts that are also resources and users?

Subject Areas

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

- **Partners - CRM Partner Contact**

Job Roles

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

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

Duty Roles

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

- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
- **Partner Org Transaction Analysis Duty**
- **Sales Administrative Transaction Analysis Duty**
How many Partners is a Contact is associated to?

Subject Areas

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

- Partners - CRM Partner Contact

Job Roles

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

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

Duty Roles

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

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
Who all is part of the Partner Resource Team for a given Partner and what is their role?

**Subject Areas**

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

- Partners - CRM Partner Resource

**Job Roles**

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

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

**Duty Roles**

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

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
How many Partners' team is a given Resource part of?

Subject Areas

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

- *Partners - CRM Partner Resource*

Job Roles

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

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

Duty Roles

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

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
What Partners are assigned to specific geographic territories?

Subject Areas

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

- Partners - CRM Partner Territory

Job Roles

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

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

Duty Roles

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

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
Subject Areas

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

- Partners - CRM Partner Territory

Job Roles

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

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

Duty Roles

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

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
Does this account have subsidiaries?

Subject Areas

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

- Sales - CRM Account Relationship

Job Roles

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

- Accounts Receivable Manager
- Accounts Receivable Specialist
- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

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

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

What are the Customers from this account, including all subsidiaries?

Subject Areas

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

- Sales - CRM Account Relationship

Job Roles

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

- Accounts Receivable Manager
- Accounts Receivable Specialist
- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Duty Roles

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

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

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

Subject Areas

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

- Sales - CRM Account Relationship

Job Roles

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

- Accounts Receivable Manager
- Accounts Receivable Specialist
- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
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
Duty Roles

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

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

How many Leads and Opportunities are Open for a given Customer in the Current quarter?

Subject Areas

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

- Sales - CRM Customer Overview
Job Roles

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

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

Duty Roles

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

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

How is the Revenue spread for a given Customer hierarchy?

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

- *Sales - CRM Customer Overview*

**Job Roles**

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

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

**Duty Roles**

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

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
How actively (# of Activities) are the Sales reps engaged with customers?

Subject Areas

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

- Sales - CRM Customer Overview

Job Roles

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

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

Duty Roles

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

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
What are my most active accounts? Who owns them and where are these located?

Subject Areas

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

- Sales - CRM Customer Overview

Job Roles

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

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

Duty Roles

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

- Partner Channel Administrative Transaction Analysis Duty
For given set of Customers, what percentage of my revenue is exposed to competition?

Subject Areas

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

- Sales - CRM Customer Overview

Job Roles

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

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

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

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

What are my best performing product lines by customer geographies?

Subject Areas

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

- Sales - CRM Customer Overview

Job Roles

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

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
How is my Revenue distributed across Customer geographies?

Subject Areas

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

- Sales - CRM Customer Overview

Job Roles

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

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 4

Business Questions

Duty Roles

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

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

What regions are my customers clustered in?

Subject Areas

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

- Sales - CRM Customers

Job Roles

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

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Business Questions

Duty Roles

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

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

Who are my teams top Customers?

Subject Areas

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

- Sales - CRM Customers

Job Roles

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

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
Duty Roles

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

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Who manages my top accounts?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Customers

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty

Who are the 'new' customers, created in the past 6 months?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Sales - CRM Customers
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are the contact - points (phone, email, address, etc.) of key contacts?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customers and Contacts Real Time*

**Job Roles**

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
What are the names of the customers that a Sales team owns? Who are the key contacts?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Customers and Contacts Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to 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 all the contacts for key customers and what are their roles?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Customers and Contacts Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
Business Questions

Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Customers and Contacts Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Are revenues getting closed in line with their forecast figures? To what extent do they deviate?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Forecasting

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
Do forecasts rely on revenues from a few customers? What is the dependency profile?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Forecasting

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
Does the forecast versus pipeline trend show a healthy picture?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Forecasting*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How to forecasts trend across periods?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Forecasting

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty

What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Sales - CRM Forecasting
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What is the relative mix of forecast revenues by the various sales channels in a specific territory?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Forecasting*

**Job Roles**

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
What were the forecast revenues for the same period, last year? How did it compare with closed revenues?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Forecasting*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
What are the Opportunity Revenue line details contributing the most to the Forecast?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Forecasting and Pipeline Revenue Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
Subject Areas

Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Do Forecast rely on Revenue from few Products?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Forecasting and Pipeline Revenue Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Is there a team or group who are over or underperforming vs forecast?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Historical Forecasting

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What forecasts have changed over time and are impacting my total quarterly revenue?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Historical Forecasting

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What forecasts have seen changes in the quantities ordered vs the quantities planned?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Historical Forecasting

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
Business Questions

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What is the channel performance vs channel forecast?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Historical Forecasting

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Are too many deals being pushed out to the subsequent fiscal quarters?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Historical Pipeline

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How are product revenues trending month over month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Historical Pipeline

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 4

Business Questions

• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty

How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Sales - CRM Historical Pipeline
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- 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
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Historical Pipeline

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
What are the higher value deals that have been moved out?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Historical Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• *Sales - CRM Historical Pipeline*

Job Roles

The following job roles secure access to the data related to this business question:

• *Channel Account Manager*
• *Channel Administrator*
• *Channel Operations Manager*
• *Channel Partner Manager*
• *Channel Partner Portal Administrator*
• *Channel Sales Director*
• *Channel Sales Manager*
• *Partner Administrator*
• *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

Who all are the Contacts associated to the Lead?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Lead Contact

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
Duty Roles

The following duty roles secure access to the data related to this business question:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How many Leads is a Contact associated to?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Lead Contact

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Are the Leads supporting products that appeal to certain customers by size of company?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Lead Product

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Are the Leads associated with certain products?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Lead Product

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
Channel Partner Portal Administrator
Channel Sales Director
Channel Sales Manager
Partner Administrator
Partner Sales Manager
Partner Sales Representative
Sales Administrator
Sales Manager
Sales Representative
Sales Restricted User
Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How many Leads are open for a given Product?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Lead Product

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Are the Approved Claims fully allocated or are the Channel partners not spending to approval?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM MDF Budget

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are my claimed vs unclaimed MDF totals?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM MDF Budget
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How many outstanding claims in the current sales period assigned to a given Channel user?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM MDF Claim

### Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

### Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
What are total number of Claims in the current quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM MDF Claim

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner 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 were the approved amounts vs the settled claim totals for the last 4 quarters?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM MDF Claim

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The 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 approved an MDF claim? What are the start and end dates of that claim?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM MDF Claim

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM MDF Claim Settlement

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Was an MDF claim rejected? What was the reason the claim was rejected?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM MDF Claim Settlement

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What was the currency conversion rate applied to a specific claim?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM MDF Claim Settlement

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Opportunities and Products Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How do wins and losses trend quarterly for a specific product line?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Opportunities and Products Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 4

Business Questions

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are the top ten products by revenue during the past quarter/year?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Opportunities and Products Real Time
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What is the open/closed revenue for each of the product groups in the selected geography?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Opportunities and Products Real Time

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
What is the revenue lost to competition for a specific product/product group?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Opportunities and Products Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
What products are often lost to key competitors? Is there a pattern?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Opportunities and Products Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
Are the sales reps moving their opportunities fast enough?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Sales - CRM Pipeline

Job Roles

The following job roles secure access to the data related to this business question:

• Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Are there any up sell/cross sell opportunities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Pipeline

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How is each member on the team performing on deal size, account coverage, and win rate?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Pipeline

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Is the sales team converting leads to opportunities fast enough?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Pipeline

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Is overall pipeline healthy enough to meet sales goals?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Pipeline

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- 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
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 4
Business Questions

• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty

What are the most likely reasons that the Opportunities are lost against our key competitors?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Sales - CRM Pipeline
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are the top 10 open opportunities? What are the target close dates and revenues for these?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Pipeline

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
What is the buying trend of our biggest customers?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Pipeline

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
What is the value trend of high value opportunities? Do they show a positive or negative trend?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Pipeline

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
Who are the top competitors and what is the revenue exposure to them?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Sales - CRM Pipeline**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**
- **Sales Manager**
- **Sales Representative**
- **Sales Restricted User**
- **Sales VP**

Duty Roles
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Sales Account Resource

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

On which sales accounts is a given sales representative a member of the account team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Sales Account Resource

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty

**What are the sales accounts owned by the Sales team?**

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

• Sales - CRM Sales Account Resource

**Job Roles**

The following job roles secure access to the data related to this business question:

• Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Partner Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are the sales accounts that a given Sales representative owns?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Sales Account Resource

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
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
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
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Sales Account Territory*

**Job Roles**

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Territory Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
Who are the resources assigned for a particular territory?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Territory Resource*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- 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 Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are the top 10 Products by Asset count?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Asset

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Asset*

**Job Roles**

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
What are the Assets that are expiring in the next quarter?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Asset

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
Duty Roles
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Who are all the Contacts assigned to the Assets?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Asset Contact

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- 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
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 4

Business Questions

- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What is the additional information updated in the Notes for a Contact?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Contact Note
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are all the contacts created in the system by Geography?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Contacts

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
Who are the Primary owners of the Contacts for contacts created in the last quarter?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Contacts

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
How many new contacts are created in the system in the current month?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Contacts

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
How are the customers classified?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Customer Classification

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What is the additional information updated in the Notes for a Customer?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Customer Note

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are the Deals submitted by the Partners in the current quarter with the Deal size?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Deal Registration

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
Sales Administrator
Sales Manager
Sales Representative
Sales Restricted User
Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

**What are all the Opportunities created as a result of Deal closure by a particular resource/team?**

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Deal Registration

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 4

Business Questions

• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty

Who are the Employees/Resource for the Deals that are submitted in the current month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Sales - CRM Deal Registration

Job Roles

The following job roles secure access to the data related to this business question:

• Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 4
Business Questions

- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are the top 10 Deals created in the current quarter by their Deal size?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Deal Registration

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty

What are the Products associated with the Deals?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Sales - CRM Deal Registration Product

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Analyst
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Operational Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are the top 10 products for all the Deals submitted in the current quarter?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

• *Sales - CRM Deal Registration Product*

Job Roles

The following job roles secure access to the data related to this business question:

• *Channel Account Manager*
• *Channel Administrator*
• *Channel Operations Manager*
• *Channel Partner Manager*
• *Channel Partner Portal Administrator*
• *Channel Sales Director*
• *Channel Sales Manager*
• *Partner Administrator*
• *Partner Sales Manager*
• *Partner Sales Representative*
• *Sales Administrator*
• *Sales Analyst*
• *Sales Manager*
• *Sales Representative*
• *Sales Restricted User*
• *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

• *Partner Channel Administrative Transaction Analysis Duty*
• *Partner Channel Transaction Analysis Duty*
• *Partner Org Transaction Analysis Duty*
• *Sales Administrative Transaction Analysis Duty*
• *Sales Executive Transaction Analysis Duty*
• *Sales Managerial Transaction Analysis Duty*
• *Sales Operational Transaction Analysis Duty*
• *Sales Transaction Analysis Duty*
How is the Deal Amount split between the products associated to the Deal Registration Lines?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Deal Registration Product*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Lead Assessments

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User

Duty Roles
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Who are the Resources assigned to the Leads created in any given time period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Lead Resource

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
Duty Roles

The following duty roles secure access to the data related to this business question:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are the Leads assigned to me/my team member?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Lead Resource

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
Duty Roles

The following duty roles secure access to the data related to this business question:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are all the Territories the Lead is part of?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Lead Territory

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 4

Business Questions

- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How many territories is the Lead part of?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Lead Territory

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 4
Business Questions

• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Lead Qualifier
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• Marketing Lead Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty

What are the responses for different Opportunity for an Assessment submitted?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Sales - CRM Opportunity Assessments
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are all the Campaigns assigned to an Opportunity?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Opportunity Campaign

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Analyst
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Operational Transaction Analysis Duty
- Sales Transaction Analysis Duty
What are all the Opportunities resulted from a Campaign?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Sales - CRM Opportunity Campaign**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**
- **Sales Analyst**
- **Sales Manager**
- **Sales Representative**
- **Sales Restricted User**
- **Sales VP**

Duty Roles

The following duty roles secure access to the data related to this business question:

- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
How many Contacts are assigned to an Opportunity?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Sales - CRM Opportunity Contact**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**
- **Sales Manager**
- **Sales Representative**
- **Sales Restricted User**
- **Sales VP**

Duty Roles
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Who are all the Contacts assigned to Opportunities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Opportunity Contact

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How many Partners are assigned to an Opportunity?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Opportunity Partner

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Analyst
- Sales Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Operational Transaction Analysis Duty
- Sales Transaction Analysis Duty

Who are all the Partners assigned to Opportunities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Opportunity Partner

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
How many Resources are assigned to an Opportunity?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Opportunity Resource

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Who are all the Resources assigned to Opportunities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Opportunity Resource

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
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*
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What is the average time the Opportunity is in a particular sales stage?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Opportunity Sales Stage Snapshot
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- **Sales - CRM Opportunity Sales Stage Snapshot**

### Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

### Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
How many Territories are assigned to an Opportunity?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Opportunity Territory

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
What are all the Territories assigned to Opportunities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Opportunity Territory

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 4
Business Questions

• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty

What are the Quotas assigned to the team and the Actuals?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Sales - CRM Quota Management

Job Roles

The following job roles secure access to the data related to this business question:

• Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What is the Territory Quota vs/ Actual?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Quota Management

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How is the Quota attainment rate for the sales team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Quota Management

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What Resources will not be able to meet the Quotas in the current quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Quota Management

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Which Territories have exceeded their Quotes in the current Quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Quota Management

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- 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
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Sales Account Assessments
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How many territories are assigned to a Resource/Employee?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Resource Territory

### Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

### Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales CRM Sales Activity Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
What are all the Territories assigned to Resources/Employees?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Resource Territory

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
What are the total number of Contact Relationships between two Contact?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Contact Relationship

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Does this Contact have subsidiaries?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Contact Relationship

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are the Resources are associated to this contact?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Contact Resource

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- 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 Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 4

Business Questions

• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty

What is the Hire date of the resources in an Organization?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Sales - CRM Resource

Job Roles

The following job roles secure access to the data related to this business question:

• Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Partner Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are the user preferences for the Users created in the system?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Resource

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

Who are the Partner resources in the system and which Partner Organization they belong to?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Resource

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
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
What are the Business plan objectives and what are their target v/s actual value?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Business Plan

Job Roles
No applicable job roles

Duty Roles
No applicable job roles

What Business plans are owned by the team?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Business Plan

Job Roles
No applicable job roles

Duty Roles
No applicable job roles
What Business plan objectives have not met the target values?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Business Plan

Job Roles

No applicable job roles

Duty Roles

No applicable job roles

How are the business plan objectives split?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Business Plan Objective Split

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are the target v/s actual number of the split objectives?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Business Plan Objective Split

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 4
Business Questions

- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are the objectives that have not met the target value set?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Business Plan Objective Split

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? submitted e.g. Partner Performance?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- **Partners - CRM Partner Assessments**

### Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator

### Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty

How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?

### Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Partner Assessments*

**Job Roles**

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*

**What are the Partners created in the system for a given time period?**

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- *Partners - CRM Partner Overview*
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty

What are the Opportunities associated for a given Partner and the revenue details of the Opportunities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Partners - CRM Partner Overview
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty

**How many Enrollments were created/submitted/expired/terminated in the last month?**

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- Partners - CRM Program Enrollments

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty

How many Enrollments are going 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 Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty

Which Program has the highest number of Enrollments?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Partners - CRM Program Enrollments

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty

What are the Programs that Partners have enrolled into?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Partners - CRM Program Enrollments

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty

How many Programs were created in the last quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Partners - CRM Programs

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
How many Programs are owned by the team with their expiration date?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Partners - CRM Programs

Job Roles

The following job roles secure access to the data related to this business question:

• Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
What are the total number of Relationships between two Partners?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Partner Relationship

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
Does this Partner have subsidiaries?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Partner Relationship

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
What are the partner I have from this Partner, including all subsidiaries?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Sales - CRM Partner Relationship**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**
- **Sales Manager**
- **Sales Representative**
- **Sales Restricted User**
- **Sales VP**
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

**What are the SIC codes associated with a Partner, and with all associated Partners?**

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Partner Relationship

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
What are all the Leads/Contacts (Campaign Members) associated to the Campaign?

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- 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 subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Campaign Members

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How many Leads are part of the Campaign?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Campaign Members

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
Business Questions

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How many Leads do not have Contact?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Campaign Members

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How many responses received for a given campaign?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Campaign Members

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How many Opportunities associated to a Campaign?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Campaign Opportunity

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty

What is the Campaign ROI (return on investment)?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Sales - CRM Campaign Opportunity

Job Roles

The following job roles secure access to the data related to this business question:

• Channel Account Manager
Against how many Opportunities, were the Quotes submitted in this month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Quotes
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Analyst
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Operational Transaction Analysis Duty
- Sales Transaction Analysis Duty

What is the total Quotes revenue for the current month?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Quotes*

**Job Roles**

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Operational Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
How many times a Quote is revised before it gets approved?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Quotes*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Analyst*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
Who has submitted the highest number of Quotes in the current month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Sales - CRM Quotes**

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Analyst
- Sales Manager
- Sales Representative
- Sales Restricted User
What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Activity Contact Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Lead Qualifier
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• Marketing Lead Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Campaign Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

How many contacts were not favored with a positive outcome with a given agent?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Activity Contact Real Time**

### Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

### Duty Roles

The following duty roles secure access to the data related to this business question:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
How many distinct customer contacts does an agent interact with through a given channel during a specific period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Activity Contact Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Customer Service Representative**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**
- **Sales Lead Qualifier**
Duty Roles

The following duty roles secure access to the data related to this business question:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What are the activity objectives for the current period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Objective Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 4

Business Questions

- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What are the latest revisions to activity objectives?

Subject Areas
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 4
Business Questions

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Objective Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
Who has completed the most activity objectives?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Objective Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What are the activity levels in specific regions?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Resource Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 4
Business Questions

• Partner Sales Representative
• Sales Administrator
• Sales Lead Qualifier
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

• Marketing Lead Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Campaign Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

What managers have teams averaging the most activities?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

• CRM - CRM Activity Resource Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty
How do the number of activities in a region and their average SR resolution rates by quarter compare?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Resource Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

447
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 often do communications cross channels to get to resolution?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Interaction Aggregate

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

How many customer interactions happen without an SR?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Interaction Aggregate

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
Across what channels do such non-SR interactions most often occur?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Interaction Aggregate**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Customer Service Representative**
- **Human Resource Help Desk Administrator**
- **Human Resource Help Desk Agent**
- **Human Resource Help Desk Manager**
- **Partner Administrator**
**Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service**

### Chapter 4

#### Business Questions

- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**
- **Sales Manager**
- **Sales Representative**
- **Sales Restricted User**
- **Sales VP**

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- **HR Help Desk Administrator Transaction Analysis Duty**
- **HR Help Desk Agent Transaction Analysis Duty**
- **HR Help Desk Manager Transaction Analysis Duty**
- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
- **Partner Org Transaction Analysis Duty**
- **Sales Administrative Transaction Analysis Duty**
- **Sales Executive Transaction Analysis Duty**
- **Sales Managerial Transaction Analysis Duty**
- **Sales Transaction Analysis Duty**
- **Service Administrative Transaction Analysis Duty**
- **Service Managerial Transaction Analysis Duty**
- **Service Transaction Analysis Duty**

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**Is my team following the norm that an SR must be opened (or updated) for every customer communication?**

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Interaction Aggregate**
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
Sales Managerial Transaction Analysis Duty
Sales Transaction Analysis Duty
Service Administrative Transaction Analysis Duty
Service Managerial Transaction Analysis Duty
Service Transaction Analysis Duty

How many times has the customer communicated with the contact center on this particular service request and what channels did they use?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

  • CRM - CRM Interaction Service Requests Real Time

Job Roles
The following job roles secure access to the data related to this business question:

  • Channel Account Manager
  • Channel Administrator
  • Channel Operations Manager
  • Channel Partner Manager
  • Channel Partner Portal Administrator
  • Channel Sales Director
  • Channel Sales Manager
  • Customer Relationship Management Application Administrator
  • Customer Service Manager
  • Customer Service Representative
  • Human Resource Help Desk Administrator
  • Human Resource Help Desk Agent
  • Human Resource Help Desk Manager
  • Partner Administrator
  • Partner Sales Manager
What percentage of service requests involve at least one interaction?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Interaction Service Requests Real Time**
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Interaction Service Requests Real Time**

**Job Roles**

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Customer Service Representative**
- **Human Resource Help Desk Administrator**
- **Human Resource Help Desk Agent**
- **Human Resource Help Desk Manager**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Interaction Service Requests Real Time
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

What is the interactions activity level across channels and agents? How do they compare across time periods?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• CRM - CRM Interactions Real Time

Job Roles

The following job roles secure access to the data related to this business question:

• Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• CRM - CRM Interactions Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
Do customers contact us more often to solve issues or to seek answers to questions?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Interactions Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What channels are the most effective for resolving issues with a single interaction?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Interactions Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 4

Business Questions

- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
What are our issue resolution rates for low and high cost channels?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Interactions Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Are agents prematurely updating SRs as Resolved to make their numbers look better?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Interactions Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty
How often are my agents able to resolve issues using a low cost channel like chat?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Interactions Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
How many interactions are being lost/abandoned? How does this compare with previous periods?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• CRM - CRM Interactions Real Time

Job Roles

The following job roles secure access to the data related to this business question:

• Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?

**Subject Areas**
The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Omni Channel Events Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Internal Help Desk Administrator
- Internal Help Desk Agent
- Internal Help Desk Manager
- Internal Help Desk User
- Next Gen Human Resource Help Desk Administrator
- Next Gen Human Resource Help Desk Agent
- Next Gen Human Resource Help Desk Manager
- Next Gen Human Resource Help Desk User
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Internal Help Desk Administrator Transaction Analysis Duty
- Internal Help Desk Agent Transaction Analysis Duty
- Internal Help Desk Manager Transaction Analysis Duty
- Internal Help Desk User Transaction Analysis Duty
- Next Gen HR Help Desk Administrator Transaction Analysis Duty
- Next Gen HR Help Desk Agent Transaction Analysis Duty
- Next Gen HR Help Desk Manager Transaction Analysis Duty
- Next Gen HR Help Desk User Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What are the rates for agents declining work offers?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Omni Channel Events Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Internal Help Desk Administrator
- Internal Help Desk Agent
- Internal Help Desk Manager
- Internal Help Desk User
- Next Gen Human Resource Help Desk Administrator
- Next Gen Human Resource Help Desk Agent
- Next Gen Human Resource Help Desk Manager
- Next Gen Human Resource Help Desk User
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
Are there currently work requests that have a long acceptance time? What are the agent utilization rates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Omni Channel Events Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Internal Help Desk Administrator
• Internal Help Desk Agent
• Internal Help Desk Manager
• Internal Help Desk User
• Next Gen Human Resource Help Desk Administrator
• Next Gen Human Resource Help Desk Agent
• Next Gen Human Resource Help Desk Manager
• Next Gen Human Resource Help Desk User
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Internal Help Desk Administrator Transaction Analysis Duty
• Internal Help Desk Agent Transaction Analysis Duty
What are the average handle times?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Omni Channel Events Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Internal Help Desk Administrator Transaction Analysis Duty
- Internal Help Desk Agent Transaction Analysis Duty
- Internal Help Desk Manager Transaction Analysis Duty
- Internal Help Desk User Transaction Analysis Duty
- Next Gen HR Help Desk Administrator Transaction Analysis Duty
- Next Gen HR Help Desk Agent Transaction Analysis Duty
- Next Gen HR Help Desk Manager Transaction Analysis Duty
How long is it taking for offers to be made to agents?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Omni Channel Events Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
Duty Roles

The following duty roles secure access to the data related to this business question:

- **HR Help Desk Administrator Transaction Analysis Duty**
- **HR Help Desk Agent Transaction Analysis Duty**
- **HR Help Desk Manager Transaction Analysis Duty**
- **Internal Help Desk Administrator Transaction Analysis Duty**
- **Internal Help Desk Agent Transaction Analysis Duty**
- **Internal Help Desk Manager Transaction Analysis Duty**
- **Internal Help Desk User Transaction Analysis Duty**
- **Next Gen HR Help Desk Administrator Transaction Analysis Duty**
- **Next Gen HR Help Desk Agent Transaction Analysis Duty**
- **Next Gen HR Help Desk Manager Transaction Analysis Duty**
- **Next Gen HR Help Desk User Transaction Analysis Duty**
- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
- **Partner Org Transaction Analysis Duty**
- **Sales Administrative Transaction Analysis Duty**
How often do communications cross channels before they are resolved?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
What percent of communications are resolved the first time? What is the most commonly used channel?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
Are there preferred channels that customers use to contact us for specific service issue categories and product areas?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
- *Sales Executive Transaction Analysis Duty*
- *Sales Managerial Transaction Analysis Duty*
- *Sales Transaction Analysis Duty*
- *Service Administrative Transaction Analysis Duty*
- *Service Managerial Transaction Analysis Duty*
- *Service Transaction Analysis Duty*

What are the number of interactions by channel, agent, and time period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *CRM - CRM Service Request Summary*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
How often are communications being transferred between agents?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How many interactions, on average, does it require to resolve an issue?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty
What is the average length of time of an interaction, by agent and channel?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What product lines have a higher percentage of non-compliant SRs open?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How is the percentage of compliant SRs trending month over month, quarter over quarter?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
Business Questions

Where are the outliers when it comes to compliance?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Are we keeping the number of non-compliant SRs in check for our most valuable customers?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
How frequently do agents link articles to SRs?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Service Request Summary

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Work Orders Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How many were compliant and non-compliant when I, as an agent review my own completed work orders?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Work Orders Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Work Orders Real Time
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty
How many showed up as compliant; how many were non-compliant during my review of completed work orders?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Work Orders Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
How many new coverages begin in the ensuing month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Customer Coverage Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
To what extent has the number of customer coverages increased between two given dates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Customer Coverage Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 4

Business Questions

- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Are we equipped to service the increase in coverages?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Customer Coverage Real Time**

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
How many emails are we receiving over time?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Inbound Messages Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Human Resource Help Desk Administrator**
- **Human Resource Help Desk Manager**
- **Partner Administrator**
- **Partner Sales Manager**
- **Partner Sales Representative**
- **Sales Administrator**

Duty Roles

The following duty roles secure access to the data related to this business question:

- **HR Help Desk Administrator Transaction Analysis Duty**
- **HR Help Desk Manager Transaction Analysis Duty**
What is the current count of inbound email requests by status and mailbox?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Inbound Messages Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Human Resource Help Desk Administrator
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty

How many messages resulted in new service request creation versus update to existing service request?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Inbound Messages Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Human Resource Help Desk Administrator
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty

How many emails came from known versus unknown contacts?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Service - CRM Inbound Messages Real Time

Job Roles

The following job roles secure access to the data related to this business question:

• Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- **HR Help Desk Administrator Transaction Analysis Duty**
- **HR Help Desk Manager Transaction Analysis Duty**
- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
- **Partner Org Transaction Analysis Duty**
- **Sales Administrative Transaction Analysis Duty**
- **Service Administrative Transaction Analysis Duty**
- **Service Managerial Transaction Analysis Duty**

Is the Service organization effectively handling new emails in the appropriate timeframe?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Inbound Messages Real Time**

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Human Resource Help Desk Administrator
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty

Are my team resources optimally deployed across service queues to maximize productivity?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Queue Resources Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Queue Resources Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Queue Resources Real Time
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 4

Business Questions

• 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 action plans tracking late to an overall target completion date?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Service - CRM Service Request Action Plan Actions Real Time

Job Roles

The following job roles secure access to the data related to this business question:

• Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• 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
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What is the delay in estimated completion dates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Action Plan Actions Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
Subject Areas for Transactional Business Intelligence in CX

Sales and B2B Service

Chapter 4

Business Questions

- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What is the breakdown of open action plans by category?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Action Plan Actions Real Time
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty
How many action plans are open and how long have they been open?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Action Plan Actions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

Are we responding to customer messages in a timely manner?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Service - CRM Service Request Messages Real Time

Job Roles

The following job roles secure access to the data related to this business question:

• Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Messages Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Service Request Messages Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Customer Service Representative**
- **Human Resource Help Desk Administrator**
- **Human Resource Help Desk Agent**
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Messages Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

**Chapter 4**

**Business Questions**

- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Milestones Real Time

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Are there currently service requests that have missed the target milestone and require escalation?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Milestones Real Time
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Milestones Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- **HR Help Desk Administrator Transaction Analysis Duty**
- **HR Help Desk Agent Transaction Analysis Duty**
- **HR Help Desk Manager Transaction Analysis Duty**
- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
- **Partner Org Transaction Analysis Duty**
- **Sales Administrative Transaction Analysis Duty**
- **Sales Executive Transaction Analysis Duty**
- **Sales Managerial Transaction Analysis Duty**
- **Sales Transaction Analysis Duty**
- **Service Administrative Transaction Analysis Duty**
- **Service Managerial Transaction Analysis Duty**
- **Service Transaction Analysis Duty**

Are our processes inefficient or preventing agents from meeting milestones?

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Service Request Milestones Real Time**

**Job Roles**
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
Chapter 4

Business Questions

Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Milestones Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How does my team perform in meeting first response milestones versus resolution milestones?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Milestones Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- **HR Help Desk Administrator Transaction Analysis Duty**
- **HR Help Desk Agent Transaction Analysis Duty**
- **HR Help Desk Manager Transaction Analysis Duty**
- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
- **Partner Org Transaction Analysis Duty**
- **Sales Administrative Transaction Analysis Duty**
- **Sales Executive Transaction Analysis Duty**
- **Sales Managerial Transaction Analysis Duty**
- **Sales Transaction Analysis Duty**
- **Service Administrative Transaction Analysis Duty**
- **Service Managerial Transaction Analysis Duty**
- **Service Transaction Analysis Duty**
What is the % of open SRs with milestones, that is, have at least one milestone?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Milestones Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Resource Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Resource Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
Chapter 4
Business Questions

• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

As an agent am I spreading myself too thin by being part of one too many SR teams?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Service - CRM Service Request Resource Real Time

Job Roles

The following job roles secure access to the data related to this business question:

• Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Sales Administrator
• Sales Manager
• Sales Representative
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What are the open critical SRs that my team is working on currently? How many of these are escalated?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty
How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What are the SRs that are waiting on my customers?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

Who are my agents that have the most pending SRs?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Requests Real Time*

### Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

### Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What is the prevalence of SR transfers for an agent/manager/group/product/location?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Help Desk - HR Service Requests Real Time
- Help Desk - Internal Service Requests Real Time
- Service - CRM Service Requests Real Time
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Internal Help Desk Administrator
- Internal Help Desk Agent
- Internal Help Desk Manager
- Internal Help Desk User
- Next Gen Human Resource Help Desk Administrator
- Next Gen Human Resource Help Desk Agent
- Next Gen Human Resource Help Desk Manager
- Next Gen Human Resource Help Desk User
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
How are SR transfers contributing to overall latency/resolution delays?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Help Desk - HR Service Requests Real Time
- Help Desk - Internal Service Requests Real Time
- Service - CRM Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Internal Help Desk Administrator
• Internal Help Desk Agent
• Internal Help Desk Manager
• Internal Help Desk User
• Next Gen Human Resource Help Desk Administrator
• Next Gen Human Resource Help Desk Agent
• Next Gen Human Resource Help Desk Manager
• Next Gen Human Resource Help Desk User
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Internal Help Desk Administrator Transaction Analysis Duty
• Internal Help Desk Agent Transaction Analysis Duty
• Internal Help Desk Manager Transaction Analysis Duty
• Internal Help Desk User Transaction Analysis Duty
What are the popular reasons for SRs to be transferred? Is there a pattern?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Help Desk - HR Service Requests Real Time
- Help Desk - Internal Service Requests Real Time
- Service - CRM Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 4
Business Questions

- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Internal Help Desk Administrator
- Internal Help Desk Agent
- Internal Help Desk Manager
- Internal Help Desk User
- Next Gen Human Resource Help Desk Administrator
- Next Gen Human Resource Help Desk Agent
- Next Gen Human Resource Help Desk Manager
- Next Gen Human Resource Help Desk User
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Internal Help Desk Administrator Transaction Analysis Duty
- Internal Help Desk Agent Transaction Analysis Duty
- Internal Help Desk Manager Transaction Analysis Duty
- Internal Help Desk User Transaction Analysis Duty
- Next Gen HR Help Desk Administrator Transaction Analysis Duty
- Next Gen HR Help Desk Agent Transaction Analysis Duty
- Next Gen HR Help Desk Manager Transaction Analysis Duty
- Next Gen HR Help Desk User Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Service Requests Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Customer Service Representative**
- **Human Resource Help Desk Administrator**
- **Human Resource Help Desk Agent**
- **Human Resource Help Desk Manager**
- **Partner Administrator**
How does the aging profile of SRs look like? Are there any outliers calling for intervention?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Requests Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How many social posts came from known versus unknown contacts?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Social Post Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty

Is the Service organization effectively handling new social service requests in the appropriate timeframe?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Social Post Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
Chapter 4

Business Questions

Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty

What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Tags Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty
Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Tags Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
Are we seeing an issue regarding compliance rates with certain tags?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Tags Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
Customer Service Manager  
Customer Service Representative  
Human Resource Help Desk Administrator  
Human Resource Help Desk Agent  
Human Resource Help Desk Manager  
Partner Administrator  
Partner Sales Manager  
Partner Sales Representative  
Sales Administrator  
Sales Manager  
Sales Representative  
Sales Restricted User  
Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty  
- HR Help Desk Agent Transaction Analysis Duty  
- HR Help Desk Manager Transaction Analysis Duty  
- Partner Channel Administrative Transaction Analysis Duty  
- Partner Channel Transaction Analysis Duty  
- Partner Org Transaction Analysis Duty  
- Sales Administrative Transaction Analysis Duty  
- Sales Executive Transaction Analysis Duty  
- Sales Managerial Transaction Analysis Duty  
- Sales Transaction Analysis Duty  
- Service Administrative Transaction Analysis Duty  
- Service Managerial Transaction Analysis Duty  
- Service Transaction Analysis Duty

How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Tags Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
How many open SRs are linked to each tag?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Tags Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Business Questions

- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How is tag usage across agents and resource teams? Which teams perform better than others?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Tags Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP
What is the opportunity information captured in the note to an opportunity?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Opportunity Note*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
- *Sales Administrative Transaction Analysis Duty*
What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Primary Contact Contact Point*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What is the contact point information of the primary contact for all active opportunities in the current quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Primary Contact Contact Point

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Primary Contact Contact Point

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM All Contact Contact Point

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM All Contact Contact Point
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM All Contact Contact Point

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
What are the open critical HR SRs that my team is working on currently? How many of these are escalated?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Help Desk - HR Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Next Gen Human Resource Help Desk Administrator
- Next Gen Human Resource Help Desk Agent
- Next Gen Human Resource Help Desk Manager
- Next Gen Human Resource Help Desk User

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Next Gen HR Help Desk Administrator Transaction Analysis Duty
- Next Gen HR Help Desk Agent Transaction Analysis Duty
How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Help Desk - HR Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Next Gen Human Resource Help Desk Administrator
- Next Gen Human Resource Help Desk Agent
- Next Gen Human Resource Help Desk Manager
- Next Gen Human Resource Help Desk User

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Next Gen HR Help Desk Administrator Transaction Analysis Duty
- Next Gen HR Help Desk Agent Transaction Analysis Duty
- Next Gen HR Help Desk Manager Transaction Analysis Duty
- Next Gen HR Help Desk User Transaction Analysis Duty
What are the HR SRs that are waiting on my customers?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Help Desk - HR Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Next Gen Human Resource Help Desk Administrator
- Next Gen Human Resource Help Desk Agent
- Next Gen Human Resource Help Desk Manager
- Next Gen Human Resource Help Desk User

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Next Gen HR Help Desk Administrator Transaction Analysis Duty
- Next Gen HR Help Desk Agent Transaction Analysis Duty
- Next Gen HR Help Desk Manager Transaction Analysis Duty
- Next Gen HR Help Desk User Transaction Analysis Duty
Who are my agents that have the most pending HR SRs?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Help Desk - HR Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Next Gen Human Resource Help Desk Administrator
- Next Gen Human Resource Help Desk Agent
- Next Gen Human Resource Help Desk Manager
- Next Gen Human Resource Help Desk User

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Next Gen HR Help Desk Administrator Transaction Analysis Duty
- Next Gen HR Help Desk Agent Transaction Analysis Duty
- Next Gen HR Help Desk Manager Transaction Analysis Duty
- Next Gen HR Help Desk User Transaction Analysis Duty
How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Help Desk - HR Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Next Gen Human Resource Help Desk Administrator
- Next Gen Human Resource Help Desk Agent
- Next Gen Human Resource Help Desk Manager
- Next Gen Human Resource Help Desk User

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Next Gen HR Help Desk Administrator Transaction Analysis Duty
- Next Gen HR Help Desk Agent Transaction Analysis Duty
- Next Gen HR Help Desk Manager Transaction Analysis Duty
- Next Gen HR Help Desk User Transaction Analysis Duty
What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Help Desk - HR Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Next Gen Human Resource Help Desk Administrator
- Next Gen Human Resource Help Desk Agent
- Next Gen Human Resource Help Desk Manager
- Next Gen Human Resource Help Desk User

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Next Gen HR Help Desk Administrator Transaction Analysis Duty
- Next Gen HR Help Desk Agent Transaction Analysis Duty
- Next Gen HR Help Desk Manager Transaction Analysis Duty
- Next Gen HR Help Desk User Transaction Analysis Duty
What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Help Desk - HR Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Next Gen Human Resource Help Desk Administrator
- Next Gen Human Resource Help Desk Agent
- Next Gen Human Resource Help Desk Manager
- Next Gen Human Resource Help Desk User

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Next Gen HR Help Desk Administrator Transaction Analysis Duty
- Next Gen HR Help Desk Agent Transaction Analysis Duty
- Next Gen HR Help Desk Manager Transaction Analysis Duty
- Next Gen HR Help Desk User Transaction Analysis Duty
How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - HR Service Requests Real Time*

Job Roles
The following job roles secure access to the data related to this business question:

- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Next Gen Human Resource Help Desk Administrator*
- *Next Gen Human Resource Help Desk Agent*
- *Next Gen Human Resource Help Desk Manager*
- *Next Gen Human Resource Help Desk User*

Duty Roles
The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk Administrator Transaction Analysis Duty*
- *Next Gen HR Help Desk Agent Transaction Analysis Duty*
- *Next Gen HR Help Desk Manager Transaction Analysis Duty*
- *Next Gen HR Help Desk User Transaction Analysis Duty*
What are the open critical Internal SRs that my team is working on currently? How many of these are escalated?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Help Desk - Internal Service Requests Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Internal Help Desk Administrator*
- *Internal Help Desk Agent*
- *Internal Help Desk Manager*
- *Internal Help Desk User*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Internal Help Desk Administrator Transaction Analysis Duty*
- *Internal Help Desk Agent Transaction Analysis Duty*
- *Internal Help Desk Manager Transaction Analysis Duty*
- *Internal Help Desk User Transaction Analysis Duty*
How are we doing on Internal SR resolution times between current and past months? What are the reasons for any degradations?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Help Desk - Internal Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Internal Help Desk Administrator
- Internal Help Desk Agent
- Internal Help Desk Manager
- Internal Help Desk User

Duty Roles

The following duty roles secure access to the data related to this business question:

- Internal Help Desk Administrator Transaction Analysis Duty
- Internal Help Desk Agent Transaction Analysis Duty
- Internal Help Desk Manager Transaction Analysis Duty
- Internal Help Desk User Transaction Analysis Duty

What are the Internal SRs waiting on my customers?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- **Help Desk - Internal Service Requests Real Time**

### Job Roles

The following job roles secure access to the data related to this business question:

- Internal Help Desk Administrator
- Internal Help Desk Agent
- Internal Help Desk Manager
- Internal Help Desk User

### Duty Roles

The following duty roles secure access to the data related to this business question:

- Internal Help Desk Administrator Transaction Analysis Duty
- Internal Help Desk Agent Transaction Analysis Duty
- Internal Help Desk Manager Transaction Analysis Duty
- Internal Help Desk User Transaction Analysis Duty

### Who are my agents that have the most pending Internal SRs?

### Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Help Desk - Internal Service Requests Real Time**

### Job Roles

The following job roles secure access to the data related to this business question:

- Internal Help Desk Administrator
- Internal Help Desk Agent
- Internal Help Desk Manager

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590
Duty Roles

The following duty roles secure access to the data related to this business question:

- Internal Help Desk Administrator Transaction Analysis Duty
- Internal Help Desk Agent Transaction Analysis Duty
- Internal Help Desk Manager Transaction Analysis Duty
- Internal Help Desk User Transaction Analysis Duty

How many Internal SRs have been waiting on my agents action for more than 24 hours? Which of these are critical or escalated?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Help Desk - Internal Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Internal Help Desk Administrator
- Internal Help Desk Agent
- Internal Help Desk Manager
- Internal Help Desk User

Duty Roles

The following duty roles secure access to the data related to this business question:

- Internal Help Desk Administrator Transaction Analysis Duty
- Internal Help Desk Agent Transaction Analysis Duty
- Internal Help Desk Manager Transaction Analysis Duty
What is the reopen rate for Internal SRs owned by my team? Who has the highest reopen rate? Is there a training issue?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

• Help Desk - Internal Service Requests Real Time

Job Roles
The following job roles secure access to the data related to this business question:

• Internal Help Desk Administrator
• Internal Help Desk Agent
• Internal Help Desk Manager
• Internal Help Desk User

Duty Roles
The following duty roles secure access to the data related to this business question:

• Internal Help Desk Administrator Transaction Analysis Duty
• Internal Help Desk Agent Transaction Analysis Duty
• Internal Help Desk Manager Transaction Analysis Duty
• Internal Help Desk User Transaction Analysis Duty
What is the status of our aging SRs? Are there any outliers that require intervention?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Help Desk - Internal Service Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Internal Help Desk Administrator
- Internal Help Desk Agent
- Internal Help Desk Manager
- Internal Help Desk User

Duty Roles

The following duty roles secure access to the data related to this business question:

- Internal Help Desk Administrator Transaction Analysis Duty
- Internal Help Desk Agent Transaction Analysis Duty
- Internal Help Desk Manager Transaction Analysis Duty
- Internal Help Desk User Transaction Analysis Duty

How many Internal SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are critical?

Subject Areas
What's the primary reason for contract closure in the last year?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Enterprise Contracts - Contracts Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Customer Contract Administrator
- Customer Contract Manager
- Customer Contract Team Member
Duty Roles

The following duty roles secure access to the data related to this business question:

- Enterprise Contracts Transaction Analysis Duty Role

What contracts have a specific policy deviation?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Enterprise Contracts - Contracts Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Customer Contract Administrator
- Customer Contract Manager
- Customer Contract Team Member
- Enterprise Contract Administrator
- Enterprise Contract Manager
- Enterprise Contract Team Member
- Supplier Contract Administrator
- Supplier Contract Manager
- Supplier Contract Team Member

Duty Roles
The following duty roles secure access to the data related to this business question:

- *Enterprise Contracts Transaction Analysis Duty Role*

### How is my contract team loaded?

#### Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Enterprise Contracts - Contracts Real Time*

#### Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Contract Administrator*
- *Customer Contract Manager*
- *Customer Contract Team Member*
- *Enterprise Contract Administrator*
- *Enterprise Contract Manager*
- *Enterprise Contract Team Member*
- *Supplier Contract Administrator*
- *Supplier Contract Manager*
- *Supplier Contract Team Member*

#### Duty Roles

The following duty roles secure access to the data related to this business question:

- *Enterprise Contracts Transaction Analysis Duty Role*
How many contracts might get affected if I modify the Payment clause?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Enterprise Contracts - Contracts Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Contract Administrator*
- *Customer Contract Manager*
- *Customer Contract Team Member*
- *Enterprise Contract Administrator*
- *Enterprise Contract Manager*
- *Enterprise Contract Team Member*
- *Supplier Contract Administrator*
- *Supplier Contract Manager*
- *Supplier Contract Team Member*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Enterprise Contracts Transaction Analysis Duty Role*

Which contracts are related to my given contract?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- *Enterprise Contracts - Contracts Real Time*

## Job Roles

The following job roles secure access to the data related to this business question:

- Customer Contract Administrator
- Customer Contract Manager
- Customer Contract Team Member
- Enterprise Contract Administrator
- Enterprise Contract Manager
- Enterprise Contract Team Member
- Supplier Contract Administrator
- Supplier Contract Manager
- Supplier Contract Team Member

## Duty Roles

The following duty roles secure access to the data related to this business question:

- *Enterprise Contracts Transaction Analysis Duty Role*

## Show me all the contracts that have a particular deliverable due.

## Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Enterprise Contracts - Contracts Real Time*

## Job Roles

The following job roles secure access to the data related to this business question:

- Customer Contract Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Enterprise Contracts Transaction Analysis Duty Role

Show me the user status progression for contracts within a given date range.

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Enterprise Contracts - Contracts Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Customer Contract Administrator
- Customer Contract Manager
- Customer Contract Team Member
- Enterprise Contract Administrator
- Enterprise Contract Manager
- Enterprise Contract Team Member
- Supplier Contract Administrator
- Supplier Contract Manager
- Supplier Contract Team Member
Duty Roles

The following duty roles secure access to the data related to this business question:

- *Enterprise Contracts Transaction Analysis Duty Role*

How many days on average did a resource work on a contract assigned to them in the last quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Enterprise Contracts - Contracts Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Contract Administrator*
- *Customer Contract Manager*
- *Customer Contract Team Member*
- *Enterprise Contract Administrator*
- *Enterprise Contract Manager*
- *Enterprise Contract Team Member*
- *Supplier Contract Administrator*
- *Supplier Contract Manager*
- *Supplier Contract Team Member*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Enterprise Contracts Transaction Analysis Duty Role*
How many days on average did a resource organization work on a contract assigned to them in the last quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Enterprise Contracts - Contracts Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Customer Contract Administrator
- Customer Contract Manager
- Customer Contract Team Member
- Enterprise Contract Administrator
- Enterprise Contract Manager
- Enterprise Contract Team Member
- Supplier Contract Administrator
- Supplier Contract Manager
- Supplier Contract Team Member

Duty Roles

The following duty roles secure access to the data related to this business question:

- Enterprise Contracts Transaction Analysis Duty Role

Show me all the contracts that have a nonstandard clause.

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- *Enterprise Contracts - Contracts Real Time*

### Job Roles

The following job roles secure access to the data related to this business question:

- *Customer Contract Administrator*
- *Customer Contract Manager*
- *Customer Contract Team Member*
- *Enterprise Contract Administrator*
- *Enterprise Contract Manager*
- *Enterprise Contract Team Member*
- *Supplier Contract Administrator*
- *Supplier Contract Manager*
- *Supplier Contract Team Member*

### Duty Roles

The following duty roles secure access to the data related to this business question:

- *Enterprise Contracts Transaction Analysis Duty Role*

### What's the total contract value (TCV) in the last one year?

### Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscriptions Real Time*

### Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*
Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

What's the number of subscriptions by status and date range?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscriptions Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Subscription Specialist*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Subscription Management Transaction Analysis Duty*

What's the total MRR?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Subscription Management - Subscriptions Real Time*
Job Roles

The following job roles secure access to the data related to this business question:

- Subscription Specialist

Duty Roles

The following duty roles secure access to the data related to this business question:

- Subscription Management Transaction Analysis Duty

How many subscriptions were renewed the last quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Subscription Management - Subscriptions Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Subscription Specialist

Duty Roles

The following duty roles secure access to the data related to this business question:

- Subscription Management Transaction Analysis Duty
How many subscriptions are expiring in the next quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Subscription Management - Subscriptions Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Subscription Specialist

Duty Roles

The following duty roles secure access to the data related to this business question:

- Subscription Management Transaction Analysis Duty

How many subscriptions were terminated in the last year?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Subscription Management - Subscriptions Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Subscription Specialist

Duty Roles

The following duty roles secure access to the data related to this business question:

- Subscription Management Transaction Analysis Duty

Are there any workload balancing issues on my team? Are a few members performing most of the activities?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Real Time

## Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

## Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
How can I identify neglected but strategic accounts to guide my team to focus on these?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activity Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
Chapter 4

Business Questions

- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How much credit did a participant receive for their sales transactions?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Attainments Real Time
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

How much credit did my team receive for their attainment?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Attainments Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
What are the various attainment attributes associated with my credits?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Attainments Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*
The following duty roles secure access to the data related to this business question:

- **Incentive Compensation Transaction Analysis Duty**

### Which participants are assigned to which plans?

### Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Incentive Compensation - Compensation Plan Assignments Real Time**

### Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Operations Manager**
- **Channel Sales Manager**
- **Incentive Compensation Analyst**
- **Incentive Compensation Manager**
- **Incentive Compensation Participant**
- **Incentive Compensation Participant Manager**
- **Incentive Compensation Plan Administrator**
- **Partner Administrator**

### Duty Roles

The following duty roles secure access to the data related to this business question:

- **Incentive Compensation Transaction Analysis Duty**
What type of assignment does a participant have to a plan?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Compensation Plan Assignments Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

What are the assignment start and end dates for a participant?

Subject Areas
Has the participant accepted the assignment to the plan?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

• Incentive Compensation - Compensation Plan Assignments Real Time

Job Roles
The following job roles secure access to the data related to this business question:

• Channel Account Manager
• Channel Operations Manager
• Channel Sales Manager
• Incentive Compensation Analyst
• Incentive Compensation Manager
• Incentive Compensation Participant
• Incentive Compensation Participant Manager
• Incentive Compensation Plan Administrator
• Partner Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

Does the participant have an individualized target incentive for the plan?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Compensation Plan Assignments Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

Are participants correctly credited?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Credits Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty
Were there credit or rollup errors that must be fixed?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Credits Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

Is the dispute load balanced between my analysts?

Asked by compensation managers.

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Disputes Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Disputes Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

Are we on track in achieving quota this period or quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Earning and Attainment Summary Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

Which of my direct reports' attainment or earnings are below the wanted performance expectation?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Earning and Attainment Summary Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty
Who got paid what amount and from where, at the detail level?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Earnings Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*
Why wasn't I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Participant Balances Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

What are my compensation plan incentive targets?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Participant Compensation Plan Real Time
- Incentive Compensation - Performance and Earnings Summary Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

How are these targets individualized across the participants.

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Participant Compensation Plan Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

**How do these targets break down by plan component?**

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Participant Compensation Plan Real Time

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

Are my individualized performance measure goals set properly?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Participant Compensation Plan Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty
How do they compare to the base goals set on the measure?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Incentive Compensation - Participant Compensation Plan Real Time

Job Roles

The following job roles secure access to the data related to this business question:

• Channel Account Manager
• Channel Operations Manager
• Channel Sales Manager
• Incentive Compensation Analyst
• Incentive Compensation Manager
• Incentive Compensation Participant
• Incentive Compensation Participant Manager
• Incentive Compensation Plan Administrator
• Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

• Incentive Compensation Transaction Analysis Duty

Who is assigned to a given plan?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Compensation Plan Real Time*

### Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

### Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

### What are the targets and goals settings for an individual?

### Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Compensation Plan Real Time*

### Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

As a participant manager, what are the targets and goals settings for my direct reports?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Participant Compensation Plan Real Time
- Incentive Compensation - Performance and Earnings Summary Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

To what country and business unit does the participant belong?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Participant Detail Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty
What is the participant's home currency or cost center?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

• Incentive Compensation - Participant Detail Real Time

Job Roles
The following job roles secure access to the data related to this business question:

• Channel Account Manager
• Channel Operations Manager
• Channel Sales Manager
• Incentive Compensation Analyst
• Incentive Compensation Manager
• Incentive Compensation Participant
• Incentive Compensation Participant Manager
• Incentive Compensation Plan Administrator
• Partner Administrator

Duty Roles
The following duty roles secure access to the data related to this business question:

• Incentive Compensation Transaction Analysis Duty

Is the participant active? And for which dates?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

• Incentive Compensation - Participant Detail Real Time
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

What is the total quota across the organization by performance measure for the interval?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Participant Interval Goals Real Time
- Incentive Compensation - Performance and Earnings Summary Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

What is the total quota by performance measure for the interval across the organization?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Participant Interval Goals Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles
Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Participant Interval Goals Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty
Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Participant Interval Goals Real Time
- Incentive Compensation - Participant Period Goals Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty
What is the total quota across the organization by performance measure for the period or across periods?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Participant Period Goals Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

What is the total quota by performance measure for the period across the organization?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Period Goals Real Time*

**Job Roles**

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Participant Period Goals Real Time*

**Job Roles**
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

Which participants are assigned to a given pay group?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Pay Group Assignments Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

What pay groups are in the application? What are their types and descriptions?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Pay Group Assignments Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty
When was a given participant assigned to a specific pay group?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Pay Group Assignments Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

As a participant manager, which pay groups do my direct reports belong to?

Subject Areas
What is my cost of compensation by participant, plan component, plan, and frequencies?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Payments Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 4
Business Questions

- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

What is the current status of the payment batches? Are they paid, reviewed, or frozen?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Paysheet Summary Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

What is the status of each paysheet within the payment batches?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Paysheet Summary Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty
How does the performance measure attainment compare with a participant's personalized goal across his directs?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Performance and Earnings Summary Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty
How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Performance and Earnings Summary Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty
How do participants' plan component earnings compare with their personalized target incentives?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Performance and Earnings Summary Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

Do I have to realign quota based on current attainment levels?

Subject Areas
Oracle CX Sales and B2B Service

Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 4

Business Questions

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Performance and Earnings Summary Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

What is the total quota by performance measure for the period across the organization? Validate quota levels.

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Performance and Earnings Summary Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

Is the company on track to attain its goals? Who is lagging and might require coaching?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Performance and Earnings Summary Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

What are the rules effective as of the given date in the hierarchy?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Rules Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty
What are the credit rules which a credit receiver is assigned to?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Rules Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty
What are the rules which contain the given criteria, for example Sales Channel = Distributor. What are the classification rules which a credit category is assigned to?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Rules Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles
The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty
What are the criteria for a rule including the inherited criteria from the ancestors?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Incentive Compensation - Rules Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Incentive Compensation Analyst
- Incentive Compensation Manager
- Incentive Compensation Participant
- Incentive Compensation Participant Manager
- Incentive Compensation Plan Administrator
- Partner Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- Incentive Compensation Transaction Analysis Duty

What are the results of the collected transactions before the crediting process?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- *Incentive Compensation - Transactions Real Time*

### Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Operations Manager*
- *Channel Sales Manager*
- *Incentive Compensation Analyst*
- *Incentive Compensation Manager*
- *Incentive Compensation Participant*
- *Incentive Compensation Participant Manager*
- *Incentive Compensation Plan Administrator*
- *Partner Administrator*

### Duty Roles

The following duty roles secure access to the data related to this business question:

- *Incentive Compensation Transaction Analysis Duty*

### What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?

### Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Primary Contact Addresses*

### Job Roles

...
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are all addresses associated with the primary contact for all active opportunities in the current quarter?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Primary Contact Addresses

**Job Roles**

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Primary Contact Addresses*

Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

Duty Roles
The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM All Contacts Addresses

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• CRM Administrative Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty

What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Sales - CRM All Contacts Addresses

Job Roles

The following job roles secure access to the data related to this business question:

• Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
**Duty Roles**

The following duty roles secure access to the data related to this business question:

- CRM Administrative Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

**What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?**

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM All Contacts Addresses
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- CRM Administrative Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

How long did it take to assign the SR to the correct queue?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- *Service - CRM Service Request Lifecycle*

### Job Roles

The following job roles secure access to the data related to this business question:

- *Channel Account Manager*
- *Channel Administrator*
- *Channel Operations Manager*
- *Channel Partner Manager*
- *Channel Partner Portal Administrator*
- *Channel Sales Director*
- *Channel Sales Manager*
- *Customer Relationship Management Application Administrator*
- *Customer Service Manager*
- *Customer Service Representative*
- *Human Resource Help Desk Administrator*
- *Human Resource Help Desk Agent*
- *Human Resource Help Desk Manager*
- *Partner Administrator*
- *Partner Sales Manager*
- *Partner Sales Representative*
- *Sales Administrator*
- *Sales Manager*
- *Sales Representative*
- *Sales Restricted User*
- *Sales VP*

### Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
Did the SR get assigned to the wrong queue/team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Lifecycle

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

How long was an SR unassigned and how long did it sit in each queue?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Lifecycle

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 4

Business Questions

- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty
Was an SR sitting in a queue longer than the average time for all other SRs?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Lifecycle

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Was the assigned agent overloaded with other work?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Lifecycle

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Was there a lot of time spent waiting on customers to respond to more information, documents and so on?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- *Service* - CRM Service Request Lifecycle

### Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

### Duty Roles

The following duty roles secure access to the data related to this business question:

- *HR Help Desk Administrator Transaction Analysis Duty*
- *HR Help Desk Agent Transaction Analysis Duty*
- *HR Help Desk Manager Transaction Analysis Duty*
- *Partner Channel Administrative Transaction Analysis Duty*
- *Partner Channel Transaction Analysis Duty*
- *Partner Org Transaction Analysis Duty*
Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Lifecycle

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Was the SR queue modified or SR resource owner modified at any point?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Lifecycle
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Service Request Lifecycle

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Representative
Duty Roles

The following duty roles secure access to the data related to this business question:

- **HR Help Desk Administrator Transaction Analysis Duty**
- **HR Help Desk Agent Transaction Analysis Duty**
- **HR Help Desk Manager Transaction Analysis Duty**
- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
- **Partner Org Transaction Analysis Duty**
- **Sales Administrative Transaction Analysis Duty**
- **Sales Executive Transaction Analysis Duty**
- **Sales Managerial Transaction Analysis Duty**
- **Sales Transaction Analysis Duty**
- **Service Administrative Transaction Analysis Duty**
- **Service Managerial Transaction Analysis Duty**
- **Service Transaction Analysis Duty**

Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Service Request Lifecycle**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Agent Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty
Does the survey request activity show a declining trend?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Survey Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Human Resource Help Desk Administrator
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
How is survey request trending compared to SR resolutions during the same period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Survey Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Human Resource Help Desk Administrator
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
Duty Roles

The following duty roles secure access to the data related to this business question:

- **HR Help Desk Administrator Transaction Analysis Duty**
- **HR Help Desk Manager Transaction Analysis Duty**
- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
- **Partner Org Transaction Analysis Duty**
- **Sales Administrative Transaction Analysis Duty**
- **Sales Executive Transaction Analysis Duty**
- **Sales Managerial Transaction Analysis Duty**
- **Service Administrative Transaction Analysis Duty**
- **Service Managerial Transaction Analysis Duty**

Do we need to adjust our survey template to improve response rates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Survey Requests Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
Does seasonality impact response rates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Survey Requests Real Time
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Human Resource Help Desk Administrator
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
How does response differ for various service teams? Do some teams obtain better response rates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Survey Requests Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Human Resource Help Desk Administrator
- Human Resource Help Desk Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Manager
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
Are survey requests being sent per plan across teams, service categories, products, account regions?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Survey Requests Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
- **Channel Sales Director**
- **Channel Sales Manager**
- **Customer Relationship Management Application Administrator**
- **Customer Service Manager**
- **Human Resource Help Desk Administrator**
- **Human Resource Help Desk Manager**
- **Partner Administrator**
- **Partner Sales Manager**
Duty Roles

The following duty roles secure access to the data related to this business question:

- **HR Help Desk Administrator Transaction Analysis Duty**
- **HR Help Desk Manager Transaction Analysis Duty**
- **Partner Channel Administrative Transaction Analysis Duty**
- **Partner Channel Transaction Analysis Duty**
- **Partner Org Transaction Analysis Duty**
- **Sales Administrative Transaction Analysis Duty**
- **Sales Executive Transaction Analysis Duty**
- **Sales Managerial Transaction Analysis Duty**
- **Service Administrative Transaction Analysis Duty**
- **Service Managerial Transaction Analysis Duty**

Are survey request frequencies meeting our norms?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **Service - CRM Survey Requests Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Channel Account Manager**
- **Channel Administrator**
- **Channel Operations Manager**
- **Channel Partner Manager**
- **Channel Partner Portal Administrator**
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Human Resource Help Desk Administrator
• Human Resource Help Desk Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Manager
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
• HR Help Desk Manager Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty

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
How many days was a resource active by channel?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Resource System Usage

How is the resource activity split across channels (web/mobile/email)?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Resource System Usage

Job Roles

No applicable job roles

Duty Roles

No applicable job roles
Which department has the highest number of active resources?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Resource System Usage

Which region has the highest number of inactive resources?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Resource System Usage
Who are the resources who have not logged in the system in the last week?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Resource System Usage*

Job Roles
No applicable job roles

Duty Roles
No applicable job roles

Resources of which job title are most active in the system?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Resource System Usage*

Job Roles
No applicable job roles

Duty Roles
No applicable job roles
Who are the top 10 active and bottom 10 inactive employees from a user adoption perspective?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Resource System Usage*

Job Roles

No applicable job roles

Duty Roles

No applicable job roles

How many records were created or updated by a user in a month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Sales - CRM Object Activity*

Job Roles

No applicable job roles

Duty Roles

No applicable job roles
What is the count of records created or updated by object type?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Object Activity

Job Roles
No applicable job roles

Duty Roles
No applicable job roles

How is the object activity split across channels (web/mobile/email)?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Object Activity

Job Roles
No applicable job roles

Duty Roles
No applicable job roles
Which times are objects not being created or updated?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Object Activity

Job Roles
No applicable job roles

Duty Roles
No applicable job roles

Who are the top 10 active users of the system?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- User System Usage

Job Roles
No applicable job roles

Duty Roles
The following duty roles secure access to the data related to this business question:

- User System Usage Transaction Analysis Duty
Who are the users who have not logged in the system in the last week?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- User System Usage

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to the data related to this business question:

- User System Usage Transaction Analysis Duty

Which department has the highest number of Active users?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- User System Usage

Job Roles

No applicable job roles

Duty Roles
Users belonging to what job title are most active in the system?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- User System Usage

Job Roles
No applicable job roles

Duty Roles
The following duty roles secure access to the data related to this business question:

- User System Usage Transaction Analysis Duty

How is the user activity split across Channel (Web/Mobile/Mail)?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- User System Usage

Job Roles
No applicable job roles
How many users run OTBI analyses?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **OTBI Usage Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- Application Implementation Consultant
- IT Security Manager

Who are the top OTBI users?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **OTBI Usage Real Time**
Job Roles
The following job roles secure access to the data related to this business question:

- Application Implementation Consultant
- IT Security Manager

Duty Roles
The following duty roles secure access to the data related to this business question:

- OTBI Usage Transactional Analysis Duty

What is the weekly OTBI analysis usage trend?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- OTBI Usage Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Application Implementation Consultant
- IT Security Manager

Duty Roles
The following duty roles secure access to the data related to this business question:

- OTBI Usage Transactional Analysis Duty
What are the most frequently-run OTBI analyses?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- OTBI Usage Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Application Implementation Consultant
- IT Security Manager

Duty Roles
The following duty roles secure access to the data related to this business question:

- OTBI Usage Transactional Analysis Duty

How many predefined OTBI analyses have been run in the past month?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- OTBI Usage Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Application Implementation Consultant
Duty Roles

The following duty roles secure access to the data related to this business question:

- **OTBI Usage Transactional Analysis Duty**

How many custom OTBI analyses have been run in the past month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **OTBI Usage Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Application Implementation Consultant**
- **IT Security Manager**

Duty Roles

The following duty roles secure access to the data related to this business question:

- **OTBI Usage Transactional Analysis Duty**

How many ad-hoc OTBI analyses have been run in the past month?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- **OTBI Usage Real Time**

**Job Roles**

The following job roles secure access to the data related to this business question:

- Application Implementation Consultant
- IT Security Manager

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- OTBI Usage Transactional Analysis Duty

**What is the execution history of dashboard X in the past month?**

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- **OTBI Usage Real Time**

**Job Roles**

The following job roles secure access to the data related to this business question:

- Application Implementation Consultant
- IT Security Manager

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- OTBI Usage Transactional Analysis Duty
Which analyses have low usage in the past month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- OTBI Usage Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Application Implementation Consultant
- IT Security Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- OTBI Usage Transactional Analysis Duty

How many OTBI SOAP web services have been run in the past month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- OTBI Usage Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Application Implementation Consultant
Duty Roles

The following duty roles secure access to the data related to this business question:

- OTBI Usage Transactional Analysis Duty

What are the long-running analyses in the past month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- OTBI Performance Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Application Implementation Consultant
- IT Security Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- OTBI Performance Transactional Analysis Duty

What is the OTBI execution time histogram in the past month?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- **OTBI Performance Real Time**

### Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

### Duty Roles

The following duty roles secure access to the data related to this business question:

- **OTBI Performance Transactional Analysis Duty**

### Which analyses have the longest response time?

### Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **OTBI Performance Real Time**

### Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

### Duty Roles

The following duty roles secure access to the data related to this business question:

- **OTBI Performance Transactional Analysis Duty**
Which analyses have high data row count?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- OTBI Performance Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Application Implementation Consultant
- IT Security Manager

Duty Roles
The following duty roles secure access to the data related to this business question:

- OTBI Performance Transactional Analysis Duty

Which analyses reached OTBI max row limit?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- OTBI Performance Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Application Implementation Consultant
- IT Security Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- **OTBI Performance Transactional Analysis Duty**

What are the common execution errors in the past month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **OTBI Performance Real Time**

Job Roles

The following job roles secure access to the data related to this business question:

- **Application Implementation Consultant**
- **IT Security Manager**

Duty Roles

The following duty roles secure access to the data related to this business question:

- **OTBI Performance Transactional Analysis Duty**

How many analyses and dashboards failed in the past month?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- **OTBI Performance Real Time**

**Job Roles**

The following job roles secure access to the data related to this business question:

- **Application Implementation Consultant**
- **IT Security Manager**

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- **OTBI Performance Transactional Analysis Duty**

### What are the most commonly used OTBI subject areas?

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- **OTBI Performance Real Time**

**Job Roles**

The following job roles secure access to the data related to this business question:

- **Application Implementation Consultant**
- **IT Security Manager**

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- **OTBI Performance Transactional Analysis Duty**
What are the least-used OTBI subject areas?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- OTBI Performance Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Application Implementation Consultant
- IT Security Manager

Duty Roles
The following duty roles secure access to the data related to this business question:

- OTBI Performance Transactional Analysis Duty

Which subject areas have slow performance?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- OTBI Performance Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Application Implementation Consultant
- IT Security Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Performance Transactional Analysis Duty*

### Which subject areas have large data volume?

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Performance Real Time*

### Job Roles

The following job roles secure access to the data related to this business question:

- *Application Implementation Consultant*
- *IT Security Manager*

### Duty Roles

The following duty roles secure access to the data related to this business question:

- *OTBI Performance Transactional Analysis Duty*

### Which analyses have low usage because of poor performance?

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- *OTBI Performance Real Time*
Job Roles

The following job roles secure access to the data related to this business question:

- Application Implementation Consultant
- IT Security Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- OTBI Performance Transactional Analysis Duty

What is the database SQL execution time and row count?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- OTBI Performance Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Application Implementation Consultant
- IT Security Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- OTBI Performance Transactional Analysis Duty
What is the overall satisfaction levels of our customers with regards to issue resolutions?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Survey Responses Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Sales Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Survey Responses Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Sales Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Survey Responses Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What are the response scores for customer where we have not met SLA's?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Survey Responses Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Is our resolution performance for escalated issues worse or better than non escalated issues?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Survey Responses Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Survey Responses Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Sales Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

Do one or more of the agents in my team need training to improve customer communication skills?

Subject Areas
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 4
Business Questions

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Survey Responses Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Sales Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty
What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Service - CRM Survey Responses Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Human Resource Help Desk Administrator
- Human Resource Help Desk Agent
- Human Resource Help Desk Manager
- Sales Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

- HR Help Desk Administrator Transaction Analysis Duty
- HR Help Desk Agent Transaction Analysis Duty
- HR Help Desk Manager Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
Which of our product lines most frequently receive suggestions for product improvements?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• Service - CRM Survey Responses Real Time

Job Roles

The following job roles secure access to the data related to this business question:

• Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Customer Relationship Management Application Administrator
• Customer Service Manager
• Customer Service Representative
• Human Resource Help Desk Administrator
• Human Resource Help Desk Agent
• Human Resource Help Desk Manager
• Sales Administrator

Duty Roles

The following duty roles secure access to the data related to this business question:

• HR Help Desk Administrator Transaction Analysis Duty
What areas of the application are users viewing or not viewing?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Click History

Job Roles
No applicable job roles

Duty Roles
The following duty roles secure access to the data related to this business question:

- User System Usage Transaction Analysis Duty

Which users are using the application the most or least based on clicks?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Click History**

### Job Roles

No applicable job roles

### Duty Roles

The following duty roles secure access to the data related to this business question:

- **User System Usage Transaction Analysis Duty**

### How are the areas of the application performing?

#### Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Click History**

#### Job Roles

No applicable job roles

#### Duty Roles

The following duty roles secure access to the data related to this business question:

- **User System Usage Transaction Analysis Duty**
What areas of the application are used by users in specific geographic region or resource hierarchies?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Click History

Job Roles
No applicable job roles

Duty Roles
The following duty roles secure access to the data related to this business question:

- User System Usage Transaction Analysis Duty

How many articles are available in the knowledgebase?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles
The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

**Which articles are published or unpublished?**

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Real Time*

**Job Roles**

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

**Which employees interacted with the articles?**

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Real Time*

**Job Roles**
The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty

What are the locales, content types, and authors of the articles in the database?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty
How many links exist between services requests and knowledge articles?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Links Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles
The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty

Which articles are linked to the maximum number of service requests?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Links Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty

Which article versions are linked to service requests?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Links Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty

Which users created the link to an article?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- **Knowledge Management - Article Links Real Time**

**Job Roles**

The following job roles secure access to the data related to this business question:

- **Knowledge Analyst**
- **Knowledge Manager**

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- **Knowledge Management Transaction Analysis Duty**

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**Which category contains the highest number of knowledge articles?**

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- **Knowledge Management - Article Category Real Time**

**Job Roles**

The following job roles secure access to the data related to this business question:

- **Knowledge Analyst**
- **Knowledge Manager**

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- **Knowledge Management Transaction Analysis Duty**
Which articles are linked to a category?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Category Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty

Which products are associated with the most number of knowledge articles?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Product Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Knowledge Analyst
Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Manager*

Which articles are linked to a product?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Product Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *Knowledge Analyst*
- *Knowledge Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Knowledge Management Transaction Analysis Duty*

What types of ratings are assigned articles?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Knowledge Management - Article Product Real Time*
Job Roles
The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles
The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty

What content in the knowledge base is satisfying users' needs?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Rating Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles
The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty
What articles are not satisfying users' needs?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Rating Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles
The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty

What content rating effectively resolves users' questions?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Rating Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Knowledge Analyst
Duty Roles

The following duty roles secure access to the data related to this business question:

- Knowledge Manager

How do knowledge managers view article historical metrics?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Summary Historical

Job Roles

The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty

How are articles are ranked in popularity?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Summary Historical

Job Roles

The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty

Which articles require updates?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Summary Historical

Job Roles

The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty
How are customers finding and using knowledgebase content?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Search Question Tokens Historical

Job Roles

The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty

How many concept tokens as assoicated to articles?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Search Question Tokens Historical

Job Roles

The following job roles secure access to the data related to this business question:

- Knowledge Analyst
Duty Roles

The following duty roles secure access to the data related to this business question:

- Knowledge Manager

How do knowledge managers view article search historical metrics?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Search Question Tokens Historical

Job Roles

The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty

How are customers are finding knowledge base content

Subject Areas
Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Search Questions Historical

Job Roles

The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty

How do knowledge managers view search article metrics?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Search Questions Historical

Job Roles

The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty
How do Knowledge managers view information on article historical metrics?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Summary Historical

Job Roles
The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles
The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty

How are articles in the knowledge base ranked in popularity?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article Summary Historical

Job Roles
The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty

How many articles are consumed by a particular usergroup during a specified period?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article User Group Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty
Which user groups area associated to an article?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article User Group Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Knowledge Analyst
- Knowledge Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty

Which employee in a user group created the most or least articles?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Knowledge Management - Article User Group Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Knowledge Analyst
Duty Roles

The following duty roles secure access to the data related to this business question:

- Knowledge Management Transaction Analysis Duty

Which types of reports and subject areas are the users in your organization are looking at?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Reporting Usage

Job Roles

No applicable job roles

Duty Roles

The following duty roles secure access to the data related to this business question:

- User System Usage Transaction Analysis Duty

What are the most and least popular reports and which analytics are important to your team?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Reporting Usage
Job Roles
No applicable job roles

Duty Roles
The following duty roles secure access to the data related to this business question:

- User System Usage Transaction Analysis Duty

How important are analytics to your team, and how much do they use them?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Reporting Usage

Job Roles
No applicable job roles

Duty Roles
The following duty roles secure access to the data related to this business question:

- User System Usage Transaction Analysis Duty

Which analytics should you prioritize and which can be phased out to optimize resources?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Reporting Usage**

**Job Roles**

No applicable job roles

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- **User System Usage Transaction Analysis Duty**

**Which customers have covered levels worth more than $50k that are expiring in 30 days?**

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- **Subscription Management - Covered Levels Real Time**

**Job Roles**

The following job roles secure access to the data related to this business question:

- **Subscription Specialist**

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- **Subscription Management Transaction Analysis Duty**
Which customers or coverage products deliver the most revenue?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Subscription Management - Covered Levels Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Subscription Specialist

Duty Roles

The following duty roles secure access to the data related to this business question:

- Subscription Management Transaction Analysis Duty

Which covered levels expired without renewal in the last month?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Subscription Management - Covered Levels Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Subscription Specialist

Duty Roles

The following duty roles secure access to the data related to this business question:

- Subscription Management Transaction Analysis Duty

What are all the assets covered for a particular customer?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Subscription Management - Covered Levels Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Subscription Specialist

Duty Roles

The following duty roles secure access to the data related to this business question:

- Subscription Management Transaction Analysis Duty

What is the Net Billing for the last 6 months?

Subject Areas
What is the projected billing for the next 6 months?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Subscription Management - Subscription Billing Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Subscription Specialist

Duty Roles
The following duty roles secure access to the data related to this business question:

- Subscription Management Transaction Analysis Duty
How does the usage of a particular subscription product trend?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Subscription Management - Subscription Billing Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Subscription Specialist

Duty Roles
The following duty roles secure access to the data related to this business question:

- Subscription Management Transaction Analysis Duty

What is the discount that was provided for a particular customer or product?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Subscription Management - Subscription Billing Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Subscription Specialist

Duty Roles

The following duty roles secure access to the data related to this business question:

- Subscription Management Transaction Analysis Duty

What is the Net MRR change due to amendments?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Subscription Management - Subscription Relationships Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Subscription Specialist

Duty Roles

The following duty roles secure access to the data related to this business question:

- Subscription Management Transaction Analysis Duty

What is the Net MRR change due to amendments where full credit was issued?
Which products are most frequently upgraded to or downgraded from?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Subscription Management - Subscription Relationships Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Subscription Specialist

Duty Roles

The following duty roles secure access to the data related to this business question:

- Subscription Management Transaction Analysis Duty
What is the trend of successful, outstanding and churned renewals in the last 6 months?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Subscription Management - Subscription Relationships Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- Subscription Specialist

Duty Roles

The following duty roles secure access to the data related to this business question:

- Subscription Management Transaction Analysis Duty

How much MRR was renewed each month in the last 6 months?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Subscription Management - Subscription Relationships Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- Subscription Specialist

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- Subscription Management Transaction Analysis Duty

**What is the MRR lost each month due to suspensions in the last 6 months?**

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- Subscription Management - Subscription Relationships Real Time

**Job Roles**

The following job roles secure access to the data related to this business question:

- Subscription Specialist

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- Subscription Management Transaction Analysis Duty
Why am I not able to view certain subject areas with my login credentials?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Security - Roles and Privileges Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- IT Security Manager

Duty Roles
The following duty roles secure access to the data related to this business question:

- Security Transaction Analysis Duty

Which data security policy would provide access to the data I need to see?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Security - Roles and Privileges Real Time

Job Roles
The following job roles secure access to the data related to this business question:

- IT Security Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- Security Transaction Analysis Duty

Can I view and edit a particular page? If yes, which functional security policy do I need to provide to a user who needs similar access?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Security - Roles and Privileges Real Time

Job Roles

The following job roles secure access to the data related to this business question:

- IT Security Manager

Duty Roles

The following duty roles secure access to the data related to this business question:

- Security Transaction Analysis Duty
I have not added a specific role to a user, but the user seems to have this job role. Can I trace how has this been inherited by the user?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Security - Roles and Privileges Real Time*

Job Roles

The following job roles secure access to the data related to this business question:

- *IT Security Manager*

Duty Roles

The following duty roles secure access to the data related to this business question:

- *Security Transaction Analysis Duty*

What are all the data security privileges that a specific user added?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- *Security - Audit Real Time*

Job Roles
The following job roles secure access to the data related to this business question:

- *IT Security Manager*

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- *Security Transaction Analysis Duty*

**Which roles were added with a specific functional security policy, and who added them?**

**Subject Areas**

The following subject areas contain the folders and attributes needed to answer this business question:

- *Security - Audit Real Time*

**Job Roles**

The following job roles secure access to the data related to this business question:

- *IT Security Manager*

**Duty Roles**

The following duty roles secure access to the data related to this business question:

- *Security Transaction Analysis Duty*

**Which reports are running poorly?**

**Subject Areas**
The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Reporting Performance**

### Job Roles

No applicable job roles

### Duty Roles

The following duty roles secure access to the data related to this business question:

- **CRM OTBI Report Performance Transactional Analysis Duty**

### Which reports are running well?

### Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Reporting Performance**

### Job Roles

No applicable job roles

### Duty Roles

The following duty roles secure access to the data related to this business question:

- **CRM OTBI Report Performance Transactional Analysis Duty**

### Which reports need maintenance?

### Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Reporting Performance**

### Job Roles

No applicable job roles

### Duty Roles

The following duty roles secure access to the data related to this business question:

- **CRM OTBI Report Performance Transactional Analysis Duty**

### What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?

### Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- **CRM - CRM Activities with Related Activities**

### Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
• Customer Service Representative
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Lead Qualifier
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• Marketing Lead Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Campaign Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Transaction Analysis Duty
• Service Administrative Transaction Analysis Duty
• Service Managerial Transaction Analysis Duty
• Service Transaction Analysis Duty

What are the associated activities related to my upcoming appointment and task?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

• CRM - CRM Activities with Related Activities
Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
What are the follow-up tasks I need to do on a particular customer?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- CRM - CRM Activities with Related Activities

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Customer Relationship Management Application Administrator
- Customer Service Manager
- Customer Service Representative
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles
The following duty roles secure access to the data related to this business question:

- Marketing Lead Transaction Analysis Duty
- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty
- Service Managerial Transaction Analysis Duty
- Service Transaction Analysis Duty

What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Quote Lines

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

Subject Areas

The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Quote Lines

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
• Channel Administrator
• Channel Operations Manager
• Channel Partner Manager
• Channel Partner Portal Administrator
• Channel Sales Director
• Channel Sales Manager
• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative
• Sales Administrator
• Sales Analyst
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

• Partner Channel Administrative Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty
• Partner Org Transaction Analysis Duty
• Sales Administrative Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty
• Sales Managerial Transaction Analysis Duty
• Sales Operational Transaction Analysis Duty
• Sales Transaction Analysis Duty

What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?

Subject Areas
The following subject areas contain the folders and attributes needed to answer this business question:

- Sales - CRM Quote Lines

Job Roles

The following job roles secure access to the data related to this business question:

- Channel Account Manager
- Channel Administrator
- Channel Operations Manager
- Channel Partner Manager
- Channel Partner Portal Administrator
- Channel Sales Director
- Channel Sales Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Analyst
- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Duty Roles

The following duty roles secure access to the data related to this business question:

- Partner Channel Administrative Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty
- Partner Org Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Operational Transaction Analysis Duty
- Sales Transaction Analysis Duty
5 Job Roles

Overview

For each job role in this chapter, links are provided for more detailed information about the duty roles, subject areas, and business questions associated with the job role.

Accounts Receivable Manager

Code Name

ORA_AR_ACCOUNTS_RECEIVABLE_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- Receivables Customer Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- Sales - CRM Account Relationship

Business Questions

This job role secures access to data that can answer the following business questions:

- Does this account have subsidiaries?
- What are the Customers from this account, including all subsidiaries?
- What are the total number of Relationships for a given Account?
Accounts Receivable Specialist

Code Name
ORA_AR_ACCOUNTS_RECEIVABLE_SPECIALIST_JOB

Duty Roles
This job role is related to the following duty roles:

- Receivables Customer Transaction Analysis Duty

Subject Areas
This job role secures access to the following subject areas:

- Sales - CRM Account Relationship

Business Questions
This job role secures access to data that can answer the following business questions:

- Does this account have subsidiaries?
- What are the Customers from this account, including all subsidiaries?
- What are the total number of Relationships for a given Account?

Application Implementation Consultant

Code Name
APP_IMPL_CONSULTANT

Duty Roles
This job role is related to the following duty roles:

- OTBI Performance Transactional Analysis Duty
• **OTBI Usage Transactional Analysis Duty**

**Subject Areas**

This job role secures access to the following subject areas:

- **OTBI Performance Real Time**
- **OTBI Usage Real Time**

**Business Questions**

This job role secures access to data that can answer the following business questions:

- **Who are the top OTBI users?**
- **How many predefined OTBI analyses have been run in the past month?**
- **What is the OTBI execution time histogram in the past month?**
- **What is the database SQL execution time and row count?**
- **Which analyses have low usage in the past month?**
- **What are the long-running analyses in the past month?**
- **Which analyses have high data row count?**
- **Which analyses reached OTBI max row limit?**
- **Which subject areas have slow performance?**
- **Which analyses have low usage because of poor performance?**
- **What are the most frequently-run OTBI analyses?**
- **How many ad-hoc OTBI analyses have been run in the past month?**
- **How many OTBI SOAP web services have been run in the past month?**
- **What are the least-used OTBI subject areas?**
- **Which subject areas have large data volume?**
- **How many analyses and dashboards failed in the past month?**
- **What are the most commonly used OTBI subject areas?**
- **How many users run OTBI analyses?**
- **How many custom OTBI analyses have been run in the past month?**
- **What is the execution history of dashboard X in the past month?**
- **What is the weekly OTBI analysis usage trend?**
- **Which analyses have the longest response time?**
- **What are the common execution errors in the past month?**
Channel Account Manager

Code Name

ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- Incentive Compensation Transaction Analysis Duty
- Partner Channel Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activities with Related Activities
- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Incentive Compensation - Attainments Real Time
- Incentive Compensation - Compensation Plan Assignments Real Time
- Incentive Compensation - Credits Real Time
- Incentive Compensation - Disputes Real Time
- Incentive Compensation - Earning and Attainment Summary Real Time
- Incentive Compensation - Earnings Real Time
- Incentive Compensation - Participant Balances Real Time
- Incentive Compensation - Participant Compensation Plan Real Time
- Incentive Compensation - Participant Detail Real Time
Job Roles

- Incentive Compensation - Participant Interval Goals Real Time
- Incentive Compensation - Participant Period Goals Real Time
- Incentive Compensation - Pay Group Assignments Real Time
- Incentive Compensation - Payments Real Time
- Incentive Compensation - Paysheet Summary Real Time
- Incentive Compensation - Performance and Earnings Summary Real Time
- Incentive Compensation - Rules Real Time
- Incentive Compensation - Transactions Real Time
- Marketing - CRM Leads
- Partners - CRM Leads and Opportunities Real Time
- Partners - CRM Opportunities and Products Real Time
- Partners - CRM Partner Assessments
- Partners - CRM Partner Classification
- Partners - CRM Partner Contact
- Partners - CRM Partner Overview
- Partners - CRM Partner Program Benefits
- Partners - CRM Partner Resource
- Partners - CRM Partner Territory
- Partners - CRM Program Enrollments
- Partners - CRM Programs
- Sales - CRM Account Relationship
- Sales - CRM All Contact Contact Point
- Sales - CRM All Contacts Addresses
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan Objective Split
- Sales - CRM Campaign Members
- Sales - CRM Campaign Opportunity
- Sales - CRM Contact Note
- Sales - CRM Contact Relationship
- Sales - CRM Contact Resource
- Sales - CRM Contacts
- Sales - CRM Customer Classification
- Sales - CRM Customer Note
- Sales - CRM Customer Overview
Job Roles

- Sales - CRM Customers
- Sales - CRM Customers and Contacts Real Time
- Sales - CRM Deal Registration
- Sales - CRM Deal Registration Product
- Sales - CRM Forecasting
- Sales - CRM Forecasting and Pipeline Revenue Real Time
- Sales - CRM Historical Forecasting
- Sales - CRM Historical Pipeline
- Sales - CRM Lead Assessments
- Sales - CRM Lead Contact
- Sales - CRM Lead Product
- Sales - CRM Lead Resource
- Sales - CRM Lead Territory
- Sales - CRM MDF Budget
- Sales - CRM MDF Claim
- Sales - CRM MDF Claim Settlement
- Sales - CRM MDF Request
- Sales - CRM Opportunities and Products Real Time
- Sales - CRM Opportunity Assessments
- Sales - CRM Opportunity Campaign
- Sales - CRM Opportunity Contact
- Sales - CRM Opportunity Note
- Sales - CRM Opportunity Partner
- Sales - CRM Opportunity Resource
- Sales - CRM Opportunity Sales Stage Snapshot
- Sales - CRM Opportunity Territory
- Sales - CRM Partner Relationship
- Sales - CRM Pipeline
- Sales - CRM Primary Contact Addresses
- Sales - CRM Primary Contact Contact Point
- Sales - CRM Quota Management
- Sales - CRM Quote Lines
- Sales - CRM Quotes
- Sales - CRM Resource
- Sales - CRM Resource Territory
- Sales - CRM Sales Account Assessments
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 5
Job Roles

• Sales - CRM Sales Account Resource
• Sales - CRM Sales Account Territory
• Sales - CRM Territory Resource
• Service - CRM Customer Coverage Real Time
• Service - CRM Inbound Messages Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Action Plan Actions Real Time
• Service - CRM Service Request Lifecycle
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Request Resource Real Time
• Service - CRM Service Request Tags Real Time
• Service - CRM Service Requests Real Time
• Service - CRM Social Post Real Time
• Service - CRM Survey Requests Real Time
• Service - CRM Survey Responses Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

• How many Leads are converted in the current quarter?
• How many Leads are unassigned in the system?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
• What is the revenue generated by Partners per Customer?
• What are my best performing product lines by customer geographies?
• How is my Revenue distributed across Customer geographies?
• What regions are my customers clustered in?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• On which sales accounts is a given sales representative a member of the account team?
• Who are all the Contacts assigned to the Assets?
• What are the responses for different Opportunity for an Assessment submitted?
• What are the Quotas assigned to the team and the Actuals?
• How are the business plan objectives split?
• What are the objectives that have not met the target value set?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• What are the SIC codes associated with a Partner, and with all associated Partners?
• Against how many Opportunities, were the Quotes submitted in this month?
• How do the number of activities in a region and their average SR resolution rates by quarter compare?
• How often do communications cross channels to get to resolution?
• How many customer interactions happen without an SR?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How often are communications being transferred between agents?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many new coverages begin in the ensuing month?
• Are we equipped to service the increase in coverages?
• What is the current count of inbound email requests by status and mailbox?
• How many messages resulted in new service request creation versus update to existing service request?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• What characteristics do groupings of SRs based on specific tags (e.g., tag = ‘outage’) exhibit?
• How is tag usage across agents and resource teams? Which teams perform better than others?
• What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• How much credit did a participant receive for their sales transactions?
• What type of assignment does a participant have to a plan?
• Which of my direct reports’ attainment or earnings are below the wanted performance expectation?
• Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.
• What is the total quota across the organization by performance measure for the period or across periods?
• Which participants are assigned to a given pay group?
• How do participants’ plan component earnings compare with their personalized target incentives?
• What are the credit rules which a credit receiver is assigned to?
• How is survey request trending compared to SR resolutions during the same period?
• What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
• What are the top 10 products associated to the Leads in the system?
• What is the number of leads by partners for a specific product group?
• How many Partners is a Contact is associated to?
• How many Leads and Opportunities are Open for a given Customer in the Current quarter?
• Are the Leads associated with certain products?
• What is the open/closed revenue for each of the product groups in the selected geography?
• Are the sales reps moving their opportunities fast enough?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the sales accounts owned by the Sales team?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• Who are the Resources assigned to the Leads created in any given time period?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• How did the Opportunity evolve over time?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• How many territories are assigned to a Resource/Employee?
• What are all the Territories assigned to Resources/Employees?
• What are the total number of Contact Relationships between two Contact?
• Does this Contact have subsidiaries?
• What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?submitted e.g. Partner Performance?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• How many emails came from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• What is the opportunity information captured in the note to an opportunity?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.
• What are my compensation plan incentive targets?
• Are my individualized performance measure goals set properly?
• Who is assigned to a given plan?
• What is the total quota by performance measure for the interval across the organization?
• When was a given participant assigned to a specific pay group?
• What is the current status of the payment batches? Are they paid, reviewed, or frozen?
• What are all addresses associated with the primary contact for all active opportunities in the current quarter?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
• Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?
• What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?
• What are the follow-up tasks I need to do on a particular customer?
• Who are the top Sales representatives by their Lead conversion ratio?
• What are the open Opportunities associated to a given Partner?
• What is the average deal size by Product groups?
• How are the Partners classified?
• What is total number of Partners assigned to a specific classification for this period?
• Does this account have subsidiaries?
• How is the Revenue spread for a given Customer hierarchy?
• How actively (# of Activities) are the Sales reps engaged with customers?
• What are my most active accounts? Who owns them and where are these located?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• Who are all the contacts for key customers and what are their roles?
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 5
Job Roles

• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?
• Do Forecast rely on Revenue from few Products?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What is the revenue lost to competition for a specific product/product group?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are the Accounts under the sales team, by territory?
• What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?
• How many Assets are created in a particular time period?
• Who are all the resources assigned to the Assets?
• What is the additional information updated in the Notes for a Contact?
• What is the additional information updated in the Notes for a Customer?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
• What is the average time the Opportunity is in a particular sales stage?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the Resources are associated to this contact?
• How many Leads do not have Contact?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• What are the various attainment attributes associated with my credits?
• How do these targets break down by plan component?
• As a participant manager, what are the targets and goals settings for my direct reports?
• Is the participant active? And for which dates?
• Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.
• How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?
• Do I have to realign quota based on current attainment levels?
• What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• What is the quarterly revenue trend for a specific product/product group by partner?
• What are the Customers from this account, including all subsidiaries?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• What is the channel performance vs channel forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
• How do wins and losses trend quarterly for a specific product line?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the sales accounts that a given Sales representative owns?
• What is the QoQ growth for Assets by Products?
• How many Territories are assigned to an Opportunity?
• What are all the Territories assigned to Opportunities?
• How many new Resources are created in the current quarter?
• What are the target v/s actual number of the split objectives?
• What are the Programs that Partners have enrolled into?
• What are the total number of Relationships between two Partners?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
• How many responses received for a given campaign?
• How many Opportunities associated to a Campaign?
• What is the total Quotes revenue for the current month?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• How many emails are we receiving over time?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What is the contact point information of the primary contact for all active opportunities in the current quarter?
• Which participants are assigned to which plans?
• Were there credit or rollup errors that must be fixed?
• What are the targets and goals settings for an individual?
• What are the rules effective as of the given date in the hierarchy?
• What are the results of the collected transactions before the crediting process?
• What are all addresses associated with the primary contact for accounts I’m the owner of or on the sales team?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the response scores for customer where we have not met SLA’s?
• Do one or more of the agents in my team need training to improve customer communication skills?
• What are the associated activities related to my upcoming appointment and task?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What is the potential revenue of leads by partners?
• What is the distribution of Partner Opportunities by sales stages?
• What is the number of partners in a specific classification within a defined geographic region?
• 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?
• How many Partners’ team is a given Resource part of?
• What are the total number of Relationships for a given Account?
• What are the top ten accounts by revenue in the last quarter?
• Who are my teams top Customers?
• Who are the ‘new’ customers, created in the past 6 months?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• How are product revenues trending month over month?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are the historical monthly trend of closed revenue by current territories?
• How many Leads are open for a given Product?
• What was the currency conversion rate applied to a specific claim?
• What products are often lost to key competitors? Is there a pattern?
• Who are the top competitors and what is the revenue exposure to them?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• How many territories is the Lead part of?
• What are all the Campaigns assigned to an Opportunity?
• Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• How many Enrollments are going to expire in the next quarter?
• How many Programs were created in the last quarter?
• Does this Partner have subsidiaries?
• What are the partner I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What is the primary contact and non-primary contact points for all active opportunities in the current quarter?
• What are the assignment start and end dates for a participant?
• Does the participant have an individualized target incentive for the plan?
• Are participants correctly credited?
• Are we on track in achieving quota this period or quarter?
• To what country and business unit does the participant belong?
• What is the total quota by performance measure for the period across the organization? Validate quota levels.
• Is the company on track to attain its goals? Who is lagging and might require coaching?
• What are all addresses of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• What is the number of Partner Contacts that are also resources and users?
• How many Territories is a Partner part of?
• Who manages my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
• What is the Territory Quota vs/ Actual?
• Which Territories have exceeded their Quotes in the current Quarter?
• Who are the Partner resources in the system and which Partner Organization they belong to?
• What are the Partners created in the system for a given time period?
• How many Enrollments were created/submitted/expired/terminated in the last month?
• What is the Campaign ROI (return on investment)?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product ‘A’ have tag ‘X’ or ‘Y’? How many have the ‘Potential Churn’ tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• How much credit did my team receive for their attainment?
• Who got paid what amount and from where, at the detail level?
• Why wasn’t I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.
• How do they compare to the base goals set on the measure?
• As a participant manager, which pay groups do my direct reports belong to?
• What is my cost of compensation by participant, plan component, plan, and frequencies?
• How does the performance measure attainment compare with a participant’s personalized goal across his directs?
• What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• Is our resolution performance for escalated issues worse or better than non escalated issues?
• What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
• What are the sources of the Leads created in the current quarter?
• What are the top ten Partners by Revenue during the past quarter/year?
• What Partners are assigned to specific geographic territories?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• How to forecasts trend across periods?
• Who all are the Contacts associated to the Lead?
• 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?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Is the sales team converting leads to opportunities fast enough?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Who are the resources assigned for a particular territory?
• How many new contacts are created in the system in the current month?
• What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Organization?
• Which Program has the highest number of Enrollments?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many social posts came from known versus unknown contacts?
• How many open SRs are linked to each tag?
• What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
• Has the participant accepted the assignment to the plan?
• Is the dispute load balanced between my analysts? Asked by compensation managers.
• What is the total quota across the organization by performance measure for the interval?
• Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.
• What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• What is the overall satisfaction levels of our customers with regards to issue resolutions?
• Which of our product lines most frequently receive suggestions for product improvements?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Does the forecast versus pipeline trend show a healthy picture?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• What are the higher value deals that have been moved out?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• Are the Leads supporting products that appeal to certain customers by size of company?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• What are all the contacts created in the system by Geography?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• What are all the Opportunities resulted from a Campaign?
• How many Resources are assigned to an Opportunity?
• 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 many Leads are part of the Campaign?
• Who has completed the most activity objectives?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• What is the breakdown of open action plans by category?
• How many action plans are open and how long have they been open?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How are these targets individualized across the participants.
• What is the participant's home currency or cost center?
• What is the total quota by performance measure for the period across the organization?
• What pay groups are in the application? What are their types and descriptions?
• What is the status of each paysheet within the payment batches?
• What are the criteria for a rule including the inherited criteria from the ancestors?
• How long was an SR unassigned and how long did it sit in each queue?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?
• What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

Channel Administrator

Code Name

ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

• Partner Channel Administrative Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Activities with Related Activities
• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• CRM - CRM Interaction Aggregate
• CRM - CRM Interaction Service Requests Real Time
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• CRM - CRM Work Orders Real Time
• Marketing - CRM Leads
• Partners - CRM Leads and Opportunities Real Time
• Partners - CRM Opportunities and Products Real Time
• Partners - CRM Partner Assessments
• Partners - CRM Partner Classification
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 5
Job Roles

- Partners - CRM Partner Contact
- Partners - CRM Partner Overview
- Partners - CRM Partner Program Benefits
- Partners - CRM Partner Resource
- Partners - CRM Partner Territory
- Partners - CRM Program Enrollments
- Partners - CRM Programs
- Sales - CRM Account Relationship
- Sales - CRM All Contact Contact Point
- Sales - CRM All Contacts Addresses
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan Objective Split
- Sales - CRM Campaign Members
- Sales - CRM Campaign Opportunity
- Sales - CRM Contact Note
- Sales - CRM Contact Relationship
- Sales - CRM Contact Resource
- Sales - CRM Contacts
- Sales - CRM Customer Classification
- Sales - CRM Customer Note
- Sales - CRM Customer Overview
- Sales - CRM Customers
- Sales - CRM Customers and Contacts Real Time
- Sales - CRM Deal Registration
- Sales - CRM Deal Registration Product
- Sales - CRM Forecasting
- Sales - CRM Forecasting and Pipeline Revenue Real Time
- Sales - CRM Historical Forecasting
- Sales - CRM Historical Pipeline
- Sales - CRM Lead Assessments
- Sales - CRM Lead Contact
- Sales - CRM Lead Product
- Sales - CRM Lead Resource
- Sales - CRM Lead Territory
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

- Sales - CRM MDF Budget
- Sales - CRM MDF Claim
- Sales - CRM MDF Claim Settlement
- Sales - CRM MDF Request
- Sales - CRM Opportunities and Products Real Time
- Sales - CRM Opportunity Assessments
- Sales - CRM Opportunity Campaign
- Sales - CRM Opportunity Contact
- Sales - CRM Opportunity Note
- Sales - CRM Opportunity Partner
- Sales - CRM Opportunity Resource
- Sales - CRM Opportunity Sales Stage Snapshot
- Sales - CRM Opportunity Territory
- Sales - CRM Partner Relationship
- Sales - CRM Pipeline
- Sales - CRM Primary Contact Addresses
- Sales - CRM Primary Contact Contact Point
- Sales - CRM Quota Management
- Sales - CRM Quote Lines
- Sales - CRM Quotes
- Sales - CRM Resource
- Sales - CRM Resource Territory
- Sales - CRM Sales Account Assessments
- Sales - CRM Sales Account Resource
- Sales - CRM Sales Account Territory
- Sales - CRM Territory Resource
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Lifecycle
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Request Tags Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time
Business Questions

This job role secures access to data that can answer the following business questions:

- How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- What is the revenue generated by Partners per Customer?
- What are my best performing product lines by customer geographies?
- How is my Revenue distributed across Customer geographies?
- What regions are my customers clustered in?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
- On which sales accounts is a given sales representative a member of the account team?
- Who are all the Contacts assigned to the Assets?
- What are the responses for different Opportunity for an Assessment submitted?
- What are the Quotas assigned to the team and the Actuals?
- How are the business plan objectives split?
- What are the objectives that have not met the target value set?
- How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
- What are the SIC codes associated with a Partner, and with all associated Partners?
- Against how many Opportunities, were the Quotes submitted in this month?
- How do the number of opportunities in a region and their average SR resolution rates by quarter compare?
- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How often are communications being transferred between agents?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
- How many new coverages begin in the ensuing month?
- Are we equipped to service the increase in coverages?
• What is the current count of inbound email requests by status and mailbox?
• How many messages resulted in new service request creation versus update to existing service request?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
• How is tag usage across agents and resource teams? Which teams perform better than others?
• What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• How is survey request trending compared to SR resolutions during the same period?
• What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
• What are the top 10 products associated to the Leads in the system?
• What is the number of leads by partners for a specific product group?
• How many Partners is a Contact is associated to?
• How many Leads and Opportunities are Open for a given Customer in the Current quarter?
• Are the Leads associated with certain products?
• What is the open/closed revenue for each of the product groups in the selected geography?
• Are the sales reps moving their opportunities fast enough?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the sales accounts owned by the Sales team?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• Who are the Resources assigned to the Leads created in any given time period?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• How did the Opportunity evolve over time?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• How many territories are assigned to a Resource/Employee?
• What are all the Territories assigned to Resources/Employees?
• What are the total number of Contact Relationships between two Contact?
• Does this Contact have subsidiaries?
• What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• How many emails come from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Do SR’s with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• What is the opportunity information captured in the note to an opportunity?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• What are all addresses associated with the primary contact for all active opportunities in the current quarter?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
• Have we kept our strategic customers happy? If not, where can we improve - in timliness, better first time resolution, etc.?
• What is the most frequent positive feedback we get from our custoemrs? Most frequent negative feedback?
• What are the follow-up tasks I need to do on a particular customer?
• Who are the top Sales representatives by their Lead conversion ratio?
• What are the open Opportunities associated to a given Partner?
• What is the average deal size by Product groups?
• How are the Partners classified?
• What is total number of Partners assigned to a specific classification for this period?
• **Does this account have subsidiaries?**
• **How is the Revenue spread for a given Customer hierarchy?**
• **How actively (# of Activities) are the Sales reps engaged with customers?**
• **What are my most active accounts? Who owns them and where are these located?**
• **What are the contact - points (phone, email, address, etc.) of key contacts?**
• **Who are all the contacts for key customers and what are their roles?**
• **Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?**
• **Do Forecast rely on Revenue from few Products?**
• **Are the Approved Claims fully allocated or are the Channel partners not spending to approval?**
• **What is the revenue lost to competition for a specific product/product group?**
• **How is each member on the team performing on deal size, account coverage, and win rate?**
• **What are the Accounts under the sales team, by territory?**
• **What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?**
• **How many Assets are created in a particular time period?**
• **Who are all the resources assigned to the Assets?**
• **What is the additional information updated in the Notes for a Contact?**
• **What is the additional information updated in the Notes for a Customer?**
• **Who are the Employees/Resource for the Deals that are submitted in the current month?**
• **What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?**
• **What is the average time the Opportunity is in a particular sales stage?**
• **What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?**
• **What are the Resources are associated to this contact?**
• **How many Leads do not have Contact?**
• **What are the activity objectives for the current period?**
• **What managers have teams averaging the most activities?**
• **Are agents prematurely updating SRs as Resolved to make their numbers look better?**
• **What product lines have a higher percentage of non-compliant SRs open?**
• **How frequently do agents link articles to SRs?**
• **How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?**
• **How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?**
• **I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?**
• **What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?**
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• What is the quarterly revenue trend for a specific product/product group by partner?
• What are the Customers from this account, including all subsidiaries?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• What is the channel performance vs channel forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
• How do wins and losses trend quarterly for a specific product line?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the sales accounts that a given Sales representative owns?
• What is the QoQ growth for Assets by Products?
• How many Territories are assigned to an Opportunity?
• What are all the Territories assigned to Opportunities?
• How many new Resources are created in the current quarter?
• What are the target v/s actual number of the split objectives?
• What are the Programs that Partners have enrolled into?
• What are the total number of Relationships between two Partners?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
• How many responses received for a given campaign?
• How many Opportunities associated to a Campaign?
• What is the total Quotes revenue for the current month?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• How many emails are we receiving over time?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
Job Roles

- What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
- How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
- What is the contact point information of the primary contact for all active opportunities in the current quarter?
- What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?
- Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
- Do we need to adjust our survey template to improve response rates?
- Does seasonality impact response rates?
- How does response differ for various service teams? Do some teams obtain better response rates?
- What are the response scores for customer where we have not met SLA's?
- Do one or more of the agents in my team need training to improve customer communication skills?
- What are the associated activities related to my upcoming appointment and task?
- Who is the Primary Contact and Resource assigned for a given Lead?
- What is the potential revenue of leads by partners?
- What is the distribution of Partner Opportunities by sales stages?
- What is the number of partners in a specific classification within a defined geographic region?
- 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?
- How many Partners' team is a given Resource part of?
- What are the total number of Relationships for a given Account?
- What are the top ten accounts by revenue in the last quarter?
- Who are my teams top Customers?
- Who are the 'new' customers, created in the past 6 months?
- What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
- How are product revenues trending month over month?
- How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
- What are the historical monthly trend of closed revenue by current territories?
- How many Leads are open for a given Product?
- What was the currency conversion rate applied to a specific claim?
- What products are often lost to key competitors? Is there a pattern?
- Who are the top competitors and what is the revenue exposure to them?
- Who are the Primary owners of the Contacts for contacts created in the last quarter?
- How many territories is the Lead part of?
- What are all the Campaigns assigned to an Opportunity?
- Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• How many Enrollments are going to expire in the next quarter?
• How many Programs were created in the last quarter?
• Does this Partner have subsidiaries?
• What are the partner I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter?
• What are all addresses of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• What is the number of Partner Contacts that are also resources and users?
• How many Territories is a Partner part of?
• Who manages my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
• What is the Territory Quota vs/ Actual?
• Which Territories have exceeded their Quotes in the current Quarter?
• Who are the Partner resources in the system and which Partner Organization they belong to?
• What are the Partners created in the system for a given time period?
• How many Enrollments were created/submitted/expired/terminated in the last month?
• What is the Campaign ROI (return on investment)?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product ‘A’ have tag ‘X’ or ‘Y’? How many have the ‘Potential Churn’ tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• Is our resolution performance for escalated issues worse or better than non escalated issues?
• What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
• What are the sources of the Leads created in the current quarter?
• What are the top ten Partners by Revenue during the past quarter/year?
• What Partners are assigned to specific geographic territories?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• How to forecasts trend across periods?
• Who all are the Contacts associated to the Lead?
• 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?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Is the sales team converting leads to opportunities fast enough?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Who are the resources assigned for a particular territory?
• How many new contacts are created in the system in the current month?
• What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Organization?
• Which Program has the highest number of Enrollments?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many social posts came from known versus unknown contacts?
• How many open SRs are linked to each tag?
• What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
• What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?

• Was an SR sitting in a queue longer than the average time for all other SRs?

• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)

• Does the survey request activity show a declining trend?

• What is the overall satisfaction levels of our customers with regards to issue resolutions?

• Which of our product lines most frequently receive suggestions for product improvements?

• How many Leads were rejected in the last quarter and what were the reason for those?

• What are the names of the customers that a Sales team owns? Who are the key contacts?

• Does the forecast versus pipeline trend show a healthy picture?

• What are the Opportunity Revenue line details contributing the most to the Forecast?

• What are the higher value deals that have been moved out?

• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?

• Are the Leads supporting products that appeal to certain customers by size of company?

• What were the approved amounts vs the settled claim totals for the last 4 quarters?

• What are the top 10 open opportunities? What are the target close dates and revenues for these?

• What are all the contacts created in the system by Geography?

• What are all the Opportunities created as a result of Deal closure by a particular resource/team?

• What are all the Opportunities resulted from a Campaign?

• How many Resources are assigned to an Opportunity?

• 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 many Leads are part of the Campaign?

• Who has completed the most activity objectives?

• What are the activity levels in specific regions?

• Do customers contact us more often to solve issues or to seek answers to questions?

• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?

• How is the percentage of compliant SRs trending month over month, quarter over quarter?

• Where are the outliers when it comes to compliance?

• How many showed up as compliant; how many were non-compliant during my review of completed work orders?

• What is the breakdown of open action plans by category?

• How many action plans are open and how long have they been open?

• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?

• What is the contact point information of the primary contact for accounts where I’m the owner or on the sales team?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?
• What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

Channel Operations Manager

Code Name

ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

• Incentive Compensation Transaction Analysis Duty
• Partner Channel Administrative Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Activities with Related Activities
• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• CRM - CRM Interaction Aggregate
• CRM - CRM Interaction Service Requests Real Time
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• CRM - CRM Work Orders Real Time
• Incentive Compensation - Attainments Real Time
• Incentive Compensation - Compensation Plan Assignments Real Time
• Incentive Compensation - Credits Real Time
• Incentive Compensation - Disputes Real Time
• Incentive Compensation - Earning and Attainment Summary Real Time
• Incentive Compensation - Earnings Real Time
• Incentive Compensation - Participant Balances Real Time
• Incentive Compensation - Participant Compensation Plan Real Time
• Incentive Compensation - Participant Detail Real Time
• Incentive Compensation - Participant Interval Goals Real Time
• Incentive Compensation - Participant Period Goals Real Time
• Incentive Compensation - Pay Group Assignments Real Time
• Incentive Compensation - Payments Real Time
• Incentive Compensation - Paysheet Summary Real Time
• Incentive Compensation - Performance and Earnings Summary Real Time
• Incentive Compensation - Rules Real Time
• Incentive Compensation - Transactions Real Time
• Marketing - CRM Leads
• Partners - CRM Leads and Opportunities Real Time
• Partners - CRM Opportunities and Products Real Time
• Partners - CRM Partner Assessments
• Partners - CRM Partner Classification
• Partners - CRM Partner Contact
• Partners - CRM Partner Overview
• Partners - CRM Partner Program Benefits
• Partners - CRM Partner Resource
• Partners - CRM Partner Territory
• Partners - CRM Program Enrollments
• Partners - CRM Programs
• Sales - CRM Account Relationship
• Sales - CRM All Contact Contact Point
• Sales - CRM All Contacts Addresses
• Sales - CRM Asset
• Sales - CRM Asset Contact
• Sales - CRM Asset Resource
• Sales - CRM Business Plan Objective Split
• Sales - CRM Campaign Members
• Sales - CRM Campaign Opportunity
• Sales - CRM Contact Note
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

- Sales - CRM Contact Relationship
- Sales - CRM Contact Resource
- Sales - CRM Contacts
- Sales - CRM Customer Classification
- Sales - CRM Customer Note
- Sales - CRM Customer Overview
- Sales - CRM Customers
- Sales - CRM Customers and Contacts Real Time
- Sales - CRM Deal Registration
- Sales - CRM Deal Registration Product
- Sales - CRM Forecasting
- Sales - CRM Forecasting and Pipeline Revenue Real Time
- Sales - CRM Historical Forecasting
- Sales - CRM Historical Pipeline
- Sales - CRM Lead Assessments
- Sales - CRM Lead Contact
- Sales - CRM Lead Product
- Sales - CRM Lead Resource
- Sales - CRM Lead Territory
- Sales - CRM MDF Budget
- Sales - CRM MDF Claim
- Sales - CRM MDF Claim Settlement
- Sales - CRM MDF Request
- Sales - CRM Opportunities and Products Real Time
- Sales - CRM Opportunity Assessments
- Sales - CRM Opportunity Campaign
- Sales - CRM Opportunity Contact
- Sales - CRM Opportunity Note
- Sales - CRM Opportunity Partner
- Sales - CRM Opportunity Resource
- Sales - CRM Opportunity Sales Stage Snapshot
- Sales - CRM Opportunity Territory
- Sales - CRM Partner Relationship
- Sales - CRM Pipeline
- Sales - CRM Primary Contact Addresses
- Sales - CRM Primary Contact Contact Point
- Sales - CRM Quota Management
• Sales - CRM Quote Lines
• Sales - CRM Quotes
• Sales - CRM Resource
• Sales - CRM Resource Territory
• Sales - CRM Sales Account Assessments
• Sales - CRM Sales Account Resource
• Sales - CRM Sales Account Territory
• Sales - CRM Territory Resource
• Service - CRM Customer Coverage Real Time
• Service - CRM Inbound Messages Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Action Plan Actions Real Time
• Service - CRM Service Request Lifecycle
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Request Resource Real Time
• Service - CRM Service Request Tags Real Time
• Service - CRM Service Requests Real Time
• Service - CRM Social Post Real Time
• Service - CRM Survey Requests Real Time
• Service - CRM Survey Responses Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

• How many Leads are converted in the current quarter?
• How many Leads are unassigned in the system?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
• What is the revenue generated by Partners per Customer?
• What are my best performing product lines by customer geographies?
• How is my Revenue distributed across Customer geographies?
• What regions are my customers clustered in?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• On which sales accounts is a given sales representative a member of the account team?
• Who are all the Contacts assigned to the Assets?
• What are the responses for different Opportunity for an Assessment submitted?
• What are the Quotas assigned to the team and the Actuals?
• How are the business plan objectives split?
• What are the objectives that have not met the target value set?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• What are the SIC codes associated with a Partner, and with all associated Partners?
• Against how many Opportunities, were the Quotes submitted in this month?
• How do the number of activities in a region and their average SR resolution rates by quarter compare?
• How many customer interactions happen without an SR?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How often are communications being transferred between agents?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many new coverages begin in the ensuing month?
• Are we equipped to service the increase in coverages?
• What is the current count of inbound email requests by status and mailbox?
• How many messages resulted in new service request creation versus update to existing service request?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• What characteristics do groupings of SR’s based on specific tags (e.g., tag = ‘outage’) exhibit?
• How is tag usage across agents and resource teams? Which teams perform better than others?
• What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• How much credit did a participant receive for their sales transactions?
• What type of assignment does a participant have to a plan?
• Which of my direct reports’ attainment or earnings are below the wanted performance expectation?
• Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.
• What is the total quota across the organization by performance measure for the period or across periods?
• Which participants are assigned to a given pay group?
• How do participants’ plan component earnings compare with their personalized target incentives?
• What are the credit rules which a credit receiver is assigned to?
• How is survey request trending compared to SR resolutions during the same period?
• What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
• What are the top 10 products associated to the Leads in the system?
• What is the number of leads by partners for a specific product group?
• How many Partners is a Contact is associated to?
• How many Leads and Opportunities are Open for a given Customer in the Current quarter?
• Are the Leads associated with certain products?
• What is the open/closed revenue for each of the product groups in the selected geography?
• Are the sales reps moving their opportunities fast enough?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the sales accounts owned by the Sales team?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• Who are the Resources assigned to the Leads created in any given time period?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• How did the Opportunity evolve over time?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• How many territories are assigned to a Resource/Employee?
• What are all the Territories assigned to Resources/Employees?
• What are the total number of Contact Relationships between two Contact?
• Does this Contact have subsidiaries?
• What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?submitted e.g. Partner Performance?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
- How many emails came from known versus unknown contacts?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- What is the delay in estimated completion dates?
- Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
- By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
- What are the SRs that are waiting on my customers?
- Is the Service organization effectively handling new social service requests in the appropriate timeframe?
- Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
- Are we seeing an issue regarding compliance rates with certain tags?
- What is the opportunity information captured in the note to an opportunity?
- As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
- Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.
- What are my compensation plan incentive targets?
- Are my individualized performance measure goals set properly?
- Who is assigned to a given plan?
- What is the total quota by performance measure for the interval across the organization?
- When was a given participant assigned to a specific pay group?
- What is the current status of the payment batches? Are they paid, reviewed, or frozen?
- What are all addresses associated with the primary contact for all active opportunities in the current quarter?
- Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
- Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
- Are survey request frequencies meeting our norms?
- What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
- Have we kept our strategic customers happy? If not, where can we improve - in timliness, better first time resolution, etc.?
- What is the most frequent positive feedback we get from our custoemrs? Most frequent negative feedback?
- What are the follow-up tasks I need to do on a particular customer?
- Who are the top Sales representatives by their Lead conversion ratio?
- What are the open Opportunities associated to a given Partner?
- What is the average deal size by Product groups?
- How are the Partners classified?
- What is total number of Partners assigned to a specific classification for this period?
- Does this account have subsidiaries?
• How is the Revenue spread for a given Customer hierarchy?
• How actively (# of Activities) are the Sales reps engaged with customers?
• What are my most active accounts? Who owns them and where are these located?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• Who are all the contacts for key customers and what are their roles?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?
• Do Forecast rely on Revenue from few Products?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What is the revenue lost to competition for a specific product/product group?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are the Accounts under the sales team, by territory?
• What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?
• How many Assets are created in a particular time period?
• Who are all the resources assigned to the Assets?
• What is the additional information updated in the Notes for a Contact?
• What is the additional information updated in the Notes for a Customer?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
• What is the average time the Opportunity is in a particular sales stage?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the Resources are associated to this contact?
• How many Leads do not have Contact?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• What are the various attainment attributes associated with my credits?
• How do these targets break down by plan component?
• As a participant manager, what are the targets and goals settings for my direct reports?
• Is the participant active? And for which dates?
• Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.
• How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?
• Do I have to realign quota based on current attainment levels?
• What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• What is the quarterly revenue trend for a specific product/product group by partner?
• What are the Customers from this account, including all subsidiaries?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• What is the channel performance vs channel forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
• How do wins and losses trend quarterly for a specific product line?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the sales accounts that a given Sales representative owns?
• What is the QoQ growth for Assets by Products?
• How many Territories are assigned to an Opportunity?
• What are all the Territories assigned to Opportunities?
• How many new Resources are created in the current quarter?
• What are the target v/s actual number of the split objectives?
• What are the Programs that Partners have enrolled into?
• What are the total number of Relationships between two Partners?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
• How many responses received for a given campaign?
• How many Opportunities associated to a Campaign?
• What is the total Quotes revenue for the current month?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• How many emails are we receiving over time?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What is the contact point information of the primary contact for all active opportunities in the current quarter?
• Which participants are assigned to which plans?
• Were there credit or rollup errors that must be fixed?
• What are the targets and goals settings for an individual?
• What are the rules effective as of the given date in the hierarchy?
• What are the results of the collected transactions before the crediting process?
• What are all addresses associated with the primary contact for accounts I’m the owner of or on the sales team?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the response scores for customer where we have not met SLA’s?
• Do one or more of the agents in my team need training to improve customer communication skills?
• What are the associated activities related to my upcoming appointment and task?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What is the potential revenue of leads by partners?
• What is the distribution of Partner Opportunities by sales stages?
• What is the number of partners in a specific classification within a defined geographic region?
• 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?
• How many Partners’ team is a given Resource part of?
• What are the total number of Relationships for a given Account?
• What are the top ten accounts by revenue in the last quarter?
• Who are my teams top Customers?
• Who are the ‘new’ customers, created in the past 6 months?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• How are product revenues trending month over month?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are the historical monthly trend of closed revenue by current territories?
• How many Leads are open for a given Product?
• What was the currency conversion rate applied to a specific claim?
• What products are often lost to key competitors? Is there a pattern?
• Who are the top competitors and what is the revenue exposure to them?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• How many territories is the Lead part of?
• What are all the Campaigns assigned to an Opportunity?
• Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• How many Enrollments are going to expire in the next quarter?
• How many Programs were created in the last quarter?
• Does this Partner have subsidiaries?
• What are the partner I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
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Sales and B2B Service

Chapter 5
Job Roles

- What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?
- What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter?
- What are the assignment start and end dates for a participant?
- Does the participant have an individualized target incentive for the plan?
- Are participants correctly credited?
- Are we on track in achieving quota this period or quarter?
- To what country and business unit does the participant belong?
- What is the total quota by performance measure for the period across the organization? Validate quota levels.
- Is the company on track to attain its goals? Who is lagging and might require coaching?
- What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?
- What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
- Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
- What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?
- What is the number of Partner Contacts that are also resources and users?
- How many Territories is a Partner part of?
- Who manages my top accounts?
- 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?
- How many Leads is a Contact associated to?
- Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
- What are the top ten products by revenue during the past quarter/year?
- What is the buying trend of our biggest customers?
- Do the sales territories need rebalancing?
- Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
- What are the top 10 Products by Asset count?
- What are the Assets that are expiring in the next quarter?
- How are the customers classified?
- What are the top 10 Deals created in the current quarter by their Deal size?
- 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?
- Who are all the Resources assigned to Opportunities?
- What is the Territory Quota vs/ Actual?
• Which Territories have exceeded their Quotes in the current Quarter?
• Who are the Partner resources in the system and which Partner Organization they belong to?
• What are the Partners created in the system for a given time period?
• How many Enrollments were created/submitted/expired/terminated in the last month?
• What is the Campaign ROI (return on investment)?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product ‘A’ have tag ‘X’ or ‘Y’? How many have the ‘Potential Churn’ tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• How many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What is the Campaign ROI (return on investment)?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product ‘A’ have tag ‘X’ or ‘Y’? How many have the ‘Potential Churn’ tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• How much credit did my team receive for their attainment?
• Who got paid what amount and from where, at the detail level?
• Why wasn’t I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.
• How do they compare to the base goals set on the measure?
• As a participant manager, which pay groups do my direct reports belong to?
• What is my cost of compensation by participant, plan component, plan, and frequencies?
• How does the performance measure attainment compare with a participant’s personalized goal across his direct reports?
• What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• Is our resolution performance for escalated issues worse or better than non escalated issues?
• What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
• What are the sources of the Leads created in the current quarter?
• What are the top ten Partners by Revenue during the past quarter/year?
• What Partners are assigned to specific geographic territories?
• For given set of Customers, what percentage of my revenue is exposed to competition?
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• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• How to forecasts trend across periods?
• Who all are the Contacts associated to the Lead?
• 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?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Is the sales team converting leads to opportunities fast enough?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Who are the resources assigned for a particular territory?
• How many new contacts are created in the system in the current month?
• What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Organization?
• Which Program has the highest number of Enrollments?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many social posts came from known versus unknown contacts?
• How many open SRs are linked to each tag?
• What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
• Has the participant accepted the assignment to the plan?
• Is the dispute load balanced between my analysts? Asked by compensation managers.
• What is the total quota across the organization by performance measure for the interval?
• Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.
• What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• What is the overall satisfaction levels of our customers with regards to issue resolutions?
• Which of our product lines most frequently receive suggestions for product improvements?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Does the forecast versus pipeline trend show a healthy picture?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• What are the higher value deals that have been moved out?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• Are the Leads supporting products that appeal to certain customers by size of company?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• What are all the contacts created in the system by Geography?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• What are all the Opportunities resulted from a Campaign?
• How many Resources are assigned to an Opportunity?
• 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 many Leads are part of the Campaign?
• Who has completed the most activity objectives?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• What is the breakdown of open action plans by category?
• How many action plans are open and how long have they been open?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• What is the contact point information of the primary contact for accounts where I’m the owner or on the sales team?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How are these targets individualized across the participants.
• What is the participant's home currency or cost center?
• What is the total quota by performance measure for the period across the organization?
• What pay groups are in the application? What are their types and descriptions?
• What is the status of each paysheet within the payment batches?
• What are the criteria for a rule including the inherited criteria from the ancestors?
• How long was an SR unassigned and how long did it sit in each queue?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?
• What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

Channel Partner Manager

Code Name
ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB

Duty Roles
This job role is related to the following duty roles:
• Partner Channel Transaction Analysis Duty

Subject Areas
This job role secures access to the following subject areas:
• CRM - CRM Activities with Related Activities
• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• CRM - CRM Interaction Aggregate
• CRM - CRM Interaction Service Requests Real Time
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• CRM - CRM Work Orders Real Time
• Marketing - CRM Leads
• Partners - CRM Leads and Opportunities Real Time
• Partners - CRM Opportunities and Products Real Time
• Partners - CRM Partner Assessments
• Partners - CRM Partner Classification
• Partners - CRM Partner Contact
• Partners - CRM Partner Overview
• Partners - CRM Partner Program Benefits
• Partners - CRM Partner Resource
• Partners - CRM Partner Territory
• Partners - CRM Program Enrollments
• Partners - CRM Programs
• Sales - CRM Account Relationship
• Sales - CRM All Contact Contact Point
• Sales - CRM All Contacts Addresses
• Sales - CRM Asset
• Sales - CRM Asset Contact
• Sales - CRM Asset Resource
• Sales - CRM Business Plan Objective Split
• Sales - CRM Campaign Members
• Sales - CRM Campaign Opportunity
• Sales - CRM Contact Note
• Sales - CRM Contact Relationship
• Sales - CRM Contact Resource
• Sales - CRM Contacts
• Sales - CRM Customer Classification
• Sales - CRM Customer Note
• Sales - CRM Customer Overview
• Sales - CRM Customers
• Sales - CRM Customers and Contacts Real Time
• Sales - CRM Deal Registration
• Sales - CRM Deal Registration Product
• Sales - CRM Forecasting
• Sales - CRM Forecasting and Pipeline Revenue Real Time
• Sales - CRM Historical Forecasting
• Sales - CRM Historical Pipeline
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 5

Job Roles

- Sales - CRM Lead Assessments
- Sales - CRM Lead Contact
- Sales - CRM Lead Product
- Sales - CRM Lead Resource
- Sales - CRM Lead Territory
- Sales - CRM MDF Budget
- Sales - CRM MDF Claim
- Sales - CRM MDF Claim Settlement
- Sales - CRM MDF Request
- Sales - CRM Opportunities and Products Real Time
- Sales - CRM Opportunity Assessments
- Sales - CRM Opportunity Campaign
- Sales - CRM Opportunity Contact
- Sales - CRM Opportunity Note
- Sales - CRM Opportunity Partner
- Sales - CRM Opportunity Resource
- Sales - CRM Opportunity Sales Stage Snapshot
- Sales - CRM Opportunity Territory
- Sales - CRM Partner Relationship
- Sales - CRM Pipeline
- Sales - CRM Primary Contact Addresses
- Sales - CRM Primary Contact Contact Point
- Sales - CRM Quota Management
- Sales - CRM Quote Lines
- Sales - CRM Quotes
- Sales - CRM Resource
- Sales - CRM Resource Territory
- Sales - CRM Sales Account Assessments
- Sales - CRM Sales Account Resource
- Sales - CRM Sales Account Territory
- Sales - CRM Territory Resource
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Lifecycle
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 5
Job Roles

- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Request Tags Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time
- Service - CRM Survey Requests Real Time
- Service - CRM Survey Responses Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- What is the revenue generated by Partners per Customer?
- What are my best performing product lines by customer geographies?
- How is my Revenue distributed across Customer geographies?
- What regions are my customers clustered in?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
- On which sales accounts is a given sales representative a member of the account team?
- Who are all the Contacts assigned to the Assets?
- What are the responses for different Opportunity for an Assessment submitted?
- What are the Quotas assigned to the team and the Actuals?
- How are the business plan objectives split?
- What are the objectives that have not met the target value set?
- How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
- What are the SIC codes associated with a Partner, and with all associated Partners?
- Against how many Opportunities, were the Quotes submitted in this month?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How often are communications being transferred between agents?

• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?

• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?

• How many new coverages begin in the ensuing month?

• Are we equipped to service the increase in coverages?

• What is the current count of inbound email requests by status and mailbox?

• How many messages resulted in new service request creation versus update to existing service request?

• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?

• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?

• How are SR transfers contributing to overall latency/resolution delays?

• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?

• How does the aging profile of SRs look like? Are there any outliers calling for intervention?

• What characteristics do groupings of SR’s based on specific tags (e.g., tag = ‘outage’) exhibit?

• How is tag usage across agents and resource teams? Which teams perform better than others?

• What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?

• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?

• How is survey request trending compared to SR resolutions during the same period?

• What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?

• What are the top 10 products associated to the Leads in the system?

• What is the number of leads by partners for a specific product group?

• How many Partners is a Contact is associated to?

• How many Leads and Opportunities are Open for a given Customer in the Current quarter?

• Are the Leads associated with certain products?

• What is the open/closed revenue for each of the product groups in the selected geography?

• Are the sales reps moving their opportunities fast enough?

• Are there any up sell/cross sell opportunities?

• Is overall pipeline healthy enough to meet sales goals?

• What are the top stalled opportunities and who are the sales reps working on these?

• What are the sales accounts owned by the Sales team?

• What are the Deals submitted by the Partners in the current quarter with the Deal size?

• Who are the Resources assigned to the Leads created in any given time period?

• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• How did the Opportunity evolve over time?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• How many territories are assigned to a Resource/Employee?
• What are all the Territories assigned to Resources/Employees?
• What are the total number of Contact Relationships between two Contact?
• Does this Contact have subsidiaries?
• What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? submitted e.g. Partner Performance?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• How many emails came from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Do SR’s with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• What is the opportunity information captured in the note to an opportunity?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• What are all addresses associated with the primary contact for all active opportunities in the current quarter?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
• Have we kept our strategic customers happy? If not, where can we improve – in timeliness, better first time resolution, etc.? 
• What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?
• What are the follow-up tasks I need to do on a particular customer?
• Who are the top Sales representatives by their Lead conversion ratio?
• What are the open Opportunities associated to a given Partner?
• What is the average deal size by Product groups?
• How are the Partners classified?
• What is total number of Partners assigned to a specific classification for this period?
• Does this account have subsidiaries?
• How is the Revenue spread for a given Customer hierarchy?
• How actively (# of Activities) are the Sales reps engaged with customers?
• What are my most active accounts? Who owns them and where are these located?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• Who are all the contacts for key customers and what are their roles?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
• Do Forecast rely on Revenue from few Products?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What is the revenue lost to competition for a specific product/product group?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are the Accounts under the sales team, by territory?
• What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?
• How many Assets are created in a particular time period?
• Who are all the resources assigned to the Assets?
• What is the additional information updated in the Notes for a Contact?
• What is the additional information updated in the Notes for a Customer?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
• What is the average time the Opportunity is in a particular sales stage?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the Resources are associated to this contact?
• How many Leads do not have Contact?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• What is the quarterly revenue trend for a specific product/product group by partner?
• What are the Customers from this account, including all subsidiaries?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• What is the channel performance vs channel forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
• How do wins and losses trend quarterly for a specific product line?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the sales accounts that a given Sales representative owns?
• What is the QoQ growth for Assets by Products?
• How many Territories are assigned to an Opportunity?
• What are all the Territories assigned to Opportunities?
• How many new Resources are created in the current quarter?
• What are the target v/s actual number of the split objectives?
• What are the Programs that Partners have enrolled into?
• What are the total number of Relationships between two Partners?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
• How many responses received for a given campaign?
• How many Opportunities associated to a Campaign?
• What is the total Quotes revenue for the current month?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• How many emails are we receiving over time?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What is the contact point information of the primary contact for all active opportunities in the current quarter?
• What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the response scores for customer where we have not met SLA's?
• Do one or more of the agents in my team need training to improve customer communication skills?
• What are the associated activities related to my upcoming appointment and task?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What is the potential revenue of leads by partners?
• What is the distribution of Partner Opportunities by sales stages?
• What is the number of partners in a specific classification within a defined geographic region?
• 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?
• How many Partners’ team is a given Resource part of?
• What are the total number of Relationships for a given Account?
• What are the top ten accounts by revenue in the last quarter?
• Who are my teams top Customers?
• Who are the ‘new’ customers, created in the past 6 months?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• How are product revenues trending month over month?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are the historical monthly trend of closed revenue by current territories?
• How many Leads are open for a given Product?
• What was the currency conversion rate applied to a specific claim?
• What products are often lost to key competitors? Is there a pattern?
• Who are the top competitors and what is the revenue exposure to them?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• How many territories is the Lead part of?
• What are all the Campaigns assigned to an Opportunity?
• Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• How many Enrollments are going to expire in the next quarter?
• How many Programs were created in the last quarter?
• Does this Partner have subsidiaries?
• What are the partner I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter?
• What are all addresses of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
• What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?
• What is the number of Partner Contacts that are also resources and users?
• How many Territories is a Partner part of?
• Who manages my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
• What is the Territory Quota vs Actual?
• Which Territories have exceeded their Quotes in the current Quarter?
• Who are the Partner resources in the system and which Partner Organization they belong to?
• What are the Partners created in the system for a given time period?
• How many Enrollments were created/submitted/expired/terminated in the last month?
• What is the Campaign ROI (return on investment)?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• Is our resolution performance for escalated issues worse or better than non escalated issues?
• What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
• What are the sources of the Leads created in the current quarter?
• What are the top ten Partners by Revenue during the past quarter/year?
• What Partners are assigned to specific geographic territories?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• How to forecasts trend across periods?
• Who all are the Contacts associated to the Lead?
• 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?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Is the sales team converting leads to opportunities fast enough?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Who are the resources assigned for a particular territory?
• How many new contacts are created in the system in the current month?
• What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Organization?
• Which Program has the highest number of Enrollments?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many social posts came from known versus unknown contacts?
• How many open SRs are linked to each tag?
• What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
• What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• What is the overall satisfaction levels of our customers with regards to issue resolutions?
• Which of our product lines most frequently receive suggestions for product improvements?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Does the forecast versus pipeline trend show a healthy picture?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• What are the higher value deals that have been moved out?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• Are the Leads supporting products that appeal to certain customers by size of company?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• What are all the contacts created in the system by Geography?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• What are all the Opportunities resulted from a Campaign?
• How many Resources are assigned to an Opportunity?
• 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 many Leads are part of the Campaign?
• Who has completed the most activity objectives?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• What is the breakdown of open action plans by category?
• How many action plans are open and how long have they been open?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• What is the contact point information of the primary contact for accounts where I’m the owner or on the sales team?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?
• What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

Channel Partner Portal Administrator

Code Name

ORA_ZPM_CHANNEL_PARTNER_PORTAL_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

• Partner Channel Administrative Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Activities with Related Activities
• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• CRM - CRM Interaction Aggregate
• CRM - CRM Interaction Service Requests Real Time
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
Chapter 5
Job Roles

- CRM - CRM Work Orders Real Time
- Marketing - CRM Leads
- Partners - CRM Leads and Opportunities Real Time
- Partners - CRM Opportunities and Products Real Time
- Partners - CRM Partner Assessments
- Partners - CRM Partner Classification
- Partners - CRM Partner Contact
- Partners - CRM Partner Overview
- Partners - CRM Partner Program Benefits
- Partners - CRM Partner Resource
- Partners - CRM Partner Territory
- Partners - CRM Program Enrollments
- Partners - CRM Programs
- Sales - CRM Account Relationship
- Sales - CRM All Contact Contact Point
- Sales - CRM All Contacts Addresses
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan Objective Split
- Sales - CRM Campaign Members
- Sales - CRM Campaign Opportunity
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- Sales - CRM Customers and Contacts Real Time
- Sales - CRM Deal Registration
- Sales - CRM Deal Registration Product
- Sales - CRM Forecasting
- Sales - CRM Forecasting and Pipeline Revenue Real Time
- Sales - CRM Historical Forecasting
• Sales - CRM Historical Pipeline
• Sales - CRM Lead Assessments
• Sales - CRM Lead Contact
• Sales - CRM Lead Product
• Sales - CRM Lead Resource
• Sales - CRM Lead Territory
• Sales - CRM MDF Budget
• Sales - CRM MDF Claim
• Sales - CRM MDF Claim Settlement
• Sales - CRM MDF Request
• Sales - CRM Opportunities and Products Real Time
• Sales - CRM Opportunity Assessments
• Sales - CRM Opportunity Campaign
• Sales - CRM Opportunity Contact
• Sales - CRM Opportunity Note
• Sales - CRM Opportunity Partner
• Sales - CRM Opportunity Resource
• Sales - CRM Opportunity Sales Stage Snapshot
• Sales - CRM Opportunity Territory
• Sales - CRM Partner Relationship
• Sales - CRM Pipeline
• Sales - CRM Primary Contact Addresses
• Sales - CRM Primary Contact Contact Point
• Sales - CRM Quota Management
• Sales - CRM Quote Lines
• Sales - CRM Quotes
• Sales - CRM Resource
• Sales - CRM Resource Territory
• Sales - CRM Sales Account Assessments
• Sales - CRM Sales Account Resource
• Sales - CRM Sales Account Territory
• Sales - CRM Territory Resource
• Service - CRM Customer Coverage Real Time
• Service - CRM Inbound Messages Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Action Plan Actions Real Time
• Service - CRM Service Request Lifecycle
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 5
Job Roles

- **Service - CRM Service Request Messages Real Time**
- **Service - CRM Service Request Milestones Real Time**
- **Service - CRM Service Request Resource Real Time**
- **Service - CRM Service Request Tags Real Time**
- **Service - CRM Service Requests Real Time**
- **Service - CRM Social Post Real Time**
- **Service - CRM Survey Requests Real Time**
- **Service - CRM Survey Responses Real Time**

**Business Questions**

This job role secures access to data that can answer the following business questions:

- How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- What is the revenue generated by Partners per Customer?
- What are my best performing product lines by customer geographies?
- How is my Revenue distributed across Customer geographies?
- What regions are my customers clustered in?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
- On which sales accounts is a given sales representative a member of the account team?
- Who are all the Contacts assigned to the Assets?
- What are the responses for different Opportunity for an Assessment submitted?
- What are the Quotas assigned to the team and the Actuals?
- How are the business plan objectives split?
- What are the objectives that have not met the target value set?
- How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
- What are the SIC codes associated with a Partner, and with all associated Partners?
- Against how many Opportunities, were the Quotes submitted in this month?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 5
Job Roles

- How often are communications being transferred between agents?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
- How many new coverages begin in the ensuing month?
- Are we equipped to service the increase in coverages?
- What is the current count of inbound email requests by status and mailbox?
- How many messages resulted in new service request creation versus update to existing service request?
- Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
- What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
- How are SR transfers contributing to overall latency/resolution delays?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How does the aging profile of SRs look like? Are there any outliers calling for intervention?
- What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
- How is tag usage across agents and resource teams? Which teams perform better than others?
- What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
- How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
- How is survey request trending compared to SR resolutions during the same period?
- What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
- What are the top 10 products associated to the Leads in the system?
- What is the number of leads by partners for a specific product group?
- How many Partners is a Contact is associated to?
- How many Leads and Opportunities are Open for a given Customer in the Current quarter?
- Are the Leads associated with certain products?
- What is the open/closed revenue for each of the product groups in the selected geography?
- Are the sales reps moving their opportunities fast enough?
- Are there any up sell/cross sell opportunities?
- Is overall pipeline healthy enough to meet sales goals?
- What are the top stalled opportunities and who are the sales reps working on these?
- What are the sales accounts owned by the Sales team?
- What are the Deals submitted by the Partners in the current quarter with the Deal size?
- Who are the Resources assigned to the Leads created in any given time period?
- What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• How did the Opportunity evolve over time?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• How many territories are assigned to a Resource/Employee?
• What are all the Territories assigned to Resources/Employees?
• What are the total number of Contact Relationships between two Contact?
• Does this Contact have subsidiaries?
• What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• How many emails came from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Do SR’s with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• What is the opportunity information captured in the note to an opportunity?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• What are all addresses associated with the primary contact for all active opportunities in the current quarter?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
• Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?
Job Roles

- What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?
- What are the follow-up tasks I need to do on a particular customer?
- Who are the top Sales representatives by their Lead conversion ratio?
- What are the open Opportunities associated to a given Partner?
- What is the average deal size by Product groups?
- How are the Partners classified?
- What is the total number of Partners assigned to a specific classification for this period?
- Does this account have subsidiaries?
- How is the Revenue spread for a given Customer hierarchy?
- How actively (# of Activities) are the Sales reps engaged with customers?
- What are my most active accounts? Who owns them and where are these located?
- What are the contact points (phone, email, address, etc.) of key contacts?
- Who are all the contacts for key customers and what are their roles?
- Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?
- Do Forecast rely on Revenue from few Products?
- Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
- What is the revenue lost to competition for a specific product/product group?
- How is each member on the team performing on deal size, account coverage, and win rate?
- What are the Accounts under the sales team, by territory?
- What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?
- How many Assets are created in a particular time period?
- Who are all the resources assigned to the Assets?
- What is the additional information updated in the Notes for a Contact?
- What is the additional information updated in the Notes for a Customer?
- Who are the Employees/Resource for the Deals that are submitted in the current month?
- What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
- What is the average time the Opportunity is in a particular sales stage?
- What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
- What are the Resources associated to this contact?
- How many Leads do not have Contact?
- What are the activity objectives for the current period?
- What managers have teams averaging the most activities?
- Are agents prematurely updating SRs as Resolved to make their numbers look better?
- What product lines have a higher percentage of non-compliant SRs open?
- How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• What is the quarterly revenue trend for a specific product/product group by partner?
• What are the Customers from this account, including all subsidiaries?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• What is the channel performance vs channel forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
• How do wins and losses trend quarterly for a specific product line?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the sales accounts that a given Sales representative owns?
• What is the QoQ growth for Assets by Products?
• How many Territories are assigned to an Opportunity?
• What are all the Territories assigned to Opportunities?
• How many new Resources are created in the current quarter?
• What are the target v/s actual number of the split objectives?
• What are the Programs that Partners have enrolled into?
• What are the total number of Relationships between two Partners?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
• How many responses received for a given campaign?
• How many Opportunities associated to a Campaign?
• What is the total Quotes revenue for the current month?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
Job Roles

- How many interactions are being lost/abandoned? How does this compare with previous periods?
- How long is it taking for offers to be made to agents?
- How many interactions, on average, does it require to resolve an issue?
- Are we keeping the number of non-compliant SRs in check for our most valuable customers?
- How many emails are we receiving over time?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
- How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
- What is the contact point information of the primary contact for all active opportunities in the current quarter?
- What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?
- Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
- Do we need to adjust our survey template to improve response rates?
- Does seasonality impact response rates?
- How does response differ for various service teams? Do some teams obtain better response rates?
- What are the response scores for customer where we have not met SLA's?
- Do one or more of the agents in my team need training to improve customer communication skills?
- What are the associated activities related to my upcoming appointment and task?
- Who is the Primary Contact and Resource assigned for a given Lead?
- What is the potential revenue of leads by partners?
- What is the distribution of Partner Opportunities by sales stages?
- What is the number of partners in a specific classification within a defined geographic region?
- 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?
- How many Partners’ team is a given Resource part of?
- What are the total number of Relationships for a given Account?
- What are the top ten accounts by revenue in the last quarter?
- Who are my teams top Customers?
- Who are the ‘new’ customers, created in the past 6 months?
- What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
- How are product revenues trending month over month?
- How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
- What are the historical monthly trend of closed revenue by current territories?
- How many Leads are open for a given Product?
• What was the currency conversion rate applied to a specific claim?
• What products are often lost to key competitors? Is there a pattern?
• Who are the top competitors and what is the revenue exposure to them?
• Who are the primary owners of the Contacts for contacts created in the last quarter?
• How many territories is the Lead part of?
• What are all the Campaigns assigned to an Opportunity?
• Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• How many Enrollments are going to expire in the next quarter?
• How many Programs were created in the last quarter?
• Does this Partner have subsidiaries?
• What are the partner I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?
• What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter?
• What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
• What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?
• What is the number of Partner Contacts that are also resources and users?
• How many Territories is a Partner part of?
• Who manages my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
• What is the Territory Quota vs Actual?
• Which Territories have exceeded their Quotes in the current Quarter?
• Who are the Partner resources in the system and which Partner Organization they belong to?
• What are the Partners created in the system for a given time period?
• How many Enrollments were created/submitted/expired/terminated in the last month?
• What is the Campaign ROI (return on investment)?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• Is our resolution performance for escalated issues worse or better than non escalated issues?
• What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
• What are the sources of the Leads created in the current quarter?
• What are the top ten Partners by Revenue during the past quarter/year?
• What Partners are assigned to specific geographic territories?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• How do forecasts trend across periods?
• Who are the Contacts associated to the Lead?
• 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?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Is the sales team converting leads to opportunities fast enough?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Who are the resources assigned for a particular territory?
• How many new contacts are created in the system in the current month?
• What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Organization?
• Which Program has the highest number of Enrollments?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many social posts came from known versus unknown contacts?
• How many open SRs are linked to each tag?
• What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
• What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• What is the overall satisfaction levels of our customers with regards to issue resolutions?
• Which of our product lines most frequently receive suggestions for product improvements?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Does the forecast versus pipeline trend show a healthy picture?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• What are the higher value deals that have been moved out?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• Are the Leads supporting products that appeal to certain customers by size of company?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• What are all the contacts created in the system by Geography?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• What are all the Opportunities resulted from a Campaign?
• How many Resources are assigned to an Opportunity?
• 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 many Leads are part of the Campaign?
• Who has completed the most activity objectives?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• What is the breakdown of open action plans by category?
• How many action plans are open and how long have they been open?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?
• What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

Channel Sales Director

Code Name

ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB

Duty Roles

This job role is related to the following duty roles:

• Partner Channel Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Activities with Related Activities
• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• CRM - CRM Interaction Aggregate
• CRM - CRM Interaction Service Requests Real Time
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
Chapter 5

Job Roles

- CRM - CRM Work Orders Real Time
- Marketing - CRM Leads
- Partners - CRM Leads and Opportunities Real Time
- Partners - CRM Opportunities and Products Real Time
- Partners - CRM Partner Assessments
- Partners - CRM Partner Classification
- Partners - CRM Partner Contact
- Partners - CRM Partner Overview
- Partners - CRM Partner Program Benefits
- Partners - CRM Partner Resource
- Partners - CRM Partner Territory
- Partners - CRM Program Enrollments
- Partners - CRM Programs
- Sales - CRM Account Relationship
- Sales - CRM All Contact Contact Point
- Sales - CRM All Contacts Addresses
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan Objective Split
- Sales - CRM Campaign Members
- Sales - CRM Campaign Opportunity
- Sales - CRM Contact Note
- Sales - CRM Contact Relationship
- Sales - CRM Contact Resource
- Sales - CRM Contacts
- Sales - CRM Customer Classification
- Sales - CRM Customer Note
- Sales - CRM Customer Overview
- Sales - CRM Customers
- Sales - CRM Customers and Contacts Real Time
- Sales - CRM Deal Registration
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- Sales - CRM Forecasting and Pipeline Revenue Real Time
- Sales - CRM Historical Forecasting
Chapter 5

Job Roles

- Sales - CRM Historical Pipeline
- Sales - CRM Lead Assessments
- Sales - CRM Lead Contact
- Sales - CRM Lead Product
- Sales - CRM Lead Resource
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- Sales - CRM Sales Account Resource
- Sales - CRM Sales Account Territory
- Sales - CRM Territory Resource
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Lifecycle
Job Roles

- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Request Tags Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time
- Service - CRM Survey Requests Real Time
- Service - CRM Survey Responses Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- What is the revenue generated by Partners per Customer?
- What are my best performing product lines by customer geographies?
- How is my Revenue distributed across Customer geographies?
- What regions are my customers clustered in?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
- On which sales accounts is a given sales representative a member of the account team?
- Who are all the Contacts assigned to the Assets?
- What are the responses for different Opportunity for an Assessment submitted?
- What are the Quotas assigned to the team and the Actuals?
- How are the business plan objectives split?
- What are the objectives that have not met the target value set?
- How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
- What are the SIC codes associated with a Partner, and with all associated Partners?
- Against how many Opportunities, were the Quotes submitted in this month?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How often are communications being transferred between agents?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many new coverages begin in the ensuing month?
• Are we equipped to service the increase in coverages?
• What is the current count of inbound email requests by status and mailbox?
• How many messages resulted in new service request creation versus update to existing service request?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
• How is tag usage across agents and resource teams? Which teams perform better than others?
• What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• How is survey request trending compared to SR resolutions during the same period?
• What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
• What are the top 10 products associated to the Leads in the system?
• What is the number of leads by partners for a specific product group?
• How many Partners is a Contact associated to?
• How many Leads and Opportunities are Open for a given Customer in the Current quarter?
• Are the Leads associated with certain products?
• What is the open/closed revenue for each of the product groups in the selected geography?
• Are the sales reps moving their opportunities fast enough?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the sales accounts owned by the Sales team?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• Who are the Resources assigned to the Leads created in any given time period?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• How did the Opportunity evolve over time?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• How many territories are assigned to a Resource/Employee?
• What are all the Territories assigned to Resources/Employees?
• What are the total number of Contact Relationships between two Contact?
• Does this Contact have subsidiaries?
• What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• How many emails came from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Do SR’s with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• What is the opportunity information captured in the note to an opportunity?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• What are all addresses associated with the primary contact for all active opportunities in the current quarter?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
• Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?
• What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?
• What are the follow-up tasks I need to do on a particular customer?
• Who are the top Sales representatives by their Lead conversion ratio?
• What are the open Opportunities associated to a given Partner?
• What is the average deal size by Product groups?
• How are the Partners classified?
• What is total number of Partners assigned to a specific classification for this period?
• Does this account have subsidiaries?
• How is the Revenue spread for a given Customer hierarchy?
• How actively (# of Activities) are the Sales reps engaged with customers?
• What are my most active accounts? Who owns them and where are these located?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• Who are all the contacts for key customers and what are their roles?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
• Do Forecast rely on Revenue from few Products?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What is the revenue lost to competition for a specific product/product group?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are the Accounts under the sales team, by territory?
• What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?
• How many Assets are created in a particular time period?
• Who are all the resources assigned to the Assets?
• What is the additional information updated in the Notes for a Contact?
• What is the additional information updated in the Notes for a Customer?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
• What is the average time the Opportunity is in a particular sales stage?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the Resources are associated to this contact?
• How many Leads do not have Contact?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
Chapter 5

Job Roles

- How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
- How long did it take to assign the SR to the correct queue?
- Was the assigned agent overloaded with other work?
- Was the SR queue modified or SR resource owner modified at any point?
- What is the quarterly revenue trend for a specific product/product group by partner?
- What are the Customers from this account, including all subsidiaries?
- Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
- What is the relative mix of forecast revenues by the various sales channels in a specific territory?
- What is the channel performance vs channel forecast?
- Are too many deals being pushed out to the subsequent fiscal quarters?
- What are my claimed vs unclaimed MDF totals?
- What are total number of Claims in the current quarter?
- Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
- How do wins and losses trend quarterly for a specific product line?
- What are the most likely reasons that the Opportunities are lost against our key competitors?
- What is the value trend of high value opportunities? Do they show a positive or negative trend?
- What are the sales accounts that a given Sales representative owns?
- What is the QoQ growth for Assets by Products?
- How many Territories are assigned to an Opportunity?
- What are all the Territories assigned to Opportunities?
- How many new Resources are created in the current quarter?
- What are the target v/s actual number of the split objectives?
- What are the Programs that Partners have enrolled into?
- What are the total number of Relationships between two Partners?
- What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
- How many responses received for a given campaign?
- How many Opportunities associated to a Campaign?
- What is the total Quotes revenue for the current month?
- How many contacts were not favored with a positive outcome with a given agent?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• How many emails are we receiving over time?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What is the contact point information of the primary contact for all active opportunities in the current quarter?
• What are all addresses associated with the primary contact for accounts I’m the owner of or on the sales team?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the response scores for customer where we have not met SLA’s?
• Do one or more of the agents in my team need training to improve customer communication skills?
• What are the associated activities related to my upcoming appointment and task?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What is the potential revenue of leads by partners?
• What is the distribution of Partner Opportunities by sales stages?
• What is the number of partners in a specific classification within a defined geographic region?
• 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?
• How many Partners’ team is a given Resource part of?
• What are the total number of Relationships for a given Account?
• What are the top ten accounts by revenue in the last quarter?
• Who are my teams top Customers?
• Who are the ‘new’ customers, created in the past 6 months?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• How are product revenues trending month over month?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are the historical monthly trend of closed revenue by current territories?
• How many Leads are open for a given Product?
• What was the currency conversion rate applied to a specific claim?
• What products are often lost to key competitors? Is there a pattern?
• Who are the top competitors and what is the revenue exposure to them?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• How many territories is the Lead part of?
• What are all the Campaigns assigned to an Opportunity?
• Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• How many Enrollments are going to expire in the next quarter?
• How many Programs were created in the last quarter?
• Does this Partner have subsidiaries?
• What are the partners I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What is the primary contact and non-primary contact point for all active opportunities in the current quarter?
• What are all addresses of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
• What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?
• What is the number of Partner Contacts that are also resources and users?
• How many Territories is a Partner part of?
• Who manages my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
• What is the Territory Quota vs/ Actual?
• Which Territories have exceeded their Quotes in the current Quarter?
• Who are the Partner resources in the system and which Partner Organization they belong to?
• What are the Partners created in the system for a given time period?
• How many Enrollments were created/submitted/expired/terminated in the last month?
• What is the Campaign ROI (return on investment)?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product ‘A’ have tag ‘X’ or ‘Y’? How many have the ‘Potential Churn’ tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• Is our resolution performance for escalated issues worse or better than non escalated issues?
• What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
• What are the sources of the Leads created in the current quarter?
• What are the top ten Partners by Revenue during the past quarter/year?
• What Partners are assigned to specific geographic territories?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• How to forecasts trend across periods?
• Who all are the Contacts associated to the Lead?
• 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?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Is the sales team converting leads to opportunities fast enough?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Who are the resources assigned for a particular territory?
• How many new contacts are created in the system in the current month?
• What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Organization?
• Which Program has the highest number of Enrollments?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many social posts came from known versus unknown contacts?
• How many open SRs are linked to each tag?
• What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
• What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• What is the overall satisfaction levels of our customers with regards to issue resolutions?
• Which of our product lines most frequently receive suggestions for product improvements?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Does the forecast versus pipeline trend show a healthy picture?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• What are the higher value deals that have been moved out?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• Are the Leads supporting products that appeal to certain customers by size of company?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• What are all the contacts created in the system by Geography?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• What are all the Opportunities resulted from a Campaign?
• How many Resources are assigned to an Opportunity?
• 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 many Leads are part of the Campaign?
• Who has completed the most activity objectives?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• What is the breakdown of open action plans by category?
• How many action plans are open and how long have they been open?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• What is the contact point information of the primary contact for accounts where I’m the owner or on the sales team?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?
• What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

Channel Sales Manager

Code Name

ORA_ZPM_CHANNEL_SALES_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

• Incentive Compensation Transaction Analysis Duty
• Partner Channel Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Activities with Related Activities
• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• CRM - CRM Interaction Aggregate
• CRM - CRM Interaction Service Requests Real Time
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• CRM - CRM Work Orders Real Time
• Incentive Compensation - Attainments Real Time
• Incentive Compensation - Compensation Plan Assignments Real Time
• Incentive Compensation - Credits Real Time
• Incentive Compensation - Disputes Real Time
• Incentive Compensation - Earning and Attainment Summary Real Time
• Incentive Compensation - Earnings Real Time
• Incentive Compensation - Participant Balances Real Time
• Incentive Compensation - Participant Compensation Plan Real Time
• Incentive Compensation - Participant Detail Real Time
• Incentive Compensation - Participant Interval Goals Real Time
• Incentive Compensation - Participant Period Goals Real Time
• Incentive Compensation - Pay Group Assignments Real Time
• Incentive Compensation - Payments Real Time
• Incentive Compensation - Paysheet Summary Real Time
• Incentive Compensation - Performance and Earnings Summary Real Time
• Incentive Compensation - Rules Real Time
• Incentive Compensation - Transactions Real Time
• Marketing - CRM Leads
• Partners - CRM Leads and Opportunities Real Time
• Partners - CRM Opportunities and Products Real Time
• Partners - CRM Partner Assessments
• Partners - CRM Partner Classification
• Partners - CRM Partner Contact
• Partners - CRM Partner Overview
• Partners - CRM Partner Program Benefits
• Partners - CRM Partner Resource
• Partners - CRM Partner Territory
• Partners - CRM Program Enrollments
• Partners - CRM Programs
• Sales - CRM Account Relationship
• Sales - CRM All Contact Contact Point
• Sales - CRM All Contacts Addresses
• Sales - CRM Asset
• Sales - CRM Asset Contact
• Sales - CRM Asset Resource
• Sales - CRM Business Plan Objective Split
• Sales - CRM Campaign Members
• Sales - CRM Campaign Opportunity
• Sales - CRM Contact Note
• Sales - CRM Contact Relationship
• Sales - CRM Contact Resource
• Sales - CRM Contacts
• Sales - CRM Customer Classification
• Sales - CRM Customer Note
• Sales - CRM Customer Overview
• Sales - CRM Customers
• Sales - CRM Customers and Contacts Real Time
• Sales - CRM Deal Registration
• Sales - CRM Deal Registration Product
• Sales - CRM Forecasting
• Sales - CRM Forecasting and Pipeline Revenue Real Time
• Sales - CRM Historical Forecasting
• Sales - CRM Historical Pipeline
• Sales - CRM Lead Assessments
• Sales - CRM Lead Contact
• Sales - CRM Lead Product
• Sales - CRM Lead Resource
• Sales - CRM Lead Territory
• Sales - CRM MDF Budget
• Sales - CRM MDF Claim
• Sales - CRM MDF Claim Settlement
• Sales - CRM MDF Request
• Sales - CRM Opportunities and Products Real Time
• Sales - CRM Opportunity Assessments
• Sales - CRM Opportunity Campaign
• Sales - CRM Opportunity Contact
• Sales - CRM Opportunity Note
• Sales - CRM Opportunity Partner
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

• Sales - CRM Opportunity Resource
• Sales - CRM Opportunity Sales Stage Snapshot
• Sales - CRM Opportunity Territory
• Sales - CRM Partner Relationship
• Sales - CRM Pipeline
• Sales - CRM Primary Contact Addresses
• Sales - CRM Primary Contact Contact Point
• Sales - CRM Quota Management
• Sales - CRM Quote Lines
• Sales - CRM Quotes
• Sales - CRM Resource
• Sales - CRM Resource Territory
• Sales - CRM Sales Account Assessments
• Sales - CRM Sales Account Resource
• Sales - CRM Sales Account Territory
• Sales - CRM Territory Resource
• Service - CRM Customer Coverage Real Time
• Service - CRM Inbound Messages Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Action Plan Actions Real Time
• Service - CRM Service Request Lifecycle
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Request Resource Real Time
• Service - CRM Service Request Tags Real Time
• Service - CRM Service Requests Real Time
• Service - CRM Social Post Real Time
• Service - CRM Survey Requests Real Time
• Service - CRM Survey Responses Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

• How many Leads are converted in the current quarter?
• How many Leads are unassigned in the system?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
• What is the revenue generated by Partners per Customer?
• What are my best performing product lines by customer geographies?
• How is my Revenue distributed across Customer geographies?
• What regions are my customers clustered in?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• On which sales accounts is a given sales representative a member of the account team?
• Who are all the Contacts assigned to the Assets?
• What are the responses for different Opportunity for an Assessment submitted?
• What are the Quotas assigned to the team and the Actuals?
• How are the business plan objectives split?
• What are the objectives that have not met the target value set?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• What are the SIC codes associated with a Partner, and with all associated Partners?
• Against how many Opportunities, were the Quotes submitted in this month?
• How do the number of activities in a region and their average SR resolution rates by quarter compare?
• How often do communications cross channels to get to resolution?
• How many customer interactions happen without an SR?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How often are communications being transferred between agents?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many new coverages begin in the ensuing month?
• Are we equipped to service the increase in coverages?
• What is the current count of inbound email requests by status and mailbox?
• How many messages resulted in new service request creation versus update to existing service request?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
Oracle CX Sales and B2B Service

Subject Areas for Transactional Business Intelligence in CX

Chapter 5

Job Roles

• How is tag usage across agents and resource teams? Which teams perform better than others?
• What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• How much credit did a participant receive for their sales transactions?
• What type of assignment does a participant have to a plan?
• Which of my direct reports' attainment or earnings are below the wanted performance expectation?
• Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.
• What is the total quota across the organization by performance measure for the period or across periods?
• Which participants are assigned to a given pay group?
• How do participants' plan component earnings compare with their personalized target incentives?
• What are the credit rules which a credit receiver is assigned to?
• How is survey request trending compared to SR resolutions during the same period?
• What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
• What are the top 10 products associated to the Leads in the system?
• What is the number of leads by partners for a specific product group?
• How many Partners is a Contact is associated to?
• How many Leads and Opportunities are Open for a given Customer in the Current quarter?
• Are the Leads associated with certain products?
• What is the open/closed revenue for each of the product groups in the selected geography?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the sales accounts owned by the Sales team?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• Who are the Resources assigned to the Leads created in any given time period?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• How did the Opportunity evolve over time?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• How many territories are assigned to a Resource/Employee?
• What are all the Territories assigned to Resources/Employees?
• What are the total number of Contact Relationships between two Contact?
• Does this Contact have subsidiaries?
• What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• How many emails came from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• What is the opportunity information captured in the note to an opportunity?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.
• What are my compensation plan incentive targets?
• Are my individualized performance measure goals set properly?
• Who is assigned to a given plan?
• What is the total quota by performance measure for the interval across the organization?
• When was a given participant assigned to a specific pay group?
• What is the current status of the payment batches? Are they paid, reviewed, or frozen?
• What are all addresses associated with the primary contact for all active opportunities in the current quarter?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
• Have we kept our strategic customers happy? If not, where can we improve - in timliness, better first time resolution, etc.?
• What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?
• What are the follow-up tasks I need to do on a particular customer?
• Who are the top Sales representatives by their Lead conversion ratio?
• What are the open Opportunities associated to a given Partner?
• What is the average deal size by Product groups?
• How are the Partners classified?
• What is total number of Partners assigned to a specific classification for this period?
• Does this account have subsidiaries?
• How is the Revenue spread for a given Customer hierarchy?
• How actively (# of Activities) are the Sales reps engaged with customers?
• What are my most active accounts? Who owns them and where are these located?
• What are the contact points (phone, email, address, etc.) of key contacts?
• Who are all the contacts for key customers and what are their roles?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
• Do Forecast rely on Revenue from few Products?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What is the revenue lost to competition for a specific product/product group?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are the Accounts under the sales team, by territory?
• What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?
• How many Assets are created in a particular time period?
• Who are all the resources assigned to the Assets?
• What is the additional information updated in the Notes for a Contact?
• What is the additional information updated in the Notes for a Customer?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
• What is the average time the Opportunity is in a particular sales stage?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the Resources are associated to this contact?
• How many Leads do not have Contact?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?

• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?

• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?

• What are the various attainment attributes associated with my credits?

• How do these targets break down by plan component?

• As a participant manager, what are the targets and goals settings for my direct reports?

• Is the participant active? And for which dates?

• Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.

• How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?

• Do I have to realign quota based on current attainment levels?

• What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?

• How long did it take to assign the SR to the correct queue?

• Was the assigned agent overloaded with other work?

• Was the SR queue modified or SR resource owner modified at any point?

• What is the quarterly revenue trend for a specific product/product group by partner?

• What are the Customers from this account, including all subsidiaries?

• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?

• What is the relative mix of forecast revenues by the various sales channels in a specific territory?

• What is the channel performance vs channel forecast?

• Are too many deals being pushed out to the subsequent fiscal quarters?

• What are my claimed vs unclaimed MDF totals?

• What are total number of Claims in the current quarter?

• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?

• How do wins and losses trend quarterly for a specific product line?

• What are the most likely reasons that the Opportunities are lost against our key competitors?

• What is the value trend of high value opportunities? Do they show a positive or negative trend?

• What are the sales accounts that a given Sales representative owns?

• What is the QoQ growth for Assets by Products?

• How many Territories are assigned to an Opportunity?

• What are all the Territories assigned to Opportunities?

• How many new Resources are created in the current quarter?

• What are the target v/s actual number of the split objectives?
- What are the Programs that Partners have enrolled into?
- What are the total number of Relationships between two Partners?
- What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
- How many responses received for a given campaign?
- How many Opportunities associated to a Campaign?
- What is the total Quotes revenue for the current month?
- How many contacts were not favored with a positive outcome with a given agent?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- How many interactions are being lost/abandoned? How does this compare with previous periods?
- How long is it taking for offers to be made to agents?
- How many interactions, on average, does it require to resolve an issue?
- Are we keeping the number of non-compliant SRs in check for our most valuable customers?
- How many emails are we receiving over time?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
- How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
- What is the contact point information of the primary contact for all active opportunities in the current quarter?
- Which participants are assigned to which plans?
- Were there credit or rollup errors that must be fixed?
- What are the targets and goals settings for an individual?
- What are the rules effective as of the given date in the hierarchy?
- What are the results of the collected transactions before the crediting process?
- What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?
- Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
- Do we need to adjust our survey template to improve response rates?
- Does seasonality impact response rates?
- How does response differ for various service teams? Do some teams obtain better response rates?
- What are the response scores for customer where we have not met SLAs?
- Do one or more of the agents in my team need training to improve customer communication skills?
- What are the associated activities related to my upcoming appointment and task?
- Who is the Primary Contact and Resource assigned for a given Lead?
- What is the potential revenue of leads by partners?
- What is the distribution of Partner Opportunities by sales stages?
Job Roles

- What is the number of partners in a specific classification within a defined geographic region?
- 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?
- How many Partners' team is a given Resource part of?
- What are the total number of Relationships for a given Account?
- What are the top ten accounts by revenue in the last quarter?
- Who are my teams top Customers?
- Who are the 'new' customers, created in the past 6 months?
- What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
- How are product revenues trending month over month?
- How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
- What are the historical monthly trend of closed revenue by current territories?
- How many Leads are open for a given Product?
- What was the currency conversion rate applied to a specific claim?
- What products are often lost to key competitors? Is there a pattern?
- Who are the top competitors and what is the revenue exposure to them?
- Who are the Primary owners of the Contacts for contacts created in the last quarter?
- How many territories is the Lead part of?
- What are all the Campaigns assigned to an Opportunity?
- Who are all the Contacts assigned to Opportunities?
- How many Partners are assigned to an Opportunity?
- Who are all the Partners assigned to Opportunities?
- How is the Quota attainment rate for the sales team?
- What are the user preferences for the Users created in the system?
- How many Enrollments are going to expire in the next quarter?
- How many Programs were created in the last quarter?
- Does this Partner have subsidiaries?
- What are the partner I have from this Partner, including all subsidiaries?
- How many times a Quote is revised before it gets approved?
- Who has submitted the highest number of Quotes in the current month?
- What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- Is my team following the norm that an SR must be opened (or updated) for every customer communication?
- What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter?
• What are the assignment start and end dates for a participant?
• Does the participant have an individualized target incentive for the plan?
• Are participants correctly credited?
• Are we on track in achieving quota this period or quarter?
• To what country and business unit does the participant belong?
• What is the total quota by performance measure for the period across the organization? Validate quota levels.
• Is the company on track to attain its goals? Who is lagging and might require coaching?
• What are all addresses of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• What is the number of Partner Contacts that are also resources and users?
• How many Territories is a Partner part of?
• Who manages my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
• What is the Territory Quota vs/ Actual?
• Which Territories have exceeded their Quotes in the current Quarter?
• Who are the Partner resources in the system and which Partner Organization they belong to?
• What are the Partners created in the system for a given time period?
• How many Enrollments were created/submitted/expired/terminated in the last month?
• What is the Campaign ROI (return on investment)?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• How much credit did my team receive for their attainment?
• Who got paid what amount and from where, at the detail level?
• Why wasn't I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.
• How do they compare to the base goals set on the measure?
• As a participant manager, which pay groups do my direct reports belong to?
• What is my cost of compensation by participant, plan component, plan, and frequencies?
• How does the performance measure attainment compare with a participant's personalized goal across his directs?
• What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• Is our resolution performance for escalated issues worse or better than non escalated issues?
• What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
• What are the sources of the Leads created in the current quarter?
• What are the top ten Partners by Revenue during the past quarter/year?
• What Partners are assigned to specific geographic territories?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• How to forecasts trend across periods?
• Who all are the Contacts associated to the Lead?
• 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?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Is the sales team converting leads to opportunities fast enough?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Who are the resources assigned for a particular territory?
• How many new contacts are created in the system in the current month?
• What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Organization?
• Which Program has the highest number of Enrollments?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many social posts came from known versus unknown contacts?
• How many open SRs are linked to each tag?
• What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?

• Has the participant accepted the assignment to the plan?

• Is the dispute load balanced between my analysts? Asked by compensation managers.

• What is the total quota across the organization by performance measure for the interval?

• Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.

• What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?

• Was an SR sitting in a queue longer than the average time for all other SRs?

• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)

• Does the survey request activity show a declining trend?

• What is the overall satisfaction levels of our customers with regards to issue resolutions?

• Which of our product lines most frequently receive suggestions for product improvements?

• How many Leads were rejected in the last quarter and what were the reason for those?

• What are the names of the customers that a Sales team owns? Who are the key contacts?

• Does the forecast versus pipeline trend show a healthy picture?

• What are the Opportunity Revenue line details contributing the most to the Forecast?

• What are the higher value deals that have been moved out?

• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?

• Are the Leads supporting products that appeal to certain customers by size of company?

• What were the approved amounts vs the settled claim totals for the last 4 quarters?

• What are the top 10 open opportunities? What are the target close dates and revenues for these?

• What are all the contacts created in the system by Geography?

• What are all the Opportunities created as a result of Deal closure by a particular resource/team?

• What are all the Opportunities resulted from a Campaign?

• How many Resources are assigned to an Opportunity?

• 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 many Leads are part of the Campaign?

• Who has completed the most activity objectives?

• What are the activity levels in specific regions?

• Do customers contact us more often to solve issues or to seek answers to questions?

• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?

• How is the percentage of compliant SRs trending month over month, quarter over quarter?

• Where are the outliers when it comes to compliance?
Chapter 5
Job Roles

- How many showed up as compliant; how many were non-compliant during my review of completed work orders?
- What is the breakdown of open action plans by category?
- How many action plans are open and how long have they been open?
- How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
- What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- How are these targets individualized across the participants.
- What is the participant's home currency or cost center?
- What is the total quota by performance measure for the period across the organization?
- What pay groups are in the application? What are their types and descriptions?
- What is the status of each paysheet within the payment batches?
- What are the criteria for a rule including the inherited criteria from the ancestors?
- How long was an SR unassigned and how long did it sit in each queue?
- What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?
- What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

Corporate Marketing Manager

Code Name
ORA_MKT_CORPORATE_MARKETING_MANAGER_JOB

Duty Roles
This job role is related to the following duty roles:

- Marketing Corporate Transaction Analysis Duty

Subject Areas
This job role secures access to the following subject areas:

- Marketing - CRM Leads
- Marketing - CRM Leads and Opportunities Real Time
Business Questions

This job role secures access to data that can answer the following business questions:

- How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- How many Leads are associated for a given Opportunity?
- How many Opportunities were created from a given Lead?
- What are the top 10 products associated to the Leads in the system?
- What are the Leads that are converted into Opportunities?
- Who are the top Sales representatives by their Lead conversion ratio?
- 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?
- What are the sources of the Leads created in the current quarter?
- How many Leads were rejected in the last quarter and what were the reason for those?

Customer Contract Administrator

Code Name

ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

- Enterprise Contracts Transaction Analysis Duty Role

Subject Areas

This job role secures access to the following subject areas:

- Enterprise Contracts - Contracts Real Time

Business Questions
This job role secures access to data that can answer the following business questions:

- Which contracts are related to my given contract?
- What contracts have a specific policy deviation?
- How many days on average did a resource work on a contract assigned to them in the last quarter?
- Show me all the contracts that have a nonstandard clause.
- Show me all the contracts that have a particular deliverable due.
- How is my contract team loaded?
- How many contracts might get affected if I modify the Payment clause?
- Show me the user status progression for contracts within a given date range.
- What's the primary reason for contract closure in the last year?
- How many days on average did a resource organization work on a contract assigned to them in the last quarter?

Customer Contract Manager

Code Name

ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- Enterprise Contracts Transaction Analysis Duty Role

Subject Areas

This job role secures access to the following subject areas:

- Enterprise Contracts - Contracts Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- Which contracts are related to my given contract?
- What contracts have a specific policy deviation?
- How many days on average did a resource work on a contract assigned to them in the last quarter?
Customer Contract Team Member

Code Name

ORA_OKC_CUSTOMER_CONTRACT_TEAM_MEMBER_ABSTRACT

Duty Roles

This job role is related to the following duty roles:

- Enterprise Contracts Transaction Analysis Duty Role

Subject Areas

This job role secures access to the following subject areas:

- Enterprise Contracts - Contracts Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- Which contracts are related to my given contract?
- What contracts have a specific policy deviation?
- How many days on average did a resource work on a contract assigned to them in the last quarter?
- Show me all the contracts that have a nonstandard clause.
- Show me all the contracts that have a particular deliverable due.
- How is my contract team loaded?
- How many contracts might get affected if I modify the Payment clause?
- Show me the user status progression for contracts within a given date range.
Customer Relationship Management Application Administrator

Code Name

ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT.APPLICATION_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

- Service Administrative Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activities with Related Activities
- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Lifecycle
- Service - CRM Service Request Messages Real Time

• What’s the primary reason for contract closure in the last year?
• How many days on average did a resource organization work on a contract assigned to them in the last quarter?
Business Questions

This job role secures access to data that can answer the following business questions:

- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How often are communications being transferred between agents?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
- How many new coverages begin in the ensuing month?
- Are we equipped to service the increase in coverages?
- What is the current count of inbound email requests by status and mailbox?
- How many messages resulted in new service request creation versus update to existing service request?
- Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
- What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
- How are SR transfers contributing to overall latency/resolution delays?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How does the aging profile of SRs look like? Are there any outliers calling for intervention?
- What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
- How is tag usage across agents and resource teams? Which teams perform better than others?
- How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
- How is survey request trending compared to SR resolutions during the same period?
- What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• How many emails came from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
• Have we kept our strategic customers happy? If not, where can we improve - in timliness, better first time resolution, etc.?
• What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?
• What are the follow-up tasks I need to do on a particular customer?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
Was the SR queue modified or SR resource owner modified at any point?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• How many emails are we receiving over time?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the response scores for customer where we have not met SLA’s?
• Do one or more of the agents in my team need training to improve customer communication skills?
• What are the associated activities related to my upcoming appointment and task?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
• Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• Is our resolution performance for escalated issues worse or better than non escalated issues?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many social posts came from known versus unknown contacts?
• How many open SRs are linked to each tag?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• What is the overall satisfaction levels of our customers with regards to issue resolutions?
• Which of our product lines most frequently receive suggestions for product improvements?
• Who has completed the most activity objectives?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• What is the breakdown of open action plans by category?
• How many action plans are open and how long have they been open?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?

Customer Service Manager

Code Name

ORA_SVC_CUSTOMER_SERVICE_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

• Service Managerial Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Activities with Related Activities
• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• CRM - CRM Interaction Aggregate
• CRM - CRM Interaction Service Requests Real Time
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 5
Job Roles

• CRM - CRM Service Request Summary
• CRM - CRM Work Orders Real Time
• Service - CRM Customer Coverage Real Time
• Service - CRM Inbound Messages Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Action Plan Actions Real Time
• Service - CRM Service Request Lifecycle
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Request Resource Real Time
• Service - CRM Service Request Tags Real Time
• Service - CRM Service Requests Real Time
• Service - CRM Social Post Real Time
• Service - CRM Survey Requests Real Time
• Service - CRM Survey Responses Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

• How do the number of activities in a region and their average SR resolution rates by quarter compare?
• How often do communications cross channels to get to resolution?
• How many customer interactions happen without an SR?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How often are communications being transferred between agents?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many new coverages begin in the ensuing month?
• Are we equipped to service the increase in coverages?
• What is the current count of inbound email requests by status and mailbox?
• How many messages resulted in new service request creation versus update to existing service request?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
• How is tag usage across agents and resource teams? Which teams perform better than others?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• How is survey request trending compared to SR resolutions during the same period?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• How many emails came from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
• Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?
• What is the most frequent positive feedback we get from our custoemrs? Most frequent negative feedback?
• What are the follow-up tasks I need to do on a particular customer?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• How many emails are we receiving over time?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the response scores for customer where we have not met SLA’s?
• Do one or more of the agents in my team need training to improve customer communication skills?
• What are the associated activities related to my upcoming appointment and task?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
• Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product ‘A’ have tag ‘X’ or ‘Y’? How many have the ‘Potential Churn’ tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• Is our resolution performance for escalated issues worse or better than non escalated issues?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many social posts came from known versus unknown contacts?
• How many open SRs are linked to each tag?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• What is the overall satisfaction levels of our customers with regards to issue resolutions?
• Which of our product lines most frequently receive suggestions for product improvements?
• Who has completed the most activity objectives?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• What is the breakdown of open action plans by category?
• How many action plans are open and how long have they been open?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?

Customer Service Representative

Code Name

ORA_SVC_CUSTOMER_SERVICE_REPRESENTATIVE_JOB

Duty Roles

This job role is related to the following duty roles:

• Service Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Activities with Related Activities
Business Questions

This job role secures access to data that can answer the following business questions:

- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How often are communications being transferred between agents?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
- How many new coverages begin in the ensuing month?
- Are we equipped to service the increase in coverages?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
• How is tag usage across agents and resource teams? Which teams perform better than others?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
• Have we kept our strategic customers happy? If not, where can we improve - in timliness, better first time resolution, etc.?
• What is the most frequent positive feedback we get from our custoemrs? Most frequent negative feedback?
• What are the follow-up tasks I need to do on a particular customer?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• What are the response scores for customer where we have not met SLA’s?
• Do one or more of the agents in my team need training to improve customer communication skills?
• What are the associated activities related to my upcoming appointment and task?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Is our resolution performance for escalated issues worse or better than non escalated issues?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many open SRs are linked to each tag?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• What is the overall satisfaction levels of our customers with regards to issue resolutions?
• Which of our product lines most frequently receive suggestions for product improvements?
• Who has completed the most activity objectives?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• What is the breakdown of open action plans by category?
• How many action plans are open and how long have they been open?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?

Enterprise Contract Administrator

Code Name

ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

• Enterprise Contracts Transaction Analysis Duty Role

Subject Areas

This job role secures access to the following subject areas:

• Enterprise Contracts - Contracts Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

• Which contracts are related to my given contract?
• What contracts have a specific policy deviation?
• How many days on average did a resource work on a contract assigned to them in the last quarter?
• Show me all the contracts that have a nonstandard clause.
• Show me all the contracts that have a particular deliverable due.
• How is my contract team loaded?
Enterprise Contract Manager

Code Name

ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- Enterprise Contracts Transaction Analysis Duty Role

Subject Areas

This job role secures access to the following subject areas:

- Enterprise Contracts - Contracts Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- Which contracts are related to my given contract?
- What contracts have a specific policy deviation?
- How many days on average did a resource work on a contract assigned to them in the last quarter?
- Show me all the contracts that have a nonstandard clause.
- Show me all the contracts that have a particular deliverable due.
- How is my contract team loaded?
- How many contracts might get affected if I modify the Payment clause?
- Show me the user status progression for contracts within a given date range.
- What's the primary reason for contract closure in the last year?
- How many days on average did a resource organization work on a contract assigned to them in the last quarter?
Enterprise Contract Team Member

Code Name

ORA_OKC_ENTERPRISE_CONTRACT_TEAM_MEMBER_ABSTRACT

Duty Roles

This job role is related to the following duty roles:

- Enterprise Contracts Transaction Analysis Duty Role

Subject Areas

This job role secures access to the following subject areas:

- Enterprise Contracts - Contracts Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- Which contracts are related to my given contract?
- What contracts have a specific policy deviation?
- How many days on average did a resource work on a contract assigned to them in the last quarter?
- Show me all the contracts that have a nonstandard clause.
- Show me all the contracts that have a particular deliverable due.
- How is my contract team loaded?
- How many contracts might get affected if I modify the Payment clause?
- Show me the user status progression for contracts within a given date range.
- What's the primary reason for contract closure in the last year?
- How many days on average did a resource organization work on a contract assigned to them in the last quarter?

Human Resource Help Desk Administrator

Code Name
ORA_SVC_HUMANRESOURCE_HELPROS_DESK_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

- *HR Help Desk Administrator Transaction Analysis Duty*

Subject Areas

This job role secures access to the following subject areas:

- *CRM - CRM Activity Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Service Requests Real Time*
- *CRM - CRM Interactions Real Time*
- *CRM - CRM Omni Channel Events Real Time*
- *CRM - CRM Service Request Summary*
- *Help Desk - HR Service Requests Real Time*
- *Service - CRM Inbound Messages Real Time*
- *Service - CRM Service Queue Resources Real Time*
- *Service - CRM Service Request Lifecycle*
- *Service - CRM Service Request Messages Real Time*
- *Service - CRM Service Request Milestones Real Time*
- *Service - CRM Service Request Resource Real Time*
- *Service - CRM Service Request Tags Real Time*
- *Service - CRM Service Requests Real Time*
- *Service - CRM Survey Requests Real Time*
- *Service - CRM Survey Responses Real Time*

Business Questions

This job role secures access to data that can answer the following business questions:

- *How often do communications cross channels to get to resolution?*
- *How many customer interactions happen without an SR?*
- *How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?*
- *As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?*
- *How often are communications being transferred between agents?*
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 5
Job Roles

• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• What is the current count of inbound email requests by status and mailbox?
• How many messages resulted in new service request creation versus update to existing service request?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
• How is tag usage across agents and resource teams? Which teams perform better than others?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• How is survey request trending compared to SR resolutions during the same period?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many emails came from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?
• What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
• Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?
Chapter 5
Job Roles

- What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?
- Are agents prematurely updating SRs as Resolved to make their numbers look better?
- What product lines have a higher percentage of non-compliant SRs open?
- How frequently do agents link articles to SRs?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?
- How many HR SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How long did it take to assign the SR to the correct queue?
- Was the assigned agent overloaded with other work?
- Was the SR queue modified or SR resource owner modified at any point?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- How many interactions are being lost/abandoned? How does this compare with previous periods?
- How long is it taking for offers to be made to agents?
- How many interactions, on average, does it require to resolve an issue?
- Are we keeping the number of non-compliant SRs in check for our most valuable customers?
- How many emails are we receiving over time?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
- How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
- How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
- Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
- Do we need to adjust our survey template to improve response rates?
- Does seasonality impact response rates?
- How does response differ for various service teams? Do some teams obtain better response rates?
- What are the response scores for customer where we have not met SLA’s?
- Do one or more of the agents in my team need training to improve customer communication skills?
- Is my team following the norm that an SR must be opened (or updated) for every customer communication?
- What are our issue resolution rates for low and high cost channels?
- What percent of communications are resolved the first time? What is the most commonly used channel?
- Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
- Are our processes inefficient or preventing agents from meeting milestones?
- Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
- How does my team perform in meeting first response milestones versus resolution milestones?
- How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
- What are the open critical HR SRs that my team is working on currently? How many of these are escalated?
- Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- On an average, how many interactions have it taken to resolve critical issues during the past month? How does that compare with previous months?
- What are the rates for agents declining work offers?
- What are the average handle times?
- What are the number of interactions by channel, agent, and time period?
- Are there currently service requests that have missed the target milestone and require escalation?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Who are my agents that have the most pending SRs?
- What is the prevalence of SR transfers for an agent/manager/group/product/location?
- What are the popular reasons for SRs to be transferred? Is there a pattern?
- How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?
- Are there any workload balancing issues on my team? Are a few members performing most of the activities?
- Did the SR get assigned to the wrong queue/team?
- Are survey requests being sent per plan across teams, service categories, products, account regions?
- Is our resolution performance for escalated issues worse or better than non escalated issues?
- Across what channels do such non-SR interactions most often occur?
- What is the interaction activity level across channels and agents? How do they compare across time periods?
- What channels are the most effective for resolving issues with a single interaction?
- How often are my agents able to resolve issues using a low cost channel like chat?
- How often do communications cross channels before they are resolved?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- As an agent am I spreading myself too thin by being part of one too many SR teams?
- What are the open critical SRs that my team is working on currently? How many of these are escalated?
- How many open SRs are linked to each tag?
- What are the HR SRs that are waiting on my customers?
- Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• What is the overall satisfaction levels of our customers with regards to issue resolutions?
• Which of our product lines most frequently receive suggestions for product improvements?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• Who are my agents that have the most pending HR SRs?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?

Human Resource Help Desk Agent

Code Name

ORA_SVC_HUMANRESOURCE_HELPDESK_AGENT_JOB

Duty Roles

This job role is related to the following duty roles:

- HR Help Desk Agent Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activity Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- Help Desk - HR Service Requests Real Time
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 5
Job Roles

- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Lifecycle
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Request Tags Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Survey Responses Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How often are communications being transferred between agents?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
- What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
- How are SR transfers contributing to overall latency/resolution delays?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How does the aging profile of SRs look like? Are there any outliers calling for intervention?
- What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
- How is tag usage across agents and resource teams? Which teams perform better than others?
- How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
- What percentage of service requests involve at least one interaction?
- Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
- What is the average length of time of an interaction, by agent and channel?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
- By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
Job Roles

- What are the SRs that are waiting on my customers?
- Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
- Are we seeing an issue regarding compliance rates with certain tags?
- How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?
- What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?
- As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
- Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
- Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
- What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
- Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?
- What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?
- Are agents premature updating SRs as Resolved to make their numbers look better?
- What product lines have a higher percentage of non-compliant SRs open?
- How frequently do agents link articles to SRs?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?
- How many HR SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How long did it take to assign the SR to the correct queue?
- Was the assigned agent overloaded with other work?
- Was the SR queue modified or SR resource owner modified at any point?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- How many interactions are being lost/abandoned? How does this compare with previous periods?
- How long is it taking for offers to be made to agents?
- How many interactions, on average, does it require to resolve an issue?
- Are we keeping the number of non-compliant SRs in check for our most valuable customers?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
- How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?

• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?

• What are the response scores for customer where we have not met SLA’s?

• Do one or more of the agents in my team need training to improve customer communication skills?

• Is my team following the norm that an SR must be opened (or updated) for every customer communication?

• What are our issue resolution rates for low and high cost channels?

• What percent of communications are resolved the first time? What is the most commonly used channel?

• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?

• Are our processes inefficient or preventing agents from meeting milestones?

• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?

• How does my team perform in meeting first response milestones versus resolution milestones?

• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?

• What are the open critical HR SRs that my team is working on currently? How many of these are escalated?

• Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?

• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?

• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?

• What are the rates for agents declining work offers?

• What are the average handle times?

• What are the number of interactions by channel, agent, and time period?

• Are there currently service requests that have missed the target milestone and require escalation?

• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?

• Who are my agents that have the most pending SRs?

• What is the prevalence of SR transfers for an agent/manager/group/product/location?

• What are the popular reasons for SRs to be transferred? Is there a pattern?

• How many SRs for product ‘A’ have tag ‘X’ or ‘Y’? How many have the ‘Potential Churn’ tag?

• Are there any workload balancing issues on my team? Are a few members performing most of the activities?

• Did the SR get assigned to the wrong queue/team?

• Is our resolution performance for escalated issues worse or better than non escalated issues?

• Across what channels do such non-SR interactions most often occur?

• What is the interactions activity level across channels and agents? How do they compare across time periods?

• What channels are the most effective for resolving issues with a single interaction?

• How often are my agents able to resolve issues using a low cost channel like chat?

• How often do communications cross channels before they are resolved?
Chapter 5
Job Roles

- What is the % of open SRs with milestones, that is, have at least one milestone?
- As an agent am I spreading myself too thin by being part of one too many SR teams?
- What are the open critical SRs that my team is working on currently? How many of these are escalated?
- How many open SRs are linked to each tag?
- What are the open critical SRs that my team is working on currently? How many of these are escalated?
- Was an SR sitting in a queue longer than the average time for all other SRs?
- Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
- What is the overall satisfaction levels of our customers with regards to issue resolutions?
- Which of our product lines most frequently receive suggestions for product improvements?
- Do customers contact us more often to solve issues or to seek answers to questions?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How is the percentage of compliant SRs trending month over month, quarter over quarter?
- Where are the outliers when it comes to compliance?
- How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
- Who are my agents that have the most pending HR SRs?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- How long was an SR unassigned and how long did it sit in each queue?

Human Resource Help Desk Manager

Code Name
ORA_SVC_HUMAN_RESOURCE_HELP_DESK_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- HR Help Desk Manager Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activity Real Time
- CRM - CRM Interaction Aggregate
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 5
Job Roles

- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- Help Desk - HR Service Requests Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Lifecycle
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Request Tags Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Survey Requests Real Time
- Service - CRM Survey Responses Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How often are communications being transferred between agents?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- What is the current count of inbound email requests by status and mailbox?
- How many messages resulted in new service request creation versus update to existing service request?
- Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
- What are the most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
- How are SR transfers contributing to overall latency/resolution delays?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How does the aging profile of SRs look like? Are there any outliers calling for intervention?
- What characteristics do groupings of SR’s based on specific tags (e.g., tag = ‘outage’) exhibit?
- How is tag usage across agents and resource teams? Which teams perform better than others?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• How is survey request trending compared to SR resolutions during the same period?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many emails came from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Do SR’s with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?
• What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
• Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?
• What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?
• How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
- Was the SR queue modified or SR resource owner modified at any point?

- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?

- How many interactions are being lost/abandoned? How does this compare with previous periods?

- How long is it taking for offers to be made to agents?

- How many interactions, on average, does it require to resolve an issue?

- Are we keeping the number of non-compliant SRs in check for our most valuable customers?

- How many emails are we receiving over time?

- Are my team resources optimally deployed across service queues to maximize productivity?

- What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?

- How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?

- How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?

- Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?

- Do we need to adjust our survey template to improve response rates?

- Does seasonality impact response rates?

- How does response differ for various service teams? Do some teams obtain better response rates?

- What are the response scores for customer where we have not met SLA’s?

- Do one or more of the agents in my team need training to improve customer communication skills?

- Is my team following the norm that an SR must be opened (or updated) for every customer communication?

- What are our issue resolution rates for low and high cost channels?

- What percent of communications are resolved the first time? What is the most commonly used channel?

- Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?

- Are our processes inefficient or preventing agents from meeting milestones?

- Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?

- How does my team perform in meeting first response milestones versus resolution milestones?

- How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?

- What are the open critical HR SRs that my team is working on currently? How many of these are escalated?

- Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?

- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?

- On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?

- What are the rates for agents declining work offers?
Chapter 5  
Job Roles

• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product ‘A’ have tag ‘X’ or ‘Y’? How many have the ‘Potential Churn’ tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• Is our resolution performance for escalated issues worse or better than non escalated issues?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many open SRs are linked to each tag?
• What are the HR SRs that are waiting on my customers?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• What is the overall satisfaction levels of our customers with regards to issue resolutions?
• Which of our product lines most frequently receive suggestions for product improvements?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• Who are my agents that have the most pending HR SRs?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?
IT Security Manager

Code Name

ORA_FND_IT_SECURITY_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- OTBI Performance Transactional Analysis Duty
- OTBI Usage Transactional Analysis Duty
- Security Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- OTBI Performance Real Time
- OTBI Usage Real Time
- Security - Audit Real Time
- Security - Roles and Privileges Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- Who are the top OTBI users?
- How many predefined OTBI analyses have been run in the past month?
- What is the OTBI execution time histogram in the past month?
- What is the database SQL execution time and row count?
- Which analyses have low usage in the past month?
- What are the long-running analyses in the past month?
- Which analyses have high data row count?
- Which analyses reached OTBI max row limit?
- Which subject areas have slow performance?
- Which analyses have low usage because of poor performance?
- What are the most frequently-run OTBI analyses?
Chapter 5
Job Roles

- How many ad-hoc OTBI analyses have been run in the past month?
- How many OTBI SOAP web services have been run in the past month?
- What are the least-used OTBI subject areas?
- Which subject areas have large data volume?
- What are all the data security privileges that a specific user added?
- How many analyses and dashboards failed in the past month?
- What are the most commonly used OTBI subject areas?
- How many users run OTBI analyses?
- How many custom OTBI analyses have been run in the past month?
- What is the execution history of dashboard X in the past month?
- Why am I not able to view certain subject areas with my login credentials?
- What is the weekly OTBI analysis usage trend?
- Can I view and edit a particular page? If yes, which functional security policy do I need to provide to a user who needs similar access?
- I have not added a specific role to a user, but the user seems to have this job role. Can I trace how has this been inherited by the user?
- Which analyses have the longest response time?
- What are the common execution errors in the past month?
- Which data security policy would provide access to the data I need to see?
- Which roles were added with a specific functional security policy, and who added them?

Incentive Compensation Analyst

Code Name
ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB

Duty Roles
This job role is related to the following duty roles:

- Incentive Compensation Transaction Analysis Duty

Subject Areas
This job role secures access to the following subject areas:

- Incentive Compensation - Attainments Real Time
• Incentive Compensation - Compensation Plan Assignments Real Time
• Incentive Compensation - Credits Real Time
• Incentive Compensation - Disputes Real Time
• Incentive Compensation - Earning and Attainment Summary Real Time
• Incentive Compensation - Earnings Real Time
• Incentive Compensation - Participant Balances Real Time
• Incentive Compensation - Participant Compensation Plan Real Time
• Incentive Compensation - Participant Detail Real Time
• Incentive Compensation - Participant Interval Goals Real Time
• Incentive Compensation - Participant Period Goals Real Time
• Incentive Compensation - Pay Group Assignments Real Time
• Incentive Compensation - Payments Real Time
• Incentive Compensation - Paysheet Summary Real Time
• Incentive Compensation - Performance and Earnings Summary Real Time
• Incentive Compensation - Rules Real Time
• Incentive Compensation - Transactions Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

• How much credit did a participant receive for their sales transactions?
• What type of assignment does a participant have to a plan?
• Which of my direct reports’ attainment or earnings are below the wanted performance expectation?
• Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.
• What is the total quota across the organization by performance measure for the period or across periods?
• Which participants are assigned to a given pay group?
• How do participants' plan component earnings compare with their personalized target incentives?
• What are the credit rules which a credit receiver is assigned to?
• Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.
• What are my compensation plan incentive targets?
• Are my individualized performance measure goals set properly?
• Who is assigned to a given plan?
• What is the total quota by performance measure for the interval across the organization?
• When was a given participant assigned to a specific pay group?
• What is the current status of the payment batches? Are they paid, reviewed, or frozen?
• What are the various attainment attributes associated with my credits?
• How do these targets break down by plan component?
• As a participant manager, what are the targets and goals settings for my direct reports?
• Is the participant active? And for which dates?
• Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.
• How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?
• Do I have to realign quota based on current attainment levels?
• Which participants are assigned to which plans?
• Were there credit or rollup errors that must be fixed?
• What are the targets and goals settings for an individual?
• What are the rules effective as of the given date in the hierarchy?
• What are the results of the collected transactions before the crediting process?
• What are the assignment start and end dates for a participant?
• Does the participant have an individualized target incentive for the plan?
• Are participants correctly credited?
• Are we on track in achieving quota this period or quarter?
• To what country and business unit does the participant belong?
• What is the total quota by performance measure for the period across the organization? Validate quota levels.
• Is the company on track to attain its goals? Who is lagging and might require coaching?
• How much credit did my team receive for their attainment?
• Who got paid what amount and from where, at the detail level?
• Why wasn’t I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.
• How do they compare to the base goals set on the measure?
• As a participant manager, which pay groups do my direct reports belong to?
• What is my cost of compensation by participant, plan component, plan, and frequencies?
• How does the performance measure attainment compare with a participant’s personalized goal across his directs?
• What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?
• Has the participant accepted the assignment to the plan?
• Is the dispute load balanced between my analysts? Asked by compensation managers.
• What is the total quota across the organization by performance measure for the interval?
• Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.
• How are these targets individualized across the participants.
• What is the participant’s home currency or cost center?
• What is the total quota by performance measure for the period across the organization?
• What pay groups are in the application? What are their types and descriptions?
• What is the status of each paysheet within the payment batches?
• What are the criteria for a rule including the inherited criteria from the ancestors?

Incentive Compensation Manager

Code Name

ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

• Incentive Compensation Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• Incentive Compensation - Attainments Real Time
• Incentive Compensation - Compensation Plan Assignments Real Time
• Incentive Compensation - Credits Real Time
• Incentive Compensation - Disputes Real Time
• Incentive Compensation - Earning and Attainment Summary Real Time
• Incentive Compensation - Earnings Real Time
• Incentive Compensation - Participant Balances Real Time
• Incentive Compensation - Participant Compensation Plan Real Time
• Incentive Compensation - Participant Detail Real Time
• Incentive Compensation - Participant Interval Goals Real Time
• Incentive Compensation - Participant Period Goals Real Time
• Incentive Compensation - Pay Group Assignments Real Time
• Incentive Compensation - Payments Real Time
• Incentive Compensation - Paysheet Summary Real Time
• Incentive Compensation - Performance and Earnings Summary Real Time
• Incentive Compensation - Rules Real Time
• Incentive Compensation - Transactions Real Time
Business Questions

This job role secures access to data that can answer the following business questions:

- How much credit did a participant receive for their sales transactions?
- What type of assignment does a participant have to a plan?
- Which of my direct reports' attainment or earnings are below the wanted performance expectation?
- Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.
- What is the total quota across the organization by performance measure for the period or across periods?
- Which participants are assigned to a given pay group?
- How do participants' plan component earnings compare with their personalized target incentives?
- What are the credit rules which a credit receiver is assigned to?
- Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.
- What are my compensation plan incentive targets?
- Are my individualized performance measure goals set properly?
- Who is assigned to a given plan?
- What is the total quota by performance measure for the interval across the organization?
- When was a given participant assigned to a specific pay group?
- What is the current status of the payment batches? Are they paid, reviewed, or frozen?
- What are the various attainment attributes associated with my credits?
- How do these targets break down by plan component?
- As a participant manager, what are the targets and goals settings for my direct reports?
- Is the participant active? And for which dates?
- Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.
- How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?
- Do I have to realign quota based on current attainment levels?
- Which participants are assigned to which plans?
- Were there credit or rollup errors that must be fixed?
- What are the targets and goals settings for an individual?
- What are the rules effective as of the given date in the hierarchy?
- What are the results of the collected transactions before the crediting process?
- What are the assignment start and end dates for a participant?
- Does the participant have an individualized target incentive for the plan?
- Are participants correctly credited?
- Are we on track in achieving quota this period or quarter?
• To what country and business unit does the participant belong?
• What is the total quota by performance measure for the period across the organization? Validate quota levels.
• Is the company on track to attain its goals? Who is lagging and might require coaching?
• How much credit did my team receive for their attainment?
• Who got paid what amount and from where, at the detail level?
• Why wasn’t I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.
• How do they compare to the base goals set on the measure?
• As a participant manager, which pay groups do my direct reports belong to?
• What is my cost of compensation by participant, plan component, plan, and frequencies?
• How does the performance measure attainment compare with a participant’s personalized goal across his directs?
• What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?
• Has the participant accepted the assignment to the plan?
• Is the dispute load balanced between my analysts? Asked by compensation managers.
• What is the total quota across the organization by performance measure for the interval?
• Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.
• How are these targets individualized across the participants.
• What is the participant’s home currency or cost center?
• What is the total quota by performance measure for the period across the organization?
• What pay groups are in the application? What are their types and descriptions?
• What is the status of each paysheet within the payment batches?
• What are the criteria for a rule including the inherited criteria from the ancestors?

Incentive Compensation Participant

Code Name

ORA_CN_INCENTIVE_COMPENSATION_PARTICIPANT_ABSTRACT

Duty Roles

This job role is related to the following duty roles:

• Incentive Compensation Transaction Analysis Duty
Subject Areas

This job role secures access to the following subject areas:

- Incentive Compensation - Attainments Real Time
- Incentive Compensation - Compensation Plan Assignments Real Time
- Incentive Compensation - Credits Real Time
- Incentive Compensation - Disputes Real Time
- Incentive Compensation - Earning and Attainment Summary Real Time
- Incentive Compensation - Earnings Real Time
- Incentive Compensation - Participant Balances Real Time
- Incentive Compensation - Participant Compensation Plan Real Time
- Incentive Compensation - Participant Detail Real Time
- Incentive Compensation - Participant Interval Goals Real Time
- Incentive Compensation - Participant Period Goals Real Time
- Incentive Compensation - Pay Group Assignments Real Time
- Incentive Compensation - Payments Real Time
- Incentive Compensation - Paysheet Summary Real Time
- Incentive Compensation - Performance and Earnings Summary Real Time
- Incentive Compensation - Rules Real Time
- Incentive Compensation - Transactions Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- How much credit did a participant receive for their sales transactions?
- What type of assignment does a participant have to a plan?
- Which of my direct reports' attainment or earnings are below the wanted performance expectation?
- Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.
- What is the total quota across the organization by performance measure for the period or across periods?
- Which participants are assigned to a given pay group?
- How do participants' plan component earnings compare with their personalized target incentives?
- What are the credit rules which a credit receiver is assigned to?
- Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.
- What are my compensation plan incentive targets?
- Are my individualized performance measure goals set properly?
• Who is assigned to a given plan?
• What is the total quota by performance measure for the interval across the organization?
• When was a given participant assigned to a specific pay group?
• What is the current status of the payment batches? Are they paid, reviewed, or frozen?
• What are the various attainment attributes associated with my credits?
• How do these targets break down by plan component?
• As a participant manager, what are the targets and goals settings for my direct reports?
• Is the participant active? And for which dates?
• Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.
• How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?
• Do I have to realign quota based on current attainment levels?
• Which participants are assigned to which plans?
• Were there credit or rollup errors that must be fixed?
• What are the targets and goals settings for an individual?
• What are the rules effective as of the given date in the hierarchy?
• What are the results of the collected transactions before the crediting process?
• What are the assignment start and end dates for a participant?
• Does the participant have an individualized target incentive for the plan?
• Are participants correctly credited?
• Are we on track in achieving quota this period or quarter?
• To what country and business unit does the participant belong?
• What is the total quota by performance measure for the period across the organization? Validate quota levels.
• Is the company on track to attain its goals? Who is lagging and might require coaching?
• How much credit did my team receive for their attainment?
• Who got paid what amount and from where, at the detail level?
• Why wasn’t I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.
• How do they compare to the base goals set on the measure?
• As a participant manager, which pay groups do my direct reports belong to?
• What is my cost of compensation by participant, plan component, plan, and frequencies?
• How does the performance measure attainment compare with a participant’s personalized goal across his directs?
• What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?
• Has the participant accepted the assignment to the plan?
• Is the dispute load balanced between my analysts? Asked by compensation managers.
• What is the total quota across the organization by performance measure for the interval?
• Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.
• How are these targets individualized across the participants.
• What is the participant’s home currency or cost center?
• What is the total quota by performance measure for the period across the organization?
• What pay groups are in the application? What are their types and descriptions?
• What is the status of each paysheet within the payment batches?
• What are the criteria for a rule including the inherited criteria from the ancestors?

Incentive Compensation Participant Manager

Code Name

ORA_CN_INCENTIVE_COMPENSATION_PARTICIPANT_MANAGER_ABSTRACT

Duty Roles

This job role is related to the following duty roles:

• Incentive Compensation Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• Incentive Compensation - Attainments Real Time
• Incentive Compensation - Compensation Plan Assignments Real Time
• Incentive Compensation - Credits Real Time
• Incentive Compensation - Disputes Real Time
• Incentive Compensation - Earning and Attainment Summary Real Time
• Incentive Compensation - Earnings Real Time
• Incentive Compensation - Participant Balances Real Time
• Incentive Compensation - Participant Compensation Plan Real Time
• Incentive Compensation - Participant Detail Real Time
• Incentive Compensation - Participant Interval Goals Real Time
• Incentive Compensation - Participant Period Goals Real Time
• Incentive Compensation - Pay Group Assignments Real Time
• Incentive Compensation - Payments Real Time
Incentive Compensation - Paysheet Summary Real Time
Incentive Compensation - Performance and Earnings Summary Real Time
Incentive Compensation - Rules Real Time
Incentive Compensation - Transactions Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- How much credit did a participant receive for their sales transactions?
- What type of assignment does a participant have to a plan?
- Which of my direct reports' attainment or earnings are below the wanted performance expectation?
- Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.
- What is the total quota across the organization by performance measure for the period or across periods?
- Which participants are assigned to a given pay group?
- How do participants' plan component earnings compare with their personalized target incentives?
- What are the credit rules which a credit receiver is assigned to?
- Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.
- What are my compensation plan incentive targets?
- Are my individualized performance measure goals set properly?
- Who is assigned to a given plan?
- What is the total quota by performance measure for the interval across the organization?
- When was a given participant assigned to a specific pay group?
- What is the current status of the payment batches? Are they paid, reviewed, or frozen?
- What are the various attainment attributes associated with my credits?
- How do these targets break down by plan component?
- As a participant manager, what are the targets and goals settings for my direct reports?
- Is the participant active? And for which dates?
- Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.
- How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?
- Do I have to realign quota based on current attainment levels?
- Which participants are assigned to which plans?
- Were there credit or rollup errors that must be fixed?
- What are the targets and goals settings for an individual?
- What are the rules effective as of the given date in the hierarchy?
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 5
Job Roles

- What are the results of the collected transactions before the crediting process?
- What are the assignment start and end dates for a participant?
- Does the participant have an individualized target incentive for the plan?
- Are participants correctly credited?
- Are we on track in achieving quota this period or quarter?
- To what country and business unit does the participant belong?
- What is the total quota by performance measure for the period across the organization? Validate quota levels.
- Is the company on track to attain its goals? Who is lagging and might require coaching?
- How much credit did my team receive for their attainment?
- Who got paid what amount and from where, at the detail level?
- Why wasn’t I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.
- How do they compare to the base goals set on the measure?
- As a participant manager, which pay groups do my direct reports belong to?
- What is my cost of compensation by participant, plan component, plan, and frequencies?
- How does the performance measure attainment compare with a participant’s personalized goal across his directs?
- What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?
- Has the participant accepted the assignment to the plan?
- Is the dispute load balanced between my analysts? Asked by compensation managers.
- What is the total quota across the organization by performance measure for the interval?
- Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.
- How are these targets individualized across the participants.
- What is the participant’s home currency or cost center?
- What is the total quota by performance measure for the period across the organization?
- What pay groups are in the application? What are their types and descriptions?
- What is the status of each paysheet within the payment batches?
- What are the criteria for a rule including the inherited criteria from the ancestors?

Incentive Compensation Plan Administrator

Code Name

ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB
Duty Roles

This job role is related to the following duty roles:

- Incentive Compensation Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- Incentive Compensation - Attainments Real Time
- Incentive Compensation - Compensation Plan Assignments Real Time
- Incentive Compensation - Credits Real Time
- Incentive Compensation - Disputes Real Time
- Incentive Compensation - Earning and Attainment Summary Real Time
- Incentive Compensation - Earnings Real Time
- Incentive Compensation - Participant Balances Real Time
- Incentive Compensation - Participant Compensation Plan Real Time
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- Incentive Compensation - Participant Period Goals Real Time
- Incentive Compensation - Pay Group Assignments Real Time
- Incentive Compensation - Payments Real Time
- Incentive Compensation - Paysheet Summary Real Time
- Incentive Compensation - Performance and Earnings Summary Real Time
- Incentive Compensation - Rules Real Time
- Incentive Compensation - Transactions Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- How much credit did a participant receive for their sales transactions?
- What type of assignment does a participant have to a plan?
- Which of my direct reports' attainment or earnings are below the wanted performance expectation?
- Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.
- What is the total quota across the organization by performance measure for the period or across periods?
- Which participants are assigned to a given pay group?
• How do participants’ plan component earnings compare with their personalized target incentives?
• What are the credit rules which a credit receiver is assigned to?
• Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.
• What are my compensation plan incentive targets?
• Are my individualized performance measure goals set properly?
• Who is assigned to a given plan?
• What is the total quota by performance measure for the interval across the organization?
• When was a given participant assigned to a specific pay group?
• What is the current status of the payment batches? Are they paid, reviewed, or frozen?
• What are the various attainment attributes associated with my credits?
• How do these targets break down by plan component?
• As a participant manager, what are the targets and goals settings for my direct reports?
• Is the participant active? And for which dates?
• Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.
• How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?
• Do I have to realign quota based on current attainment levels?
• Which participants are assigned to which plans?
• Were there credit or rollup errors that must be fixed?
• What are the targets and goals settings for an individual?
• What are the rules effective as of the given date in the hierarchy?
• What are the results of the collected transactions before the crediting process?
• What are the assignment start and end dates for a participant?
• Does the participant have an individualized target incentive for the plan?
• Are participants correctly credited?
• Are we on track in achieving quota this period or quarter?
• To what country and business unit does the participant belong?
• What is the total quota by performance measure for the period across the organization? Validate quota levels.
• Is the company on track to attain its goals? Who is lagging and might require coaching?
• How much credit did my team receive for their attainment?
• Who got paid what amount and from where, at the detail level?
• Why wasn’t I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.
• How do they compare to the base goals set on the measure?
• As a participant manager, which pay groups do my direct reports belong to?
• What is my cost of compensation by participant, plan component, plan, and frequencies?
• How does the performance measure attainment compare with a participant’s personalized goal across his directs?

• What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?

• Has the participant accepted the assignment to the plan?

• Is the dispute load balanced between my analysts? Asked by compensation managers.

• What is the total quota across the organization by performance measure for the interval?

• Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.

• How are these targets individualized across the participants.

• What is the participant’s home currency or cost center?

• What is the total quota by performance measure for the period across the organization?

• What pay groups are in the application? What are their types and descriptions?

• What is the status of each paysheet within the payment batches?

• What are the criteria for a rule including the inherited criteria from the ancestors?

Internal Help Desk Administrator

Code Name

ORA_SVC_INTERNAL_HELP_DESK_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

• Internal Help Desk Administrator Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Omni Channel Events Real Time

• Help Desk - Internal Service Requests Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How are SR transfers contributing to overall latency/resolution delays?
• How many Internal SRs are unassigned for more than a day? Who are the impacted customers? How many of these are critical?
• What are the open critical Internal SRs that my team is working on currently? How many of these are escalated?
• How many Internal SRs have been waiting on my agents action for more than 24 hours? Which of these are critical or escalated?
• How long is it taking for offers to be made to agents?
• What are the Internal SRs waiting on my customers?
• What is the status of our aging SRs? Are there any outliers that require intervention?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• What is the reopen rate for Internal SRs owned by my team? Who has the highest reopen rate? Is there a training issue?
• How are we doing on Internal SR resolution times between current and past months? What are the reasons for any degradations?
• Who are my agents that have the most pending Internal SRs?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?

Internal Help Desk Agent

Code Name

ORA_SVC_INTERNAL_HELP_DESK_AGENT_JOB

Duty Roles

This job role is related to the following duty roles:

• Internal Help Desk Agent Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Omni Channel Events Real Time
• Help Desk - Internal Service Requests Real Time
Business Questions

This job role secures access to data that can answer the following business questions:

- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How are SR transfers contributing to overall latency/resolution delays?
- How many Internal SRs are unassigned for more than a day? Who are the impacted customers? How many of these are critical?
- What are the open critical Internal SRs that my team is working on currently? How many of these are escalated?
- How many Internal SRs have been waiting on my agents action for more than 24 hours? Which of these are critical or escalated?
- How long is it taking for offers to be made to agents?
- What are the Internal SRs waiting on my customers?
- What is the status of our aging SRs? Are there any outliers that require intervention?
- What are the rates for agents declining work offers?
- What are the average handle times?
- What is the prevalence of SR transfers for an agent/manager/group/product/location?
- What are the popular reasons for SRs to be transferred? Is there a pattern?
- What is the reopen rate for Internal SRs owned by my team? Who has the highest reopen rate? Is there a training issue?
- How are we doing on Internal SR resolution times between current and past months? What are the reasons for any degradations?
- Who are my agents that have the most pending Internal SRs?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?

Internal Help Desk Manager

Code Name

ORA_SVC_INTERNAL_HELP_DESK_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- Internal Help Desk Manager Transaction Analysis Duty

Subject Areas
This job role secures access to the following subject areas:

- CRM - CRM Omni Channel Events Real Time
- Help Desk - Internal Service Requests Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How are SR transfers contributing to overall latency/resolution delays?
- How many Internal SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are critical?
- What are the open critical Internal SRs that my team is working on currently? How many of these are escalated?
- How many Internal SRs have been waiting on my agents action for more than 24 hours? Which of these are critical or escalated?
- How long is it taking for offers to be made to agents?
- What are the Internal SRs waiting on my customers?
- What is the status of our aging SRs? Are there any outliers that require intervention?
- What are the rates for agents declining work offers?
- What are the average handle times?
- What is the prevalence of SR transfers for an agent/manager/group/product/location?
- What are the popular reasons for SRs to be transferred? Is there a pattern?
- What is the reopen rate for Internal SRs owned by my team? Who has the highest reopen rate? Is there a training issue?
- How are we doing on Internal SR resolution times between current and past months? What are the reasons for any degradations?
- Who are my agents that have the most pending Internal SRs?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?

Internal Help Desk User

Code Name

ORA_SVC_INTERNAL_HELP_DESK_USER_JOB

Duty Roles
This job role is related to the following duty roles:

- Internal Help Desk User Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Omni Channel Events Real Time
- Help Desk - Internal Service Requests Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How are SR transfers contributing to overall latency/resolution delays?
- How many Internal SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are critical?
- What are the open critical Internal SRs that my team is working on currently? How many of these are escalated?
- How many Internal SRs have been waiting on my agents action for more than 24 hours? Which of these are critical or escalated?
- How long is it taking for offers to be made to agents?
- What are the Internal SRs waiting on my customers?
- What is the status of our aging SRs? Are there any outliers that require intervention?
- What are the rates for agents declining work offers?
- What are the average handle times?
- What is the prevalence of SR transfers for an agent/manager/group/product/location?
- What are the popular reasons for SRs to be transferred? Is there a pattern?
- What is the reopen rate for Internal SRs owned by my team? Who has the highest reopen rate? Is there a training issue?
- How are we doing on Internal SR resolution times between current and past months? What are the reasons for any degradations?
- Who are my agents that have the most pending Internal SRs?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
ORA_CSO_KNOWLEDGE_ANALYST_JOB

Duty Roles
This job role is related to the following duty roles:

- Knowledge Management Transaction Analysis Duty

Subject Areas
This job role secures access to the following subject areas:

- Knowledge Management - Article Category Real Time
- Knowledge Management - Article Links Real Time
- Knowledge Management - Article Product Real Time
- Knowledge Management - Article Rating Real Time
- Knowledge Management - Article Real Time
- Knowledge Management - Article Search Historical
- Knowledge Management - Article Search Question Tokens Historical
- Knowledge Management - Article Search Questions Historical
- Knowledge Management - Article Summary Historical
- Knowledge Management - Article User Group Real Time

Business Questions
This job role secures access to data that can answer the following business questions:

- How many articles are available in the knowledgebase?
- What content in the knowledge base is satisfying users' needs?
- How do knowledge managers view search article metrics?
- Which articles are linked to the maximum number of service requests?
- Which employees interacted with the articles?
- Which articles are linked to a category?
- How do knowledge managers view article search historical metrics?
- How do Knowledge managers view information on article historical metrics?
- Which products are associated with the most number of knowledge articles?
- What content rating effectively resolves users' questions?
- How are articles ranked in popularity?
- How many articles are consumed by a particular user group during a specified period?
• Which users created the link to an article?
• Which category contains the highest number of knowledge articles?
• What articles are not satisfying users’ needs?
• How do knowledge managers view article historical metrics?
• How are customers finding knowledge base content
• Which user groups area associated to an article?
• Which articles are published or unpublished?
• How many links exist between services requests and knowledge articles?
• Which articles are linked to a product?
• How many concept tokens associated to articles?
• How are articles in the knowledge base ranked in popularity?
• What are the locales, content types, and authors of the articles in the database?
• Which article versions are linked to service requests?
• Which articles require updates?
• How are customers finding and using knowledge base content?
• Which employee in a user group created the most or least articles?
• What types of ratings are assigned articles?

Knowledge Manager

Code Name

ORA_CSO_KNOWLEDGE_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

• Knowledge Management Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• Knowledge Management - Article Category Real Time
• Knowledge Management - Article Links Real Time
• Knowledge Management - Article Product Real Time
Business Questions

This job role secures access to data that can answer the following business questions:

- How many articles are available in the knowledgebase?
- What content in the knowledge base is satisfying users’ needs?
- How do knowledge managers view search article metrics?
- Which articles are linked to the maximum number of service requests?
- Which employees interacted with the articles?
- Which articles are linked to a category?
- How do knowledge managers view article search historical metrics?
- How do Knowledge managers view information on article historical metrics?
- Which products are associated with the most number of knowledge articles?
- What content rating effectively resolves users’ questions?
- How are articles ranked in popularity?
- How many articles are consumed by a particular user group during a specified period?
- Which users created the link to an article?
- Which category contains the highest number of knowledge articles?
- What articles are not satisfying users’ needs?
- How do knowledge managers view article historical metrics?
- How are customers finding knowledge base content?
- Which user groups are associated to an article?
- Which articles are published or unpublished?
- How many links exist between service requests and knowledge articles?
- Which articles are linked to a product?
- How many concept tokens are associated to articles?
- How are articles in the knowledge base ranked in popularity?
- What are the locales, content types, and authors of the articles in the database?
- Which article versions are linked to service requests?
• Which articles require updates?
• How are customers finding and using knowledgebase content?
• Which employee in a user group created the most or least articles?
• What types of ratings are assigned articles?

Marketing Analyst

Code Name

ORA_MKT_MARKETING_ANALYST_JOB

Duty Roles

This job role is related to the following duty roles:

• Marketing Administrative Transaction Analysis Duty
• Marketing Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• 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 converted in the current quarter?
• How many Leads are unassigned in the system?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
• How many Leads are associated for a given Opportunity?
• How many Opportunities were created from a given Lead?
• What are the top 10 products associated to the Leads in the system?
• What are the Leads that are covert into Opportunities?
• Who are the top Sales representatives by their Lead conversion ratio?
• Who is the Primary Contact and Resource assigned for a given Lead?
Marketing Manager

Code Name

ORA_MKT_MARKETING_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

• Marketing Managerial Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• Marketing - CRM Leads
• Marketing - CRM Leads and Opportunities Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

• How many Leads are converted in the current quarter?
• How many Leads are unassigned in the system?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
• How many Leads are associated for a given Opportunity?
• How many Opportunities were created from a given Lead?
• What are the top 10 products associated to the Leads in the system?
• What are the Leads that are covert into Opportunities?
• Who are the top Sales representatives by their Lead conversion ratio?
• 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?
• What are the sources of the Leads created in the current quarter?
• How many Leads were rejected in the last quarter and what were the reason for those?

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 converted in the current quarter?
• How many Leads are unassigned in the system?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
• How many Leads are associated for a given Opportunity?
• How many Opportunities were created from a given Lead?
• What are the top 10 products associated to the Leads in the system?
• What are the Leads that are converted into Opportunities?
• Who are the top Sales representatives by their Lead conversion ratio?
• 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?
• What are the sources of the Leads created in the current 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 were rejected in the last quarter and what were the reason for those?
Next Gen Human Resource Help Desk Administrator

Code Name

ORA_SVC_HUMAN_RESOURCE_HELP_DESK_ADMINISTRATOR_NG_JOB

Duty Roles

This job role is related to the following duty roles:

- Next Gen HR Help Desk Administrator Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Omni Channel Events Real Time
- Help Desk - HR Service Requests Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How are SR transfers contributing to overall latency/resolution delays?
- How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?
- What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?
- What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?
- How many HR SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
- How long is it taking for offers to be made to agents?
- How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
- What are the open critical HR SRs that my team is working on currently? How many of these are escalated?
- What are the rates for agents declining work offers?
- What are the average handle times?
- What is the prevalence of SR transfers for an agent/manager/group/product/location?
- What are the popular reasons for SRs to be transferred? Is there a pattern?
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 5
Job Roles

- What are the HR SRs that are waiting on my customers?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- Who are my agents that have the most pending HR SRs?

Next Gen Human Resource Help Desk Agent

Code Name

ORA_SVC_HUMAN_RESOURCE_HELP_DESK_AGENT_NG_JOB

Duty Roles

This job role is related to the following duty roles:

- Next Gen HR Help Desk Agent Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Omni Channel Events Real Time
- Help Desk - HR Service Requests Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How are SR transfers contributing to overall latency/resolution delays?
- How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?
- What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?
- What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?
- How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
- How long is it taking for offers to be made to agents?
- How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
- What are the open critical HR SRs that my team is working on currently? How many of these are escalated?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• What are the HR SRs that are waiting on my customers?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• Who are my agents that have the most pending HR SRs?

Next Gen Human Resource Help Desk Manager

Code Name
ORA_SVC_HUMANRESOURCE_HELP_DESK_MANAGER_NG_JOB

Duty Roles
This job role is related to the following duty roles:
• Next Gen HR Help Desk Manager Transaction Analysis Duty

Subject Areas
This job role secures access to the following subject areas:
• CRM - CRM Omni Channel Events Real Time
• Help Desk - HR Service Requests Real Time

Business Questions
This job role secures access to data that can answer the following business questions:
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How are SR transfers contributing to overall latency/resolution delays?
• How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?
• What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?
• What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?
• How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
• How long is it taking for offers to be made to agents?
• How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What are the open critical HR SRs that my team is working on currently? How many of these are escalated?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• What are the HR SRs that are waiting on my customers?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• Who are my agents that have the most pending HR SRs?

Next Gen Human Resource Help Desk User

Code Name

ORA_SVC_HUMANRESOURCE_HELPDESK_USER_JOB

Duty Roles

This job role is related to the following duty roles:

• Next Gen HR Help Desk User Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Omni Channel Events Real Time
• Help Desk - HR Service Requests Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How are SR transfers contributing to overall latency/resolution delays?
• How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?
• What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?
• What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?
• How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
• How long is it taking for offers to be made to agents?
• How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What are the open critical HR SRs that my team is working on currently? How many of these are escalated?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• What are the HR SRs that are waiting on my customers?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• Who are my agents that have the most pending HR SRs?

Partner Administrator

Code Name

ORA_ZPM_PARTNER_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

• Incentive Compensation Transaction Analysis Duty
• Partner Org Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Activities with Related Activities
• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Incentive Compensation - Attainments Real Time
- Incentive Compensation - Compensation Plan Assignments Real Time
- Incentive Compensation - Credits Real Time
- Incentive Compensation - Disputes Real Time
- Incentive Compensation - Earning and Attainment Summary Real Time
- Incentive Compensation - Earnings Real Time
- Incentive Compensation - Participant Balances Real Time
- Incentive Compensation - Participant Compensation Plan Real Time
- Incentive Compensation - Participant Detail Real Time
- Incentive Compensation - Participant Interval Goals Real Time
- Incentive Compensation - Participant Period Goals Real Time
- Incentive Compensation - Pay Group Assignments Real Time
- Incentive Compensation - Payments Real Time
- Incentive Compensation - Paysheet Summary Real Time
- Incentive Compensation - Performance and Earnings Summary Real Time
- Incentive Compensation - Rules Real Time
- Incentive Compensation - Transactions Real Time
- Marketing - CRM Leads
- Partners - CRM Leads and Opportunities Real Time
- Partners - CRM Opportunities and Products Real Time
- Partners - CRM Partner Assessments
- Partners - CRM Partner Classification
- Partners - CRM Partner Contact
- Partners - CRM Partner Overview
- Partners - CRM Partner Program Benefits
- Partners - CRM Partner Resource
- Partners - CRM Partner Territory
- Partners - CRM Program Enrollments
- Partners - CRM Programs
- Sales - CRM Account Relationship
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**Chapter 5**

**Job Roles**

- Sales - CRM All Contact Contact Point
- Sales - CRM All Contacts Addresses
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan Objective Split
- Sales - CRM Campaign Members
- Sales - CRM Campaign Opportunity
- Sales - CRM Contact Note
- Sales - CRM Contact Relationship
- Sales - CRM Contact Resource
- Sales - CRM Contacts
- Sales - CRM Customer Classification
- Sales - CRM Customer Note
- Sales - CRM Customer Overview
- Sales - CRM Customers
- Sales - CRM Customers and Contacts Real Time
- Sales - CRM Deal Registration
- Sales - CRM Deal Registration Product
- Sales - CRM Forecasting
- Sales - CRM Forecasting and Pipeline Revenue Real Time
- Sales - CRM Historical Forecasting
- Sales - CRM Historical Pipeline
- Sales - CRM Lead Assessments
- Sales - CRM Lead Contact
- Sales - CRM Lead Product
- Sales - CRM Lead Resource
- Sales - CRM Lead Territory
- Sales - CRM MDF Budget
- Sales - CRM MDF Claim
- Sales - CRM MDF Claim Settlement
- Sales - CRM MDF Request
- Sales - CRM Opportunities and Products Real Time
- Sales - CRM Opportunity Assessments
- Sales - CRM Opportunity Campaign
- Sales - CRM Opportunity Contact

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*Oracle CX Sales and B2B Service*

Subject Areas for Transactional Business Intelligence in CX

Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

• Sales - CRM Opportunity Note
• Sales - CRM Opportunity Partner
• Sales - CRM Opportunity Resource
• Sales - CRM Opportunity Sales Stage Snapshot
• Sales - CRM Opportunity Territory
• Sales - CRM Partner Relationship
• Sales - CRM Pipeline
• Sales - CRM Primary Contact Addresses
• Sales - CRM Primary Contact Contact Point
• Sales - CRM Quota Management
• Sales - CRM Quote Lines
• Sales - CRM Quotes
• Sales - CRM Resource
• Sales - CRM Resource Territory
• Sales - CRM Sales Account Assessments
• Sales - CRM Sales Account Resource
• Sales - CRM Sales Account Territory
• Sales - CRM Territory Resource
• Service - CRM Customer Coverage Real Time
• Service - CRM Inbound Messages Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Action Plan Actions Real Time
• Service - CRM Service Request Lifecycle
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Request Tags Real Time
• Service - CRM Service Requests Real Time
• Service - CRM Social Post Real Time
• Service - CRM Survey Requests Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

• How many Leads are converted in the current quarter?
• How many Leads are unassigned in the system?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- What is the revenue generated by Partners per Customer?
- What are my best performing product lines by customer geographies?
- How is my Revenue distributed across Customer geographies?
- What regions are my customers clustered in?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
- On which sales accounts is a given sales representative a member of the account team?
- Who are all the Contacts assigned to the Assets?
- What are the responses for different Opportunity for an Assessment submitted?
- What are the Quotas assigned to the team and the Actuals?
- How are the business plan objectives split?
- What are the objectives that have not met the target value set?
- How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
- What are the SIC codes associated with a Partner, and with all associated Partners?
- Against how many Opportunities, were the Quotes submitted in this month?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How often are communications being transferred between agents?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
- How many new coverages begin in the ensuing month?
- Are we equipped to service the increase in coverages?
- What is the current count of inbound email requests by status and mailbox?
- How many messages resulted in new service request creation versus update to existing service request?
- Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
- What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
- How are SR transfers contributing to overall latency/resolution delays?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How does the aging profile of SRs look like? Are there any outliers calling for intervention?
Chapter 5

Job Roles

- What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
- How is tag usage across agents and resource teams? Which teams perform better than others?
- What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
- How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
- How much credit did a participant receive for their sales transactions?
- What type of assignment does a participant have to a plan?
- Which of my direct reports' attainment or earnings are below the wanted performance expectation?
- Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.
- What is the total quota across the organization by performance measure for the period or across periods?
- Which participants are assigned to a given pay group?
- How do participants' plan component earnings compare with their personalized target incentives?
- What are the credit rules which a credit receiver is assigned to?
- How is survey request trending compared to SR resolutions during the same period?
- What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
- What are the top 10 products associated to the Leads in the system?
- What is the number of leads by partners for a specific product group?
- How many Partners is a Contact is associated to?
- How many Leads and Opportunities are Open for a given Customer in the Current quarter?
- Are the Leads associated with certain products?
- What is the open/closed revenue for each of the product groups in the selected geography?
- Are the sales reps moving their opportunities fast enough?
- Are there any up sell/cross sell opportunities?
- Is overall pipeline healthy enough to meet sales goals?
- What are the top stalled opportunities and who are the sales reps working on these?
- What are the sales accounts owned by the Sales team?
- What are the Deals submitted by the Partners in the current quarter with the Deal size?
- Who are the Resources assigned to the Leads created in any given time period?
- What are the Leads assigned to me/my team member?
- What are all the Territories the Lead is part of?
- How did the Opportunity evolve over time?
- How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
- How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
- How many territories are assigned to a Resource/Employee?
- What are all the Territories assigned to Resources/Employees?
• What are the total number of Contact Relationships between two Contact?
• Does this Contact have subsidiaries?
• What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• How many emails came from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• What are the SRs that are waiting on my customers?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• What is the opportunity information captured in the note to an opportunity?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.
• What are my compensation plan incentive targets?
• Are my individualized performance measure goals set properly?
• Who is assigned to a given plan?
• What is the total quota by performance measure for the interval across the organization?
• When was a given participant assigned to a specific pay group?
• What is the current status of the payment batches? Are they paid, reviewed, or frozen?
• What are all addresses associated with the primary contact for all active opportunities in the current quarter?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What are the follow-up tasks I need to do on a particular customer?
• Who are the top Sales representatives by their Lead conversion ratio?
• What are the open Opportunities associated to a given Partner?
Job Roles

- What is the average deal size by Product groups?
- How are the Partners classified?
- What is total number of Partners assigned to a specific classification for this period?
- Does this account have subsidiaries?
- How is the Revenue spread for a given Customer hierarchy?
- How actively (# of Activities) are the Sales reps engaged with customers?
- What are my most active accounts? Who owns them and where are these located?
- What are the contact - points (phone, email, address, etc.) of key contacts?
- Who are all the contacts for key customers and what are their roles?
- Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?
- Do Forecast rely on Revenue from few Products?
- Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
- What is the revenue lost to competition for a specific product/product group?
- How is each member on the team performing on deal size, account coverage, and win rate?
- What are the Accounts under the sales team, by territory?
- What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?
- How many Assets are created in a particular time period?
- Who are all the resources assigned to the Assets?
- What is the additional information updated in the Notes for a Contact?
- What is the additional information updated in the Notes for a Customer?
- Who are the Employees/Resource for the Deals that are submitted in the current month?
- What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
- What is the average time the Opportunity is in a particular sales stage?
- What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
- What are the Resources are associated to this contact?
- How many Leads do not have Contact?
- What are the activity objectives for the current period?
- What managers have teams averaging the most activities?
- Are agents prematurely updating SRs as Resolved to make their numbers look better?
- What product lines have a higher percentage of non-compliant SRs open?
- How frequently do agents link articles to SRs?
- How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- What are the various attainment attributes associated with my credits?
- How do these targets break down by plan component?
- As a participant manager, what are the targets and goals settings for my direct reports?
- Is the participant active? And for which dates?
- Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.
- How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?
- Do I have to realign quota based on current attainment levels?
- What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
- How long did it take to assign the SR to the correct queue?
- Was the assigned agent overloaded with other work?
- Was the SR queue modified or SR resource owner modified at any point?
- What is the quarterly revenue trend for a specific product/product group by partner?
- What are the Customers from this account, including all subsidiaries?
- Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
- What is the relative mix of forecast revenues by the various sales channels in a specific territory?
- What is the channel performance vs channel forecast?
- Are too many deals being pushed out to the subsequent fiscal quarters?
- What are my claimed vs unclaimed MDF totals?
- What are total number of Claims in the current quarter?
- Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
- How do wins and losses trend quarterly for a specific product line?
- What are the most likely reasons that the Opportunities are lost against our key competitors?
- What is the value trend of high value opportunities? Do they show a positive or negative trend?
- What are the sales accounts that a given Sales representative owns?
- What is the QoQ growth for Assets by Products?
- How many Territories are assigned to an Opportunity?
- What are all the Territories assigned to Opportunities?
- How many new Resources are created in the current quarter?
- What are the target v/s actual number of the split objectives?
- What are the Programs that Partners have enrolled into?
- What are the total number of Relationships between two Partners?
- What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
- How many responses received for a given campaign?
- How many Opportunities associated to a Campaign?
- What is the total Quotes revenue for the current month?
- How many contacts were not favored with a positive outcome with a given agent?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- How many interactions are being lost/abandoned? How does this compare with previous periods?
- How long is it taking for offers to be made to agents?
- How many interactions, on average, does it require to resolve an issue?
- Are we keeping the number of non-compliant SRs in check for our most valuable customers?
- How many emails are we receiving over time?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
- What is the contact point information of the primary contact for all active opportunities in the current quarter?
- Which participants are assigned to which plans?
- Were there credit or rollup errors that must be fixed?
- What are the targets and goals settings for an individual?
- What are the rules effective as of the given date in the hierarchy?
- What are the results of the collected transactions before the crediting process?
- What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?
- Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
- Do we need to adjust our survey template to improve response rates?
- Does seasonality impact response rates?
- How does response differ for various service teams? Do some teams obtain better response rates?
- What are the associated activities related to my upcoming appointment and task?
- Who is the Primary Contact and Resource assigned for a given Lead?
- What is the potential revenue of leads by partners?
- What is the distribution of Partner Opportunities by sales stages?
- What is the number of partners in a specific classification within a defined geographic region?
- 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?
- How many Partners' team is a given Resource part of?
- What are the total number of Relationships for a given Account?
- What are the top ten accounts by revenue in the last quarter?
- Who are my teams top Customers?
- Who are the 'new' customers, created in the past 6 months?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• How are product revenues trending month over month?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are the historical monthly trend of closed revenue by current territories?
• How many Leads are open for a given Product?
• What was the currency conversion rate applied to a specific claim?
• What products are often lost to key competitors? Is there a pattern?
• Who are the top competitors and what is the revenue exposure to them?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• How many territories is the Lead part of?
• What are all the Campaigns assigned to an Opportunity?
• Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• How many Enrollments are going to expire in the next quarter?
• How many Programs were created in the last quarter?
• Does this Partner have subsidiaries?
• What are the partner I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter?
• What are the assignment start and end dates for a participant?
• Does the participant have an individualized target incentive for the plan?
• Are participants correctly credited?
• Are we on track in achieving quota this period or quarter?
• To what country and business unit does the participant belong?
• What is the total quota by performance measure for the period across the organization? Validate quota levels.
• Is the company on track to attain its goals? Who is lagging and might require coaching?
• What are all addresses of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• What is the number of Partner Contacts that are also resources and users?
• How many Territories is a Partner part of?
• Who manages my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
• What is the Territory Quota vs/ Actual?
• Which Territories have exceeded their Quotes in the current Quarter?
• Who are the Partner resources in the system and which Partner Organization they belong to?
• What are the Partners created in the system for a given time period?
• How many Enrollments were created/submitted/terminated in the last month?
• What is the Campaign ROI (return on investment)?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What is the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• How much credit did my team receive for their attainment?
• Who got paid what amount and from where, at the detail level?
• Why wasn't I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.
• How do they compare to the base goals set on the measure?
• As a participant manager, which pay groups do my direct reports belong to?
• What is my cost of compensation by participant, plan component, plan, and frequencies?
• How does the performance measure attainment compare with a participant's personalized goal across his directs?
• What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
• What are the sources of the Leads created in the current quarter?
• What are the top ten Partners by Revenue during the past quarter/year?
• What Partners are assigned to specific geographic territories?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• How to forecasts trend across periods?
• Who all are the Contacts associated to the Lead?
• 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?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Is the sales team converting leads to opportunities fast enough?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Who are the resources assigned for a particular territory?
• How many new contacts are created in the system in the current month?
• What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Organization?
• Which Program has the highest number of Enrollments?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many social posts came from known versus unknown contacts?
• How many open SRs are linked to each tag?
• What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
• Has the participant accepted the assignment to the plan?
• Is the dispute load balanced between my analysts? Asked by compensation managers.
• What is the total quota across the organization by performance measure for the interval?
• Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.
• What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
Job Roles

- How many Leads were rejected in the last quarter and what were the reason for those?
- What are the names of the customers that a Sales team owns? Who are the key contacts?
- Does the forecast versus pipeline trend show a healthy picture?
- What are the Opportunity Revenue line details contributing the most to the Forecast?
- What are the higher value deals that have been moved out?
- What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
- Are the Leads supporting products that appeal to certain customers by size of company?
- What were the approved amounts vs the settled claim totals for the last 4 quarters?
- What are the top 10 open opportunities? What are the target close dates and revenues for these?
- What are all the contacts created in the system by Geography?
- What are all the Opportunities created as a result of Deal closure by a particular resource/team?
- What are all the Opportunities resulted from a Campaign?
- How many Resources are assigned to an Opportunity?
- 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 many Leads are part of the Campaign?
- Who has completed the most activity objectives?
- What are the activity levels in specific regions?
- Do customers contact us more often to solve issues or to seek answers to questions?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How is the percentage of compliant SRs trending month over month, quarter over quarter?
- Where are the outliers when it comes to compliance?
- How many showed up as compliant; how many were non-compliant during my review of completed work orders?
- What is the breakdown of open action plans by category?
- How many action plans are open and how long have they been open?
- How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
- What is the contact point information of the primary contact for accounts where I’m the owner or on the sales team?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- How are these targets individualized across the participants.
- What is the participant's home currency or cost center?
- What is the total quota by performance measure for the period across the organization?
- What pay groups are in the application? What are their types and descriptions?
- What is the status of each paysheet within the payment batches?
- What are the criteria for a rule including the inherited criteria from the ancestors?
Partner Sales Manager

Code Name

ORA_ZPM_PARTNER_SALES_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- Partner Org Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activities with Related Activities
- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Marketing - CRM Leads
- Partners - CRM Leads and Opportunities Real Time
- Partners - CRM Opportunities and Products Real Time
- Partners - CRM Partner Assessments
- Partners - CRM Partner Classification
Job Roles

- Partners - CRM Partner Contact
- Partners - CRM Partner Overview
- Partners - CRM Partner Program Benefits
- Partners - CRM Partner Resource
- Partners - CRM Partner Territory
- Partners - CRM Program Enrollments
- Partners - CRM Programs
- Sales - CRM Account Relationship
- Sales - CRM All Contact Contact Point
- Sales - CRM All Contacts Addresses
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan Objective Split
- Sales - CRM Campaign Members
- Sales - CRM Campaign Opportunity
- Sales - CRM Contact Note
- Sales - CRM Contact Relationship
- Sales - CRM Contact Resource
- Sales - CRM Contacts
- Sales - CRM Customer Classification
- Sales - CRM Customer Note
- Sales - CRM Customer Overview
- Sales - CRM Customers
- Sales - CRM Customers and Contacts Real Time
- Sales - CRM Deal Registration
- Sales - CRM Deal Registration Product
- Sales - CRM Forecasting
- Sales - CRM Forecasting and Pipeline Revenue Real Time
- Sales - CRM Historical Forecasting
- Sales - CRM Historical Pipeline
- Sales - CRM Lead Assessments
- Sales - CRM Lead Contact
- Sales - CRM Lead Product
- Sales - CRM Lead Resource
- Sales - CRM Lead Territory
Sales - CRM MDF Budget
Sales - CRM MDF Claim
Sales - CRM MDF Claim Settlement
Sales - CRM MDF Request
Sales - CRM Opportunities and Products Real Time
Sales - CRM Opportunity Assessments
Sales - CRM Opportunity Campaign
Sales - CRM Opportunity Contact
Sales - CRM Opportunity Note
Sales - CRM Opportunity Partner
Sales - CRM Opportunity Resource
Sales - CRM Opportunity Sales Stage Snapshot
Sales - CRM Opportunity Territory
Sales - CRM Partner Relationship
Sales - CRM Pipeline
Sales - CRM Primary Contact Addresses
Sales - CRM Primary Contact Contact Point
Sales - CRM Quota Management
Sales - CRM Quote Lines
Sales - CRM Quotes
Sales - CRM Resource
Sales - CRM Resource Territory
Sales - CRM Sales Account Assessments
Sales - CRM Sales Account Resource
Sales - CRM Sales Account Territory
Sales - CRM Territory Resource
Service - CRM Customer Coverage Real Time
Service - CRM Inbound Messages Real Time
Service - CRM Service Queue Resources Real Time
Service - CRM Service Request Action Plan Actions Real Time
Service - CRM Service Request Lifecycle
Service - CRM Service Request Messages Real Time
Service - CRM Service Request Milestones Real Time
Service - CRM Service Request Tags Real Time
Service - CRM Service Requests Real Time
Service - CRM Social Post Real Time
Business Questions

This job role secures access to data that can answer the following business questions:

- How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- What is the revenue generated by Partners per Customer?
- What are my best performing product lines by customer geographies?
- How is my Revenue distributed across Customer geographies?
- What regions are my customers clustered in?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
- On which sales accounts is a given sales representative a member of the account team?
- Who are all the Contacts assigned to the Assets?
- What are the responses for different Opportunity for an Assessment submitted?
- What are the Quotas assigned to the team and the Actuals?
- How are the business plan objectives split?
- What are the objectives that have not met the target value set?
- How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
- What are the SIC codes associated with a Partner, and with all associated Partners?
- Against how many Opportunities, were the Quotes submitted in this month?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How often are communications being transferred between agents?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
- How many new coverages begin in the ensuing month?
- Are we equipped to service the increase in coverages?
- What is the current count of inbound email requests by status and mailbox?
• How many messages resulted in new service request creation versus update to existing service request?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
• How is tag usage across agents and resource teams? Which teams perform better than others?
• What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• How is survey request trending compared to SR resolutions during the same period?
• What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
• What are the top 10 products associated to the Leads in the system?
• What is the number of leads by partners for a specific product group?
• How many Partners is a Contact is associated to?
• How many Leads and Opportunities are Open for a given Customer in the Current quarter?
• Are the Leads associated with certain products?
• What is the open/closed revenue for each of the product groups in the selected geography?
• Are the sales reps moving their opportunities fast enough?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the sales accounts owned by the Sales team?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• Who are the Resources assigned to the Leads created in any given time period?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• How did the Opportunity evolve over time?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• How many territories are assigned to a Resource/Employee?
• What are all the Territories assigned to Resources/ Employees?
• What are the total number of Contact Relationships between two Contact?
• Does this contact have subsidiaries?
• What are the responses by different Partners for an Assessment submitted, e.g., Partner Performance?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent, review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• How many emails came from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• What are the SRs that are waiting on my customers?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• What is the opportunity information captured in the note to an opportunity?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• What are all addresses associated with the primary contact for all active opportunities in the current quarter?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What are the follow-up tasks I need to do on a particular customer?
• Who are the top Sales representatives by their Lead conversion ratio?
• What are the open Opportunities associated to a given Partner?
• What is the average deal size by Product groups?
• How are the Partners classified?
• What is the total number of Partners assigned to a specific classification for this period?
• Does this account have subsidiaries?
• How is the Revenue spread for a given Customer hierarchy?
• How actively (# of Activities) are the Sales reps engaged with customers?
• What are my most active accounts? Who owns them and where are these located?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• Who are all the contacts for key customers and what are their roles?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?
• Do Forecast rely on Revenue from few Products?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What is the revenue lost to competition for a specific product/product group?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are the Accounts under the sales team, by territory?
• What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?
• How many Assets are created in a particular time period?
• Who are all the resources assigned to the Assets?
• What is the additional information updated in the Notes for a Contact?
• What is the additional information updated in the Notes for a Customer?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
• What is the average time the Opportunity is in a particular sales stage?
• What are the responses by different Accounts/Customer for an Assessment submitted e.g. Customer Satisfaction?
• What are the Resources are associated to this contact?
• How many Leads do not have Contact?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• What is the quarterly revenue trend for a specific product/product group by partner?
• What are the Customers from this account, including all subsidiaries?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 5
Job Roles

- What is the relative mix of forecast revenues by the various sales channels in a specific territory?
- What is the channel performance vs channel forecast?
- Are too many deals being pushed out to the subsequent fiscal quarters?
- What are my claimed vs unclaimed MDF totals?
- What are total number of Claims in the current quarter?
- Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
- How do wins and losses trend quarterly for a specific product line?
- What are the most likely reasons that the Opportunities are lost against our key competitors?
- What is the value trend of high value opportunities? Do they show a positive or negative trend?
- What are the sales accounts that a given Sales representative owns?
- What is the QoQ growth for Assets by Products?
- How many Territories are assigned to an Opportunity?
- What are all the Territories assigned to Opportunities?
- How many new Resources are created in the current quarter?
- What are the target vs actual number of the split objectives?
- What are the Programs that Partners have enrolled into?
- What are the total number of Relationships between two Partners?
- What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
- How many responses received for a given campaign?
- How many Opportunities associated to a Campaign?
- What is the total Quotes revenue for the current month?
- How many contacts were not favored with a positive outcome with a given agent?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- How many interactions are being lost/abandoned? How does this compare with previous periods?
- How long is it taking for offers to be made to agents?
- How many interactions, on average, does it require to resolve an issue?
- Are we keeping the number of non-compliant SRs in check for our most valuable customers?
- How many emails are we receiving over time?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
- What is the contact point information of the primary contact for all active opportunities in the current quarter?
- What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?
- Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the associated activities related to my upcoming appointment and task?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What is the potential revenue of leads by partners?
• What is the distribution of Partner Opportunities by sales stages?
• What is the number of partners in a specific classification within a defined geographic region?
• 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?
• How many Partners’ team is a given Resource part of?
• What are the total number of Relationships for a given Account?
• What are the top ten accounts by revenue in the last quarter?
• Who are my teams top Customers?
• Who are the ‘new’ customers, created in the past 6 months?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• How are product revenues trending month over month?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are the historical monthly trend of closed revenue by current territories?
• How many Leads are open for a given Product?
• What was the currency conversion rate applied to a specific claim?
• What products are often lost to key competitors? Is there a pattern?
• Who are the top competitors and what is the revenue exposure to them?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• How many territories is the Lead part of?
• What are all the Campaigns assigned to an Opportunity?
• Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• How many Enrollments are going to expire in the next quarter?
• How many Programs were created in the last quarter?
• Does this Partner have subsidiaries?
• What are the partner I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What is the primary contact and non-primary contact points for all active opportunities in the current quarter?
• What are all addresses of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• What is the number of Partner Contacts that are also resources and users?
• How many Territories is a Partner part of?
• Who manages my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
• What is the Territory Quota vs/ Actual?
• Which Territories have exceeded their Quotes in the current Quarter?
• Who are the Partner resources in the system and which Partner Organization they belong to?
• What are the Partners created in the system for a given time period?
• How many Enrollments were created/submitted/expired/terminated in the last month?
• What is the Campaign ROI (return on investment)?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
• What are the sources of the Leads created in the current quarter?
• What are the top ten Partners by Revenue during the past quarter/year?
• What Partners are assigned to specific geographic territories?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• How to forecasts trend across periods?
• Who all are the Contacts associated to the Lead?
• 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?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Is the sales team converting leads to opportunities fast enough?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Who are the resources assigned for a particular territory?
• How many new contacts are created in the system in the current month?
• What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Organization?
• Which Program has the highest number of Enrollments?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many social posts came from known versus unknown contacts?
• How many open SRs are linked to each tag?
• What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
• What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Does the forecast versus pipeline trend show a healthy picture?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• What are the higher value deals that have been moved out?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• Are the Leads supporting products that appeal to certain customers by size of company?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• What are all the contacts created in the system by Geography?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• What are all the Opportunities resulted from a Campaign?
• How many Resources are assigned to an Opportunity?
• 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 many Leads are part of the Campaign?
• Who has completed the most activity objectives?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• What is the breakdown of open action plans by category?
• How many action plans are open and how long have they been open?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• What is the contact point information of the primary contact for accounts where I'm the owner or on the sales team?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?
• What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

Partner Sales Representative

Code Name

ORA_ZPM_PARTNER_SALES_REPRESENTATIVE_JOB
Duty Roles

This job role is related to the following duty roles:

- **Partner Org Transaction Analysis Duty**

Subject Areas

This job role secures access to the following subject areas:

- **CRM - CRM Activities with Related Activities**
- **CRM - CRM Activity Contact Real Time**
- **CRM - CRM Activity Objective Real Time**
- **CRM - CRM Activity Real Time**
- **CRM - CRM Activity Resource Real Time**
- **CRM - CRM Interaction Aggregate**
- **CRM - CRM Interaction Service Requests Real Time**
- **CRM - CRM Interactions Real Time**
- **CRM - CRM Omni Channel Events Real Time**
- **CRM - CRM Service Request Summary**
- **CRM - CRM Work Orders Real Time**
- **Marketing - CRM Leads**
- **Partners - CRM Leads and Opportunities Real Time**
- **Partners - CRM Opportunities and Products Real Time**
- **Partners - CRM Partner Assessments**
- **Partners - CRM Partner Classification**
- **Partners - CRM Partner Contact**
- **Partners - CRM Partner Overview**
- **Partners - CRM Partner Program Benefits**
- **Partners - CRM Partner Resource**
- **Partners - CRM Partner Territory**
- **Partners - CRM Program Enrollments**
- **Partners - CRM Programs**
- **Sales - CRM Account Relationship**
- **Sales - CRM All Contact Contact Point**
- **Sales - CRM All Contacts Addresses**
- **Sales - CRM Asset**
- **Sales - CRM Asset Contact**
• Sales - CRM Asset Resource
• Sales - CRM Business Plan Objective Split
• Sales - CRM Campaign Members
• Sales - CRM Campaign Opportunity
• Sales - CRM Contact Note
• Sales - CRM Contact Relationship
• Sales - CRM Contact Resource
• Sales - CRM Contacts
• Sales - CRM Customer Classification
• Sales - CRM Customer Note
• Sales - CRM Customer Overview
• Sales - CRM Customers
• Sales - CRM Customers and Contacts Real Time
• Sales - CRM Deal Registration
• Sales - CRM Deal Registration Product
• Sales - CRM Forecasting
• Sales - CRM Forecasting and Pipeline Revenue Real Time
• Sales - CRM Historical Forecasting
• Sales - CRM Historical Pipeline
• Sales - CRM Lead Assessments
• Sales - CRM Lead Contact
• Sales - CRM Lead Product
• Sales - CRM Lead Resource
• Sales - CRM Lead Territory
• Sales - CRM MDF Budget
• Sales - CRM MDF Claim
• Sales - CRM MDF Claim Settlement
• Sales - CRM MDF Request
• Sales - CRM Opportunities and Products Real Time
• Sales - CRM Opportunity Assessments
• Sales - CRM Opportunity Campaign
• Sales - CRM Opportunity Contact
• Sales - CRM Opportunity Note
• Sales - CRM Opportunity Partner
• Sales - CRM Opportunity Resource
• Sales - CRM Opportunity Sales Stage Snapshot
Sales - CRM Opportunity Territory
Sales - CRM Partner Relationship
Sales - CRM Pipeline
Sales - CRM Primary Contact Addresses
Sales - CRM Primary Contact Contact Point
Sales - CRM Quota Management
Sales - CRM Quote Lines
Sales - CRM Quotes
Sales - CRM Resource
Sales - CRM Resource Territory
Sales - CRM Sales Account Assessments
Sales - CRM Sales Account Resource
Sales - CRM Sales Account Territory
Sales - CRM Territory Resource
Service - CRM Customer Coverage Real Time
Service - CRM Inbound Messages Real Time
Service - CRM Service Queue Resources Real Time
Service - CRM Service Request Action Plan Actions Real Time
Service - CRM Service Request Lifecycle
Service - CRM Service Request Messages Real Time
Service - CRM Service Request Milestones Real Time
Service - CRM Service Request Tags Real Time
Service - CRM Service Requests Real Time
Service - CRM Social Post Real Time
Service - CRM Survey Requests Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- What is the revenue generated by Partners per Customer?
- What are my best performing product lines by customer geographies?
- How is my Revenue distributed across Customer geographies?
- What regions are my customers clustered in?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• On which sales accounts is a given sales representative a member of the account team?
• Who are all the Contacts assigned to the Assets?
• What are the responses for different Opportunity for an Assessment submitted?
• What are the Quotas assigned to the team and the Actuals?
• How are the business plan objectives split?
• What are the objectives that have not met the target value set?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• What are the SIC codes associated with a Partner, and with all associated Partners?
• Against how many Opportunities, were the Quotes submitted in this month?
• How do the number of activities in a region and their average SR resolution rates by quarter compare?
• How often do communications cross channels to get to resolution?
• How many customer interactions happen without an SR?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How often are communications being transferred between agents?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many new coverages begin in the ensuing month?
• Are we equipped to service the increase in coverages?
• What is the current count of inbound email requests by status and mailbox?
• How many messages resulted in new service request creation versus update to existing service request?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• What characteristics do groupings of SR’s based on specific tags (e.g., tag = ‘outage’) exhibit?
• How is tag usage across agents and resource teams? Which teams perform better than others?
• What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• How is survey request trending compared to SR resolutions during the same period?
• What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
• What are the top 10 products associated to the Leads in the system?
• What is the number of leads by partners for a specific product group?
• How many Partners is a Contact associated to?
• How many Leads and Opportunities are Open for a given Customer in the Current quarter?
• Are the Leads associated with certain products?
• What is the open/closed revenue for each of the product groups in the selected geography?
• Are the sales reps moving their opportunities fast enough?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the sales accounts owned by the Sales team?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• Who are the Resources assigned to the Leads created in any given time period?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• How did the Opportunity evolve over time?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• How many territories are assigned to a Resource/Employee?
• What are all the Territories assigned to Resources/Employees?
• What are the total number of Contact Relationships between two Contact?
• Does this Contact have subsidiaries?
• What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• How many emails came from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• What are the SRs that are waiting on my customers?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• What is the opportunity information captured in the note to an opportunity?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• What are all addresses associated with the primary contact for all active opportunities in the current quarter?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What are the follow-up tasks I need to do on a particular customer?
• Who are the top Sales representatives by their Lead conversion ratio?
• What are the open Opportunities associated to a given Partner?
• What is the average deal size by Product groups?
• How are the Partners classified?
• What is total number of Partners assigned to a specific classification for this period?
• Does this account have subsidiaries?
• How is the Revenue spread for a given Customer hierarchy?
• How actively (# of Activities) are the Sales reps engaged with customers?
• What are my most active accounts? Who owns them and where are these located?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• Who are all the contacts for key customers and what are their roles?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?
• Do Forecast rely on Revenue from few Products?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What is the revenue lost to competition for a specific product/product group?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are the Accounts under the sales team, by territory?
• What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?
• How many Assets are created in a particular time period?
• Who are all the resources assigned to the Assets?
• What is the additional information updated in the Notes for a Contact?
• What is the additional information updated in the Notes for a Customer?
Who are the Employees/Resource for the Deals that are submitted in the current month?
What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
What is the average time the Opportunity is in a particular sales stage?
What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
What are the Resources are associated to this contact?
How many Leads do not have Contact?
What are the activity objectives for the current period?
What managers have teams averaging the most activities?
Are agents prematurely updating SRs as Resolved to make their numbers look better?
What product lines have a higher percentage of non-compliant SRs open?
How frequently do agents link articles to SRs?
How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
How long did it take to assign the SR to the correct queue?
Was the assigned agent overloaded with other work?
Was the SR queue modified or SR resource owner modified at any point?
What is the quarterly revenue trend for a specific product/product group by partner?
What are the Customers from this account, including all subsidiaries?
Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
What is the relative mix of forecast revenues by the various sales channels in a specific territory?
What is the channel performance vs channel forecast?
Are too many deals being pushed out to the subsequent fiscal quarters?
What are my claimed vs unclaimed MDF totals?
What are total number of Claims in the current quarter?
Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
How do wins and losses trend quarterly for a specific product line?
What are the most likely reasons that the Opportunities are lost against our key competitors?
What is the value trend of high value opportunities? Do they show a positive or negative trend?
What are the sales accounts that a given Sales representative owns?
What is the QoQ growth for Assets by Products?
How many Territories are assigned to an Opportunity?
• What are all the Territories assigned to Opportunities?
• How many new Resources are created in the current quarter?
• What are the target v/s actual number of the split objectives?
• What are the Programs that Partners have enrolled into?
• What are the total number of Relationships between two Partners?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
• How many responses received for a given campaign?
• How many Opportunities associated to a Campaign?
• What is the total Quotes revenue for the current month?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• How many emails are we receiving over time?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What is the contact point information of the primary contact for all active opportunities in the current quarter?
• What are all addresses associated with the primary contact for accounts I’m the owner of or on the sales team?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the associated activities related to my upcoming appointment and task?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What is the potential revenue of leads by partners?
• What is the distribution of Partner Opportunities by sales stages?
• What is the number of partners in a specific classification within a defined geographic region?
• 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?
• How many Partners’ team is a given Resource part of?
• What are the total number of Relationships for a given Account?
• What are the top ten accounts by revenue in the last quarter?
• Who are my teams top Customers?
• Who are the 'new' customers, created in the past 6 months?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• How are product revenues trending month over month?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are the historical monthly trend of closed revenue by current territories?
• How many Leads are open for a given Product?
• What was the currency conversion rate applied to a specific claim?
• What products are often lost to key competitors? Is there a pattern?
• Who are the top competitors and what is the revenue exposure to them?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• How many territories is the Lead part of?
• What are all the Campaigns assigned to an Opportunity?
• Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• How many Enrollments are going to expire in the next quarter?
• How many Programs were created in the last quarter?
• Does this Partner have subsidiaries?
• What are the partner I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?
• What is the primary contact and non-primary contact pointers for all active opportunities in the current quarter?
• What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?
• What is the number of Partner Contacts that are also resources and users?
• How many Territories is a Partner part of?
• Who manages my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
• What is the Territory Quota vs Actual?
• Which Territories have exceeded their Quotes in the current Quarter?
• Who are the Partner resources in the system and which Partner Organization they belong to?
• What are the Partners created in the system for a given time period?
• How many Enrollments were created/submitted/expired/terminated in the last month?
• What is the Campaign ROI (return on investment)?
Job Roles

- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
- What are the rates for agents declining work offers?
- What are the average handle times?
- What are the number of interactions by channel, agent, and time period?
- Are there currently service requests that have missed the target milestone and require escalation?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Who are my agents that have the most pending SRs?
- What is the prevalence of SR transfers for an agent/manager/group/product/location?
- What are the popular reasons for SRs to be transferred? Is there a pattern?
- How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?
- Are there any workload balancing issues on my team? Are a few members performing most of the activities?
- Did the SR get assigned to the wrong queue/team?
- Are survey requests being sent per plan across teams, service categories, products, account regions?
- What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
- What are the sources of the Leads created in the current quarter?
- What are the top ten Partners by Revenue during the past quarter/year?
- What Partners are assigned to specific geographic territories?
- For given set of Customers, what percentage of my revenue is exposed to competition?
- Do forecasts rely on revenues from a few customers? What is the dependency profile?
- How do forecasts trend across periods?
- Who are the Contacts associated to the Lead?
- 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?
- Was an MDF claim rejected? What was the reason the claim was rejected?
- Is the sales team converting leads to opportunities fast enough?
- How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
- Who are the resources assigned for a particular territory?
- How many new contacts are created in the system in the current month?
- What are the Products associated with the Deals?
- How many Contacts are assigned to an Opportunity?
- What Resources will not be able to meet the Quotas in the current quarter?
- What is the Hire date of the resources in an Organization?
- Which Program has the highest number of Enrollments?
Job Roles

- What are the latest revisions to activity objectives?
- Across what channels do such non-SR interactions most often occur?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What channels are the most effective for resolving issues with a single interaction?
- How often are my agents able to resolve issues using a low cost channel like chat?
- How often do communications cross channels before they are resolved?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- What are the open critical SRs that my team is working on currently? How many of these are escalated?
- How many social posts came from known versus unknown contacts?
- How many open SRs are linked to each tag?
- What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
- What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
- Was an SR sitting in a queue longer than the average time for all other SRs?
- Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
- Does the survey request activity show a declining trend?
- How many Leads were rejected in the last quarter and what were the reason for those?
- What are the names of the customers that a Sales team owns? Who are the key contacts?
- Does the forecast versus pipeline trend show a healthy picture?
- What are the Opportunity Revenue line details contributing the most to the Forecast?
- What are the higher value deals that have been moved out?
- What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
- Are the Leads supporting products that appeal to certain customers by size of company?
- What were the approved amounts vs the settled claim totals for the last 4 quarters?
- What are the top 10 open opportunities? What are the target close dates and revenues for these?
- What are all the contacts created in the system by Geography?
- What are all the Opportunities created as a result of Deal closure by a particular resource/team?
- What are all the Opportunities resulted from a Campaign?
- How many Resources are assigned to an Opportunity?
- 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 many Leads are part of the Campaign?
- Who has completed the most activity objectives?
- What are the activity levels in specific regions?
Sales Administrator

Code Name

ORA_ZBS_SALES_ADMINISTRATOR_JOB

Duty Roles

This job role is related to the following duty roles:

- CRM Administrative Transaction Analysis Duty
- Sales Administrative Transaction Analysis Duty
- Service Administrative Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activities with Related Activities
- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• CRM - CRM Interaction Aggregate
• CRM - CRM Interaction Service Requests Real Time
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• CRM - CRM Work Orders Real Time
• Marketing - CRM Leads
• Marketing - CRM Leads and Opportunities Real Time
• Partners - CRM Leads and Opportunities Real Time
• Partners - CRM Opportunities and Products Real Time
• Partners - CRM Partner Assessments
• Partners - CRM Partner Classification
• Partners - CRM Partner Contact
• Partners - CRM Partner Overview
• Partners - CRM Partner Resource
• Partners - CRM Partner Territory
• Partners - CRM Program Enrollments
• Partners - CRM Programs
• Sales - CRM Account Relationship
• Sales - CRM All Contact Contact Point
• Sales - CRM All Contacts Addresses
• Sales - CRM Asset
• Sales - CRM Asset Contact
• Sales - CRM Asset Resource
• Sales - CRM Business Plan Objective Split
• Sales - CRM Campaign Members
• Sales - CRM Campaign Opportunity
• Sales - CRM Contact Note
• Sales - CRM Contact Relationship
• Sales - CRM Contact Resource
• Sales - CRM Contacts
• Sales - CRM Customer Classification
• Sales - CRM Customer Note
• Sales - CRM Customer Overview
Sales - CRM Customers
Sales - CRM Customers and Contacts Real Time
Sales - CRM Deal Registration
Sales - CRM Deal Registration Product
Sales - CRM Forecasting
Sales - CRM Forecasting and Pipeline Revenue Real Time
Sales - CRM Historical Forecasting
Sales - CRM Historical Pipeline
Sales - CRM Lead Assessments
Sales - CRM Lead Contact
Sales - CRM Lead Product
Sales - CRM Lead Resource
Sales - CRM Lead Territory
Sales - CRM MDF Budget
Sales - CRM MDF Claim
Sales - CRM MDF Claim Settlement
Sales - CRM MDF Request
Sales - CRM Opportunities and Products Real Time
Sales - CRM Opportunity Assessments
Sales - CRM Opportunity Campaign
Sales - CRM Opportunity Contact
Sales - CRM Opportunity Note
Sales - CRM Opportunity Partner
Sales - CRM Opportunity Resource
Sales - CRM Opportunity Sales Stage Snapshot
Sales - CRM Opportunity Territory
Sales - CRM Partner Relationship
Sales - CRM Pipeline
Sales - CRM Primary Contact Addresses
Sales - CRM Primary Contact Contact Point
Sales - CRM Quota Management
Sales - CRM Quote Lines
Sales - CRM Quotes
Sales - CRM Resource
Sales - CRM Resource Territory
Sales - CRM Sales Account Assessments
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

- Sales - CRM Sales Account Resource
- Sales - CRM Sales Account Territory
- Sales - CRM Territory Resource
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Lifecycle
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Request Tags Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time
- Service - CRM Survey Requests Real Time
- Service - CRM Survey Responses Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- How many Leads are associated for a given Opportunity?
- How many Opportunities were created from a given Lead?
- What is the revenue generated by Partners per Customer?
- What are my best performing product lines by customer geographies?
- How is my Revenue distributed across Customer geographies?
- What regions are my customers clustered in?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
- On which sales accounts is a given sales representative a member of the account team?
- Who are all the Contacts assigned to the Assets?
- What are the responses for different Opportunity for an Assessment submitted?
- What are the Quotas assigned to the team and the Actuals?
- How are the business plan objectives split?
What are the objectives that have not met the target value set?

How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?

What are the SIC codes associated with a Partner, and with all associated Partners?

Against how many Opportunities, were the Quotes submitted in this month?

How do the number of activities in a region and their average SR resolution rates by quarter compare?

How often do communications cross channels to get to resolution?

How many customer interactions happen without an SR?

How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?

As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?

How often are communications being transferred between agents?

What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?

How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?

How many new coverages begin in the ensuing month?

Are we equipped to service the increase in coverages?

What is the current count of inbound email requests by status and mailbox?

How many messages resulted in new service request creation versus update to existing service request?

Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?

What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?

How are SR transfers contributing to overall latency/resolution delays?

What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?

How does the aging profile of SRs look like? Are there any outliers calling for intervention?

What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?

How is tag usage across agents and resource teams? Which teams perform better than others?

What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?

How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?

How is survey request trending compared to SR resolutions during the same period?

What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?

What are the top 10 products associated to the Leads in the system?

What are the Leads that are coverted into Opportunities?

What is the number of leads by partners for a specific product group?

How many Partners is a Contact is associated to?
Job Roles

- How many Leads and Opportunities are Open for a given Customer in the Current quarter?
- Are the Leads associated with certain products?
- What is the open/closed revenue for each of the product groups in the selected geography?
- Are the sales reps moving their opportunities fast enough?
- Are there any up sell/cross sell opportunities?
- Is overall pipeline healthy enough to meet sales goals?
- What are the top stalled opportunities and who are the sales reps working on these?
- What are the sales accounts owned by the Sales team?
- What are the Deals submitted by the Partners in the current quarter with the Deal size?
- Who are the Resources assigned to the Leads created in any given time period?
- What are the Leads assigned to me/my team member?
- What are all the Territories the Lead is part of?
- How did the Opportunity evolve over time?
- How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
- How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
- How many territories are assigned to a Resource/Employee?
- What are all the Territories assigned to Resources/Employees?
- What are the total number of Contact Relationships between two Contact?
- Does this Contact have subsidiaries?
- What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
- What percentage of service requests involve at least one interaction?
- Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
- What is the average length of time of an interaction, by agent and channel?
- How many were compliant and non-compliant when I, as an agent review my own completed work orders?
- To what extent has the number of customer coverages increased between two given dates?
- How many emails came from known versus unknown contacts?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- What is the delay in estimated completion dates?
- Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
- By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
- What are the SRs that are waiting on my customers?
- Is the Service organization effectively handling new social service requests in the appropriate timeframe?
- Do SR’s with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• What is the opportunity information captured in the note to an opportunity?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• What are all addresses associated with the primary contact for all active opportunities in the current quarter?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
• Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?
• What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?
• What are the follow-up tasks I need to do on a particular customer?
• Who are the top Sales representatives by their Lead conversion ratio?
• What are the open Opportunities associated to a given Partner?
• What is the average deal size by Product groups?
• How are the Partners classified?
• What is total number of Partners assigned to a specific classification for this period?
• Does this account have subsidiaries?
• How is the Revenue spread for a given Customer hierarchy?
• How actively (# of Activities) are the Sales reps engaged with customers?
• What are my most active accounts? Who owns them and where are these located?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• Who are all the contacts for key customers and what are their roles?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?
• Do Forecast rely on Revenue from few Products?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What is the revenue lost to competition for a specific product/product group?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are the Accounts under the sales team, by territory?
• What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?
• How many Assets are created in a particular time period?
• Who are all the resources assigned to the Assets?
• What is the additional information updated in the Notes for a Contact?
• What is the additional information updated in the Notes for a Customer?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
• What is the average time the Opportunity is in a particular sales stage?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the Resources are associated to this contact?
• How many Leads do not have Contact?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• What is the quarterly revenue trend for a specific product/product group by partner?
• What are the Customers from this account, including all subsidiaries?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• What is the channel performance vs channel forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
• How do wins and losses trend quarterly for a specific product line?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the sales accounts that a given Sales representative owns?
• What is the QoQ growth for Assets by Products?
• How many Territories are assigned to an Opportunity?
• What are all the Territories assigned to Opportunities?
• How many new Resources are created in the current quarter?
• What are the target v/s actual number of the split objectives?
• What are the Programs that Partners have enrolled into?
• What are the total number of Relationships between two Partners?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
• How many responses received for a given campaign?
• How many Opportunities associated to a Campaign?
• What is the total Quotes revenue for the current month?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• How many emails are we receiving over time?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What is the contact point information of the primary contact for all active opportunities in the current quarter?
• What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the response scores for customer where we have not met SLAs?
• Do one or more of the agents in my team need training to improve customer communication skills?
• What are the associated activities related to my upcoming appointment and task?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What is the potential revenue of leads by partners?
• What is the distribution of Partner Opportunities by sales stages?
• What is the number of partners in a specific classification within a defined geographic region?
• 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?
• How many Partners’ team is a given Resource part of?
• What are the total number of Relationships for a given Account?
• What are the top ten accounts by revenue in the last quarter?
• Who are my teams top Customers?
• Who are the ‘new’ customers, created in the past 6 months?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• How are product revenues trending month over month?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are the historical monthly trend of closed revenue by current territories?
• How many Leads are open for a given Product?
• What was the currency conversion rate applied to a specific claim?
• What products are often lost to key competitors? Is there a pattern?
• Who are the top competitors and what is the revenue exposure to them?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• How many territories is the Lead part of?
• What are all the Campaigns assigned to an Opportunity?
• Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• How many Enrollments are going to expire in the next quarter?
• How many Programs were created in the last quarter?
• Does this Partner have subsidiaries?
• What are the partner I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 5
Job Roles

• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter?
• What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• What is the number of Partner Contacts that are also resources and users?
• How many Territories is a Partner part of?
• Who manages my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
• What is the Territory Quota vs/ Actual?
• Which Territories have exceeded their Quotes in the current Quarter?
• Who are the Partner resources in the system and which Partner Organization they belong to?
Chapter 5
Job Roles

- What are the Partners created in the system for a given time period?
- How many Enrollments were created/submitted/expired/terminated in the last month?
- What is the Campaign ROI (return on investment)?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
- What are the rates for agents declining work offers?
- What are the average handle times?
- What are the number of interactions by channel, agent, and time period?
- Are there currently service requests that have missed the target milestone and require escalation?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Who are my agents that have the most pending SRs?
- What is the prevalence of SR transfers for an agent/manager/group/product/location?
- What are the popular reasons for SRs to be transferred? Is there a pattern?
- How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?
- Are there any workload balancing issues on my team? Are a few members performing most of the activities?
- Did the SR get assigned to the wrong queue/team?
- Are survey requests being sent per plan across teams, service categories, products, account regions?
- Is our resolution performance for escalated issues worse or better than non escalated issues?
- What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
- What are the sources of the Leads created in the current quarter?
- What are the top ten Partners by Revenue during the past quarter/year?
- What Partners are assigned to specific geographic territories?
- For given set of Customers, what percentage of my revenue is exposed to competition?
- Do forecasts rely on revenues from a few customers? What is the dependency profile?
- How to forecasts trend across periods?
- Who all are the Contacts associated to the Lead?
- 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?
- Was an MDF claim rejected? What was the reason the claim was rejected?
- Is the sales team converting leads to opportunities fast enough?
- How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
- Who are the resources assigned for a particular territory?
- How many new contacts are created in the system in the current month?
- What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Organization?
• Which Program has the highest number of Enrollments?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many social posts came from known versus unknown contacts?
• How many open SRs are linked to each tag?
• What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
• What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• What is the overall satisfaction levels of our customers with regards to issue resolutions?
• Which of our product lines most frequently receive suggestions for product improvements?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Does the forecast versus pipeline trend show a healthy picture?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• What are the higher value deals that have been moved out?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• Are the Leads supporting products that appeal to certain customers by size of company?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• What are all the contacts created in the system by Geography?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• What are all the Opportunities resulted from a Campaign?
• How many Resources are assigned to an Opportunity?
• 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 many Leads are part of the Campaign?
• Who has completed the most activity objectives?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• What is the breakdown of open action plans by category?
• How many action plans are open and how long have they been open?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• What is the contact point information of the primary contact for accounts where I’m the owner or on the sales team?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?
• What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

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 Quote Lines
- Sales - CRM Quotes

Business Questions

This job role secures access to data that can answer the following business questions:

- Against how many Opportunities, were the Quotes submitted in this month?
- What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
- What is the total Quotes revenue for the current month?
- What are all the Campaigns assigned to an Opportunity?
- How many Partners are assigned to an Opportunity?
- Who are all the Partners assigned to Opportunities?
- How many times a Quote is revised before it gets approved?
- Who has submitted the highest number of Quotes in the current month?
- What are the top 10 products for all the Deals submitted in the current quarter?
- How is the Deal Amount split between the products associated to the Deal Registration Lines?
- What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
- What are the Products associated with the Deals?
- What are all the Opportunities resulted from a Campaign?
- What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

Sales Lead Qualifier

Code Name

ORA_MKL_SALES_LEAD_QUALIFIER_JOB

Duty Roles
This job role is related to the following duty roles:

- Marketing Lead Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activities with Related Activities
- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Activity Resource Real Time
- Marketing - CRM Leads
- Marketing - CRM Leads and Opportunities Real Time
- Sales - CRM Lead Contact
- Sales - CRM Lead Resource
- Sales - CRM Lead Territory

Business Questions

This job role secures access to data that can answer the following business questions:

- How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- How many Leads are associated for a given Opportunity?
- How many Opportunities were created from a given Lead?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
- What are the top 10 products associated to the Leads in the system?
- What are the Leads that are converted into Opportunities?
- Who are the Resources assigned to the Leads created in any given time period?
- What are the Leads assigned to me/my team member?
- What are all the Territories the Lead is part of?
- As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
- What are the follow-up tasks I need to do on a particular customer?
- Who are the top Sales representatives by their Lead conversion ratio?
- What managers have teams averaging the most activities?
I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?

How many contacts were not favored with a positive outcome with a given agent?

What are the associated activities related to my upcoming appointment and task?

Who is the Primary Contact and Resource assigned for a given Lead?

How many territories is the Lead part of?

What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?

How many distinct customer contacts does an agent interact with through a given channel during a specific period?

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 is a Contact associated to?

Are there any workload balancing issues on my team? Are a few members performing most of the activities?

What are the sources of the Leads created in the current quarter?

Who all are the Contacts associated to the Lead?

How many Leads were rejected in the last quarter and what were the reason for those?

What are the activity levels in specific regions?

How can I identify neglected but strategic accounts to guide my team to focus on these?

What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?

Sales Manager

Code Name

ORA_ZBS_SALES_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- Marketing Lead Transaction Analysis Duty
- Sales Campaign Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty

Subject Areas
This job role secures access to the following subject areas:

- CRM - CRM Activities with Related Activities
- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Marketing - CRM Leads
- Marketing - CRM Leads and Opportunities Real Time
- Partners - CRM Partner Territory
- Sales - CRM Account Relationship
- Sales - CRM All Contact Contact Point
- Sales - CRM All Contacts Addresses
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan Objective Split
- Sales - CRM Campaign Members
- Sales - CRM Campaign Opportunity
- Sales - CRM Contact Note
- Sales - CRM Contact Relationship
- Sales - CRM Contact Resource
- Sales - CRM Contacts
- Sales - CRM Customer Classification
- Sales - CRM Customer Note
- Sales - CRM Customer Overview
- Sales - CRM Customers
- Sales - CRM Customers and Contacts Real Time
- Sales - CRM Deal Registration
- Sales - CRM Deal Registration Product
• Sales - CRM Forecasting
• Sales - CRM Forecasting and Pipeline Revenue Real Time
• Sales - CRM Historical Forecasting
• Sales - CRM Historical Pipeline
• Sales - CRM Lead Assessments
• Sales - CRM Lead Contact
• Sales - CRM Lead Product
• Sales - CRM Lead Resource
• Sales - CRM Lead Territory
• Sales - CRM MDF Budget
• Sales - CRM MDF Claim
• Sales - CRM MDF Claim Settlement
• Sales - CRM MDF Request
• Sales - CRM Opportunities and Products Real Time
• Sales - CRM Opportunity Assessments
• Sales - CRM Opportunity Campaign
• Sales - CRM Opportunity Contact
• Sales - CRM Opportunity Note
• Sales - CRM Opportunity Partner
• Sales - CRM Opportunity Resource
• Sales - CRM Opportunity Sales Stage Snapshot
• Sales - CRM Opportunity Territory
• Sales - CRM Partner Relationship
• Sales - CRM Pipeline
• Sales - CRM Primary Contact Addresses
• Sales - CRM Primary Contact Contact Point
• Sales - CRM Quota Management
• Sales - CRM Quote Lines
• Sales - CRM Quotes
• Sales - CRM Resource
• Sales - CRM Resource Territory
• Sales - CRM Sales Account Assessments
• Sales - CRM Sales Account Resource
• Sales - CRM Sales Account Territory
• Sales - CRM Territory Resource
• Service - CRM Customer Coverage Real Time
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 5
Job Roles

- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Lifecycle
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Request Tags Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Survey Requests Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- How many Leads are associated for a given Opportunity?
- How many Opportunities were created from a given Lead?
- What are my best performing product lines by customer geographies?
- How is my Revenue distributed across Customer geographies?
- What regions are my customers clustered in?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
- On which sales accounts is a given sales representative a member of the account team?
- Who are all the Contacts assigned to the Assets?
- What are the responses for different Opportunity for an Assessment submitted?
- What are the Quotas assigned to the team and the Actuals?
- How are the business plan objectives split?
- What are the objectives that have not met the target value set?
- What are the SIC codes associated with a Partner, and with all associated Partners?
- Against how many Opportunities, were the Quotes submitted in this month?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How often are communications being transferred between agents?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own work orders?
• How many new coverages begin in the ensuing month?
• Are we equipped to service the increase in coverages?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• What characteristics do groupings of SR’s based on specific tags (e.g., tag = ‘outage’) exhibit?
• How is tag usage across agents and resource teams? Which teams perform better than others?
• What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• How is survey request trending compared to SR resolutions during the same period?
• What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
• What are the top 10 products associated to the Leads in the system?
• What are the Leads that are converted into Opportunities?
• How many Leads and Opportunities are Open for a given Customer in the Current quarter?
• Are the Leads associated with certain products?
• What is the open/closed revenue for each of the product groups in the selected geography?
• Are the sales reps moving their opportunities fast enough?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the sales accounts owned by the Sales team?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• Who are the Resources assigned to the Leads created in any given time period?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• How did the Opportunity evolve over time?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
- How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
- How many territories are assigned to a Resource/Employee?
- What are all the Territories assigned to Resources/Employees?
- What are the total number of Contact Relationships between two Contact?
- Does this Contact have subsidiaries?
- What percentage of service requests involve at least one interaction?
- Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
- What is the average length of time of an interaction, by agent and channel?
- How many were compliant and non-compliant when I, as an agent review my own completed work orders?
- To what extent has the number of customer coverages increased between two given dates?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- What is the delay in estimated completion dates?
- Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
- By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
- What are the SRs that are waiting on my customers?
- Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
- Are we seeing an issue regarding compliance rates with certain tags?
- What is the opportunity information captured in the note to an opportunity?
- As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
- What are all addresses associated with the primary contact for all active opportunities in the current quarter?
- Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
- Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
- Are survey request frequencies meeting our norms?
- What are the follow-up tasks I need to do on a particular customer?
- Who are the top Sales representatives by their Lead conversion ratio?
- Does this account have subsidiaries?
- How is the Revenue spread for a given Customer hierarchy?
- How actively (# of Activities) are the Sales reps engaged with customers?
- What are my most active accounts? Who owns them and where are these located?
- What are the contact - points (phone, email, address, etc.) of key contacts?
- Who are all the contacts for key customers and what are their roles?
- Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
• Do Forecast rely on Revenue from few Products?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What is the revenue lost to competition for a specific product/product group?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are the Accounts under the sales team, by territory?
• What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?
• How many Assets are created in a particular time period?
• Who are all the resources assigned to the Assets?
• What is the additional information updated in the Notes for a Contact?
• What is the additional information updated in the Notes for a Customer?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
• What is the average time the Opportunity is in a particular sales stage?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the Resources are associated to this contact?
• How many Leads do not have Contact?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• What are the Customers from this account, including all subsidiaries?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• What is the channel performance vs channel forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
• How do wins and losses trend quarterly for a specific product line?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the sales accounts that a given Sales representative owns?
• What is the QoQ growth for Assets by Products?
• How many Territories are assigned to an Opportunity?
• What are all the Territories assigned to Opportunities?
• How many new Resources are created in the current quarter?
• What are the target v/s actual number of the split objectives?
• What are the total number of Relationships between two Partners?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
• How many responses received for a given campaign?
• How many Opportunities associated to a Campaign?
• What is the total Quotes revenue for the current month?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What is the contact point information of the primary contact for all active opportunities in the current quarter?
• What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the associated activities related to my upcoming appointment and task?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What are the total number of Relationships for a given Account?
• What are the top ten accounts by revenue in the last quarter?
• Who are my teams top Customers?
• Who are the 'new' customers, created in the past 6 months?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• How are product revenues trending month over month?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are the historical monthly trend of closed revenue by current territories?
• How many Leads are open for a given Product?
• What was the currency conversion rate applied to a specific claim?
• What products are often lost to key competitors? Is there a pattern?
• Who are the top competitors and what is the revenue exposure to them?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• How many territories is the Lead part of?
• What are all the Campaigns assigned to an Opportunity?
• Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• Does this Partner have subsidiaries?
• What are the partner I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter?
• What are all addresses of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• How many Territories is a Partner part of?
• Who manages my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
• What is the Territory Quota vs/ Actual?
• Which Territories have exceeded their Quotes in the current Quarter?
• Who are the Partner resources in the system and which Partner Organization they belong to?
• What is the Campaign ROI (return on investment)?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product ‘A’ have tag ‘X’ or ‘Y’? How many have the ‘Potential Churn’ tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
• What are the sources of the Leads created in the current quarter?
• What Partners are assigned to specific geographic territories?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• How to forecasts trend across periods?
• Who are the resources assigned for a particular territory?
• 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?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Is the sales team converting leads to opportunities fast enough?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Who are the resources assigned for a particular territory?
• How many new contacts are created in the system in the current month?
• What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Organization?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many open SRs are linked to each tag?
• What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
• What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Does the forecast versus pipeline trend show a healthy picture?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• What are the higher value deals that have been moved out?
• What are the opportunities that have undergone revenue changes – either upward or downward? Which team members own these opportunities?
• Are the Leads supporting products that appeal to certain customers by size of company?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• What are all the contacts created in the system by Geography?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• What are all the Opportunities resulted from a Campaign?
• How many Resources are assigned to an Opportunity?
• How many Leads are part of the Campaign?
• Who has completed the most activity objectives?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• What is the breakdown of open action plans by category?
• How many action plans are open and how long have they been open?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• What is the contact point information of the primary contact for accounts where I’m the owner or on the sales team?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?
• What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

Sales Representative

Code Name

ORA_ZBS_SALES_REPRESENTATIVE_JOB

Duty Roles

This job role is related to the following duty roles:

• Marketing Lead Transaction Analysis Duty
• Sales Campaign Transaction Analysis Duty
• Sales Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Activities with Related Activities
• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• CRM - CRM Interaction Aggregate
• CRM - CRM Interaction Service Requests Real Time
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• CRM - CRM Work Orders Real Time
• Marketing - CRM Leads
• Marketing - CRM Leads and Opportunities Real Time
• Partners - CRM Partner Territory
• Sales - CRM Account Relationship
• Sales - CRM All Contact Contact Point
• Sales - CRM All Contacts Addresses
• Sales - CRM Asset
• Sales - CRM Asset Contact
• Sales - CRM Asset Resource
• Sales - CRM Business Plan Objective Split
• Sales - CRM Campaign Members
• Sales - CRM Campaign Opportunity
• Sales - CRM Contact Note
• Sales - CRM Contact Relationship
• Sales - CRM Contact Resource
• Sales - CRM Contacts
• Sales - CRM Customer Classification
• Sales - CRM Customer Note
• Sales - CRM Customer Overview
• Sales - CRM Customers
• Sales - CRM Customers and Contacts Real Time
• Sales - CRM Deal Registration
• Sales - CRM Deal Registration Product
• Sales - CRM Forecasting
• Sales - CRM Forecasting and Pipeline Revenue Real Time
• Sales - CRM Historical Forecasting
• Sales - CRM Historical Pipeline
• Sales - CRM Lead Assessments
• Sales - CRM Lead Contact
• Sales - CRM Lead Product
• Sales - CRM Lead Resource
• Sales - CRM Lead Territory
• Sales - CRM MDF Budget
• Sales - CRM MDF Claim
• Sales - CRM MDF Claim Settlement
• Sales - CRM MDF Request
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

• Sales - CRM Opportunities and Products Real Time
• Sales - CRM Opportunity Assessments
• Sales - CRM Opportunity Campaign
• Sales - CRM Opportunity Contact
• Sales - CRM Opportunity Note
• Sales - CRM Opportunity Partner
• Sales - CRM Opportunity Resource
• Sales - CRM Opportunity Sales Stage Snapshot
• Sales - CRM Opportunity Territory
• Sales - CRM Partner Relationship
• Sales - CRM Pipeline
• Sales - CRM Primary Contact Addresses
• Sales - CRM Primary Contact Contact Point
• Sales - CRM Quota Management
• Sales - CRM Quote Lines
• Sales - CRM Quotes
• Sales - CRM Resource
• Sales - CRM Resource Territory
• Sales - CRM Sales Account Assessments
• Sales - CRM Sales Account Resource
• Sales - CRM Sales Account Territory
• Sales - CRM Territory Resource
• Service - CRM Customer Coverage Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Action Plan Actions Real Time
• Service - CRM Service Request Lifecycle
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Request Resource Real Time
• Service - CRM Service Request Tags Real Time
• Service - CRM Service Requests Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

• How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- How many Leads are associated for a given Opportunity?
- How many Opportunities were created from a given Lead?
- What are my best performing product lines by customer geographies?
- How is my Revenue distributed across Customer geographies?
- What regions are my customers clustered in?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
- On which sales accounts is a given sales representative a member of the account team?
- Who are all the Contacts assigned to the Assets?
- What are the responses for different Opportunity for an Assessment submitted?
- What are the Quotas assigned to the team and the Actuals?
- How are the business plan objectives split?
- What are the objectives that have not met the target value set?
- What are the SIC codes associated with a Partner, and with all associated Partners?
- Against how many Opportunities, were the Quotes submitted in this month?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How often are communications being transferred between agents?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopens?
- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
- How many new coverages begin in the ensuing month?
- Are we equipped to service the increase in coverages?
- Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
- What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
- How are SR transfers contributing to overall latency/resolution delays?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How does the aging profile of SRs look like? Are there any outliers calling for intervention?
- What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
• How is tag usage across agents and resource teams? Which teams perform better than others?
• What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
• What are the top 10 products associated to the Leads in the system?
• What are the Leads that are converted into Opportunities?
• How many Leads and Opportunities are Open for a given Customer in the Current quarter?
• Are the Leads associated with certain products?
• What is the open/closed revenue for each of the product groups in the selected geography?
• Are the sales reps moving their opportunities fast enough?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the sales accounts owned by the Sales team?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• Who are the Resources assigned to the Leads created in any given time period?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• How did the Opportunity evolve over time?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• How many territories are assigned to a Resource/Employee?
• What are all the Territories assigned to Resources/Employees?
• What are the total number of Contact Relationships between two Contact?
• Does this Contact have subsidiaries?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Do SR’s with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• What is the opportunity information captured in the note to an opportunity?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• What are all addresses associated with the primary contact for all active opportunities in the current quarter?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• What are the follow-up tasks I need to do on a particular customer?
• Who are the top Sales representatives by their Lead conversion ratio?
• Does this account have subsidiaries?
• How is the Revenue spread for a given Customer hierarchy?
• How actively (# of Activities) are the Sales reps engaged with customers?
• What are my most active accounts? Who owns them and where are these located?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• Who are all the contacts for key customers and what are their roles?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
• Do Forecast rely on Revenue from few Products?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What is the revenue lost to competition for a specific product/product group?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are the Accounts under the sales team, by territory?
• What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
• How many Assets are created in a particular time period?
• Who are all the resources assigned to the Assets?
• What is the additional information updated in the Notes for a Contact?
• What is the additional information updated in the Notes for a Customer?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
• What is the average time the Opportunity is in a particular sales stage?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the Resources are associated to this contact?
• How many Leads do not have Contact?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• What are the Customers from this account, including all subsidiaries?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• What is the channel performance vs channel forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
• How do wins and losses trend quarterly for a specific product line?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the sales accounts that a given Sales representative owns?
• What is the QoQ growth for Assets by Products?
• How many Territories are assigned to an Opportunity?
• What are all the Territories assigned to Opportunities?
• How many new Resources are created in the current quarter?
• What are the target v/s actual number of the split objectives?
• What are the total number of Relationships between two Partners?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
• How many responses received for a given campaign?
• **How many Opportunities associated to a Campaign?**
• **What is the total Quotes revenue for the current month?**
• **How many contacts were not favored with a positive outcome with a given agent?**
• **How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?**
• **How many interactions are being lost/abandoned? How does this compare with previous periods?**
• **How long is it taking for offers to be made to agents?**
• **How many interactions, on average, does it require to resolve an issue?**
• **Are we keeping the number of non-compliant SRs in check for our most valuable customers?**
• **Are my team resources optimally deployed across service queues to maximize productivity?**
• **Are we responding to customer messages in a timely manner?**
• **What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?**
• **How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?**
• **What is the contact point information of the primary contact for all active opportunities in the current quarter?**
• **What are all addresses associated with the primary contact for accounts I’m the owner of or on the sales team?**
• **Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?**
• **What are the associated activities related to my upcoming appointment and task?**
• **Who is the Primary Contact and Resource assigned for a given Lead?**
• **What are the total number of Relationships for a given Account?**
• **What are the top ten accounts by revenue in the last quarter?**
• **Who are my teams top Customers?**
• **Who are the ‘new’ customers, created in the past 6 months?**
• **What were the forecast revenues for the same period, last year? How did it compare with closed revenues?**
• **How are product revenues trending month over month?**
• **How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?**
• **What are the historical monthly trend of closed revenue by current territories?**
• **How many Leads are open for a given Product?**
• **What was the currency conversion rate applied to a specific claim?**
• **What products are often lost to key competitors? Is there a pattern?**
• **Who are the top competitors and what is the revenue exposure to them?**
• **Who are the Primary owners of the Contacts for contacts created in the last quarter?**
• **How many territories is the Lead part of?**
• **What are all the Campaigns assigned to an Opportunity?**
• **Who are all the Contacts assigned to Opportunities?**
- How many Partners are assigned to an Opportunity?
- Who are all the Partners assigned to Opportunities?
- How is the Quota attainment rate for the sales team?
- What are the user preferences for the Users created in the system?
- Does this Partner have subsidiaries?
- What are the partner I have from this Partner, including all subsidiaries?
- How many times a Quote is revised before it gets approved?
- Who has submitted the highest number of Quotes in the current month?
- What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- Is my team following the norm that an SR must be opened (or updated) for every customer communication?
- What are our issue resolution rates for low and high cost channels?
- What percent of communications are resolved the first time? What is the most commonly used channel?
- Are there action plans tracking late to an overall target completion date?
- Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
- Are our processes inefficient or preventing agents from meeting milestones?
- Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
- How does my team perform in meeting first response milestones versus resolution milestones?
- How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
- What is the contact point information of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
- What is the primary contact and non-primary contact point for all active opportunities in the current quarter?
- What are all addresses of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
- What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
- What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
- How many Territories is a Partner part of?
- Who manages my top accounts?
- 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?
- How many Leads is a Contact associated to?
- Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
• What is the Territory Quota vs/ Actual?
• Which Territories have exceeded their Quotes in the current Quarter?
• Who are the Partner resources in the system and which Partner Organization they belong to?
• What is the Campaign ROI (return on investment)?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product ‘A’ have tag ‘X’ or ‘Y’? How many have the ‘Potential Churn’ tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
• What are the sources of the Leads created in the current quarter?
• What Partners are assigned to specific geographic territories?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• How to forecasts trend across periods?
• Who all are the Contacts associated to the Lead?
• 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?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Is the sales team converting leads to opportunities fast enough?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Who are the resources assigned for a particular territory?
• How many new contacts are created in the system in the current month?
• What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Organization?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many open SRs are linked to each tag?
• What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
• What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Does the forecast versus pipeline trend show a healthy picture?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• What are the higher value deals that have been moved out?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• Are the Leads supporting products that appeal to certain customers by size of company?
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 5
Job Roles

- What were the approved amounts vs the settled claim totals for the last 4 quarters?
- What are the top 10 open opportunities? What are the target close dates and revenues for these?
- What are all the contacts created in the system by Geography?
- What are all the Opportunities created as a result of Deal closure by a particular resource/team?
- What are all the Opportunities resulted from a Campaign?
- How many Resources are assigned to an Opportunity?
- How many Leads are part of the Campaign?
- Who has completed the most activity objectives?
- What are the activity levels in specific regions?
- Do customers contact us more often to solve issues or to seek answers to questions?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How is the percentage of compliant SRs trending month over month, quarter over quarter?
- Where are the outliers when it comes to compliance?
- How many showed up as compliant; how many were non-compliant during my review of completed work orders?
- What is the breakdown of open action plans by category?
- How many action plans are open and how long have they been open?
- How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
- What is the contact point information of the primary contact for accounts where I’m the owner or on the sales team?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- How long was an SR unassigned and how long did it sit in each queue?
- What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?
- What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

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
Subject Areas

This job role secures access to the following subject areas:

- CRM - CRM Activities with Related Activities
- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Marketing - CRM Leads
- Marketing - CRM Leads and Opportunities Real Time
- Partners - CRM Partner Territory
- Sales - CRM Account Relationship
- Sales - CRM All Contact Contact Point
- Sales - CRM All Contacts Addresses
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan Objective Split
- Sales - CRM Campaign Members
- Sales - CRM Campaign Opportunity
- Sales - CRM Contact Note
- Sales - CRM Contact Relationship
- Sales - CRM Contact Resource
- Sales - CRM Contacts
- Sales - CRM Customer Classification
- Sales - CRM Customer Note
- Sales - CRM Customer Overview
Job Roles

- Sales - CRM Customers
- Sales - CRM Customers and Contacts Real Time
- Sales - CRM Deal Registration
- Sales - CRM Deal Registration Product
- Sales - CRM Forecasting
- Sales - CRM Forecasting and Pipeline Revenue Real Time
- Sales - CRM Historical Forecasting
- Sales - CRM Historical Pipeline
- Sales - CRM Lead Assessments
- Sales - CRM Lead Contact
- Sales - CRM Lead Product
- Sales - CRM Lead Resource
- Sales - CRM Lead Territory
- Sales - CRM MDF Budget
- Sales - CRM MDF Claim
- Sales - CRM MDF Claim Settlement
- Sales - CRM MDF Request
- Sales - CRM Opportunities and Products Real Time
- Sales - CRM Opportunity Assessments
- Sales - CRM Opportunity Campaign
- Sales - CRM Opportunity Contact
- Sales - CRM Opportunity Note
- Sales - CRM Opportunity Partner
- Sales - CRM Opportunity Resource
- Sales - CRM Opportunity Sales Stage Snapshot
- Sales - CRM Opportunity Territory
- Sales - CRM Partner Relationship
- Sales - CRM Pipeline
- Sales - CRM Primary Contact Addresses
- Sales - CRM Primary Contact Contact Point
- Sales - CRM Quota Management
- Sales - CRM Quote Lines
- Sales - CRM Quotes
- Sales - CRM Resource
- Sales - CRM Resource Territory
- Sales - CRM Sales Account Assessments
Job Roles

- Sales - CRM Sales Account Resource
- Sales - CRM Sales Account Territory
- Sales - CRM Territory Resource
- Service - CRM Customer Coverage Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Lifecycle
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Request Tags Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Survey Requests Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- How many Leads are associated for a given Opportunity?
- How many Opportunities were created from a given Lead?
- What are my best performing product lines by customer geographies?
- How is my Revenue distributed across Customer geographies?
- What regions are my customers clustered in?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
- On which sales accounts is a given sales representative a member of the account team?
- Who are all the Contacts assigned to the Assets?
- What are the responses for different Opportunity for an Assessment submitted?
- What are the Quotas assigned to the team and the Actuals?
- How are the business plan objectives split?
- What are the objectives that have not met the target value set?
- What are the SIC codes associated with a Partner, and with all associated Partners?
- Against how many Opportunities, were the Quotes submitted in this month?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
Oracle CX Sales and B2B Service

Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 5
Job Roles

- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How often are communications being transferred between agents?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
- How many new coverages begin in the ensuing month?
- Are we equipped to service the increase in coverages?
- Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
- What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
- How are SR transfers contributing to overall latency/resolution delays?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How does the aging profile of SRs look like? Are there any outliers calling for intervention?
- What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
- How is tag usage across agents and resource teams? Which teams perform better than others?
- What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
- How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
- How is survey request trending compared to SR resolutions during the same period?
- What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
- What are the top 10 products associated to the Leads in the system?
- What are the Leads that are covert into Opportunities?
- How many Leads and Opportunities are Open for a given Customer in the Current quarter?
- Are the Leads associated with certain products?
- What is the open/closed revenue for each of the product groups in the selected geography?
- Are the sales reps moving their opportunities fast enough?
- Are there any up sell/cross sell opportunities?
- Is overall pipeline healthy enough to meet sales goals?
- What are the top stalled opportunities and who are the sales reps working on these?
- What are the sales accounts owned by the Sales team?
- What are the Deals submitted by the Partners in the current quarter with the Deal size?
- Who are the Resources assigned to the Leads created in any given time period?
- What are the Leads assigned to me/my team member?
- What are all the Territories the Lead is part of?
- How did the Opportunity evolve over time?
- How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
- How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
- How many territories are assigned to a Resource/Employee?
- What are all the Territories assigned to Resources/Employees?
- What are the total number of Contact Relationships between two Contact?
- Does this Contact have subsidiaries?
- What percentage of service requests involve at least one interaction?
- Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
- What is the average length of time of an interaction, by agent and channel?
- How many were compliant and non-compliant when I, as an agent review my own completed work orders?
- To what extent has the number of customer coverages increased between two given dates?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- What is the delay in estimated completion dates?
- Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
- By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
- What are the SRs that are waiting on my customers?
- Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
- Are we seeing an issue regarding compliance rates with certain tags?
- What is the opportunity information captured in the note to an opportunity?
- As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
- What are all addresses associated with the primary contact for all active opportunities in the current quarter?
- Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
- Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
- Are survey request frequencies meeting our norms?
- What are the follow-up tasks I need to do on a particular customer?
- Who are the top Sales representatives by their Lead conversion ratio?
- Does this account have subsidiaries?
- How is the Revenue spread for a given Customer hierarchy?
• How actively (# of Activities) are the Sales reps engaged with customers?
• What are my most active accounts? Who owns them and where are these located?
• What are the contact points (phone, email, address, etc.) of key contacts?
• Who are all the contacts for key customers and what are their roles?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
• Do Forecast rely on Revenue from few Products?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What is the revenue lost to competition for a specific product/product group?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are the Accounts under the sales team, by territory?
• What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
• How many Assets are created in a particular time period?
• Who are all the resources assigned to the Assets?
• What is the additional information updated in the Notes for a Contact?
• What is the additional information updated in the Notes for a Customer?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
• What is the average time the Opportunity is in a particular sales stage?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the Resources are associated to this contact?
• How many Leads do not have Contact?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• What are the Customers from this account, including all subsidiaries?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• What is the channel performance vs channel forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
• How do wins and losses trend quarterly for a specific product line?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the sales accounts that a given Sales representative owns?
• What is the QoQ growth for Assets by Products?
• How many Territories are assigned to an Opportunity?
• What are all the Territories assigned to Opportunities?
• How many new Resources are created in the current quarter?
• What are the target v/s actual number of the split objectives?
• What are the total number of Relationships between two Partners?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
• How many responses received for a given campaign?
• How many Opportunities associated to a Campaign?
• What is the total Quotes revenue for the current month?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What is the contact point information of the primary contact for all active opportunities in the current quarter?
• What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the associated activities related to my upcoming appointment and task?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What are the total number of Relationships for a given Account?
• What are the top ten accounts by revenue in the last quarter?
• Who are my teams top Customers?
• Who are the 'new' customers, created in the past 6 months?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• How are product revenues trending month over month?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are the historical monthly trend of closed revenue by current territories?
• How many Leads are open for a given Product?
• What was the currency conversion rate applied to a specific claim?
• What products are often lost to key competitors? Is there a pattern?
• Who are the top competitors and what is the revenue exposure to them?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• How many territories is the Lead part of?
• What are all the Campaigns assigned to an Opportunity?
• Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• Does this Partner have subsidiaries?
• What are the partner I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter?
• What are all addresses of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• How many Territories is a Partner part of?
• Who manages my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
Job Roles

- Who are all the Resources assigned to Opportunities?
- What is the Territory Quota vs/ Actual?
- Which Territories have exceeded their Quotes in the current Quarter?
- Who are the Partner resources in the system and which Partner Organization they belong to?
- What is the Campaign ROI (return on investment)?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
- What are the rates for agents declining work offers?
- What are the average handle times?
- What are the number of interactions by channel, agent, and time period?
- Are there currently service requests that have missed the target milestone and require escalation?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Who are my agents that have the most pending SRs?
- What is the prevalence of SR transfers for an agent/manager/group/product/location?
- What are the popular reasons for SRs to be transferred? Is there a pattern?
- How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?
- Are there any workload balancing issues on my team? Are a few members performing most of the activities?
- Did the SR get assigned to the wrong queue/team?
- Are survey requests being sent per plan across teams, service categories, products, account regions?
- What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
- What are the sources of the Leads created in the current quarter?
- What Partners are assigned to specific geographic territories?
- For given set of Customers, what percentage of my revenue is exposed to competition?
- Do forecasts rely on revenues from a few customers? What is the dependency profile?
- How to forecasts trend across periods?
- Who all are the Contacts associated to the Lead?
- 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?
- Was an MDF claim rejected? What was the reason the claim was rejected?
- Is the sales team converting leads to opportunities fast enough?
- How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
- Who are the resources assigned for a particular territory?
- How many new contacts are created in the system in the current month?
- What are the Products associated with the Deals?
Job Roles

- How many Contacts are assigned to an Opportunity?
- What Resources will not be able to meet the Quotas in the current quarter?
- What is the Hire date of the resources in an Organization?
- What are the latest revisions to activity objectives?
- Across what channels do such non-SR interactions most often occur?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What channels are the most effective for resolving issues with a single interaction?
- How often are my agents able to resolve issues using a low cost channel like chat?
- How often do communications cross channels before they are resolved?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- As an agent am I spreading myself too thin by being part of one too many SR teams?
- What are the open critical SRs that my team is working on currently? How many of these are escalated?
- How many open SRs are linked to each tag?
- What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
- What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
- Was an SR sitting in a queue longer than the average time for all other SRs?
- Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
- Does the survey request activity show a declining trend?
- How many Leads were rejected in the last quarter and what were the reason for those?
- What are the names of the customers that a Sales team owns? Who are the key contacts?
- Does the forecast versus pipeline trend show a healthy picture?
- What are the Opportunity Revenue line details contributing the most to the Forecast?
- What are the higher value deals that have been moved out?
- What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
- Are the Leads supporting products that appeal to certain customers by size of company?
- What were the approved amounts vs the settled claim totals for the last 4 quarters?
- What are the top 10 open opportunities? What are the target close dates and revenues for these?
- What are all the contacts created in the system by Geography?
- What are all the Opportunities created as a result of Deal closure by a particular resource/team?
- What are all the Opportunities resulted from a Campaign?
- How many Resources are assigned to an Opportunity?
- How many Leads are part of the Campaign?
- Who has completed the most activity objectives?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• What is the breakdown of open action plans by category?
• How many action plans are open and how long have they been open?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• What is the contact point information of the primary contact for accounts where I’m the owner or on the sales team?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?
• What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

Sales VP

Code Name

ORA_ZBS_SALES_VP_JOB

Duty Roles

This job role is related to the following duty roles:

• Marketing Lead Transaction Analysis Duty
• Sales Campaign Transaction Analysis Duty
• Sales Executive Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

• CRM - CRM Activities with Related Activities
• CRM - CRM Activity Contact Real Time
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Marketing - CRM Leads
- Marketing - CRM Leads and Opportunities Real Time
- Partners - CRM Partner Territory
- Sales - CRM Account Relationship
- Sales - CRM All Contact Contact Point
- Sales - CRM All Contacts Addresses
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan Objective Split
- Sales - CRM Campaign Members
- Sales - CRM Campaign Opportunity
- Sales - CRM Contact Note
- Sales - CRM Contact Relationship
- Sales - CRM Contact Resource
- Sales - CRM Contacts
- Sales - CRM Customer Classification
- Sales - CRM Customer Note
- Sales - CRM Customer Overview
- Sales - CRM Customers
- Sales - CRM Customers and Contacts Real Time
- Sales - CRM Deal Registration
- Sales - CRM Deal Registration Product
- Sales - CRM Forecasting
- Sales - CRM Forecasting and Pipeline Revenue Real Time
- Sales - CRM Historical Forecasting
- Sales - CRM Historical Pipeline
Subject Areas for Transactional Business Intelligence in CX

Sales and B2B Service

Chapter 5

Job 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 Note
- Sales - CRM Opportunity Partner
- Sales - CRM Opportunity Resource
- Sales - CRM Opportunity Sales Stage Snapshot
- Sales - CRM Opportunity Territory
- Sales - CRM Partner Relationship
- Sales - CRM Pipeline
- Sales - CRM Primary Contact Addresses
- Sales - CRM Primary Contact Contact Point
- Sales - CRM Quota Management
- Sales - CRM Quote Lines
- Sales - CRM Quotes
- Sales - CRM Resource
- Sales - CRM Resource Territory
- Sales - CRM Sales Account Assessments
- Sales - CRM Sales Account Resource
- Sales - CRM Sales Account Territory
- Sales - CRM Territory Resource
- Service - CRM Customer Coverage Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Lifecycle
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 5
Job Roles

- Service - CRM Service Request Resource Real Time
- Service - CRM Service Request Tags Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Survey Requests Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- How many Leads are associated for a given Opportunity?
- How many Opportunities were created from a given Lead?
- What are my best performing product lines by customer geographies?
- How is my Revenue distributed across Customer geographies?
- What regions are my customers clustered in?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
- On which sales accounts is a given sales representative a member of the account team?
- Who are all the Contacts assigned to the Assets?
- What are the responses for different Opportunity for an Assessment submitted?
- What are the Quotas assigned to the team and the Actuals?
- How are the business plan objectives split?
- What are the objectives that have not met the target value set?
- What are the SIC codes associated with a Partner, and with all associated Partners?
- Against how many Opportunities, were the Quotes submitted in this month?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How often are communications being transferred between agents?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many new coverages begin in the ensuing month?
• Are we equipped to service the increase in coverages?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
• How is tag usage across agents and resource teams? Which teams perform better than others?
• What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• How is survey request trending compared to SR resolutions during the same period?
• What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
• What are the top 10 products associated to the Leads in the system?
• What are the Leads that are converted into Opportunities?
• How many Leads and Opportunities are Open for a given Customer in the Current quarter?
• Are the Leads associated with certain products?
• What is the open/closed revenue for each of the product groups in the selected geography?
• Are the sales reps moving their opportunities fast enough?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the sales accounts owned by the Sales team?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• Who are the Resources assigned to the Leads created in any given time period?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• How did the Opportunity evolve over time?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• How many territories are assigned to a Resource/Employee?
• What are all the Territories assigned to Resources/Employees?
• What are the total number of Contact Relationships between two Contact?
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 5
Job Roles

- Does this Contact have subsidiaries?
- What percentage of service requests involve at least one interaction?
- Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
- What is the average length of time of an interaction, by agent and channel?
- How many were compliant and non-compliant when I, as an agent review my own completed work orders?
- To what extent has the number of customer coverages increased between two given dates?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- What is the delay in estimated completion dates?
- Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
- By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
- What are the SRs that are waiting on my customers?
- Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
- Are we seeing an issue regarding compliance rates with certain tags?
- What is the opportunity information captured in the note to an opportunity?
- As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
- What are all addresses associated with the primary contact for all active opportunities in the current quarter?
- Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
- Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
- Are survey request frequencies meeting our norms?
- What are the follow-up tasks I need to do on a particular customer?
- Who are the top Sales representatives by their Lead conversion ratio?
- Does this account have subsidiaries?
- How is the Revenue spread for a given Customer hierarchy?
- How actively (# of Activities) are the Sales reps engaged with customers?
- What are my most active accounts? Who owns them and where are these located?
- What are the contact - points (phone, email, address, etc.) of key contacts?
- Who are all the contacts for key customers and what are their roles?
- Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
- Do Forecast rely on Revenue from few Products?
- Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
- What is the revenue lost to competition for a specific product/product group?
- How is each member on the team performing on deal size, account coverage, and win rate?
- What are the Accounts under the sales team, by territory?
• What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?

• How many Assets are created in a particular time period?

• Who are all the resources assigned to the Assets?

• What is the additional information updated in the Notes for a Contact?

• What is the additional information updated in the Notes for a Customer?

• Who are the Employees/Resource for the Deals that are submitted in the current month?

• What is the average time the Opportunity is in a particular sales stage?

• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?

• What are the Resources are associated to this contact?

• How many Leads do not have Contact?

• What are the activity objectives for the current period?

• What managers have teams averaging the most activities?

• Are agents prematurely updating SRs as Resolved to make their numbers look better?

• What product lines have a higher percentage of non-compliant SRs open?

• How frequently do agents link articles to SRs?

• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?

• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?

• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?

• What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?

• How long did it take to assign the SR to the correct queue?

• Was the assigned agent overloaded with other work?

• Was the SR queue modified or SR resource owner modified at any point?

• What are the Customers from this account, including all subsidiaries?

• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?

• What is the relative mix of forecast revenues by the various sales channels in a specific territory?

• What is the channel performance vs channel forecast?

• Are too many deals being pushed out to the subsequent fiscal quarters?

• What are my claimed vs unclaimed MDF totals?

• What are total number of Claims in the current quarter?

• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?

• How do wins and losses trend quarterly for a specific product line?

• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the sales accounts that a given Sales representative owns?
• What is the QoQ growth for Assets by Products?
• How many Territories are assigned to an Opportunity?
• What are all the Territories assigned to Opportunities?
• How many new Resources are created in the current quarter?
• What are the target v/s actual number of the split objectives?
• What are the total number of Relationships between two Partners?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
• How many responses received for a given campaign?
• How many Opportunities associated to a Campaign?
• What is the total Quotes revenue for the current month?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What is the contact point information of the primary contact for all active opportunities in the current quarter?
• What are all addresses associated with the primary contact for accounts I’m the owner of or on the sales team?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the associated activities related to my upcoming appointment and task?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What are the total number of Relationships for a given Account?
• What are the top ten accounts by revenue in the last quarter?
• Who are my teams top Customers?
• Who are the ‘new’ customers, created in the past 6 months?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• How are product revenues trending month over month?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are the historical monthly trend of closed revenue by current territories?
• How many Leads are open for a given Product?
• What was the currency conversion rate applied to a specific claim?
• What products are often lost to key competitors? Is there a pattern?
• Who are the top competitors and what is the revenue exposure to them?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• How many territories is the Lead part of?
• What are all the Campaigns assigned to an Opportunity?
• Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• Does this Partner have subsidiaries?
• What are the partner I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I am the owner or on the sales team?
• What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter?
• What are all addresses of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• How many Territories is a Partner part of?
• Who manages my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
• What is the Territory Quota vs/ Actual?
• Which Territories have exceeded their Quotes in the current Quarter?
• Who are the Partner resources in the system and which Partner Organization they belong to?
• What is the Campaign ROI (return on investment)?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
• What are the sources of the Leads created in the current quarter?
• What Partners are assigned to specific geographic territories?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• How to forecasts trend across periods?
• Who are the Contacts associated to the Lead?
• 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?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Is the sales team converting leads to opportunities fast enough?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Who are the resources assigned for a particular territory?
• How many new contacts are created in the system in the current month?
• What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Organization?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many open SRs are linked to each tag?
• What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
• What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Does the forecast versus pipeline trend show a healthy picture?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• What are the higher value deals that have been moved out?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• Are the Leads supporting products that appeal to certain customers by size of company?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• What are all the contacts created in the system by Geography?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• What are all the Opportunities resulted from a Campaign?
• How many Resources are assigned to an Opportunity?
• How many Leads are part of the Campaign?
• Who has completed the most activity objectives?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• What is the breakdown of open action plans by category?
• How many action plans are open and how long have they been open?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• What is the contact point information of the primary contact for accounts where I’m the owner or on the sales team?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
Subscription Specialist

Code Name

ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB

Duty Roles

This job role is related to the following duty roles:

- Subscription Management Transaction Analysis Duty

Subject Areas

This job role secures access to the following subject areas:

- Subscription Management - Covered Levels Real Time
- Subscription Management - Subscription Billing Real Time
- Subscription Management - Subscription Relationships Real Time
- Subscription Management - Subscriptions Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- How many subscriptions were renewed the last quarter?
- Which customers have covered levels worth more than $50k that are expiring in 30 days?
- What's the number of subscriptions by status and date range?
- What is the discount that was provided for a particular customer or product?
- What is the Net MRR change due to amendments?
- What is the trend of successful, outstanding and churned renewals in the last 6 months?
- What is the MRR lost each month due to suspensions in the last 6 months?
- What's the total contract value (TCV) in the last one year?
• What’s the total MRR?
• What is the Net MRR change due to amendments where full credit was issued?
• Which covered levels expired without renewal in the last month?
• What are all the assets covered for a particular customer?
• What is the projected billing for the next 6 months?
• How much MRR was renewed each month in the last 6 months?
• How does the usage of a particular subscription product trend?
• Which products are most frequently upgraded to or downgraded from?
• How many subscriptions are expiring in the next quarter?
• How many subscriptions were terminated in the last year?
• Which customers or coverage products deliver the most revenue?
• What is the Net Billing for the last 6 months?

Supplier Contract Administrator

Code Name
ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB

Duty Roles
This job role is related to the following duty roles:

• Enterprise Contracts Transaction Analysis Duty Role

Subject Areas
This job role secures access to the following subject areas:

• Enterprise Contracts - Contracts Real Time

Business Questions
This job role secures access to data that can answer the following business questions:

• Which contracts are related to my given contract?
• What contracts have a specific policy deviation?
• How many days on average did a resource work on a contract assigned to them in the last quarter?
Supplier Contract Manager

Code Name

ORA_OKC_SUPPLIER_CONTRACT_MANAGER_JOB

Duty Roles

This job role is related to the following duty roles:

- Enterprise Contracts Transaction Analysis Duty Role

Subject Areas

This job role secures access to the following subject areas:

- Enterprise Contracts - Contracts Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

- Which contracts are related to my given contract?
- What contracts have a specific policy deviation?
- How many days on average did a resource work on a contract assigned to them in the last quarter?
- Show me all the contracts that have a nonstandard clause.
- Show me all the contracts that have a particular deliverable due.
- How is my contract team loaded?
- How many contracts might get affected if I modify the Payment clause?
- Show me the user status progression for contracts within a given date range.
• What's the primary reason for contract closure in the last year?
• How many days on average did a resource organization work on a contract assigned to them in the last quarter?

Supplier Contract Team Member

Code Name

ORA_OKC_SUPPLIER_CONTRACT_TEAM_MEMBER_ABSTRACT

Duty Roles

This job role is related to the following duty roles:

• Enterprise Contracts Transaction Analysis Duty Role

Subject Areas

This job role secures access to the following subject areas:

• Enterprise Contracts - Contracts Real Time

Business Questions

This job role secures access to data that can answer the following business questions:

• Which contracts are related to my given contract?
• What contracts have a specific policy deviation?
• How many days on average did a resource work on a contract assigned to them in the last quarter?
• Show me all the contracts that have a nonstandard clause.
• Show me all the contracts that have a particular deliverable due.
• How is my contract team loaded?
• How many contracts might get affected if I modify the Payment clause?
• Show me the user status progression for contracts within a given date range.
• What's the primary reason for contract closure in the last year?
• How many days on average did a resource organization work on a contract assigned to them in the last quarter?
6 Duty Roles

Overview

For each duty role in this chapter, links are provided for more detailed information about the job roles, subject areas, and business questions associated with the duty role.

CRM Administrative Transaction Analysis Duty

Code Name

FBI_CRM_ADMINISTRATIVE_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- Sales Administrator

Subject Areas

This duty role secures access to the following subject areas:

- Sales - CRM All Contacts Addresses

Business Questions

This duty role secures access to data that can answer the following business questions:

- What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
- What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?
- What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
CRM OTBI Report Performance Transactional Analysis Duty

Code Name
FBI_USER_SYSTEM_PERFORMANCE_TRANSACTION_ANALYSIS_DUTY

Job Roles
No applicable job roles

Subject Areas
This duty role secures access to the following subject areas:

- CRM - CRM Reporting Performance

Business Questions
This duty role secures access to data that can answer the following business questions:

- Which reports are running well?
- Which reports are running poorly?
- Which reports need maintenance?

Enterprise Contracts Transaction Analysis Duty Role

Code Name
FBI_ENTERPRISE_CONTRACTS_TRANSACTION_ANALYSIS_DUTY

Job Roles
This duty role is related to the following job roles:

- Customer Contract Administrator
- Customer Contract Manager
Subject Areas

This duty role secures access to the following subject areas:

- Enterprise Contracts - Contracts Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- Which contracts are related to my given contract?
- What contracts have a specific policy deviation?
- How many days on average did a resource work on a contract assigned to them in the last quarter?
- Show me all the contracts that have a nonstandard clause.
- Show me all the contracts that have a particular deliverable due.
- How is my contract team loaded?
- How many contracts might get affected if I modify the Payment clause?
- Show me the user status progression for contracts within a given date range.
- What's the primary reason for contract closure in the last year?
- How many days on average did a resource organization work on a contract assigned to them in the last quarter?

HR Help Desk Administrator Transaction Analysis Duty

Code Name

FBI HR HELP DESK ADMIN TRANSACTION ANALYSIS DUTY

Job Roles
This duty role is related to the following job roles:

- Human Resource Help Desk Administrator

Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activity Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- Help Desk - HR Service Requests Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Lifecycle
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Request Tags Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Survey Requests Real Time
- Service - CRM Survey Responses Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How often are communications being transferred between agents?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- What is the current count of inbound email requests by status and mailbox?
- How many messages resulted in new service request creation versus update to existing service request?
Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?

What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?

How are SR transfers contributing to overall latency/resolution delays?

What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?

How does the aging profile of SRs look like? Are there any outliers calling for intervention?

What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?

How is tag usage across agents and resource teams? Which teams perform better than others?

How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?

How is survey request trending compared to SR resolutions during the same period?

What percentage of service requests involve at least one interaction?

Are there preferred channels that customers use to contact us for specific service issue categories and product areas?

What is the average length of time of an interaction, by agent and channel?

How many emails came from known versus unknown contacts?

Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?

Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?

By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?

What are the SRs that are waiting on my customers?

Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?

Are we seeing an issue regarding compliance rates with certain tags?

How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?

What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?

As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?

Was there a lot of time spent waiting on customers to respond to more information, documents and so on?

Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?

Are survey request frequencies meeting our norms?

What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?

Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?

What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?

Are agents prematurely updating SRs as Resolved to make their numbers look better?

What product lines have a higher percentage of non-compliant SRs open?

How frequently do agents link articles to SRs?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?
• How many HR SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• How many emails are we receiving over time?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the response scores for customer where we have not met SLA's?
• Do one or more of the agents in my team need training to improve customer communication skills?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• What are the open critical HR SRs that my team is working on currently? How many of these are escalated?
• Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product ‘A’ have tag ‘X’ or ‘Y’? How many have the ‘Potential Churn’ tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• Is our resolution performance for escalated issues worse or better than non escalated issues?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many open SRs are linked to each tag?
• What are the HR SRs that are waiting on my customers?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• What is the overall satisfaction levels of our customers with regards to issue resolutions?
• Which of our product lines most frequently receive suggestions for product improvements?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• Who are my agents that have the most pending HR SRs?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?

HR Help Desk Agent Transaction Analysis Duty

Code Name

FBI_HR_HELP_DESK_AGENT_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

• Human Resource Help Desk Agent

Subject Areas

This duty role secures access to the following subject areas:

• CRM - CRM Activity Real Time
• CRM - CRM Interaction Aggregate
• CRM - CRM Interaction Service Requests Real Time
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• Help Desk - HR Service Requests Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Lifecycle
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Request Resource Real Time
• Service - CRM Service Request Tags Real Time
• Service - CRM Service Requests Real Time
• Service - CRM Survey Responses Real Time
Business Questions

This duty role secures access to data that can answer the following business questions:

- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How often are communications being transferred between agents?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
- What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
- How are SR transfers contributing to overall latency/resolution delays?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How does the aging profile of SRs look like? Are there any outliers calling for intervention?
- What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
- How is tag usage across agents and resource teams? Which teams perform better than others?
- How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
- What percentage of service requests involve at least one interaction?
- Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
- What is the average length of time of an interaction, by agent and channel?
- Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
- Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
- By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
- What are the SRs that are waiting on my customers?
- Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
- Are we seeing an issue regarding compliance rates with certain tags?
- How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?
- What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?
- As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
- Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?

• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?

• Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?

• What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?

• Are agents prematurely updating SRs as Resolved to make their numbers look better?

• What product lines have a higher percentage of non-compliant SRs open?

• How frequently do agents link articles to SRs?

• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?

• What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?

• How many HR SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?

• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?

• How long did it take to assign the SR to the correct queue?

• Was the assigned agent overloaded with other work?

• Was the SR queue modified or SR resource owner modified at any point?

• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?

• How many interactions are being lost/abandoned? How does this compare with previous periods?

• How long is it taking for offers to be made to agents?

• How many interactions, on average, does it require to resolve an issue?

• Are we keeping the number of non-compliant SRs in check for our most valuable customers?

• Are my team resources optimally deployed across service queues to maximize productivity?

• Are we responding to customer messages in a timely manner?

• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?

• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?

• How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?

• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?

• What are the response scores for customer where we have not met SLA's?

• Do one or more of the agents in my team need training to improve customer communication skills?

• Is my team following the norm that an SR must be opened (or updated) for every customer communication?

• What are our issue resolution rates for low and high cost channels?

• What percent of communications are resolved the first time? What is the most commonly used channel?

• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
• What are the open critical HR SRs that my team is working on currently? How many of these are escalated?
• Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Is our resolution performance for escalated issues worse or better than non escalated issues?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many open SRs are linked to each tag?
• What are the HR SRs that are waiting on my customers?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• What is the overall satisfaction levels of our customers with regards to issue resolutions?
• Which of our product lines most frequently receive suggestions for product improvements?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• Who are my agents that have the most pending HR SRs?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?

HR Help Desk Manager Transaction Analysis Duty

Code Name

FBI_HR_HELP_DESK_MANAGER_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

• Human Resource Help Desk Manager

Subject Areas

This duty role secures access to the following subject areas:

• CRM - CRM Activity Real Time
• CRM - CRM Interaction Aggregate
• CRM - CRM Interaction Service Requests Real Time
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• Help Desk - HR Service Requests Real Time
• Service - CRM Inbound Messages Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Lifecycle
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Request Resource Real Time
• Service - CRM Service Request Tags Real Time
Business Questions

This duty role secures access to data that can answer the following business questions:

• How often do communications cross channels to get to resolution?
• How many customer interactions happen without an SR?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How often are communications being transferred between agents?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• What is the current count of inbound email requests by status and mailbox?
• How many messages resulted in new service request creation versus update to existing service request?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• What characteristics do groupings of SR’s based on specific tags (e.g., tag = ‘outage’) exhibit?
• How is tag usage across agents and resource teams? Which teams perform better than others?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• How is survey request trending compared to SR resolutions during the same period?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many emails came from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Do SR’s with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?

• How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?

• What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?

• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?

• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?

• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?

• Are survey request frequencies meeting our norms?

• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?

•Have we kept our strategic customers happy? If not, where can we improve - in timliness, better first time resolution, etc.?

• What is the most frequent positive feedback we get from our custoemrs? Most frequent negative feedback?

• Are agents prematurely updating SRs as Resolved to make their numbers look better?

• What product lines have a higher percentage of non-compliant SRs open?

• How frequently do agents link articles to SRs?

• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?

• What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?

• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?

• How long did it take to assign the SR to the correct queue?

• Was the assigned agent overloaded with other work?

• Was the SR queue modified or SR resource owner modified at any point?

• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?

• How many interactions are being lost/abandoned? How does this compare with previous periods?

• How long is it taking for offers to be made to agents?

• How many interactions, on average, does it require to resolve an issue?

• Are we keeping the number of non-compliant SRs in check for our most valuable customers?

• How many emails are we receiving over time?

• Are my team resources optimally deployed across service queues to maximize productivity?

• Are we responding to customer messages in a timely manner?

• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?

• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?

• How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
- Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
- Do we need to adjust our survey template to improve response rates?
- Does seasonality impact response rates?
- How does response differ for various service teams? Do some teams obtain better response rates?
- What are the response scores for customer where we have not met SLA’s?
- Do one or more of the agents in my team need training to improve customer communication skills?
- Is my team following the norm that an SR must be opened (or updated) for every customer communication?
- What are our issue resolution rates for low and high cost channels?
- What percent of communications are resolved the first time? What is the most commonly used channel?
- Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
- Are our processes inefficient or preventing agents from meeting milestones?
- Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
- How does my team perform in meeting first response milestones versus resolution milestones?
- How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
- What are the open critical HR SRs that my team is working on currently? How many of these are escalated?
- Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
- What are the rates for agents declining work offers?
- What are the average handle times?
- What are the number of interactions by channel, agent, and time period?
- Are there currently service requests that have missed the target milestone and require escalation?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Who are my agents that have the most pending SRs?
- What is the prevalence of SR transfers for an agent/manager/group/product/location?
- What are the popular reasons for SRs to be transferred? Is there a pattern?
- How many SRs for product ‘A’ have tag ‘X’ or ‘Y’? How many have the ‘Potential Churn’ tag?
- Are there any workload balancing issues on my team? Are a few members performing most of the activities?
- Did the SR get assigned to the wrong queue/team?
- Are survey requests being sent per plan across teams, service categories, products, account regions?
- Is our resolution performance for escalated issues worse or better than non escalated issues?
- Across what channels do such non-SR interactions most often occur?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many open SRs are linked to each tag?
• What are the HR SRs that are waiting on my customers?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• What is the overall satisfaction levels of our customers with regards to issue resolutions?
• Which of our product lines most frequently receive suggestions for product improvements?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• Who are my agents that have the most pending HR SRs?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?

Incentive Compensation Transaction Analysis Duty

Code Name

FBI_INCENTIVE_COMPENSATION_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

• Channel Account Manager
• Channel Operations Manager
• Channel Sales Manager
• Incentive Compensation Analyst
• Incentive Compensation Manager
Subject Areas

This duty role secures access to the following subject areas:

- Incentive Compensation - Attainments Real Time
- Incentive Compensation - Compensation Plan Assignments Real Time
- Incentive Compensation - Credits Real Time
- Incentive Compensation - Disputes Real Time
- Incentive Compensation - Earning and Attainment Summary Real Time
- Incentive Compensation - Earnings Real Time
- Incentive Compensation - Participant Balances Real Time
- Incentive Compensation - Participant Compensation Plan Real Time
- Incentive Compensation - Participant Detail Real Time
- Incentive Compensation - Participant Interval Goals Real Time
- Incentive Compensation - Participant Period Goals Real Time
- Incentive Compensation - Pay Group Assignments Real Time
- Incentive Compensation - Payments Real Time
- Incentive Compensation - Paysheet Summary Real Time
- Incentive Compensation - Performance and Earnings Summary Real Time
- Incentive Compensation - Rules Real Time
- Incentive Compensation - Transactions Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- How much credit did a participant receive for their sales transactions?
- What type of assignment does a participant have to a plan?
- Which of my direct reports’ attainment or earnings are below the wanted performance expectation?
- Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.
- What is the total quota across the organization by performance measure for the period or across periods?
- Which participants are assigned to a given pay group?
- How do participants’ plan component earnings compare with their personalized target incentives?
• What are the credit rules which a credit receiver is assigned to?
• Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.
• What are my compensation plan incentive targets?
• Are my individualized performance measure goals set properly?
• Who is assigned to a given plan?
• What is the total quota by performance measure for the interval across the organization?
• When was a given participant assigned to a specific pay group?
• What is the current status of the payment batches? Are they paid, reviewed, or frozen?
• What are the various attainment attributes associated with my credits?
• How do these targets break down by plan component?
• As a participant manager, what are the targets and goals settings for my direct reports?
• Is the participant active? And for which dates?
• Do I have to realign quota based on current attainment levels? Answering this question requires a cross-subject-area join.
• How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?
• Do I have to realign quota based on current attainment levels?
• Which participants are assigned to which plans?
• Were there credit or rollup errors that must be fixed?
• What are the targets and goals settings for an individual?
• What are the rules effective as of the given date in the hierarchy?
• What are the results of the collected transactions before the crediting process?
• What are the assignment start and end dates for a participant?
• Does the participant have an individualized target incentive for the plan?
• Are participants correctly credited?
• Are we on track in achieving quota this period or quarter?
• To what country and business unit does the participant belong?
• What is the total quota by performance measure for the period across the organization? Validate quota levels.
• Is the company on track to attain its goals? Who is lagging and might require coaching?
• How much credit did my team receive for their attainment?
• Who got paid what amount and from where, at the detail level?
• Why wasn't I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts use the balances while resolving a dispute.
• How do they compare to the base goals set on the measure?
• As a participant manager, which pay groups do my direct reports belong to?
• What is my cost of compensation by participant, plan component, plan, and frequencies?
• How does the performance measure attainment compare with a participant's personalized goal across his directs?
• What are the rules which contain the given criteria, for example Sales Channel = Distributor What are the classification rules which a credit category is assigned to?

• Has the participant accepted the assignment to the plan?

• Is the dispute load balanced between my analysts? Asked by compensation managers.

• What is the total quota across the organization by performance measure for the interval?

• Is the company on track to attain its goals? Who is lagging and might require coaching? Answering the secondary question requires a cross-subject-area join.

• How are these targets individualized across the participants.

• What is the participant's home currency or cost center?

• What is the total quota by performance measure for the period across the organization?

• What pay groups are in the application? What are their types and descriptions?

• What is the status of each paysheet within the payment batches?

• What are the criteria for a rule including the inherited criteria from the ancestors?

Internal Help Desk Administrator Transaction Analysis Duty

Code Name

FBI_INTERNAL_HELP_DESK_ADMINISTRATOR_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

• Internal Help Desk Administrator

Subject Areas

This duty role secures access to the following subject areas:

• CRM - CRM Omni Channel Events Real Time

• Help Desk - Internal Service Requests Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How are SR transfers contributing to overall latency/resolution delays?
• How many Internal SRs are unassigned for more than a day? Who are the impacted customers? How many of these are critical?
• What are the open critical Internal SRs that my team is working on currently? How many of these are escalated?
• How many Internal SRs have been waiting on my agents action for more than 24 hours? Which of these are critical or escalated?
• How long is it taking for offers to be made to agents?
• What are the Internal SRs waiting on my customers?
• What is the status of our aging SRs? Are there any outliers that require intervention?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• What is the reopen rate for Internal SRs owned by my team? Who has the highest reopen rate? Is there a training issue?
• How are we doing on Internal SR resolution times between current and past months? What are the reasons for any degradations?
• Who are my agents that have the most pending Internal SRs?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?

Internal Help Desk Agent Transaction Analysis Duty

Code Name

FBI_INTERNAL_HELP_DESK_AGENT_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

• Internal Help Desk Agent

Subject Areas

This duty role secures access to the following subject areas:

• CRM - CRM Omni Channel Events Real Time
• Help Desk - Internal Service Requests Real Time
Business Questions

This duty role secures access to data that can answer the following business questions:

• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How are SR transfers contributing to overall latency/resolution delays?
• How many Internal SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are critical?
• What are the open critical Internal SRs that my team is working on currently? How many of these are escalated?
• How many Internal SRs have been waiting on my agents action for more than 24 hours? Which of these are critical or escalated?
• How long is it taking for offers to be made to agents?
• What are the Internal SRs waiting on my customers?
• What is the status of our aging SRs? Are there any outliers that require intervention?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• What is the reopen rate for Internal SRs owned by my team? Who has the highest reopen rate? Is there a training issue?
• How are we doing on Internal SR resolution times between current and past months? What are the reasons for any degradations?
• Who are my agents that have the most pending Internal SRs?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?

Internal Help Desk Manager Transaction Analysis Duty

Code Name

FBI_INTERNALHELPDESKMANAGER_TRANSACTIONANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

• Internal Help Desk Manager

Subject Areas
This duty role secures access to the following subject areas:

- CRM - CRM Omni Channel Events Real Time
- Help Desk - Internal Service Requests Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How are SR transfers contributing to overall latency/resolution delays?
- How many Internal SRs are unassigned for more than a day? Who are the impacted customers? How many of these are critical?
- What are the open critical Internal SRs that my team is working on currently? How many of these are escalated?
- How many Internal SRs have been waiting on my agents action for more than 24 hours? Which of these are critical or escalated?
- How long is it taking for offers to be made to agents?
- What are the Internal SRs waiting on my customers?
- What is the status of our aging SRs? Are there any outliers that require intervention?
- What are the rates for agents declining work offers?
- What are the average handle times?
- What is the prevalence of SR transfers for an agent/manager/group/product/location?
- What are the popular reasons for SRs to be transferred? Is there a pattern?
- What is the reopen rate for Internal SRs owned by my team? Who has the highest reopen rate? Is there a training issue?
- How are we doing on Internal SR resolution times between current and past months? What are the reasons for any degradations?
- Who are my agents that have the most pending Internal SRs?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?

Internal Help Desk User Transaction Analysis Duty

Code Name

FBI_INTERNAL_HELP_DESK_USER_TRANSACTION_ANALYSIS_DUTY

Job Roles
This duty role is related to the following job roles:

- Internal Help Desk User

Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Omni Channel Events Real Time
- Help Desk - Internal Service Requests Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How are SR transfers contributing to overall latency/resolution delays?
- How many Internal SRs are unassigned for more than a day? Who are the impacted customers? How many of these are critical?
- What are the open critical Internal SRs that my team is working on currently? How many of these are escalated?
- How many Internal SRs have been waiting on my agents action for more than 24 hours? Which of these are critical or escalated?
- How long is it taking for offers to be made to agents?
- What are the Internal SRs waiting on my customers?
- What is the status of our aging SRs? Are there any outliers that require intervention?
- What are the rates for agents declining work offers?
- What are the average handle times?
- What is the prevalence of SR transfers for an agent/manager/group/product/location?
- What are the popular reasons for SRs to be transferred? Is there a pattern?
- What is the reopen rate for Internal SRs owned by my team? Who has the highest reopen rate? Is there a training issue?
- How are we doing on Internal SR resolution times between current and past months? What are the reasons for any degradations?
- Who are my agents that have the most pending Internal SRs?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?

Knowledge Management Transaction Analysis Duty

Code Name
Job Roles

This duty role is related to the following job roles:

- Knowledge Analyst
- Knowledge Manager

Subject Areas

This duty role secures access to the following subject areas:

- Knowledge Management - Article Category Real Time
- Knowledge Management - Article Links Real Time
- Knowledge Management - Article Product Real Time
- Knowledge Management - Article Rating Real Time
- Knowledge Management - Article Real Time
- Knowledge Management - Article Search Historical
- Knowledge Management - Article Search Question Tokens Historical
- Knowledge Management - Article Search Questions Historical
- Knowledge Management - Article Summary Historical
- Knowledge Management - Article User Group Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- How many articles are available in the knowledgebase?
- What content in the knowledgebase is satisfying users' needs?
- How do knowledge managers view search article metrics?
- Which articles are linked to the maximum number of service requests?
- Which employees interacted with the articles?
- Which articles are linked to a category?
- How do knowledge managers view article search historical metrics?
- How do Knowledge managers view information on article historical metrics?
- Which products are associated with the most number of knowledge articles?
- What content rating effectively resolves users' questions?
- How are articles ranked in popularity?
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 converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- How many Leads are associated for a given Opportunity?
- How many Opportunities were created from a given Lead?
- What are the top 10 products associated to the Leads in the system?
- What are the Leads that are converted into Opportunities?
- Who are the top Sales representatives by their Lead conversion ratio?
- 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?
- What are the sources of the Leads created in the current quarter?
- How many Leads were rejected in the last quarter and what were the reason for those?

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 converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- How many Leads are associated for a given Opportunity?
- How many Opportunities were created from a given Lead?
- What are the top 10 products associated to the Leads in the system?
- What are the Leads that are converted into Opportunities?
- Who are the top Sales representatives by their Lead conversion ratio?
- 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?
- What are the sources of the Leads created in the current quarter?
- How many Leads were rejected in the last quarter and what were the reason for those?

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 converted in the current quarter?
• How many Leads are unassigned in the system?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
• How many Leads are associated for a given Opportunity?
• How many Opportunities were created from a given Lead?
• What are the top 10 products associated to the Leads in the system?
• What are the Leads that are covert into Opportunities?
• Who are the top Sales representatives by their Lead conversion ratio?
• 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?
• What are the sources of the Leads created in the current quarter?
• How many Leads were rejected in the last quarter and what were the reason for those?

Marketing Lead Transaction Analysis Duty

Code Name

FBI_MARKETING_LEAD_TRANSACTION_ANALYSIS DUTY

Job Roles

This duty role is related to the following job roles:

• Sales Lead Qualifier
• Sales Manager
• Sales Representative
• Sales Restricted User
• Sales VP

Subject Areas

This duty role secures access to the following subject areas:

• CRM - CRM Activities with Related Activities
• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 6
Duty Roles

- Marketing - CRM Leads
- Marketing - CRM Leads and Opportunities Real Time
- Sales - CRM Lead Contact
- Sales - CRM Lead Resource
- Sales - CRM Lead Territory

Business Questions

This duty role secures access to data that can answer the following business questions:

- How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- How many Leads are associated for a given Opportunity?
- How many Opportunities were created from a given Lead?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
- What are the top 10 products associated to the Leads in the system?
- What are the Leads that are coverted into Opportunities?
- Who are the Resources assigned to the Leads created in any given time period?
- What are the Leads assigned to me/my team member?
- What are all the Territories the Lead is part of?
- As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
- What are the follow-up tasks I need to do on a particular customer?
- Who are the top Sales representatives by their Lead conversion ratio?
- What managers have teams averaging the most activities?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- How many contacts were not favored with a positive outcome with a given agent?
- What are the associated activities related to my upcoming appointment and task?
- Who is the Primary Contact and Resource assigned for a given Lead?
- How many territories is the Lead part of?
- What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- 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 is a Contact associated to?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• What are the sources of the Leads created in the current quarter?
• Who all are the Contacts associated to the Lead?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the activity levels in specific regions?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?

Marketing Managerial Transaction Analysis Duty

Code Name

FBI_MARKETING_MANAGERIAL_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

• Marketing Manager

Subject Areas

This duty role secures access to the following subject areas:

• Marketing - CRM Leads
• Marketing - CRM Leads and Opportunities Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

• How many Leads are converted in the current quarter?
• How many Leads are unassigned in the system?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
• How many Leads are associated for a given Opportunity?
• How many Opportunities were created from a given Lead?
• What are the top 10 products associated to the Leads in the system?
• What are the Leads that are converted into Opportunities?
• Who are the top Sales representatives by their Lead conversion ratio?
• 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?
• What are the sources of the Leads created in the current quarter?
• How many Leads were rejected in the last quarter and what were the reason for those?

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 converted in the current quarter?
• How many Leads are unassigned in the system?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
• How many Leads are associated for a given Opportunity?
• How many Opportunities were created from a given Lead?
• What are the top 10 products associated to the Leads in the system?
• What are the Leads that are converted into Opportunities?
• Who are the top Sales representatives by their Lead conversion ratio?
• 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?
• What are the sources of the Leads created in the current quarter?
• How many Leads were rejected in the last quarter and what were the reason for those?

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 converted in the current quarter?
• How many Leads are unassigned in the system?
• Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
• How many Leads are associated for a given Opportunity?
• How many Opportunities were created from a given Lead?
• What are the top 10 products associated to the Leads in the system?
• What are the Leads that are covered into Opportunities?
Chapter 6
Duty Roles

- Who are the top Sales representatives by their Lead conversion ratio?
- 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?
- What are the sources of the Leads created in the current quarter?
- How many Leads were rejected in the last quarter and what were the reason for those?

Next Gen HR Help Desk Administrator Transaction Analysis Duty

Code Name
FBI_HR_HELP_DESK_ADMIN_NG_TRANSACTION_ANALYSIS_DUTY

Job Roles
This duty role is related to the following job roles:

- Next Gen Human Resource Help Desk Administrator

Subject Areas
This duty role secures access to the following subject areas:

- CRM - CRM Omni Channel Events Real Time
- Help Desk - HR Service Requests Real Time

Business Questions
This duty role secures access to data that can answer the following business questions:

- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How are SR transfers contributing to overall latency/resolution delays?
- How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?
- What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?
- What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?
- How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
Next Gen HR Help Desk Agent Transaction Analysis Duty

Code Name

FBI_HR_HELP_DESK_AGENT_NG_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- Next Gen Human Resource Help Desk Agent

Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Omni Channel Events Real Time
- Help Desk - HR Service Requests Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How are SR transfers contributing to overall latency/resolution delays?
• How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?
• What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?
• What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?
• How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
• How long is it taking for offers to be made to agents?
• How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What are the open critical HR SRs that my team is working on currently? How many of these are escalated?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• What are the HR SRs that are waiting on my customers?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• Who are my agents that have the most pending HR SRs?

Next Gen HR Help Desk Manager Transaction Analysis Duty

Code Name
FBI_HR_HELP_DESK_MANAGER_NG_TRANSACTION_ANALYSIS_DUTY

Job Roles
This duty role is related to the following job roles:

• Next Gen Human Resource Help Desk Manager

Subject Areas
This duty role secures access to the following subject areas:

• CRM - CRM Omni Channel Events Real Time
• Help Desk - HR Service Requests Real Time
Business Questions

This duty role secures access to data that can answer the following business questions:

- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How are SR transfers contributing to overall latency/resolution delays?
- How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?
- What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?
- What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?
- How many HR SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
- How long is it taking for offers to be made to agents?
- How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
- What are the open critical HR SRs that my team is working on currently? How many of these are escalated?
- What are the rates for agents declining work offers?
- What are the average handle times?
- What is the prevalence of SR transfers for an agent/manager/group/product/location?
- What are the popular reasons for SRs to be transferred? Is there a pattern?
- What are the HR SRs that are waiting on my customers?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- Who are my agents that have the most pending HR SRs?

Next Gen HR Help Desk User Transaction Analysis Duty

Code Name

FBI_HR_HELP_DESK_USER_NG_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- Next Gen Human Resource Help Desk User
This duty role secures access to the following subject areas:

- CRM - CRM Omni Channel Events Real Time
- Help Desk - HR Service Requests Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How are SR transfers contributing to overall latency/resolution delays?
- How are we doing on HR SR resolution times between current and past months? What are the reasons for any degradations?
- What is the reopen rate for HR SRs owned by my team? Who has the most reopen rates? Is there a training issue?
- What does the aging profile of HR SRs look like? Are there any outliers calling for intervention?
- How many HR SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
- How long is it taking for offers to be made to agents?
- How many HR SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
- What are the open critical HR SRs that my team is working on currently? How many of these are escalated?
- What are the rates for agents declining work offers?
- What are the average handle times?
- What is the prevalence of SR transfers for an agent/manager/group/product/location?
- What are the popular reasons for SRs to be transferred? Is there a pattern?
- What are the HR SRs that are waiting on my customers?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- Who are my agents that have the most pending HR SRs?

OTBI Performance Transactional Analysis Duty

Code Name

FBI_Performance_Transactional_Analysis_Duty

Job Roles

This duty role is related to the following job roles:

- Application Implementation Consultant
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 6
Duty Roles

- IT Security Manager

Subject Areas

This duty role secures access to the following subject areas:

- OTBI Performance Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- What is the OTBI execution time histogram in the past month?
- What is the database SQL execution time and row count?
- What are the long-running analyses in the past month?
- Which analyses have high data row count?
- Which analyses reached OTBI max row limit?
- Which subject areas have slow performance?
- Which analyses have low usage because of poor performance?
- What are the least-used OTBI subject areas?
- Which subject areas have large data volume?
- How many analyses and dashboards failed in the past month?
- What are the most commonly used OTBI subject areas?
- Which analyses have the longest response time?
- What are the common execution errors in the past month?

OTBI Usage Transactional Analysis Duty

Code Name

FBI_Usage_Transactional_Analysis_Duty

Job Roles

This duty role is related to the following job roles:

- Application Implementation Consultant
- IT Security Manager
Subject Areas

This duty role secures access to the following subject areas:

- OTBI Usage Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- Who are the top OTBI users?
- How many predefined OTBI analyses have been run in the past month?
- Which analyses have low usage in the past month?
- What are the most frequently-run OTBI analyses?
- How many ad-hoc OTBI analyses have been run in the past month?
- How many OTBI SOAP web services have been run in the past month?
- How many users run OTBI analyses?
- How many custom OTBI analyses have been run in the past month?
- What is the execution history of dashboard X in the past month?
- What is the weekly OTBI analysis usage trend?

Partner Channel Administrative Transaction Analysis Duty

Code Name

FBI_PARTNER_CHANNEL_ADMINISTRATIVE_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- Channel Administrator
- Channel Operations Manager
- Channel Partner Portal Administrator

Subject Areas
This duty role secures access to the following subject areas:

- CRM - CRM Activities with Related Activities
- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Marketing - CRM Leads
- Partners - CRM Leads and Opportunities Real Time
- Partners - CRM Opportunities and Products Real Time
- Partners - CRM Partner Assessments
- Partners - CRM Partner Classification
- Partners - CRM Partner Contact
- Partners - CRM Partner Overview
- Partners - CRM Partner Program Benefits
- Partners - CRM Partner Resource
- Partners - CRM Partner Territory
- Partners - CRM Program Enrollments
- Partners - CRM Programs
- Sales - CRM Account Relationship
- Sales - CRM All Contact Contact Point
- Sales - CRM All Contacts Addresses
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan Objective Split
- Sales - CRM Campaign Members
- Sales - CRM Campaign Opportunity
- Sales - CRM Contact Note
- Sales - CRM Contact Relationship
- Sales - CRM Contact Resource
Duty Roles

- Sales - CRM Contacts
- Sales - CRM Customer Classification
- Sales - CRM Customer Note
- Sales - CRM Customer Overview
- Sales - CRM Customers
- Sales - CRM Customers and Contacts Real Time
- Sales - CRM Deal Registration
- Sales - CRM Deal Registration Product
- Sales - CRM Forecasting
- Sales - CRM Forecasting and Pipeline Revenue Real Time
- Sales - CRM Historical Forecasting
- Sales - CRM Historical Pipeline
- Sales - CRM Lead Assessments
- Sales - CRM Lead Contact
- Sales - CRM Lead Product
- Sales - CRM Lead Resource
- Sales - CRM Lead Territory
- Sales - CRM MDF Budget
- Sales - CRM MDF Claim
- Sales - CRM MDF Claim Settlement
- Sales - CRM MDF Request
- Sales - CRM Opportunities and Products Real Time
- Sales - CRM Opportunity Assessments
- Sales - CRM Opportunity Campaign
- Sales - CRM Opportunity Contact
- Sales - CRM Opportunity Note
- Sales - CRM Opportunity Partner
- Sales - CRM Opportunity Resource
- Sales - CRM Opportunity Sales Stage Snapshot
- Sales - CRM Opportunity Territory
- Sales - CRM Partner Relationship
- Sales - CRM Pipeline
- Sales - CRM Primary Contact Addresses
- Sales - CRM Primary Contact Contact Point
- Sales - CRM Quota Management
- Sales - CRM Quote Lines
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 6
Duty Roles

- Sales - CRM Quotes
- Sales - CRM Resource
- Sales - CRM Resource Territory
- Sales - CRM Sales Account Assessments
- Sales - CRM Sales Account Resource
- Sales - CRM Sales Account Territory
- Sales - CRM Territory Resource
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Lifecycle
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Request Tags Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time
- Service - CRM Survey Requests Real Time
- Service - CRM Survey Responses Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- What is the revenue generated by Partners per Customer?
- What are my best performing product lines by customer geographies?
- How is my Revenue distributed across Customer geographies?
- What regions are my customers clustered in?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
- On which sales accounts is a given sales representative a member of the account team?
- Who are all the Contacts assigned to the Assets?
- What are the responses for different Opportunity for an Assessment submitted?
What are the Quotas assigned to the team and the Actuals?

How are the business plan objectives split?

What are the objectives that have not met the target value set?

How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?

What are the SIC codes associated with a Partner, and with all associated Partners?

Against how many Opportunities, were the Quotes submitted in this month?

How do the number of activities in a region and their average SR resolution rates by quarter compare?

How often do communications cross channels to get to resolution?

How many customer interactions happen without an SR?

How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?

As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?

How often are communications being transferred between agents?

What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?

How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?

How many new coverages begin in the ensuing month?

Are we equipped to service the increase in coverages?

What is the current count of inbound email requests by status and mailbox?

How many messages resulted in new service request creation versus update to existing service request?

Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?

What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?

How are SR transfers contributing to overall latency/resolution delays?

What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?

How does the aging profile of SRs look like? Are there any outliers calling for intervention?

What characteristics do groupings of SR's based on specific tags (e.g., tag = ‘outage’) exhibit?

How is tag usage across agents and resource teams? Which teams perform better than others?

What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?

How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?

How is survey request trending compared to SR resolutions during the same period?

What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?

What are the top 10 products associated to the Leads in the system?

What is the number of leads by partners for a specific product group?
• How many Partners is a Contact is associated to?
• How many Leads and Opportunities are Open for a given Customer in the Current quarter?
• Are the Leads associated with certain products?
• What is the open/closed revenue for each of the product groups in the selected geography?
• Are the sales reps moving their opportunities fast enough?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the sales accounts owned by the Sales team?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• Who are the Resources assigned to the Leads created in any given time period?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• How did the Opportunity evolve over time?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• How many territories are assigned to a Resource/Employee?
• What are all the Territories assigned to Resources/Employees?
• What are the total number of Contact Relationships between two Contact?
• Does this Contact have subsidiaries?
• What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• How many emails came from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Do SR’s with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• What is the opportunity information captured in the note to an opportunity?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• What are all addresses associated with the primary contact for all active opportunities in the current quarter?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
• Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?
• What is the most frequent positive feedback we get from our custoemrs? Most frequent negative feedback?
• What are the follow-up tasks I need to do on a particular customer?
• Who are the top Sales representatives by their Lead conversion ratio?
• What are the open Opportunities associated to a given Partner?
• What is the average deal size by Product groups?
• How are the Partners classified?
• What is total number of Partners assigned to a specific classification for this period?
• Does this account have subsidiaries?
• How is the Revenue spread for a given Customer hierarchy?
• How actively (# of Activities) are the Sales reps engaged with customers?
• What are my most active accounts? Who owns them and where are these located?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• Who are all the contacts for key customers and what are their roles?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
• Do Forecast rely on Revenue from few Products?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What is the revenue lost to competition for a specific product/product group?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are the Accounts under the sales team, by territory?
• What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
• How many Assets are created in a particular time period?
• Who are all the resources assigned to the Assets?
• What is the additional information updated in the Notes for a Contact?
• What is the additional information updated in the Notes for a Customer?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
• What is the average time the Opportunity is in a particular sales stage?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the Resources are associated to this contact?
• How many Leads do not have Contact?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• What is the quarterly revenue trend for a specific product/product group by partner?
• What are the Customers from this account, including all subsidiaries?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• What is the channel performance vs channel forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
• How do wins and losses trend quarterly for a specific product line?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the sales accounts that a given Sales representative owns?
• What is the QoQ growth for Assets by Products?
• How many Territories are assigned to an Opportunity?
• What are all the Territories assigned to Opportunities?
• How many new Resources are created in the current quarter?
• What are the target v/s actual number of the split objectives?
• What are the Programs that Partners have enrolled into?
• What are the total number of Relationships between two Partners?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
• How many responses received for a given campaign?
• How many Opportunities associated to a Campaign?
• What is the total Quotes revenue for the current month?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• How many emails are we receiving over time?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What is the contact point information of the primary contact for all active opportunities in the current quarter?
• What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the response scores for customer where we have not met SLA's?
• Do one or more of the agents in my team need training to improve customer communication skills?
• What are the associated activities related to my upcoming appointment and task?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What is the potential revenue of leads by partners?
• What is the distribution of Partner Opportunities by sales stages?
• What is the number of partners in a specific classification within a defined geographic region?
• 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?
• How many Partners’ team is a given Resource part of?
• What are the total number of Relationships for a given Account?
• What are the top ten accounts by revenue in the last quarter?
• Who are my teams top Customers?
• Who are the ‘new’ customers, created in the past 6 months?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• How are product revenues trending month over month?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are the historical monthly trend of closed revenue by current territories?
• How many Leads are open for a given Product?
• What was the currency conversion rate applied to a specific claim?
• What products are often lost to key competitors? Is there a pattern?
• Who are the top competitors and what is the revenue exposure to them?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• How many territories is the Lead part of?
• What are all the Campaigns assigned to an Opportunity?
• Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• How many Enrollments are going to expire in the next quarter?
• How many Programs were created in the last quarter?
• Does this Partner have subsidiaries?
• What are the partner I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?
• What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter?
• What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
• What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?
• What is the number of Partner Contacts that are also resources and users?
• How many Territories is a Partner part of?
• Who manages my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
Chapter 6
Duty Roles

- What is the Territory Quota vs Actual?
- Which Territories have exceeded their Quotes in the current Quarter?
- Who are the Partner resources in the system and which Partner Organization they belong to?
- What are the Partners created in the system for a given time period?
- How many Enrollments were created/submitted/expired/terminated in the last month?
- What is the Campaign ROI (return on investment)?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
- What are the rates for agents declining work offers?
- What are the average handle times?
- What are the number of interactions by channel, agent, and time period?
- Are there currently service requests that have missed the target milestone and require escalation?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Who are my agents that have the most pending SRs?
- What is the prevalence of SR transfers for an agent/manager/group/product/location?
- What are the popular reasons for SRs to be transferred? Is there a pattern?
- How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?
- Are there any workload balancing issues on my team? Are a few members performing most of the activities?
- Did the SR get assigned to the wrong queue/team?
- Are survey requests being sent per plan across teams, service categories, products, account regions?
- Is our resolution performance for escalated issues worse or better than non escalated issues?
- What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
- What are the sources of the Leads created in the current quarter?
- What are the top ten Partners by Revenue during the past quarter/year?
- What Partners are assigned to specific geographic territories?
- For given set of Customers, what percentage of my revenue is exposed to competition?
- Do forecasts rely on revenues from a few customers? What is the dependency profile?
- How to forecasts trend across periods?
- Who all are the Contacts associated to the Lead?
- 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?
- Was an MDF claim rejected? What was the reason the claim was rejected?
- Is the sales team converting leads to opportunities fast enough?
- How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Who are the resources assigned for a particular territory?
• How many new contacts are created in the system in the current month?
• What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Organization?
• Which Program has the highest number of Enrollments?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many social posts came from known versus unknown contacts?
• How many open SRs are linked to each tag?
• What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
• What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• What is the overall satisfaction levels of our customers with regards to issue resolutions?
• Which of our product lines most frequently receive suggestions for product improvements?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Does the forecast versus pipeline trend show a healthy picture?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• What are the higher value deals that have been moved out?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• Are the Leads supporting products that appeal to certain customers by size of company?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
• What are all the contacts created in the system by Geography?
• What are all the Opportunities created as a result of Deal closure by a particular resource/team?
• What are all the Opportunities resulted from a Campaign?
• How many Resources are assigned to an Opportunity?
• 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 many Leads are part of the Campaign?
• Who has completed the most activity objectives?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• What is the breakdown of open action plans by category?
• How many action plans are open and how long have they been open?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• What is the contact point information of the primary contact for accounts where I’m the owner or on the sales team?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?
• What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

Partner Channel Transaction Analysis Duty

Code Name
FBI_PARTNER_CHANNEL_TRANSACTION_ANALYSIS_DUTY

Job Roles
This duty role is related to the following job roles:

- Channel Account Manager
- Channel Partner Manager
- Channel Sales Director
- Channel Sales Manager

Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activities with Related Activities
- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Marketing - CRM Leads
- Partners - CRM Leads and Opportunities Real Time
- Partners - CRM Opportunities and Products Real Time
- Partners - CRM Partner Assessments
- Partners - CRM Partner Classification
- Partners - CRM Partner Contact
- Partners - CRM Partner Overview
- Partners - CRM Partner Program Benefits
- Partners - CRM Partner Resource
- Partners - CRM Partner Territory
- Partners - CRM Program Enrollments
- Partners - CRM Programs
- Sales - CRM Account Relationship
- Sales - CRM All Contact Contact Point
- Sales - CRM All Contacts Addresses
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 6
Duty Roles

- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan Objective Split
- Sales - CRM Campaign Members
- Sales - CRM Campaign Opportunity
- Sales - CRM Contact Note
- Sales - CRM Contact Relationship
- Sales - CRM Contact Resource
- Sales - CRM Contacts
- Sales - CRM Customer Classification
- Sales - CRM Customer Note
- Sales - CRM Customer Overview
- Sales - CRM Customers
- Sales - CRM Customers and Contacts Real Time
- Sales - CRM Deal Registration
- Sales - CRM Deal Registration Product
- Sales - CRM Forecasting
- Sales - CRM Forecasting and Pipeline Revenue Real Time
- Sales - CRM Historical Forecasting
- Sales - CRM Historical Pipeline
- Sales - CRM Lead Assessments
- Sales - CRM Lead Contact
- Sales - CRM Lead Product
- Sales - CRM Lead Resource
- Sales - CRM Lead Territory
- Sales - CRM MDF Budget
- Sales - CRM MDF Claim
- Sales - CRM MDF Claim Settlement
- Sales - CRM MDF Request
- Sales - CRM Opportunities and Products Real Time
- Sales - CRM Opportunity Assessments
- Sales - CRM Opportunity Campaign
- Sales - CRM Opportunity Contact
- Sales - CRM Opportunity Note
- Sales - CRM Opportunity Partner
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

- Sales - CRM Opportunity Resource
- Sales - CRM Opportunity Sales Stage Snapshot
- Sales - CRM Opportunity Territory
- Sales - CRM Partner Relationship
- Sales - CRM Pipeline
- Sales - CRM Primary Contact Addresses
- Sales - CRM Primary Contact Contact Point
- Sales - CRM Quota Management
- Sales - CRM Quote Lines
- Sales - CRM Quotes
- Sales - CRM Resource
- Sales - CRM Resource Territory
- Sales - CRM Sales Account Assessments
- Sales - CRM Sales Account Resource
- Sales - CRM Sales Account Territory
- Sales - CRM Territory Resource
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Lifecycle
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Request Tags Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time
- Service - CRM Survey Requests Real Time
- Service - CRM Survey Responses Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
• What is the revenue generated by Partners per Customer?
• What are my best performing product lines by customer geographies?
• How is my Revenue distributed across Customer geographies?
• What regions are my customers clustered in?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• On which sales accounts is a given sales representative a member of the account team?
• Who are all the Contacts assigned to the Assets?
• What are the responses for different Opportunity for an Assessment submitted?
• What are the Quotas assigned to the team and the Actuals?
• How are the business plan objectives split?
• What are the objectives that have not met the target value set?
• How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
• What are the SIC codes associated with a Partner, and with all associated Partners?
• Against how many Opportunities, were the Quotes submitted in this month?
• How do the number of activities in a region and their average SR resolution rates by quarter compare?
• How often do communications cross channels to get to resolution?
• How many customer interactions happen without an SR?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How often are communications being transferred between agents?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many new coverages begin in the ensuing month?
• Are we equipped to service the increase in coverages?
• What is the current count of inbound email requests by status and mailbox?
• How many messages resulted in new service request creation versus update to existing service request?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
Duty Roles

- What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
- How is tag usage across agents and resource teams? Which teams perform better than others?
- What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
- How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
- How is survey request trending compared to SR resolutions during the same period?
- What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
- What are the top 10 products associated to the Leads in the system?
- What is the number of leads by partners for a specific product group?
- How many Partners is a Contact is associated to?
- How many Leads and Opportunities are Open for a given Customer in the Current quarter?
- Are the Leads associated with certain products?
- What is the open/closed revenue for each of the product groups in the selected geography?
- Are the sales reps moving their opportunities fast enough?
- Are there any up sell/cross sell opportunities?
- Is overall pipeline healthy enough to meet sales goals?
- What are the top stalled opportunities and who are the sales reps working on these?
- What are the sales accounts owned by the Sales team?
- What are the Deals submitted by the Partners in the current quarter with the Deal size?
- Who are the Resources assigned to the Leads created in any given time period?
- What are the Leads assigned to me/my team member?
- What are all the Territories the Lead is part of?
- How did the Opportunity evolve over time?
- How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
- How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
- How many territories are assigned to a Resource/Employee?
- What are all the Territories assigned to Resources/Employees?
- What are the total number of Contact Relationships between two Contact?
- Does this Contact have subsidiaries?
- What are the responses by different Partners for an Assessment submitted e.g. Partner Performance? submitted e.g. Partner Performance?
- What percentage of service requests involve at least one interaction?
- Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
- What is the average length of time of an interaction, by agent and channel?
- How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• How many emails came from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• What is the opportunity information captured in the note to an opportunity?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• What are all addresses associated with the primary contact for all active opportunities in the current quarter?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
• Have we kept our strategic customers happy? If not, where can we improve - in timliness, better first time resolution, etc.?
• What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?
• What are the follow-up tasks I need to do on a particular customer?
• Who are the top Sales representatives by their Lead conversion ratio?
• What are the open Opportunities associated to a given Partner?
• What is the average deal size by Product groups?
• How are the Partners classified?
• What is total number of Partners assigned to a specific classification for this period?
• Does this account have subsidiaries?
• How is the Revenue spread for a given Customer hierarchy?
• How actively (# of Activities) are the Sales reps engaged with customers?
• What are my most active accounts? Who owns them and where are these located?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• Who are all the contacts for key customers and what are their roles?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
• Do Forecast rely on Revenue from few Products?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What is the revenue lost to competition for a specific product/product group?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are the Accounts under the sales team, by territory?
• What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?
• How many Assets are created in a particular time period?
• Who are all the resources assigned to the Assets?
• What is the additional information updated in the Notes for a Contact?
• What is the additional information updated in the Notes for a Customer?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
• What is the average time the Opportunity is in a particular sales stage?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the Resources associated to this contact?
• How many Leads do not have Contact?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• What is the quarterly revenue trend for a specific product/product group by partner?
• What are the Customers from this account, including all subsidiaries?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• What is the channel performance vs channel forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
• How do wins and losses trend quarterly for a specific product line?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the sales accounts that a given Sales representative owns?
• What is the QoQ growth for Assets by Products?
• How many Territories are assigned to an Opportunity?
• What are all the Territories assigned to Opportunities?
• How many new Resources are created in the current quarter?
• What are the target v/s actual number of the split objectives?
• What are the Programs that Partners have enrolled into?
• What are the total number of Relationships between two Partners?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
• How many responses received for a given campaign?
• How many Opportunities associated to a Campaign?
• What is the total Quotes revenue for the current month?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• How many emails are we receiving over time?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What is the contact point information of the primary contact for all active opportunities in the current quarter?
• What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the response scores for customer where we have not met SLA’s?
• Do one or more of the agents in my team need training to improve customer communication skills?
• What are the associated activities related to my upcoming appointment and task?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What is the potential revenue of leads by partners?
• What is the distribution of Partner Opportunities by sales stages?
• What is the number of partners in a specific classification within a defined geographic region?
• 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?
• How many Partners’ team is a given Resource part of?
• What are the total number of Relationships for a given Account?
• What are the top ten accounts by revenue in the last quarter?
• Who are my teams top Customers?
• Who are the 'new' customers, created in the past 6 months?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• How are product revenues trending month over month?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are the historical monthly trend of closed revenue by current territories?
• How many Leads are open for a given Product?
• What was the currency conversion rate applied to a specific claim?
• What products are often lost to key competitors? Is there a pattern?
• Who are the top competitors and what is the revenue exposure to them?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• How many territories is the Lead part of?
• What are all the Campaigns assigned to an Opportunity?
• Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• How many Enrollments are going to expire in the next quarter?
• How many Programs were created in the last quarter?
• Does this Partner have subsidiaries?
• What are the partner I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter?
• What are all addresses of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• What is the number of Partner Contacts that are also resources and users?
• How many Territories is a Partner part of?
• Who manages my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
• What is the Territory Quota vs Actual?
• Which Territories have exceeded their Quotes in the current Quarter?
• Who are the Partner resources in the system and which Partner Organization they belong to?
• What are the Partners created in the system for a given time period?
• How many Enrollments were created/submitted/expired/terminated in the last month?
• What is the Campaign ROI (return on investment)?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product ‘A’ have tag ‘X’ or ‘Y’? How many have the ‘Potential Churn’ tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• Is our resolution performance for escalated issues worse or better than non escalated issues?
• What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
• What are the sources of the Leads created in the current quarter?
• What are the top ten Partners by Revenue during the past quarter/year?
• What Partners are assigned to specific geographic territories?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• How to forecasts trend across periods?
• Who all are the Contacts associated to the Lead?
• 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?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Is the sales team converting leads to opportunities fast enough?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Who are the resources assigned for a particular territory?
• How many new contacts are created in the system in the current month?
• What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Orgnanization?
• Which Program has the highest number of Enrollments?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many social posts came from known versus unknown contacts?
• How many open SRs are linked to each tag?
• What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
• What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
- What is the overall satisfaction levels of our customers with regards to issue resolutions?
- Which of our product lines most frequently receive suggestions for product improvements?
- How many Leads were rejected in the last quarter and what were the reason for those?
- What are the names of the customers that a Sales team owns? Who are the key contacts?
- Does the forecast versus pipeline trend show a healthy picture?
- What are the Opportunity Revenue line details contributing the most to the Forecast?
- What are the higher value deals that have been moved out?
- What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
- Are the Leads supporting products that appeal to certain customers by size of company?
- What were the approved amounts vs the settled claim totals for the last 4 quarters?
- What are the top 10 open opportunities? What are the target close dates and revenues for these?
- What are all the contacts created in the system by Geography?
- What are all the Opportunities created as a result of Deal closure by a particular resource/team?
- What are all the Opportunities resulted from a Campaign?
- How many Resources are assigned to an Opportunity?
- 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 many Leads are part of the Campaign?
- Who has completed the most activity objectives?
- What are the activity levels in specific regions?
- Do customers contact us more often to solve issues or to seek answers to questions?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How is the percentage of compliant SRs trending month over month, quarter over quarter?
- Where are the outliers when it comes to compliance?
- How many showed up as compliant; how many were non-compliant during my review of completed work orders?
- What is the breakdown of open action plans by category?
- How many action plans are open and how long have they been open?
- How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
- What is the contact point information of the primary contact for accounts where I’m the owner or on the sales team?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- How long was an SR unassigned and how long did it sit in each queue?
- What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?
- What quotes are associated with my opportunities, what are the quoteline items, and the associated products?
Partner Org Transaction Analysis Duty

Code Name

FBI_PARTNER_ORG_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

• Partner Administrator
• Partner Sales Manager
• Partner Sales Representative

Subject Areas

This duty role secures access to the following subject areas:

• CRM - CRM Activities with Related Activities
• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• CRM - CRM Interaction Aggregate
• CRM - CRM Interaction Service Requests Real Time
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• CRM - CRM Work Orders Real Time
• Marketing - CRM Leads
• Partners - CRM Leads and Opportunities Real Time
• Partners - CRM Opportunities and Products Real Time
• Partners - CRM Partner Assessments
• Partners - CRM Partner Classification
• Partners - CRM Partner Contact
• Partners - CRM Partner Overview
• Partners - CRM Partner Program Benefits
• Partners - CRM Partner Resource
• Partners - CRM Partner Territory
• Partners - CRM Program Enrollments
• Partners - CRM Programs
• Sales - CRM Account Relationship
• Sales - CRM All Contact Contact Point
• Sales - CRM All Contacts Addresses
• Sales - CRM Asset
• Sales - CRM Asset Contact
• Sales - CRM Asset Resource
• Sales - CRM Business Plan Objective Split
• Sales - CRM Campaign Members
• Sales - CRM Campaign Opportunity
• Sales - CRM Contact Note
• Sales - CRM Contact Relationship
• Sales - CRM Contact Resource
• Sales - CRM Contacts
• Sales - CRM Customer Classification
• Sales - CRM Customer Note
• Sales - CRM Customer Overview
• Sales - CRM Customers
• Sales - CRM Customers and Contacts Real Time
• Sales - CRM Deal Registration
• Sales - CRM Deal Registration Product
• Sales - CRM Forecasting
• Sales - CRM Forecasting and Pipeline Revenue Real Time
• Sales - CRM Historical Forecasting
• Sales - CRM Historical Pipeline
• Sales - CRM Lead Assessments
• Sales - CRM Lead Contact
• Sales - CRM Lead Product
• Sales - CRM Lead Resource
• Sales - CRM Lead Territory
• Sales - CRM MDF Budget
• Sales - CRM MDF Claim
• Sales - CRM MDF Claim Settlement
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Duty Roles

- Sales - CRM MDF Request
- Sales - CRM Opportunities and Products Real Time
- Sales - CRM Opportunity Assessments
- Sales - CRM Opportunity Campaign
- Sales - CRM Opportunity Contact
- Sales - CRM Opportunity Note
- Sales - CRM Opportunity Partner
- Sales - CRM Opportunity Resource
- Sales - CRM Opportunity Sales Stage Snapshot
- Sales - CRM Opportunity Territory
- Sales - CRM Partner Relationship
- Sales - CRM Pipeline
- Sales - CRM Primary Contact Addresses
- Sales - CRM Primary Contact Contact Point
- Sales - CRM Quota Management
- Sales - CRM Quote Lines
- Sales - CRM Quotes
- Sales - CRM Resource
- Sales - CRM Resource Territory
- Sales - CRM Sales Account Assessments
- Sales - CRM Sales Account Resource
- Sales - CRM Sales Account Territory
- Sales - CRM Territory Resource
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Lifecycle
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Tags Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time
- Service - CRM Survey Requests Real Time

Business Questions
This duty role secures access to data that can answer the following business questions:

- How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- What is the revenue generated by Partners per Customer?
- What are my best performing product lines by customer geographies?
- How is my Revenue distributed across Customer geographies?
- What regions are my customers clustered in?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
- On which sales accounts is a given sales representative a member of the account team?
- Who are all the Contacts assigned to the Assets?
- What are the responses for different Opportunity for an Assessment submitted?
- What are the Quotas assigned to the team and the Actuals?
- How are the business plan objectives split?
- What are the objectives that have not met the target value set?
- How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
- What are the SIC codes associated with a Partner, and with all associated Partners?
- Against how many Opportunities, were the Quotes submitted in this month?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How often are communications being transferred between agents?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
- How many new coverages begin in the ensuing month?
- Are we equipped to service the increase in coverages?
- What is the current count of inbound email requests by status and mailbox?
- How many messages resulted in new service request creation versus update to existing service request?
- Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
• How is tag usage across agents and resource teams? Which teams perform better than others?
• What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• How is survey request trending compared to SR resolutions during the same period?
• What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
• What are the top 10 products associated to the Leads in the system?
• What is the number of leads by partners for a specific product group?
• How many Partners is a Contact is associated to?
• How many Leads and Opportunities are Open for a given Customer in the Current quarter?
• Are the Leads associated with certain products?
• What is the open/closed revenue for each of the product groups in the selected geography?
• Are the sales reps moving their opportunities fast enough?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the sales accounts owned by the Sales team?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• Who are the Resources assigned to the Leads created in any given time period?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• How did the Opportunity evolve over time?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• How many territories are assigned to a Resource/Employee?
• What are all the Territories assigned to Resources/Employees?
• What are the total number of Contact Relationships between two Contact?
• Does this Contact have subsidiaries?
• What are the responses by different Partners for an Assessment submitted e.g. Partner Performance submitted e.g. Partner Performance?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• How many emails came from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• What are the SRs that are waiting on my customers?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Do SR’s with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• What is the opportunity information captured in the note to an opportunity?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• What are all addresses associated with the primary contact for all active opportunities in the current quarter?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What are the follow-up tasks I need to do on a particular customer?
• Who are the top Sales representatives by their Lead conversion ratio?
• What are the open Opportunities associated to a given Partner?
• What is the average deal size by Product groups?
• How are the Partners classified?
• What is total number of Partners assigned to a specific classification for this period?
• Does this account have subsidiaries?
• How is the Revenue spread for a given Customer hierarchy?
• How actively (# of Activities) are the Sales reps engaged with customers?
• What are my most active accounts? Who owns them and where are these located?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• Who are all the contacts for key customers and what are their roles?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
• Do Forecast rely on Revenue from few Products?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What is the revenue lost to competition for a specific product/product group?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are the Accounts under the sales team, by territory?
• What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?
• How many Assets are created in a particular time period?
• Who are all the resources assigned to the Assets?
• What is the additional information updated in the Notes for a Contact?
• What is the additional information updated in the Notes for a Customer?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
• What is the average time the Opportunity is in a particular sales stage?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the Resources are associated to this contact?
• How many Leads do not have Contact?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• What is the quarterly revenue trend for a specific product/product group by partner?
• What are the Customers from this account, including all subsidiaries?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• What is the channel performance vs channel forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
• How do wins and losses trend quarterly for a specific product line?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the sales accounts that a given Sales representative owns?
• What is the QoQ growth for Assets by Products?
• How many Territories are assigned to an Opportunity?
• What are all the Territories assigned to Opportunities?
• How many new Resources are created in the current quarter?
• What are the target vs actual number of the split objectives?
• What are the Programs that Partners have enrolled into?
• What are the total number of Relationships between two Partners?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
• How many responses received for a given campaign?
• How many Opportunities associated to a Campaign?
• What is the total Quotes revenue for the current month?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• How many emails are we receiving over time?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What is the contact point information of the primary contact for all active opportunities in the current quarter?
• What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the associated activities related to my upcoming appointment and task?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What is the potential revenue of leads by partners?
• What is the distribution of Partner Opportunities by sales stages?
• What is the number of partners in a specific classification within a defined geographic region?
• 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?
• How many Partners' team is a given Resource part of?
• What are the total number of Relationships for a given Account?
• What are the top ten accounts by revenue in the last quarter?
• Who are my teams top Customers?
• Who are the 'new' customers, created in the past 6 months?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• How are product revenues trending month over month?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are the historical monthly trend of closed revenue by current territories?
• How many Leads are open for a given Product?
• What was the currency conversion rate applied to a specific claim?
• What products are often lost to key competitors? Is there a pattern?
• Who are the top competitors and what is the revenue exposure to them?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• How many territories is the Lead part of?
• What are all the Campaigns assigned to an Opportunity?
• Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• How many Enrollments are going to expire in the next quarter?
• How many Programs were created in the last quarter?
• Does this Partner have subsidiaries?
• What are the partner I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter?
• What are all addresses of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• What are the Leads created by a Sales Rep/Sales Manager’s team in the Current Quarter and what are their statuses?
• What is the number of Partner Contacts that are also resources and users?
• How many Territories is a Partner part of?
• Who manages my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
• What is the Territory Quota vs/ Actual?
• Which Territories have exceeded their Quotes in the current Quarter?
• Who are the Partner resources in the system and which Partner Organization they belong to?
• What are the Partners created in the system for a given time period?
• How many Enrollments were created/submitted/expired/terminated in the last month?
• What is the Campaign ROI (return on investment)?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
• What are the sources of the Leads created in the current quarter?
• What are the top ten Partners by Revenue during the past quarter/year?
• What Partners are assigned to specific geographic territories?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• How to forecasts trend across periods?
• Who all are the Contacts associated to the Lead?
• 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?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Is the sales team converting leads to opportunities fast enough?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Who are the resources assigned for a particular territory?
• How many new contacts are created in the system in the current month?
• What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Organization?
• Which Program has the highest number of Enrollments?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many social posts came from known versus unknown contacts?
• How many open SRs are linked to each tag?
• What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
• What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• How many Leads were rejected in the last quarter and what were the reason for those?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Does the forecast versus pipeline trend show a healthy picture?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• What are the higher value deals that have been moved out?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• Are the Leads supporting products that appeal to certain customers by size of company?
• What were the approved amounts vs the settled claim totals for the last 4 quarters?
• What are the top 10 open opportunities? What are the target close dates and revenues for these?
Duty Roles

- What are all the contacts created in the system by Geography?
- What are all the Opportunities created as a result of Deal closure by a particular resource/team?
- What are all the Opportunities resulted from a Campaign?
- How many Resources are assigned to an Opportunity?
- 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 many Leads are part of the Campaign?
- Who has completed the most activity objectives?
- What are the activity levels in specific regions?
- Do customers contact us more often to solve issues or to seek answers to questions?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How is the percentage of compliant SRs trending month over month, quarter over quarter?
- Where are the outliers when it comes to compliance?
- How many showed up as compliant; how many were non-compliant during my review of completed work orders?
- What is the breakdown of open action plans by category?
- How many action plans are open and how long have they been open?
- How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
- What is the contact point information of the primary contact for accounts where I’m the owner or on the sales team?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- How long was an SR unassigned and how long did it sit in each queue?
- What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?
- What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

Receivables Customer Transaction Analysis Duty

Code Name

FBI_RECEIVABLES_CUSTOMER_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- Accounts Receivable Manager
Subject Areas

This duty role secures access to the following subject areas:

- *Sales - CRM Account Relationship*

Business Questions

This duty role secures access to data that can answer the following business questions:

- *Does this account have subsidiaries?*
- *What are the Customers from this account, including all subsidiaries?*
- *What are the total number of Relationships for a given Account?*

Sales Administrative Transaction Analysis Duty

Code Name

FBI_SALES_ADMINISTRATIVE_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- *Sales Administrator*

Subject Areas

This duty role secures access to the following subject areas:

- *CRM - CRM Activities with Related Activities*
- *CRM - CRM Activity Contact Real Time*
- *CRM - CRM Activity Objective Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Activity Resource Real Time*
- *CRM - CRM Interaction Aggregate*
- *CRM - CRM Interaction Service Requests Real Time*
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• CRM - CRM Work Orders Real Time
• Marketing - CRM Leads
• Marketing - CRM Leads and Opportunities Real Time
• Partners - CRM Leads and Opportunities Real Time
• Partners - CRM Opportunities and Products Real Time
• Partners - CRM Partner Assessments
• Partners - CRM Partner Classification
• Partners - CRM Partner Contact
• Partners - CRM Partner Overview
• Partners - CRM Partner Resource
• Partners - CRM Partner Territory
• Partners - CRM Program Enrollments
• Partners - CRM Programs
• Sales - CRM Account Relationship
• Sales - CRM All Contact Contact Point
• Sales - CRM Asset
• Sales - CRM Asset Contact
• Sales - CRM Asset Resource
• Sales - CRM Business Plan Objective Split
• Sales - CRM Campaign Members
• Sales - CRM Campaign Opportunity
• Sales - CRM Contact Note
• Sales - CRM Contact Relationship
• Sales - CRM Contact Resource
• Sales - CRM Contacts
• Sales - CRM Customer Classification
• Sales - CRM Customer Note
• Sales - CRM Customer Overview
• Sales - CRM Customers
• Sales - CRM Customers and Contacts Real Time
• Sales - CRM Deal Registration
• Sales - CRM Deal Registration Product
• Sales - CRM Forecasting
Sales - CRM Forecasting and Pipeline Revenue Real Time
Sales - CRM Historical Forecasting
Sales - CRM Historical Pipeline
Sales - CRM Lead Assessments
Sales - CRM Lead Contact
Sales - CRM Lead Product
Sales - CRM Lead Resource
Sales - CRM Lead Territory
Sales - CRM MDF Budget
Sales - CRM MDF Claim
Sales - CRM MDF Claim Settlement
Sales - CRM MDF Request
Sales - CRM Opportunities and Products Real Time
Sales - CRM Opportunity Assessments
Sales - CRM Opportunity Campaign
Sales - CRM Opportunity Contact
Sales - CRM Opportunity Note
Sales - CRM Opportunity Partner
Sales - CRM Opportunity Resource
Sales - CRM Opportunity Sales Stage Snapshot
Sales - CRM Opportunity Territory
Sales - CRM Partner Relationship
Sales - CRM Pipeline
Sales - CRM Primary Contact Addresses
Sales - CRM Primary Contact Contact Point
Sales - CRM Quota Management
Sales - CRM Quote Lines
Sales - CRM Quotes
Sales - CRM Resource
Sales - CRM Resource Territory
Sales - CRM Sales Account Assessments
Sales - CRM Sales Account Resource
Sales - CRM Sales Account Territory
Sales - CRM Territory Resource
Service - CRM Customer Coverage Real Time
Service - CRM Inbound Messages Real Time
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

Chapter 6
Duty Roles

- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Lifecycle
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Request Tags Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time
- Service - CRM Survey Requests Real Time
- Service - CRM Survey Responses Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- How many Leads are converted in the current quarter?
- How many Leads are unassigned in the system?
- Which Sales Campaign resulted in the highest number of Qualified Leads in the last quarter?
- How many Leads are associated for a given Opportunity?
- How many Opportunities were created from a given Lead?
- What is the revenue generated by Partners per Customer?
- What are my best performing product lines by customer geographies?
- How is my Revenue distributed across Customer geographies?
- What regions are my customers clustered in?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
- On which sales accounts is a given sales representative a member of the account team?
- Who are all the Contacts assigned to the Assets?
- What are the responses for different Opportunity for an Assessment submitted?
- What are the Quotas assigned to the team and the Actuals?
- How are the business plan objectives split?
- What are the objectives that have not met the target value set?
- How is the QoQ progress of a Partner (by comparing the same assessments submitted by Partner) for different Quarters?
- What are the SIC codes associated with a Partner, and with all associated Partners?
- Against how many Opportunities, were the Quotes submitted in this month?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
Duty Roles

• How often do communications cross channels to get to resolution?
• How many customer interactions happen without an SR?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How often are communications being transferred between agents?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many new coverages begin in the ensuing month?
• Are we equipped to service the increase in coverages?
• What is the current count of inbound email requests by status and mailbox?
• How many messages resulted in new service request creation versus update to existing service request?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
• How is tag usage across agents and resource teams? Which teams perform better than others?
• What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• How is survey request trending compared to SR resolutions during the same period?
• What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
• What are the top 10 products associated to the Leads in the system?
• What are the Leads that are coverted into Opportunities?
• What is the number of leads by partners for a specific product group?
• How many Partners is a Contact is associated to?
• How many Leads and Opportunities are Open for a given Customer in the Current quarter?
• Are the Leads associated with certain products?
• What is the open/closed revenue for each of the product groups in the selected geography?
• Are the sales reps moving their opportunities fast enough?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the sales accounts owned by the Sales team?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• Who are the Resources assigned to the Leads created in any given time period?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• How did the Opportunity evolve over time?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• How many territories are assigned to a Resource/Employee?
• What are all the Territories assigned to Resources/Employees?
• What are the total number of Contact Relationships between two Contact?
• Does this Contact have subsidiaries?
• What are the responses by different Partners for an Assessment submitted e.g. Partner Performance?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• How many emails came from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• What is the opportunity information captured in the note to an opportunity?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• What are all addresses associated with the primary contact for all active opportunities in the current quarter?
- Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
- Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
- Are survey request frequencies meeting our norms?
- What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
- Have we kept our strategic customers happy? If not, where can we improve - in timliness, better first time resolution, etc.?
- What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?
- What are the follow-up tasks I need to do on a particular customer?
- Who are the top Sales representatives by their Lead conversion ratio?
- What are the open Opportunities associated to a given Partner?
- What is the average deal size by Product groups?
- How are the Partners classified?
- What is total number of Partners assigned to a specific classification for this period?
- Does this account have subsidiaries?
- How is the Revenue spread for a given Customer hierarchy?
- How actively (# of Activities) are the Sales reps engaged with customers?
- What are my most active accounts? Who owns them and where are these located?
- What are the contact points (phone, email, address, etc.) of key contacts?
- Who are all the contacts for key customers and what are their roles?
- Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
- Do Forecast rely on Revenue from few Products?
- Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
- What is the revenue lost to competition for a specific product/product group?
- How is each member on the team performing on deal size, account coverage, and win rate?
- What are the Accounts under the sales team, by territory?
- What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?
- How many Assets are created in a particular time period?
- Who are all the resources assigned to the Assets?
- What is the additional information updated in the Notes for a Contact?
- What is the additional information updated in the Notes for a Customer?
- Who are the Employees/Resource for the Deals that are submitted in the current month?
- What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
- What is the average time the Opportunity is in a particular sales stage?
- What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the Resources associated to this contact?
• How many Leads do not have Contact?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• What is the quarterly revenue trend for a specific product/product group by partner?
• What are the Customers from this account, including all subsidiaries?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• What is the channel performance vs channel forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
• How do wins and losses trend quarterly for a specific product line?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the sales accounts that a given Sales representative owns?
• What is the QoQ growth for Assets by Products?
• How many Territories are assigned to an Opportunity?
• What are all the Territories assigned to Opportunities?
• How many new Resources are created in the current quarter?
• What are the target v/s actual number of the split objectives?
• What are the Programs that Partners have enrolled into?
• What are the total number of Relationships between two Partners?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
• How many responses received for a given campaign?
• How many Opportunities associated to a Campaign?
• What is the total Quotes revenue for the current month?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• How many emails are we receiving over time?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What is the contact point information of the primary contact for all active opportunities in the current quarter?
• What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the response scores for customer where we have not met SLA's?
• Do one or more of the agents in my team need training to improve customer communication skills?
• What are the associated activities related to my upcoming appointment and task?
• Who is the Primary Contact and Resource assigned for a given Lead?
• What is the potential revenue of leads by partners?
• What is the distribution of Partner Opportunities by sales stages?
• What is the number of partners in a specific classification within a defined geographic region?
• 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?
• How many Partners' team is a given Resource part of?
• What are the total number of Relationships for a given Account?
• What are the top ten accounts by revenue in the last quarter?
• Who are my teams top Customers?
• Who are the 'new' customers, created in the past 6 months?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• How are product revenues trending month over month?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are the historical monthly trend of closed revenue by current territories?
• How many Leads are open for a given Product?
• What was the currency conversion rate applied to a specific claim?
• What products are often lost to key competitors? Is there a pattern?
• Who are the top competitors and what is the revenue exposure to them?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• How many territories is the Lead part of?
• What are all the Campaigns assigned to an Opportunity?
• Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• How many Enrollments are going to expire in the next quarter?
• How many Programs were created in the last quarter?
• Does this Partner have subsidiaries?
• What are the partner I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
- What is the contact point information of the primary contact and non-primary contacts for accounts where I'm the owner or on the sales team?
- What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter?
- Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
- What are the Leads created by a Sales Rep/Sales Manager's team in the Current Quarter and what are their statuses?
- What is the number of Partner Contacts that are also resources and users?
- How many Territories is a Partner part of?
- Who manages my top accounts?
- 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?
- How many Leads is a Contact associated to?
- Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
- What are the top ten products by revenue during the past quarter/year?
- What is the buying trend of our biggest customers?
- Do the sales territories need rebalancing?
- Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
- What are the top 10 Products by Asset count?
- What are the Assets that are expiring in the next quarter?
- How are the customers classified?
- What are the top 10 Deals created in the current quarter by their Deal size?
- 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?
- Who are all the Resources assigned to Opportunities?
- What is the Territory Quota vs/ Actual?
- Which Territories have exceeded their Quotes in the current Quarter?
- Who are the Partner resources in the system and which Partner Organization they belong to?
- What are the Partners created in the system for a given time period?
- How many Enrollments were created/submitted/expired/terminated in the last month?
- What is the Campaign ROI (return on investment)?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
- What are the rates for agents declining work offers?
- What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product ‘A’ have tag ‘X’ or ‘Y’? How many have the ‘Potential Churn’ tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• Is our resolution performance for escalated issues worse or better than non escalated issues?
• What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
• What are the sources of the Leads created in the current quarter?
• What are the top ten Partners by Revenue during the past quarter/year?
• What Partners are assigned to specific geographic territories?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• How to forecasts trend across periods?
• Who all are the Contacts associated to the Lead?
• 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?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Is the sales team converting leads to opportunities fast enough?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Who are the resources assigned for a particular territory?
• How many new contacts are created in the system in the current month?
• What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Organization?
• Which Program has the highest number of Enrollments?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
- How often do communications cross channels before they are resolved?
- Is the Service organization effectively handling new emails in the appropriate timeframe?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- As an agent am I spreading myself too thin by being part of one too many SR teams?
- What are the open critical SRs that my team is working on currently? How many of these are escalated?
- How many social posts came from known versus unknown contacts?
- How many open SRs are linked to each tag?
- What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
- What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
- Was an SR sitting in a queue longer than the average time for all other SRs?
- Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
- Does the survey request activity show a declining trend?
- What is the overall satisfaction levels of our customers with regards to issue resolutions?
- Which of our product lines most frequently receive suggestions for product improvements?
- How many Leads were rejected in the last quarter and what were the reason for those?
- What are the names of the customers that a Sales team owns? Who are the key contacts?
- Does the forecast versus pipeline trend show a healthy picture?
- What are the Opportunity Revenue line details contributing the most to the Forecast?
- What are the higher value deals that have been moved out?
- What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
- Are the Leads supporting products that appeal to certain customers by size of company?
- What were the approved amounts vs the settled claim totals for the last 4 quarters?
- What are the top 10 open opportunities? What are the target close dates and revenues for these?
- What are all the contacts created in the system by Geography?
- What are all the Opportunities created as a result of Deal closure by a particular resource/team?
- What are all the Opportunities resulted from a Campaign?
- How many Resources are assigned to an Opportunity?
- 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 many Leads are part of the Campaign?
- Who has completed the most activity objectives?
- What are the activity levels in specific regions?
- Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• What is the breakdown of open action plans by category?
• How many action plans are open and how long have they been open?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• What is the contact point information of the primary contact for accounts where I’m the owner or on the sales team?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?
• What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

Sales CRM Sales Activity Transaction Analysis Duty

Code Name

FBI_SALES_CRM_SALES_ACTIVITY_TRANSACTION_ANALYSIS_DUTY

Job Roles

No applicable job roles

Subject Areas

This duty role secures access to the following subject areas:

• Sales - CRM Resource Territory

Business Questions

This duty role secures access to data that can answer the following business questions:

• How many territories are assigned to a Resource/Employee?
• What are all the Territories assigned to Resources/Employees?
Sales Campaign Transaction Analysis Duty

Code Name

FBI_SALES_CAMPAIGN_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- Sales Manager
- Sales Representative
- Sales Restricted User
- Sales VP

Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activities with Related Activities
- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- 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 associated for a given Opportunity?
- How many Opportunities were created from a given Lead?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
- What are the Leads that are coverted into Opportunities?
- As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
- What are the follow-up tasks I need to do on a particular customer?
- What managers have teams averaging the most activities?
I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?

How many contacts were not favored with a positive outcome with a given agent?

What are the associated activities related to my upcoming appointment and task?

What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?

How many distinct customer contacts does an agent interact with through a given channel during a specific period?

Are there any workload balancing issues on my team? Are a few members performing most of the activities?

What are the activity levels in specific regions?

How can I identify neglected but strategic accounts to guide my team to focus on these?

What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?

Sales Executive Transaction Analysis Duty

Code Name

FBI_SALES_EXECUTIVE_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- Sales VP

Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activities with Related Activities
- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 6
Duty Roles

- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Marketing - CRM Leads and Opportunities Real Time
- Partners - CRM Partner Territory
- Sales - CRM Account Relationship
- Sales - CRM All Contact Contact Point
- Sales - CRM All Contacts Addresses
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan Objective Split
- Sales - CRM Campaign Members
- Sales - CRM Campaign Opportunity
- Sales - CRM Contact Note
- Sales - CRM Contact Relationship
- Sales - CRM Contact Resource
- Sales - CRM Contacts
- Sales - CRM Customer Classification
- Sales - CRM Customer Note
- Sales - CRM Customer Overview
- Sales - CRM Customers
- Sales - CRM Customers and Contacts Real Time
- Sales - CRM Deal Registration
- Sales - CRM Deal Registration Product
- Sales - CRM Forecasting
- Sales - CRM Forecasting and Pipeline Revenue Real Time
- Sales - CRM Historical Forecasting
- Sales - CRM Historical Pipeline
- Sales - CRM Lead Contact
- Sales - CRM Lead Product
- Sales - CRM Lead Resource
- Sales - CRM Lead Territory
- Sales - CRM MDF Budget
- Sales - CRM MDF Claim
- Sales - CRM MDF Claim Settlement
• Sales - CRM MDF Request
• Sales - CRM Opportunities and Products Real Time
• Sales - CRM Opportunity Assessments
• Sales - CRM Opportunity Campaign
• Sales - CRM Opportunity Contact
• Sales - CRM Opportunity Note
• Sales - CRM Opportunity Partner
• Sales - CRM Opportunity Resource
• Sales - CRM Opportunity Sales Stage Snapshot
• Sales - CRM Opportunity Territory
• Sales - CRM Partner Relationship
• Sales - CRM Pipeline
• Sales - CRM Primary Contact Addresses
• Sales - CRM Primary Contact Contact Point
• Sales - CRM Quota Management
• Sales - CRM Quote Lines
• Sales - CRM Quotes
• Sales - CRM Resource
• Sales - CRM Resource Territory
• Sales - CRM Sales Account Assessments
• Sales - CRM Sales Account Resource
• Sales - CRM Sales Account Territory
• Sales - CRM Territory Resource
• Service - CRM Customer Coverage Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Action Plan Actions Real Time
• Service - CRM Service Request Lifecycle
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Request Resource Real Time
• Service - CRM Service Request Tags Real Time
• Service - CRM Service Requests Real Time
• Service - CRM Survey Requests Real Time

Business Questions
This duty role secures access to data that can answer the following business questions:

- How many Leads are associated for a given Opportunity?
- How many Opportunities were created from a given Lead?
- What are my best performing product lines by customer geographies?
- How is my Revenue distributed across Customer geographies?
- What regions are my customers clustered in?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
- On which sales accounts is a given sales representative a member of the account team?
- Who are all the Contacts assigned to the Assets?
- What are the responses for different Opportunity for an Assessment submitted?
- What are the Quotas assigned to the team and the Actuals?
- How are the business plan objectives split?
- What are the objectives that have not met the target value set?
- What are the SIC codes associated with a Partner, and with all associated Partners?
- Against how many Opportunities, were the Quotes submitted in this month?
- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How often are communications being transferred between agents?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
- How many new coverages begin in the ensuing month?
- Are we equipped to service the increase in coverages?
- Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
- What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
- How are SR transfers contributing to overall latency/resolution delays?
- What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
- How does the aging profile of SRs look like? Are there any outliers calling for intervention?
- What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
1. How is tag usage across agents and resource teams? Which teams perform better than others?
2. What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
3. How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
4. How is survey request trending compared to SR resolutions during the same period?
5. What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
6. What are the Leads that are converted into Opportunities?
7. How many Leads and Opportunities are Open for a given Customer in the Current quarter?
8. Are the Leads associated with certain products?
9. What is the open/closed revenue for each of the product groups in the selected geography?
10. Are the sales reps moving their opportunities fast enough?
11. Are there any up sell/cross sell opportunities?
12. Is overall pipeline healthy enough to meet sales goals?
13. What are the top stalled opportunities and who are the sales reps working on these?
14. What are the sales accounts owned by the Sales team?
15. What are the Deals submitted by the Partners in the current quarter with the Deal size?
16. Who are the Leads assigned to the Leads created in any given time period?
17. What are the Leads assigned to me/my team member?
18. What are all the Territories the Lead is part of?
19. How did the Opportunity evolve over time?
20. How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
21. How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
22. How many territories are assigned to a Resource/Employee?
23. What are all the Territories assigned to Resources/Employees?
24. What are the total number of Contact Relationships between two Contact?
25. Does this Contact have subsidiaries?
26. What percentage of service requests involve at least one interaction?
27. Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
28. What is the average length of time of an interaction, by agent and channel?
29. How many were compliant and non-compliant when I, as an agent review my own completed work orders?
30. To what extent has the number of customer coverages increased between two given dates?
31. Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
32. What is the delay in estimated completion dates?
33. Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Do SRs with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• What is the opportunity information captured in the note to an opportunity?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• What are all addresses associated with the primary contact for all active opportunities in the current quarter?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What are the follow-up tasks I need to do on a particular customer?
• Does this account have subsidiaries?
• How is the Revenue spread for a given Customer hierarchy?
• How actively (# of Activities) are the Sales reps engaged with customers?
• What are my most active accounts? Who owns them and where are these located?
• What is the contact - points (phone, email, address, etc.) of key contacts?
• Who are all the contacts for key customers and what are their roles?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?
• Do Forecast rely on Revenue from few Products?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What is the revenue lost to competition for a specific product/product group?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are the Accounts under the sales team, by territory?
• What are the customer open/closed revenues and activities for all accounts in my resource team’s territory hierarchy?
• How many Assets are created in a particular time period?
• Who are all the resources assigned to the Assets?
• What is the additional information updated in the Notes for a Contact?
• What is the additional information updated in the Notes for a Customer?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What is the average time the Opportunity is in a particular sales stage?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the Resources are associated to this contact?
• How many Leads do not have Contact?
- What are the activity objectives for the current period?
- What managers have teams averaging the most activities?
- Are agents prematurely updating SRs as Resolved to make their numbers look better?
- What product lines have a higher percentage of non-compliant SRs open?
- How frequently do agents link articles to SRs?
- How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
- How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
- I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
- What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
- How long did it take to assign the SR to the correct queue?
- Was the assigned agent overloaded with other work?
- Was the SR queue modified or SR resource owner modified at any point?
- What are the Customers from this account, including all subsidiaries?
- Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
- What is the relative mix of forecast revenues by the various sales channels in a specific territory?
- What is the channel performance vs channel forecast?
- Are too many deals being pushed out to the subsequent fiscal quarters?
- What are my claimed vs unclaimed MDF totals?
- What are total number of Claims in the current quarter?
- Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
- How do wins and losses trend quarterly for a specific product line?
- What are the most likely reasons that the Opportunities are lost against our key competitors?
- What is the value trend of high value opportunities? Do they show a positive or negative trend?
- What are the sales accounts that a given Sales representative owns?
- What is the QoQ growth for Assets by Products?
- How many Territories are assigned to an Opportunity?
- What are all the Territories assigned to Opportunities?
- How many new Resources are created in the current quarter?
- What are the target v/s actual number of the split objectives?
- What are the total number of Relationships between two Partners?
- What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
- How many responses received for a given campaign?
- How many Opportunities associated to a Campaign?
- What is the total Quotes revenue for the current month?
- How many contacts were not favored with a positive outcome with a given agent?
- How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
- How many interactions are being lost/abandoned? How does this compare with previous periods?
- How long is it taking for offers to be made to agents?
- How many interactions, on average, does it require to resolve an issue?
- Are we keeping the number of non-compliant SRs in check for our most valuable customers?
- Are my team resources optimally deployed across service queues to maximize productivity?
- Are we responding to customer messages in a timely manner?
- What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
- How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
- What is the contact point information of the primary contact for all active opportunities in the current quarter?
- What are all addresses associated with the primary contact for accounts I’m the owner of or on the sales team?
- Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
- Do we need to adjust our survey template to improve response rates?
- Does seasonality impact response rates?
- How does response differ for various service teams? Do some teams obtain better response rates?
- What are the associated activities related to my upcoming appointment and task?
- What are the total number of Relationships for a given Account?
- What are the top ten accounts by revenue in the last quarter?
- Who are my teams top Customers?
- Who are the ‘new’ customers, created in the past 6 months?
- What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
- How are product revenues trending month over month?
- How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
- What are the historical monthly trend of closed revenue by current territories?
- How many Leads are open for a given Product?
- What was the currency conversion rate applied to a specific claim?
- What products are often lost to key competitors? Is there a pattern?
- Who are the top competitors and what is the revenue exposure to them?
- Who are the Primary owners of the Contacts for contacts created in the last quarter?
- How many territories is the Lead part of?
- What are all the Campaigns assigned to an Opportunity?
• Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• Does this Partner have subsidiaries?
• What are the partners I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter?
• What are all addresses of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• How many Territories is a Partner part of?
• Who handles my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
• What is the Territory Quota vs/ Actual?
• Which Territories have exceeded their Quotes in the current Quarter?
• Who are the Partner resources in the system and which Partner Organization they belong to?
• What is the Campaign ROI (return on investment)?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product ‘A’ have tag ‘X’ or ‘Y’? How many have the ‘Potential Churn’ tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
• What Partners are assigned to specific geographic territories?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• How to forecasts trend across periods?
• Who all are the Contacts associated to the Lead?
• 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?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Is the sales team converting leads to opportunities fast enough?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Who are the resources assigned for a particular territory?
• How many new contacts are created in the system in the current month?
• What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Organization?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many open SRs are linked to each tag?
• What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
• What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• What are the names of the customers that a Sales team owns? Who are the key contacts?
• Does the forecast versus pipeline trend show a healthy picture?
• What are the Opportunity Revenue line details contributing the most to the Forecast?
• What are the higher value deals that have been moved out?
• What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
• Are the Leads supporting products that appeal to certain customers by size of company?
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
Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activities with Related Activities
- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Marketing - CRM Leads and Opportunities Real Time
- Partners - CRM Partner Territory
- Sales - CRM Account Relationship
- Sales - CRM All Contact Contact Point
- Sales - CRM All Contacts Addresses
- Sales - CRM Asset
- Sales - CRM Asset Contact
- Sales - CRM Asset Resource
- Sales - CRM Business Plan Objective Split
- Sales - CRM Campaign Members
- Sales - CRM Campaign Opportunity
- Sales - CRM Contact Note
- Sales - CRM Contact Relationship
- Sales - CRM Contact Resource
- Sales - CRM Contacts
- Sales - CRM Customer Classification
- Sales - CRM Customer Note
- Sales - CRM Customer Overview
- Sales - CRM Customers
- Sales - CRM Customers and Contacts Real Time
- Sales - CRM Deal Registration
- Sales - CRM Deal Registration Product
- Sales - CRM Forecasting
- Sales - CRM Forecasting and Pipeline Revenue Real Time
- Sales - CRM Historical Forecasting
- Sales - CRM Historical Pipeline
- Sales - CRM Lead Assessments
- Sales - CRM Lead Contact
- Sales - CRM Lead Product
- Sales - CRM Lead Resource
- Sales - CRM Lead Territory
- Sales - CRM MDF Budget
- Sales - CRM MDF Claim
- Sales - CRM MDF Claim Settlement
- Sales - CRM MDF Request
- Sales - CRM Opportunities and Products Real Time
- Sales - CRM Opportunity Assessments
- Sales - CRM Opportunity Campaign
- Sales - CRM Opportunity Contact
- Sales - CRM Opportunity Note
- Sales - CRM Opportunity Partner
- Sales - CRM Opportunity Resource
- Sales - CRM Opportunity Sales Stage Snapshot
- Sales - CRM Opportunity Territory
- Sales - CRM Partner Relationship
- Sales - CRM Pipeline
- Sales - CRM Primary Contact Addresses
- Sales - CRM Primary Contact Contact Point
- Sales - CRM Quota Management
- Sales - CRM Quote Lines
- Sales - CRM Quotes
- Sales - CRM Resource
- Sales - CRM Resource Territory
- Sales - CRM Sales Account Assessments
- Sales - CRM Sales Account Resource
- Sales - CRM Sales Account Territory
• Sales - CRM Territory Resource
• Service - CRM Customer Coverage Real Time
• Service - CRM Service Queue Resources Real Time
• Service - CRM Service Request Action Plan Actions Real Time
• Service - CRM Service Request Lifecycle
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Request Resource Real Time
• Service - CRM Service Request Tags Real Time
• Service - CRM Service Requests Real Time
• Service - CRM Survey Requests Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

• How many Leads are associated for a given Opportunity?
• How many Opportunities were created from a given Lead?
• What are my best performing product lines by customer geographies?
• How is my Revenue distributed across Customer geographies?
• What regions are my customers clustered in?
• What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• On which sales accounts is a given sales representative a member of the account team?
• Who are all the Contacts assigned to the Assets?
• What are the responses for different Opportunity for an Assessment submitted?
• What are the Quotas assigned to the team and the Actuals?
• How are the business plan objectives split?
• What are the objectives that have not met the target value set?
• What are the SIC codes associated with a Partner, and with all associated Partners?
• Against how many Opportunities, were the Quotes submitted in this month?
• How do the number of activities in a region and their average SR resolution rates by quarter compare?
• How often do communications cross channels to get to resolution?
• How many customer interactions happen without an SR?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How often are communications being transferred between agents?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many new coverages begin in the ensuing month?
• Are we equipped to service the increase in coverages?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
• How is tag usage across agents and resource teams? Which teams perform better than others?
• What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• How is survey request trending compared to SR resolutions during the same period?
• What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
• What are the Leads that are converted into Opportunities?
• How many Leads and Opportunities are Open for a given Customer in the Current quarter?
• Are the Leads associated with certain products?
• What is the open/closed revenue for each of the product groups in the selected geography?
• Are the sales reps moving their opportunities fast enough?
• Are there any upsell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the sales accounts owned by the Sales team?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• Who are the Resources assigned to the Leads created in any given time period?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• How did the Opportunity evolve over time?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• How many territories are assigned to a Resource/Employee?
• What are all the Territories assigned to Resources/Employees?
• What are the total number of Contact Relationships between two Contact?
• Does this Contact have subsidiaries?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• What is the opportunity information captured in the note to an opportunity?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• What are all addresses associated with the primary contact for all active opportunities in the current quarter?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What are the follow-up tasks I need to do on a particular customer?
• Does this account have subsidiaries?
• How is the Revenue spread for a given Customer hierarchy?
• How actively (# of Activities) are the Sales reps engaged with customers?
• What are my most active accounts? Who owns them and where are these located?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• Who are all the contacts for key customers and what are their roles?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region 'X'?
• Do Forecast rely on Revenue from few Products?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What is the revenue lost to competition for a specific product/product group?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are the Accounts under the sales team, by territory?
• What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?
• How many Assets are created in a particular time period?
• Who are all the resources assigned to the Assets?
• What is the additional information updated in the Notes for a Contact?
• What is the additional information updated in the Notes for a Customer?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
• What is the average time the Opportunity is in a particular sales stage?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the Resources associated to this contact?
• How many Leads do not have Contact?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• What are the Customers from this account, including all subsidiaries?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• What is the channel performance vs channel forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
• How do wins and losses trend quarterly for a specific product line?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the sales accounts that a given Sales representative owns?
• What is the QoQ growth for Assets by Products?
• How many Territories are assigned to an Opportunity?
• What are all the Territories assigned to Opportunities?
• How many new Resources are created in the current quarter?
• What are the target vs. actual number of the split objectives?
• What are the total number of Relationships between two Partners?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
• How many responses received for a given campaign?
• How many Opportunities associated to a Campaign?
• What is the total Quotes revenue for the current month?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What is the contact point information of the primary contact for all active opportunities in the current quarter?
• What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the associated activities related to my upcoming appointment and task?
• What are the total number of Relationships for a given Account?
• What are the top ten accounts by revenue in the last quarter?
Chapter 6
Duty Roles

Oracle CX Sales and B2B Service
Subject Areas for Transactional Business Intelligence in CX
Sales and B2B Service

- Who are my teams top Customers?
- Who are the 'new' customers, created in the past 6 months?
- What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
- How are product revenues trending month over month?
- How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
- What are the historical monthly trend of closed revenue by current territories?
- How many Leads are open for a given Product?
- What was the currency conversion rate applied to a specific claim?
- What products are often lost to key competitors? Is there a pattern?
- Who are the top competitors and what is the revenue exposure to them?
- Who are the Primary owners of the Contacts for contacts created in the last quarter?
- How many territories is the Lead part of?
- What are all the Campaigns assigned to an Opportunity?
- Who are all the Contacts assigned to Opportunities?
- How many Partners are assigned to an Opportunity?
- Who are all the Partners assigned to Opportunities?
- How is the Quota attainment rate for the sales team?
- What are the user preferences for the Users created in the system?
- Does this Partner have subsidiaries?
- What are the partner I have from this Partner, including all subsidiaries?
- How many times a Quote is revised before it gets approved?
- Who has submitted the highest number of Quotes in the current month?
- What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
- How many distinct customer contacts does an agent interact with through a given channel during a specific period?
- Is my team following the norm that an SR must be opened (or updated) for every customer communication?
- What are our issue resolution rates for low and high cost channels?
- What percent of communications are resolved the first time? What is the most commonly used channel?
- Are there action plans tracking late to an overall target completion date?
- Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
- Are our processes inefficient or preventing agents from meeting milestones?
- Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
- How does my team perform in meeting first response milestones versus resolution milestones?
- How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter?
• What are all addresses of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• How many Territories is a Partner part of?
• Who manages my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
• What is the Territory Quota vs/ Actual?
• Which Territories have exceeded their Quotes in the current Quarter?
• Who are the Partner resources in the system and which Partner Organization they belong to?
• What is the Campaign ROI (return on investment)?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
• What Partners are assigned to specific geographic territories?
• For given set of Customers, what percentage of my revenue is exposed to competition?
• Do forecasts rely on revenues from a few customers? What is the dependency profile?
• How to forecasts trend across periods?
• Who all are the Contacts associated to the Lead?
• 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?
• Was an MDF claim rejected? What was the reason the claim was rejected?
• Is the sales team converting leads to opportunities fast enough?
• How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
• Who are the resources assigned for a particular territory?
• How many new contacts are created in the system in the current month?
• What are the Products associated with the Deals?
• How many Contacts are assigned to an Opportunity?
• What Resources will not be able to meet the Quotas in the current quarter?
• What is the Hire date of the resources in an Organization?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many open SRs are linked to each tag?
Chapter 6
Duty Roles

- What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
- What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
- Was an SR sitting in a queue longer than the average time for all other SRs?
- Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
- Does the survey request activity show a declining trend?
- What are the names of the customers that a Sales team owns? Who are the key contacts?
- Does the forecast versus pipeline trend show a healthy picture?
- What are the Opportunity Revenue line details contributing the most to the Forecast?
- What are the higher value deals that have been moved out?
- What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
- Are the Leads supporting products that appeal to certain customers by size of company?
- What were the approved amounts vs the settled claim totals for the last 4 quarters?
- What are the top 10 open opportunities? What are the target close dates and revenues for these?
- What are all the contacts created in the system by Geography?
- What are all the Opportunities created as a result of Deal closure by a particular resource/team?
- What are all the Opportunities resulted from a Campaign?
- How many Resources are assigned to an Opportunity?
- How many Leads are part of the Campaign?
- Who has completed the most activity objectives?
- What are the activity levels in specific regions?
- Do customers contact us more often to solve issues or to seek answers to questions?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How is the percentage of compliant SRs trending month over month, quarter over quarter?
- Where are the outliers when it comes to compliance?
- How many showed up as compliant; how many were non-compliant during my review of completed work orders?
- What is the breakdown of open action plans by category?
- How many action plans are open and how long have they been open?
- How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
- What is the contact point information of the primary contact for accounts where I’m the owner or on the sales team?
- How can I identify neglected but strategic accounts to guide my team to focus on these?
- How long was an SR unassigned and how long did it sit in each queue?
- What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?
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 Quote Lines
• Sales - CRM Quotes

Business Questions

This duty role secures access to data that can answer the following business questions:

• Against how many Opportunities, were the Quotes submitted in this month?
• What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
• What is the total Quotes revenue for the current month?
• What are all the Campaigns assigned to an Opportunity?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What are the top 10 products for all the Deals submitted in the current quarter?
• How is the Deal Amount split between the products associated to the Deal Registration Lines?
• What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
• What are the Products associated with the Deals?
• What are all the Opportunities resulted from a Campaign?
• What quotes are associated with my opportunities, what are the quoteline items, and the associated products?

Sales Transaction Analysis Duty

Code Name

FBI_SALES_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

• Sales Representative

Subject Areas

This duty role secures access to the following subject areas:

• CRM - CRM Activities with Related Activities
• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• CRM - CRM Interaction Aggregate
• CRM - CRM Interaction Service Requests Real Time
• CRM - CRM Interactions Real Time
• CRM - CRM Omni Channel Events Real Time
• CRM - CRM Service Request Summary
• CRM - CRM Work Orders Real Time
• Marketing - CRM Leads and Opportunities Real Time
• Partners - CRM Partner Territory
• Sales - CRM Account Relationship
• Sales - CRM All Contact Contact Point
• Sales - CRM All Contacts Addresses
• Sales - CRM Asset
• Sales - CRM Asset Contact
• Sales - CRM Asset Resource
• Sales - CRM Business Plan Objective Split
• Sales - CRM Campaign Members
• Sales - CRM Campaign Opportunity
• Sales - CRM Contact Note
• Sales - CRM Contact Relationship
• Sales - CRM Contact Resource
• Sales - CRM Contacts
• Sales - CRM Customer Classification
• Sales - CRM Customer Note
• Sales - CRM Customer Overview
• Sales - CRM Customers
• Sales - CRM Customers and Contacts Real Time
• Sales - CRM Deal Registration
• Sales - CRM Deal Registration Product
• Sales - CRM Forecasting
• Sales - CRM Forecasting and Pipeline Revenue Real Time
• Sales - CRM Historical Forecasting
• Sales - CRM Historical Pipeline
• Sales - CRM Lead Assessments
• Sales - CRM Lead Contact
• Sales - CRM Lead Product
• Sales - CRM Lead Resource
• Sales - CRM Lead Territory
• Sales - CRM MDF Budget
• Sales - CRM MDF Claim
• Sales - CRM MDF Claim Settlement
• Sales - CRM MDF Request
• Sales - CRM Opportunities and Products Real Time
• Sales - CRM Opportunity Assessments
• Sales - CRM Opportunity Campaign
• Sales - CRM Opportunity Contact
• Sales - CRM Opportunity Note
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 6
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 Primary Contact Addresses
- Sales - CRM Primary Contact Contact Point
- Sales - CRM Quota Management
- Sales - CRM Quote Lines
- Sales - CRM Quotes
- Sales - CRM Resource
- Sales - CRM Resource Territory
- Sales - CRM Sales Account Assessments
- Sales - CRM Sales Account Resource
- Sales - CRM Sales Account Territory
- Sales - CRM Territory Resource
- Service - CRM Customer Coverage Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Lifecycle
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Request Tags Real Time
- Service - CRM Service Requests Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- How many Leads are associated for a given Opportunity?
- How many Opportunities were created from a given Lead?
- What are my best performing product lines by customer geographies?
- How is my Revenue distributed across Customer geographies?
- What regions are my customers clustered in?
- What are Sales Representatives forecast and closed revenues for the quarter? How do they compare against the Quota?
• On which sales accounts is a given sales representative a member of the account team?
• Who are all the Contacts assigned to the Assets?
• What are the responses for different Opportunity for an Assessment submitted?
• What are the Quotas assigned to the team and the Actuals?
• How are the business plan objectives split?
• What are the objectives that have not met the target value set?
• What are the SIC codes associated with a Partner, and with all associated Partners?
• Against how many Opportunities, were the Quotes submitted in this month?
• How do the number of activities in a region and their average SR resolution rates by quarter compare?
• How often do communications cross channels to get to resolution?
• How many customer interactions happen without an SR?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How often are communications being transferred between agents?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many new coverages begin in the ensuing month?
• Are we equipped to service the increase in coverages?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• What characteristics do groupings of SR’s based on specific tags (e.g., tag = ‘outage’) exhibit?
• How is tag usage across agents and resource teams? Which teams perform better than others?
• What is the complete set of contact points for a primary contact to ensure I send a communication out to only one contact point, and do not send duplicate communications to the same primary contact?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• What is my recurring and non-recurring revenue at the quote line item and number of quotes and quote line items?
• What are the Leads that are covetered into Opportunities?
• How many Leads and Opportunities are Open for a given Customer in the Current quarter?
• Are the Leads associated with certain products?
• What is the open/closed revenue for each of the product groups in the selected geography?
• Are the sales reps moving their opportunities fast enough?
• Are there any up sell/cross sell opportunities?
• Is overall pipeline healthy enough to meet sales goals?
• What are the top stalled opportunities and who are the sales reps working on these?
• What are the sales accounts owned by the Sales team?
• What are the Deals submitted by the Partners in the current quarter with the Deal size?
• Who are the Resources assigned to the Leads created in any given time period?
• What are the Leads assigned to me/my team member?
• What are all the Territories the Lead is part of?
• How did the Opportunity evolve over time?
• How did the Opportunity revenue amount change over time? (or any other Opportunity attributes)
• How is the QoQ trend of the Customer Satisfaction? (by comparing the same assessments submitted by Partner) for different Quarters?
• How many territories are assigned to a Resource/Employee?
• What are all the Territories assigned to Resources/Employees?
• What are the total number of Contact Relationships between two Contact?
• Does this Contact have subsidiaries?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• What is the opportunity information captured in the note to an opportunity?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• What are all addresses associated with the primary contact for all active opportunities in the current quarter?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• What are the follow-up tasks I need to do on a particular customer?
• Does this account have subsidiaries?
• How is the Revenue spread for a given Customer hierarchy?
• How actively (# of Activities) are the Sales reps engaged with customers?
• What are my most active accounts? Who owns them and where are these located?
• What are the contact - points (phone, email, address, etc.) of key contacts?
• Who are all the contacts for key customers and what are their roles?
• Who are the customers/contacts that I can potentially visit when I am planning my travel to Account Region ‘X’?
• Do Forecast rely on Revenue from few Products?
• Are the Approved Claims fully allocated or are the Channel partners not spending to approval?
• What is the revenue lost to competition for a specific product/product group?
• How is each member on the team performing on deal size, account coverage, and win rate?
• What are the Accounts under the sales team, by territory?
• What are the customer open/closed revenues and activities for all accounts in my resource team's territory hierarchy?
• How many Assets are created in a particular time period?
• Who are all the resources assigned to the Assets?
• What is the additional information updated in the Notes for a Contact?
• What is the additional information updated in the Notes for a Customer?
• Who are the Employees/Resource for the Deals that are submitted in the current month?
• What are the responses for different Leads for an Assessment submitted e.g. Lead Qualification Assessment?
• What is the average time the Opportunity is in a particular sales stage?
• What are the responses by different Accounts/Customers for an Assessment submitted e.g. Customer Satisfaction?
• What are the Resources are associated to this contact?
• How many Leads do not have Contact?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• What is the complete set of addresses for the primary contact and non-primary contacts of an account to ensure I send a communication out to only one address per contact, and do not send duplicate communications to other addresses for the same contact?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• What are the Customers from this account, including all subsidiaries?
• Are revenues getting closed in line with their forecast figures? To what extent do they deviate?
• What is the relative mix of forecast revenues by the various sales channels in a specific territory?
• What is the channel performance vs channel forecast?
• Are too many deals being pushed out to the subsequent fiscal quarters?
• What are my claimed vs unclaimed MDF totals?
• What are total number of Claims in the current quarter?
• Are there any opportunities to cross-sell/up-sell to help me meet/exceed my quota?
• How do wins and losses trend quarterly for a specific product line?
• What are the most likely reasons that the Opportunities are lost against our key competitors?
• What is the value trend of high value opportunities? Do they show a positive or negative trend?
• What are the sales accounts that a given Sales representative owns?
• What is the QoQ growth for Assets by Products?
• How many Territories are assigned to an Opportunity?
• What are all the Territories assigned to Opportunities?
• How many new Resources are created in the current quarter?
• What are the target v/s actual number of the split objectives?
• What are the total number of Relationships between two Partners?
• What are all the Leads/Contacts (Campaign Members) associated to the Campaign?
• How many responses received for a given campaign?
• How many Opportunities associated to a Campaign?
• What is the total Quotes revenue for the current month?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• What is the contact point information of the primary contact for all active opportunities in the current quarter?
• What are all addresses associated with the primary contact for accounts I'm the owner of or on the sales team?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• What are the associated activities related to my upcoming appointment and task?
• What are the total number of Relationships for a given Account?
• What are the top ten accounts by revenue in the last quarter?
• Who are my teams top Customers?
• Who are the 'new' customers, created in the past 6 months?
• What were the forecast revenues for the same period, last year? How did it compare with closed revenues?
• How are product revenues trending month over month?
• How do opportunities evolve over weeks/months in relation to sales stage, revenue amount, products, and territories?
• What are the historical monthly trend of closed revenue by current territories?
• How many Leads are open for a given Product?
• What was the currency conversion rate applied to a specific claim?
• What products are often lost to key competitors? Is there a pattern?
• Who are the top competitors and what is the revenue exposure to them?
• Who are the Primary owners of the Contacts for contacts created in the last quarter?
• How many territories is the Lead part of?
• What are all the Campaigns assigned to an Opportunity?
• Who are all the Contacts assigned to Opportunities?
• How many Partners are assigned to an Opportunity?
• Who are all the Partners assigned to Opportunities?
• How is the Quota attainment rate for the sales team?
• What are the user preferences for the Users created in the system?
• Does this Partner have subsidiaries?
• What are the partner I have from this Partner, including all subsidiaries?
• How many times a Quote is revised before it gets approved?
• Who has submitted the highest number of Quotes in the current month?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How of many of these are raised as critical?
• What is the contact point information of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What is the primary contact and non-primary contact pointa for all active opportunities in the current quarter?
• What are all addresses of the primary contact and non-primary contacts for accounts where I’m the owner or on the sales team?
• What are all addresses of the primary contact and non-primary contacts for all active opportunities in the current quarter?
• How many Territories is a Partner part of?
• Who manages my top accounts?
• 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?
• How many Leads is a Contact associated to?
• Are the MDF claims paid promptly? How many days on average between a claim request vs claim approval?
• What are the top ten products by revenue during the past quarter/year?
• What is the buying trend of our biggest customers?
• Do the sales territories need rebalancing?
• Are the Sales reps paying enough attention to the territories that they are a part of? What are their customer activity levels?
• What are the top 10 Products by Asset count?
• What are the Assets that are expiring in the next quarter?
• How are the customers classified?
• What are the top 10 Deals created in the current quarter by their Deal size?
• 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?
• Who are all the Resources assigned to Opportunities?
• What is the Territory Quota vs/ Actual?
- Which Territories have exceeded their Quotes in the current Quarter?
- Who are the Partner resources in the system and which Partner Organization they belong to?
- What is the Campaign ROI (return on investment)?
- How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
- On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
- What are the rates for agents declining work offers?
- What are the average handle times?
- What are the number of interactions by channel, agent, and time period?
- Are there currently service requests that have missed the target milestone and require escalation?
- Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
- Who are my agents that have the most pending SRs?
- What is the prevalence of SR transfers for an agent/manager/group/product/location?
- What are the popular reasons for SRs to be transferred? Is there a pattern?
- How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?
- Are there any workload balancing issues on my team? Are a few members performing most of the activities?
- Did the SR get assigned to the wrong queue/team?
- What are the details on my quotes such as, quote number, quote amount, status, and proposal documents?
- What Partners are assigned to specific geographic territories?
- For given set of Customers, what percentage of my revenue is exposed to competition?
- Do forecasts rely on revenues from a few customers? What is the dependency profile?
- How to forecasts trend across periods?
- Who all are the Contacts associated to the Lead?
- 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?
- Was an MDF claim rejected? What was the reason the claim was rejected?
- Is the sales team converting leads to opportunities fast enough?
- How is my team doing in terms of task completions? (requires cross subject area join with Sales - CRM Sales Activity)
- Who are the resources assigned for a particular territory?
- How many new contacts are created in the system in the current month?
- What are the Products associated with the Deals?
- How many Contacts are assigned to an Opportunity?
- What Resources will not be able to meet the Quotas in the current quarter?
- What is the Hire date of the resources in an Organization?
- What are the latest revisions to activity objectives?
Duty Roles

- Across what channels do such non-SR interactions most often occur?
- What is the interactions activity level across channels and agents? How do they compare across time periods?
- What channels are the most effective for resolving issues with a single interaction?
- How often are my agents able to resolve issues using a low cost channel like chat?
- How often do communications cross channels before they are resolved?
- What is the % of open SRs with milestones, that is, have at least one milestone?
- As an agent am I spreading myself too thin by being part of one too many SR teams?
- What are the open critical SRs that my team is working on currently? How many of these are escalated?
- How many open SRs are linked to each tag?
- What is the complete set of contact points for the primary contact and non-primary contacts of an account? Am I sending out duplicate communications?
- What are the complete set of addresses for a primary contact to ensure I send a communication out to only one address for the contact, and do not send duplicate communications out to other addresses for the same primary contact?
- Was an SR sitting in a queue longer than the average time for all other SRs?
- Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
- What are the names of the customers that a Sales team owns? Who are the key contacts?
- Does the forecast versus pipeline trend show a healthy picture?
- What are the Opportunity Revenue line details contributing the most to the Forecast?
- What are the higher value deals that have been moved out?
- What are the opportunities that have undergone revenue changes - either upward or downward? Which team members own these opportunities?
- Are the Leads supporting products that appeal to certain customers by size of company?
- What were the approved amounts vs the settled claim totals for the last 4 quarters?
- What are the top 10 open opportunities? What are the target close dates and revenues for these?
- What are all the contacts created in the system by Geography?
- What are all the Opportunities created as a result of Deal closure by a particular resource/team?
- What are all the Opportunities resulted from a Campaign?
- How many Resources are assigned to an Opportunity?
- How many Leads are part of the Campaign?
- Who has completed the most activity objectives?
- What are the activity levels in specific regions?
- Do customers contact us more often to solve issues or to seek answers to questions?
- Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
- How is the percentage of compliant SRs trending month over month, quarter over quarter?
- Where are the outliers when it comes to compliance?
- How many showed up as compliant; how many were non-compliant during my review of completed work orders?
Security Transaction Analysis Duty

Code Name

FBI_SECURITY_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- IT Security Manager

Subject Areas

This duty role secures access to the following subject areas:

- Security - Audit Real Time
- Security - Roles and Privileges Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- What are all the data security privileges that a specific user added?
- Why am I not able to view certain subject areas with my login credentials?
- Can I view and edit a particular page? If yes, which functional security policy do I need to provide to a user who needs similar access?
I have not added a specific role to a user, but the user seems to have this job role. Can I trace how has this been inherited by the user?

Which data security policy would provide access to the data I need to see?

Which roles were added with a specific functional security policy, and who added them?

Service Administrative Transaction Analysis Duty

Code Name

FBI_SERVICE_ADMINISTRATIVE_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

- Customer Relationship Management Application Administrator
- Sales Administrator

Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activities with Related Activities
- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
• Service - CRM Service Request Lifecycle
• Service - CRM Service Request Messages Real Time
• Service - CRM Service Request Milestones Real Time
• Service - CRM Service Request Resource Real Time
• Service - CRM Service Request Tags Real Time
• Service - CRM Service Requests Real Time
• Service - CRM Social Post Real Time
• Service - CRM Survey Requests Real Time
• Service - CRM Survey Responses Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

• How do the number of activities in a region and their average SR resolution rates by quarter compare?
• How often do communications cross channels to get to resolution?
• How many customer interactions happen without an SR?
• How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
• As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
• How often are communications being transferred between agents?
• What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
• How many new coverages begin in the ensuing month?
• Are we equipped to service the increase in coverages?
• What is the current count of inbound email requests by status and mailbox?
• How many messages resulted in new service request creation versus update to existing service request?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?
• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?
• How are SR transfers contributing to overall latency/resolution delays?
• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?
• How does the aging profile of SRs look like? Are there any outliers calling for intervention?
• What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?
• How is tag usage across agents and resource teams? Which teams perform better than others?
• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?
• How is survey request trending compared to SR resolutions during the same period?
• What percentage of service requests involve at least one interaction?
• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?
• What is the average length of time of an interaction, by agent and channel?
• How many were compliant and non-compliant when I, as an agent review my own completed work orders?
• To what extent has the number of customer coverages increased between two given dates?
• How many emails came from known versus unknown contacts?
• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?
• What is the delay in estimated completion dates?
• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?
• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?
• What are the SRs that are waiting on my customers?
• Is the Service organization effectively handling new social service requests in the appropriate timeframe?
• Do SR’s with specific tags (e.g., tags for specific partners) show higher resolution times?
• Are we seeing an issue regarding compliance rates with certain tags?
• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?
• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?
• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?
• Are survey request frequencies meeting our norms?
• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?
• Have we kept our strategic customers happy? If not, where can we improve - in timeliness, better first time resolution, etc.?
• What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?
• What are the follow-up tasks I need to do on a particular customer?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• How many emails are we receiving over time?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the response scores for customer where we have not met SLA’s?
• Do one or more of the agents in my team need training to improve customer communication skills?
• What are the associated activities related to my upcoming appointment and task?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product ‘A’ have tag ‘X’ or ‘Y’? How many have the ‘Potential Churn’ tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• Is our resolution performance for escalated issues worse or better than non escalated issues?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many social posts came from known versus unknown contacts?
• How many open SRs are linked to each tag?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• What is the overall satisfaction levels of our customers with regards to issue resolutions?
• Which of our product lines most frequently receive suggestions for product improvements?
• Who has completed the most activity objectives?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• What is the breakdown of open action plans by category?
• How many action plans are open and how long have they been open?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?

Service Managerial Transaction Analysis Duty

Code Name

FBI_SERVICE_MANAGERIAL_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

• Customer Service Manager

Subject Areas

This duty role secures access to the following subject areas:

• CRM - CRM Activities with Related Activities
• CRM - CRM Activity Contact Real Time
• CRM - CRM Activity Objective Real Time
• CRM - CRM Activity Real Time
• CRM - CRM Activity Resource Real Time
• CRM - CRM Interaction Aggregate
Subject Areas for Transactional Business Intelligence in CX Sales and B2B Service

Chapter 6
Duty Roles

- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Inbound Messages Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Lifecycle
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Request Tags Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Social Post Real Time
- Service - CRM Survey Requests Real Time
- Service - CRM Survey Responses Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How often are communications being transferred between agents?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
- How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?
- How many new coverages begin in the ensuing month?
- Are we equipped to service the increase in coverages?
- What is the current count of inbound email requests by status and mailbox?
- How many messages resulted in new service request creation versus update to existing service request?
• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?

• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?

• How are SR transfers contributing to overall latency/resolution delays?

• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?

• How does the aging profile of SRs look like? Are there any outliers calling for intervention?

• What characteristics do groupings of SR’s based on specific tags (e.g., tag = ‘outage’) exhibit?

• How is tag usage across agents and resource teams? Which teams perform better than others?

• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?

• How is survey request trending compared to SR resolutions during the same period?

• What percentage of service requests involve at least one interaction?

• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?

• What is the average length of time of an interaction, by agent and channel?

• How many were compliant and non-compliant when I, as an agent review my own completed work orders?

• To what extent has the number of customer coverages increased between two given dates?

• How many emails came from known versus unknown contacts?

• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?

• What is the delay in estimated completion dates?

• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?

• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?

• What are the SRs that are waiting on my customers?

• Is the Service organization effectively handling new social service requests in the appropriate timeframe?

• Do SR’s with specific tags (e.g., tags for specific partners) show higher resolution times?

• Are we seeing an issue regarding compliance rates with certain tags?

• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?

• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?

• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?

• Are survey request frequencies meeting our norms?

• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?

• Have we kept our strategic customers happy? If not, where can we improve - in timliness, better first time resolution, etc.?

• What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?

• What are the follow-up tasks I need to do on a particular customer? 
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• How many emails are we receiving over time?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• Do we need to adjust our survey template to improve response rates?
• Does seasonality impact response rates?
• How does response differ for various service teams? Do some teams obtain better response rates?
• What are the response scores for customer where we have not met SLA’s?
• Do one or more of the agents in my team need training to improve customer communication skills?
• What are the associated activities related to my upcoming appointment and task?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product 'A' have tag 'X' or 'Y'? How many have the 'Potential Churn' tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Are survey requests being sent per plan across teams, service categories, products, account regions?
• Is our resolution performance for escalated issues worse or better than non escalated issues?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• Is the Service organization effectively handling new emails in the appropriate timeframe?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many social posts came from known versus unknown contacts?
• How many open SRs are linked to each tag?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• Does the survey request activity show a declining trend?
• What is the overall satisfaction levels of our customers with regards to issue resolutions?
• Which of our product lines most frequently receive suggestions for product improvements?
• Who has completed the most activity objectives?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• What is the breakdown of open action plans by category?
• How many action plans are open and how long have they been open?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?

Service Transaction Analysis Duty

Code Name

FBI_SERVICE_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

• Customer Service Representative
Subject Areas

This duty role secures access to the following subject areas:

- CRM - CRM Activities with Related Activities
- CRM - CRM Activity Contact Real Time
- CRM - CRM Activity Objective Real Time
- CRM - CRM Activity Real Time
- CRM - CRM Activity Resource Real Time
- CRM - CRM Interaction Aggregate
- CRM - CRM Interaction Service Requests Real Time
- CRM - CRM Interactions Real Time
- CRM - CRM Omni Channel Events Real Time
- CRM - CRM Service Request Summary
- CRM - CRM Work Orders Real Time
- Service - CRM Customer Coverage Real Time
- Service - CRM Service Queue Resources Real Time
- Service - CRM Service Request Action Plan Actions Real Time
- Service - CRM Service Request Lifecycle
- Service - CRM Service Request Messages Real Time
- Service - CRM Service Request Milestones Real Time
- Service - CRM Service Request Resource Real Time
- Service - CRM Service Request Tags Real Time
- Service - CRM Service Requests Real Time
- Service - CRM Survey Responses Real Time

Business Questions

This duty role secures access to data that can answer the following business questions:

- How do the number of activities in a region and their average SR resolution rates by quarter compare?
- How often do communications cross channels to get to resolution?
- How many customer interactions happen without an SR?
- How many interactions does it take before an SR is resolved? How does this vary across product lines and service categories?
- As a Service Manager, do I have coverage to support all channel work? What are the abandonment rates?
- How often are communications being transferred between agents?
- What is the impact of linking knowledge articles to SRs? Has it led to reduced SR resolution times and SR reopenings?
• How many work orders are non-compliant, expected to be non-compliant and expected to be compliant when I, as an agent review my own open work orders?

• How many new coverages begin in the ensuing month?

• Are we equipped to service the increase in coverages?

• Can the variation in SR resolution times between team members be attributable to sub-optimal queue assignments?

• What are our most commonly used channels for messaging by product, service category, and location? Is the channel usage of high cost channels very high?

• How are SR transfers contributing to overall latency/resolution delays?

• What is the reopen rate for SRs owned by my team? Who has the most reopen rate? Is there a training issue?

• How does the aging profile of SRs look like? Are there any outliers calling for intervention?

• What characteristics do groupings of SR's based on specific tags (e.g., tag = 'outage') exhibit?

• How is tag usage across agents and resource teams? Which teams perform better than others?

• How are the individuals on my team doing as far as completing tasks on SRs with milestone due dates this week?

• What percentage of service requests involve at least one interaction?

• Are there preferred channels that customers use to contact us for specific service issue categories and product areas?

• What is the average length of time of an interaction, by agent and channel?

• How many were compliant and non-compliant when I, as an agent review my own completed work orders?

• To what extent has the number of customer coverages increased between two given dates?

• Is there scope for a better resource load balance keeping in consideration the SR throughput across queues?

• What is the delay in estimated completion dates?

• Do we see a pattern in the average number of messages per closed SR going up in recent months? What factors are contributing to this surge, if any?

• By being part of the SR team, how many SR resolutions has my resource team been able to influence during the past period?

• What are the SRs that are waiting on my customers?

• Do SR's with specific tags (e.g., tags for specific partners) show higher resolution times?

• Are we seeing an issue regarding compliance rates with certain tags?

• As a Service agent, I need to view my workload for the upcoming week/month. What are my urgent and overdue tasks for this period?

• Was there a lot of time spent waiting on customers to respond to more information, documents and so on?

• Did the SR have more than one issue that needed to be resolved (perhaps serially or requiring parallel efforts by multiple resources)?

• What aspects of service delivery are customers most happy about? Which ones are they most unhappy about?

• Have we kept our strategic customers happy? If not, where can we improve - in timliness, better first time resolution, etc.?

• What is the most frequent positive feedback we get from our customers? Most frequent negative feedback?

• What are the follow-up tasks I need to do on a particular customer?
• What are the activity objectives for the current period?
• What managers have teams averaging the most activities?
• Are agents prematurely updating SRs as Resolved to make their numbers look better?
• What product lines have a higher percentage of non-compliant SRs open?
• How frequently do agents link articles to SRs?
• How many are non-compliant, expected non-compliant, and expected compliant during my review of open work orders?
• How often am I meeting milestone targets for my SRs? Which milestones do I miss most often?
• I need some of my team members to focus on the expected surge in support calls for the new product being introduced next quarter. Who should I recruit for this initiative, based on their activity levels?
• How long did it take to assign the SR to the correct queue?
• Was the assigned agent overloaded with other work?
• Was the SR queue modified or SR resource owner modified at any point?
• How many contacts were not favored with a positive outcome with a given agent?
• How many interactions does it take on average to resolve an issue? What is the average interaction duration - by team, agent, and channel?
• How many interactions are being lost/abandoned? How does this compare with previous periods?
• How long is it taking for offers to be made to agents?
• How many interactions, on average, does it require to resolve an issue?
• Are we keeping the number of non-compliant SRs in check for our most valuable customers?
• Are my team resources optimally deployed across service queues to maximize productivity?
• Are we responding to customer messages in a timely manner?
• What is the incidence of participation of my resource team in SRs over a period? How many open SRs are they a part of, presently?
• How many SRs have been waiting on my agents for more than 24 hours? Which of these are critical or escalated?
• Was the assigned agent overloaded with other work (based on the average number of SRs assigned to the agent)?
• What are the response scores for customer where we have not met SLA’s?
• Do one or more of the agents in my team need training to improve customer communication skills?
• What are the associated activities related to my upcoming appointment and task?
• What is the maximum number of distinct contacts that is involved with an SR before it is closed? Does this vary by SR category, product, and agent?
• How many distinct customer contacts does an agent interact with through a given channel during a specific period?
• Is my team following the norm that an SR must be opened (or updated) for every customer communication?
• What are our issue resolution rates for low and high cost channels?
• What percent of communications are resolved the first time? What is the most commonly used channel?
• Are there action plans tracking late to an overall target completion date?
• Are there too many stale messages, that is, messages that have not been updated in a long time tied to critical/escalated issues?
• Are our processes inefficient or preventing agents from meeting milestones?
• Is a particular target too aggressive? Who is best at achieving targets for a given category of service request?
• How does my team perform in meeting first response milestones versus resolution milestones?
• How many SRs are unassigned for more than a day? Who are the impacted customers? How many of these are raised as critical?
• Are satisfaction levels showing a declining trend over time? What specific account regions contribute to this?
• How many times has the customer communicated with the contact center on this particular service request and what channels did they use?
• On an average, how many interactions has it taken to resolve critical issues during the past month? How does that compare with previous months?
• What are the rates for agents declining work offers?
• What are the average handle times?
• What are the number of interactions by channel, agent, and time period?
• Are there currently service requests that have missed the target milestone and require escalation?
• Where is my team missing SLAs? Is it in certain geographic locations, service categories, or product lines?
• Who are my agents that have the most pending SRs?
• What is the prevalence of SR transfers for an agent/manager/group/product/location?
• What are the popular reasons for SRs to be transferred? Is there a pattern?
• How many SRs for product ‘A’ have tag ‘X’ or ‘Y’? How many have the ‘Potential Churn’ tag?
• Are there any workload balancing issues on my team? Are a few members performing most of the activities?
• Did the SR get assigned to the wrong queue/team?
• Is our resolution performance for escalated issues worse or better than non escalated issues?
• What are the latest revisions to activity objectives?
• Across what channels do such non-SR interactions most often occur?
• What is the interactions activity level across channels and agents? How do they compare across time periods?
• What channels are the most effective for resolving issues with a single interaction?
• How often are my agents able to resolve issues using a low cost channel like chat?
• How often do communications cross channels before they are resolved?
• What is the % of open SRs with milestones, that is, have at least one milestone?
• As an agent am I spreading myself too thin by being part of one too many SR teams?
• What are the open critical SRs that my team is working on currently? How many of these are escalated?
• How many open SRs are linked to each tag?
• Was an SR sitting in a queue longer than the average time for all other SRs?
• Do some SR categories imply higher difficulties (going by the actual time agents spend on such SRs)
• What is the overall satisfaction levels of our customers with regards to issue resolutions?
• Which of our product lines most frequently receive suggestions for product improvements?
• Who has completed the most activity objectives?
• What are the activity levels in specific regions?
• Do customers contact us more often to solve issues or to seek answers to questions?
• Are there currently work requests that have a long acceptance time? What are the agent utilization rates?
• How is the percentage of compliant SRs trending month over month, quarter over quarter?
• Where are the outliers when it comes to compliance?
• How many showed up as compliant; how many were non-compliant during my review of completed work orders?
• What is the breakdown of open action plans by category?
• How many action plans are open and how long have they been open?
• How are we doing on SR resolution times between current and past months? What is the reason for degradation, if any?
• How can I identify neglected but strategic accounts to guide my team to focus on these?
• How long was an SR unassigned and how long did it sit in each queue?
• What is the association between my appointments or tasks and their related call reports or follow-up activities for an opportunity?

Subscription Management Transaction Analysis Duty

Code Name

FBI_SUBSCRIPTION_TRANSACTION_ANALYSIS_DUTY

Job Roles

This duty role is related to the following job roles:

• Subscription Specialist

Subject Areas

This duty role secures access to the following subject areas:

• Subscription Management - Covered Levels Real Time
• Subscription Management - Subscription Billing Real Time
• Subscription Management - Subscription Relationships Real Time
• Subscription Management - Subscriptions Real Time
Business Questions

This duty role secures access to data that can answer the following business questions:

- How many subscriptions were renewed the last quarter?
- Which customers have covered levels worth more then $50k that are expiring in 30 days?
- What's the number of subscriptions by status and date range?
- What is the discount that was provided for a particular customer or product?
- What is the Net MRR change due to amendments?
- What is the trend of successful, outstanding and churned renewals in the last 6 months?
- What is the MRR lost each month due to suspensions in the last 6 months?
- What's the total contract value (TCV) in the last one year?
- What's the total MRR?
- What is the Net MRR change due to amendments where full credit was issued?
- Which covered levels expired without renewal in the last month?
- What are all the assets covered for a particular customer?
- What is the projected billing for the next 6 months?
- How much MRR was renewed each month in the last 6 months?
- How does the usage of a particular subscription product trend?
- Which products are most frequently upgraded to or downgraded from?
- How many subscriptions are expiring in the next quarter?
- How many subscriptions were terminated in the last year?
- Which customers or coverage products deliver the most revenue?
- What is the Net Billing for the last 6 months?

User System Usage Transaction Analysis Duty

Code Name

FBI_USER_SYSTEM_USAGE_TRANSACTION_ANALYSIS_DUTY

Job Roles

No applicable job roles

Subject Areas
This duty role secures access to the following subject areas:

- CRM - CRM Click History
- CRM - CRM Reporting Usage

Business Questions

This duty role secures access to data that can answer the following business questions:

- Which users are using the application the most or least based on clicks?
- How are the areas of the application performing?
- What areas of the application are used by users in specific geographic region or resource hierarchies?
- Which types of reports and subject areas are the users in your organization are looking at?
- How important are analytics to your team, and how much do they use them?
- What are the most and least popular reports and which analytics are important to your team?
- Which analytics should you prioritize and which can be phased out to optimize resources?
- What areas of the application are users viewing or not viewing?

User System Usage Transaction Analysis Duty

Code Name

FBI_USER_SYSTEM_USAGE_TRANSACTION_ANALYSIS_DUTY

Job Roles

No applicable job roles

Subject Areas

This duty role secures access to the following subject areas:

- User System Usage

Business Questions

This duty role secures access to data that can answer the following business questions:

- Who are the top 10 active users of the system?
• How is the user 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 users?
• Users belonging to what job title are most active in the system?