LeanData Reporting

SLA and Velocity Reporting

Overview

This guide is designed to walk you through setting up SLA and Funnel Metrics Velocity (FMV) Reporting with LeanData. With Time-Based features such as the Time-Based Node and Relative date stamping in LeanData Router, many users find that they are able to create reports to help track SLAs and Deal Velocity. This guide will walk you through creating reports and adding the necessary nodes to LeanData's Lead Router to track and report on SLAs and funnel velocity.

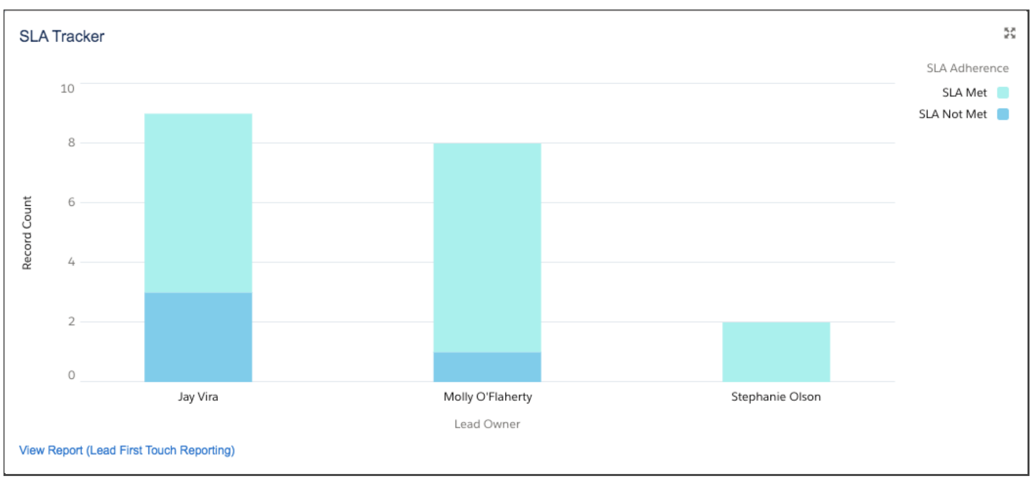
Use Cases Covered

- Forecast revenue & time to close based on company size, company industry, etc.
- Identify the stages with the longest duration and adjust processes accordingly
- Support Sales Performance conversations with SLA adherence

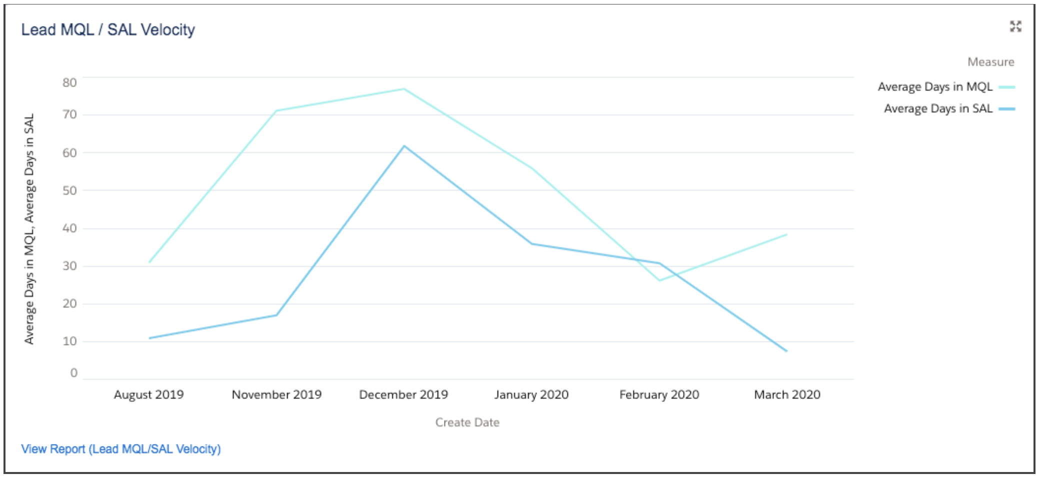
Requirements

- Must create custom field(s) on the primary object
- Must create custom field(s) or a row-level formula field for reporting (Option 2/FMV)
- Only captures data moving forward (not historical data)

SLA Lightning Dashboard Example

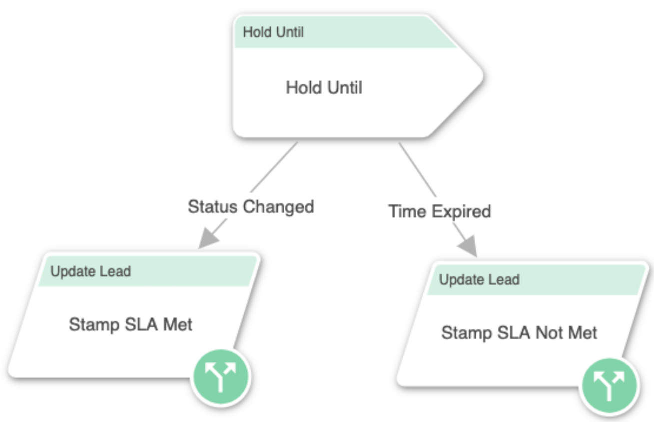


Funnel Metrics Lightning Dashboard Example

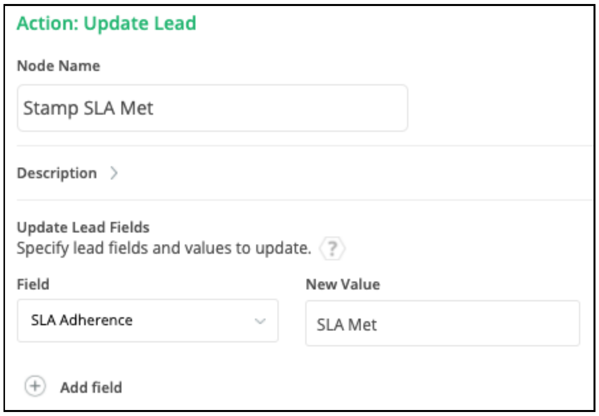


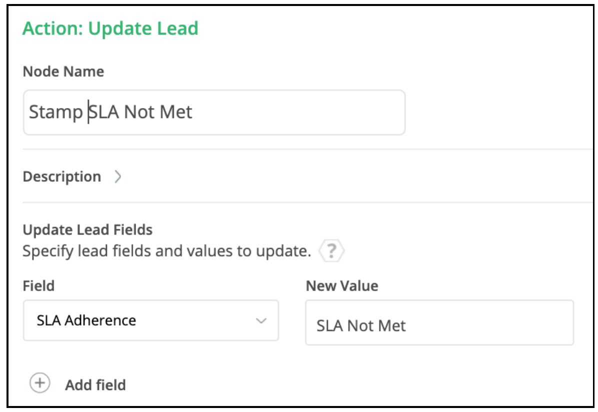
SLAs

Option 1: Use the Hold Until Node

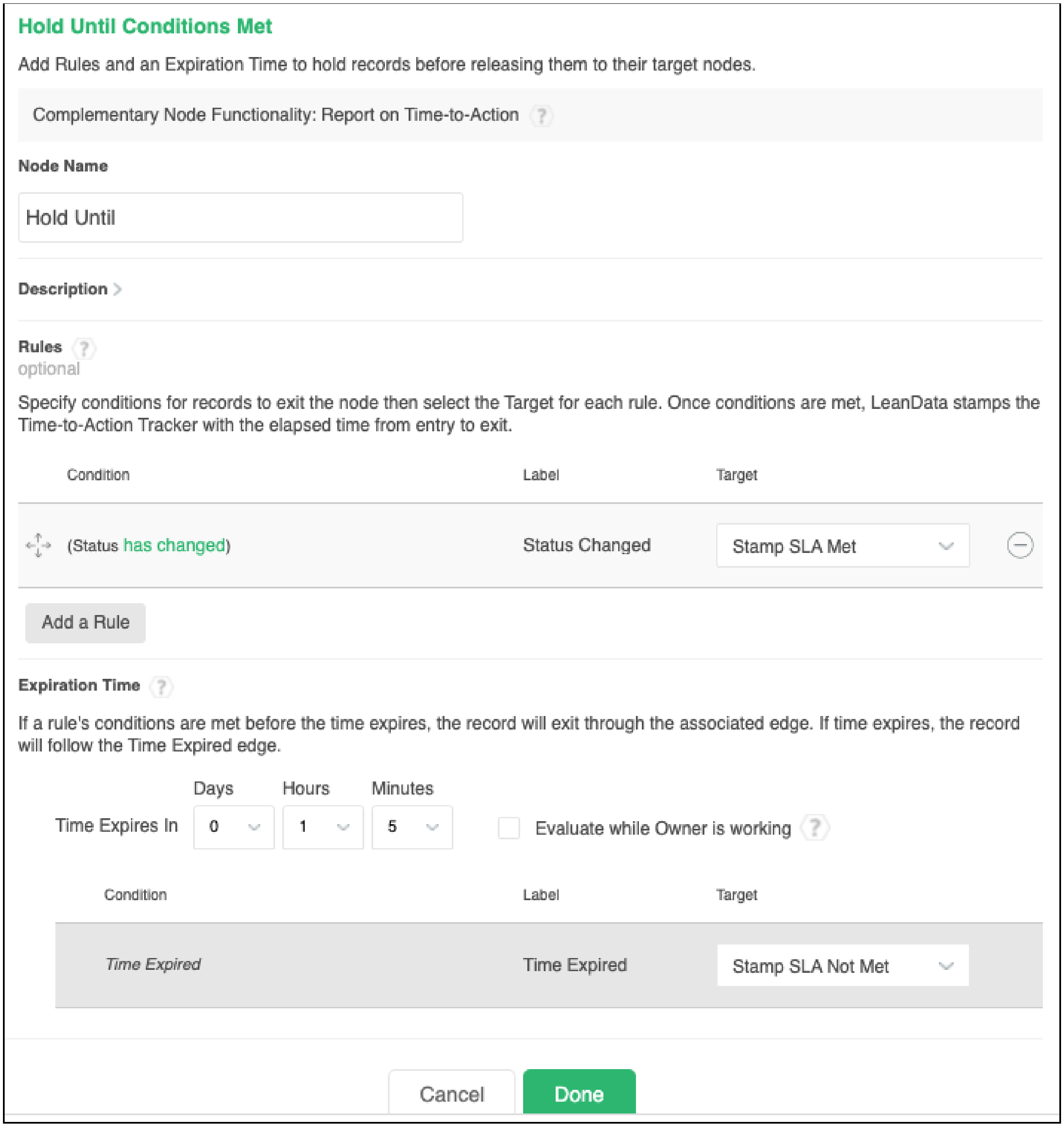


1. In Salesforce, create a custom text field on the object with a unique name, such as “SLA Adherence”
2. Add two Update record nodes
3. In one Update record node, update the “SLA Adherence” field to with the value: “SLA Met” and name the node “Stamp SLA Met” or something similar.
4. In the other Update record node, update the “SLA Adherence” field to with the value: “SLA Not Met” and name the node “Stamp SLA Not Met” or something similar.





5. In FlowBuilder, add a Hold Until node
6. Set the SLA time frame in the Hold Until node
7. Set conditions in the Hold Until node. For example: “Lead Status has changed”
8. If conditions are met and Lead Status has changed, connect the edge to the “Stamp SLA Met” Update record node
9. If conditions are not met, connect the edge to the “Stamp SLA Not Met” Update record node

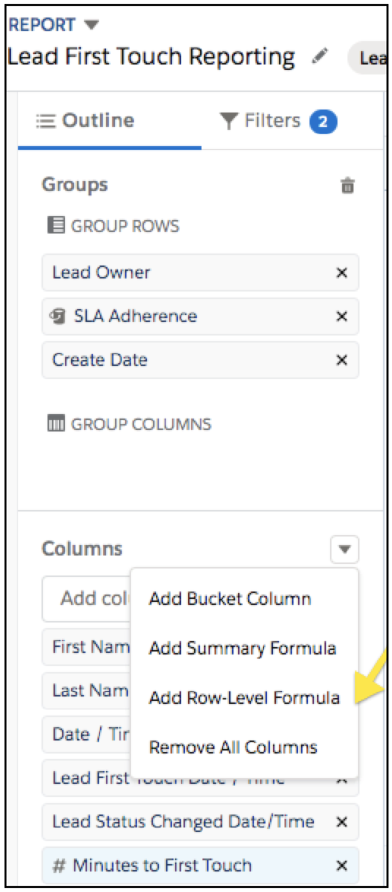


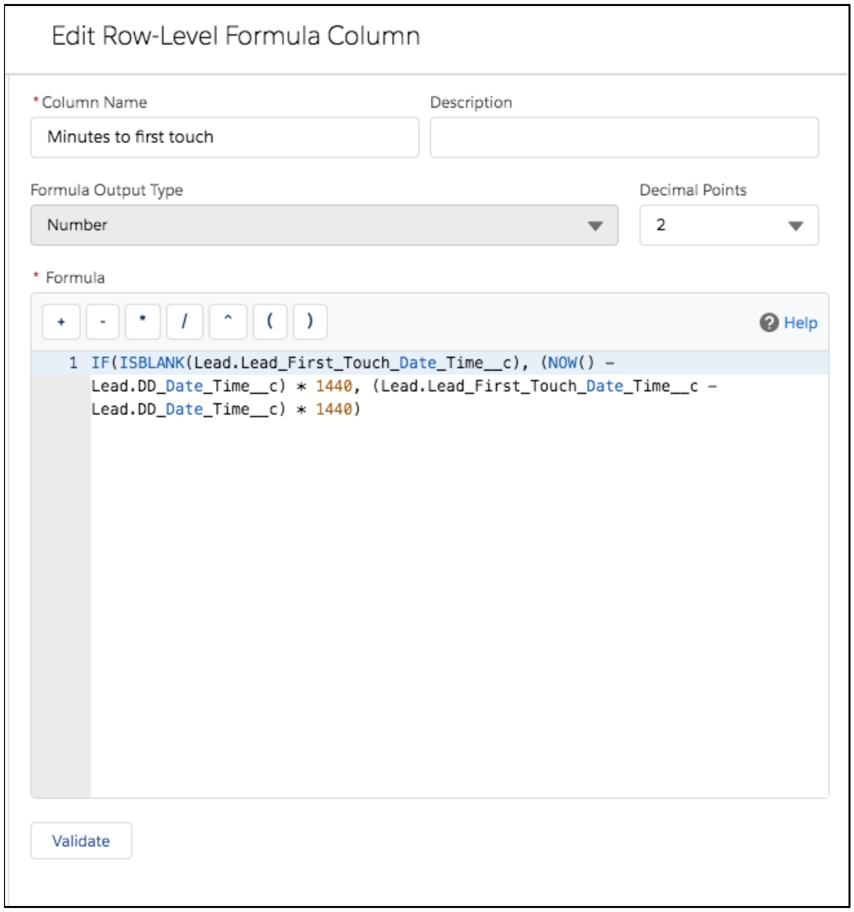
Option 2: Use Relative Date Stamping

Steps in Salesforce Setup (under Objects):

1. In Salesforce, create two custom date/time fields on the object with unique names, such as “Lead Assigned Date/Time” and “First Touch Date/Time”
2. To track the difference between the fields, two options are available:
    a. **Option 1**: A Salesforce Report Row-Level Formula Field. Each Report in Lightning can only have **ONE of these fields**

b. **Option 2**: Create a Salesforce Formula Field of number type. The limit of fields may vary - to check your current usage, follow the directions here





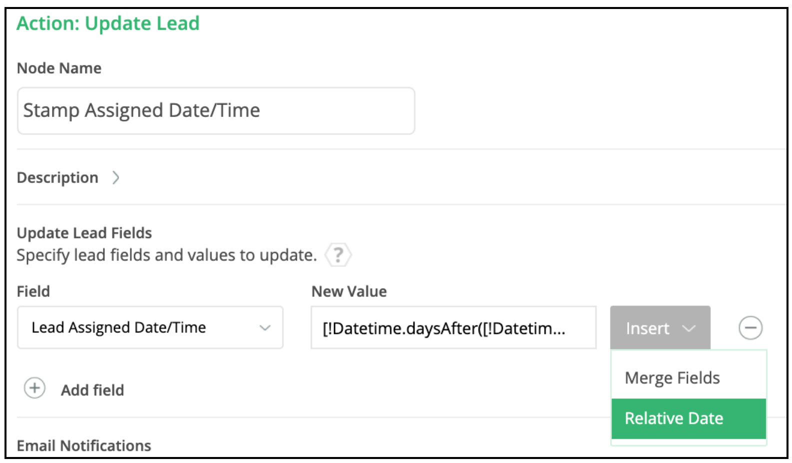
3. Add a formula:
   a. **Option 1**:
      i. In Lightning, on the Salesforce Report, next to columns, add a row-level formula field, with a name, such as “Minutes to First Touch” Enter a formula, calculating the difference between the two fields, such as IF(ISBLANK(**Lead.Lead_First_Touch_Date_Time__c**), (NOW() - **Lead.Assigned_Date_Time__c**) * 1440, (**Lead.Lead_First_Touch_Date_Time__c - Lead.Assigned_Date_Time__c**) * 1440)
   b. **Option 2**:
      i. In Salesforce Setup, add a new Formula Field of number type calculating the difference between the two fields, such as IF(ISBLANK(**Lead_First_Touch_Date_Time__c**), (NOW() - **Assigned_Date_Time__c**) * 1440, (**Lead_First_Touch_Date_Time__c - Assigned_Date_Time__c**) * 1440)
      ii. Create additional fields as necessary

c. For both options, replace the bolded text with the API names of the fields you created in Step 1 by using Salesforce’s native functionality to insert fields into the formula.

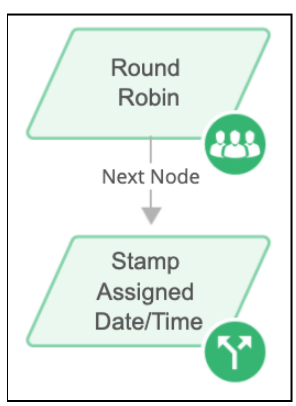
4. Additionally/optionally, on the Report, create bucket fields to bucket values in the “Minutes to First Touch” field
    a. For example, if the value > 30 minutes, then SLA not met
    b. If the value < 30 minutes, then SLA Met

Steps in LeanData FlowBuilder:

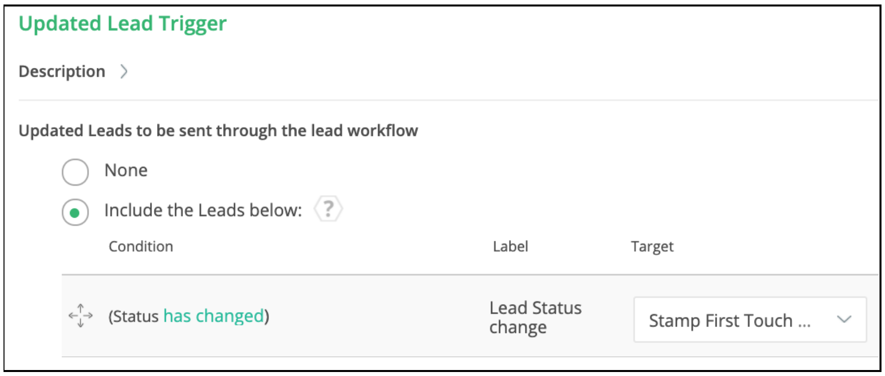
5. In FlowBuilder, add two Update record nodes
6. In one Update record node, select the custom field “Lead Assigned Date/Time” → click the Insert button → select Relative date → then Today. Name this node “Stamp Assigned Date/Time” or something similar.



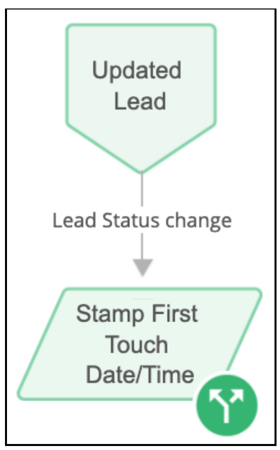
7. In the Assignment node you wish to track, direct the Next Node edge to your “Stamp Assigned Date/Time” Update record node. This will stamp the record with the date/time the record was assigned.

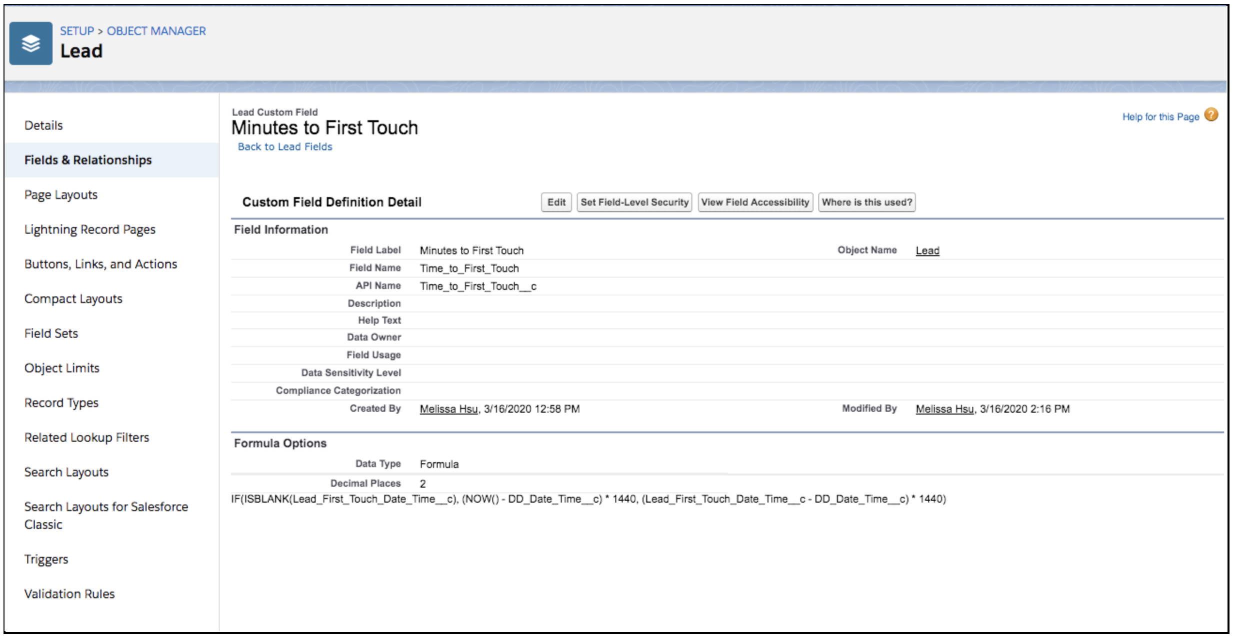


8. In the other Update record node, select the custom field "First Touch Date/Time" → click the Insert button → select Relative date → then Today. Name this node "Stamp First Touch Date/Time" or something similar.
9. In the Updated Lead entry node, add entry conditions, such as "Lead Status has changed", to initiate LeanData when this Lead is worked by a rep.



10. Connect the conditions met edge to the "Stamp First Touch Date/Time" Update record node. This will stamp the object with the date/time the record was assigned





Step 2b/3b

Funnel Metrics Velocity

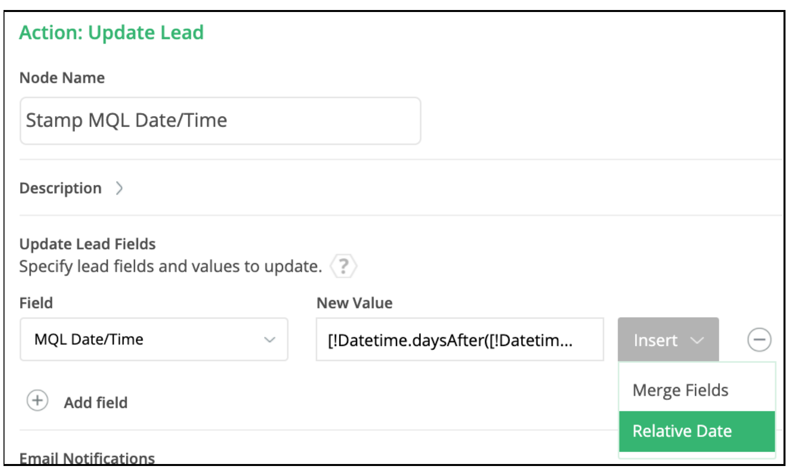
Steps in Salesforce Setup (under Objects)

1. Create two custom date/time field on the object with unique names, such as “MQL Date/Time” and “SAL Date/Time”
2. To track the difference between the fields, two options are available:
    a. Option 1: A Salesforce Report Row-Level Formula Field. Each Report in Lightning can only have **ONE of these fields**.
    b. Option 2: Create a Salesforce Formula Field of number type. The limit of fields may vary - to check your current usage, follow the directions here
3. Add a formula:

    a. Option 1:
        i. In Lightning, on the Salesforce Report, next to columns, add a row-level formula field, with a name, such as “Days in SAL” Enter a formula, calculating the difference between the two fields, such as IF(ISBLANK(**Lead.SAL_Date_Time__c**), null, **Lead.SAL_Date_Time__c - MQL_Date_Time__c**)
    b. Option 2:
        i. In Salesforce Setup, add a new Formula Field of number type calculating the difference between the two fields, such as IF(ISBLANK(**SAL_Date_Time__c**), null , **SAL_Date_Time__c - MQL_Date_Time__c**)
        ii. Create additional fields as necessary
    c. For both options, replace the bolded text with the API names of the fields you created in Step 1 by using Salesforce’s native functionality to insert fields into the formula
4. Report on the time spent in each stage.
    a. Splice data by additional fields, such as Matched Account Industry, Employee Size, Revenue, etc.

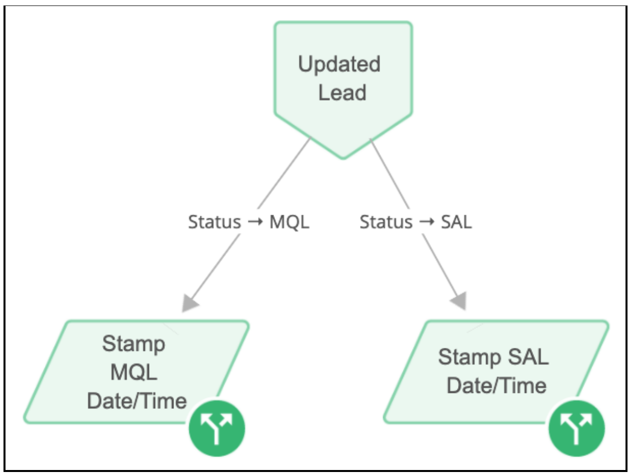
Steps in LeanData FlowBuilder

5. In FlowBuilder, add two Update record nodes
6. In one Update record node, select the custom field “MQL Date/Time” → click the Insert button → select Relative date → then Today. Name this node “Stamp MQL Date/Time” or something similar.



7. In the Update Lead entry node, (or decision node if Lead is inserted as MQL) add your MQL conditions, such as “Lead Status” equals “MQL”

8. Connect the conditions met edge to the “Stamp MQL Date/Time” update record node. This will stamp the record with the date/time the record became MQL.
9. In the other Update record node, select the custom field “SAL Date/Time” → click the Insert button → select Relative date → then Today. Name this node “Stamp SAL Date/Time” or something similar.
10. In the Updated Lead entry node add an edge for your SAL conditions, such as “Lead Status” equals “SAL”
11. Connect this edge to the “Stamp SAL Date/Time” Update record node. This will stamp the record with the date/time the record became SAL.



Static Business Hours Calculations

For more advanced use cases, such as excluding weekend hours, utilize and adjust the Sample Date Formulas provided by Salesforce. Here is an article from Salesforce Community outlining formula adjustments.