



# **SLEMMMA'S GUIDE TO BETTER BUSINESS REPORTING**

## *DATA DASHBOARDS IN THE CLOUD*

*Analytics help organizations drastically improve and scale their business  
—but only if done right.*

In this white paper, we'll cover the basics of data reporting and how to create effective dashboards that facilitate optimal analytics practices.

“Information is the oil of the 21st century, and analytics is the combustion engine.”

—Peter Sondergaard, Senior Vice President, Gartner<sup>1</sup>

The deluge of data is threatening to overwhelm us all. As the numbers pour in from our CRM, social media platforms, ad metrics, email marketing software and all the other apps and tools we use, it's easy to throw up our hands in confusion and shuffle it aside for later, “when we have time.” Yet, in that sea of numbers, there is a lot of valuable, time-sensitive insight to glean about your buyer's journey, your sales process and your entire business. The way to make sense of all the disparate data flowing in from multiple sources is with cohesive dashboards. Using an easy-to-read visual format that's

customizable and flexible for data reporting allows organizations to unify all their KPIs (key performance indicators), metrics and other essential data sets in one place. With dashboards, you can aggregate all your data from every resource into one single reporting interface and then share that information across your organization so that every department can take advantage of the business intelligence that lies within the numbers.

Dashboards turn cumbersome data into actionable insights, so you can make practical business decisions today.

## THE BUSINESS CASE FOR DATA REPORTING

“If your organization stores multiple petabytes of data, if the information most critical to your business resides in forms other than rows and columns of numbers, or if answering your biggest question would involve a ‘mashup’ of several analytical efforts, you've got a big data opportunity.”

—Harvard Business Review<sup>2</sup>

<sup>1</sup> <http://www.gartner.com/newsroom/id/1824919>

<sup>2</sup> <https://hbr.org/2012/10/data-scientist-the-sexiest-job-of-the-21st-century>

Dashboards don't just give you a cold, static presentation of numbers. By providing visual insight with customized views, data reporting allows you to ask and answer questions that breathe life into those numbers *for your particular organization*. For instance, where are your efforts resulting in improved productivity, more closed deals and higher revenue generation? Where do you need to focus on improving areas of your business that are stagnating or have grown ineffective?

Data reporting brings the details of your business activities into high relief: whether you're meeting your KPIs, and what factors are affecting your metrics. Which facets of your organization—sales, marketing, financial—are actively successful, and which tend to flounder. You can even pinpoint how specific individuals on your team are performing and use that information to redirect, guide, train and reward them.

**Unified data reporting is essential to:**

1. Render the theoretical value of information into actual ROI
2. Reduce the amount of time and effort you spend compiling metrics and weeding through the reporting from multiple analytics services
3. Expose your data to everyone in the organization so that it becomes a common ground for business decision-making

But enough about the *why*. There's no doubt that data is one of your organization's most valuable assets. Putting that data to work for you in real time is the challenge. Let's get right into the *how*, and just as importantly, the *how not*.

## HOW **NOT** TO IMPLEMENT EFFECTIVE REPORTING

**70%** of marketing decision-makers say a major goal is to improve campaign effectiveness, increase revenue or optimize spend with analytics. Yet, **61%** say they struggle to access or integrate data.<sup>3</sup>

Just as every organization has unique reporting needs, there are countless ways to do that reporting. Some companies go the route of hiring a professional data analyst, a person with years of data experience who is highly skilled at scrutinizing numbers.

The problem with enlisting a data analyst is that your team gets very little insight or experience into how to read your data. And just as they remain in the dark about reporting best practices, the analyst is usually in the dark about your organization's *true north*. He or she lacks the internal perspective to keep all your metrics in context and instead focuses on generic outcomes. Data analysts tend to come into organizations with a tunnel-vision view on increasing profits and gear their expertise in using disparate reporting tools around that objective, while ignoring some of the other answers data can provide. Data analysis is very expensive, and doesn't always provide worthy ROI.

Other organizations decide to create inexpensive homegrown solutions with hacked-together spreadsheets and ad hoc dashboards. The benefit of this type of solution is that reporting is simplified and utterly customized. Results can be delivered quickly to anyone within an organization, and analysis can happen on the spot, without relying on IT.

But with little best practice to go on, these homegrown solutions are often crippled by bad data, data manipulation and a lack of expertise in general. They become time consuming, inject data errors into decision-making and are typically ineffective at providing real business insight.

Between the rigid point of view of expensive data analysis and the error-riddled issues of an ad hoc homemade tool, there lies a solution that is both flexible and reliable, and it lives in the cloud.

<sup>3</sup> Google Surveys, U.S., "2016–2017 Marketing Analytics Challenges and Goals," Base: 203, marketing executives who have analytics or data-driven initiatives, Dec. 2016.

## REPORTING BEST PRACTICE IN THE CLOUD

**89%** of your employees are accessing business apps from mobile devices at least some of the time.<sup>4</sup>

A cloud-based SaaS data-reporting tool empowers organizations with the versatility to customize reporting to their exact needs, and to easily render visual reporting views on any device, from anywhere. This ability to work anywhere is critical in today's business universe, where employees expect to be able to use mobile devices from on the road and in the field to stay up to date.

The drawbacks? If you don't choose your SaaS reporting tool carefully, you can be subject to planned or unplanned downtime that can cripple your ability to get work done. You're also beholden to the service's security and compliance standards, so governance can be a challenging cooperative effort. And, of course, your access to any tool is dependent on your internet connectivity.

It's crucial to choose a tool that takes into consideration these contingencies. With Slemma, you get both reliability and versatility in terms of things like:

- An affordable, pay-as-you-go pricing model
- Automated updates
- Zero maintenance
- The ability to download dashboards as static files
- The freedom to work anywhere

With a code-free, encrypted solution to protect your sensitive data, everyone on your team can build powerful, custom reports in a matter of minutes. You get a unified hub for all your data that is extraordinarily easy to implement and use and typically results in high adoption. With this in mind, let's get into the best features and best practices of using an SaaS solution for your data reporting.

<sup>4</sup> <https://communities.cisco.com/community/solutions/sp/mobility/blog/2013/03/10/cisco-global-work-your-way-study-byod-for-it-and-the-end-user-infographic>

## TEST AND TWEAK

A dashboard is only as good as its input. Effective dashboards require continuous testing and tweaking.

As your team members use the dashboard, ask for input. Is it posing the right questions? Giving the right answers? With user feedback, you can then tweak adjustments on your views so that you're driving toward specific and unique business objectives.

This isn't just important in terms of using your metrics to make business decisions. It's also a component of developing a collaborative culture within your organization. When your tools integrate well with the work style of your team, exponential innovation becomes possible.

## BENEFITS OF THE CLOUD

A robust, cloud-based SaaS tool should offer several major benefits over old-school software.

**Ease of use and mobility:** With a simple UI that's usable even from the tiny screen of a mobile phone, there's little learning curve in the cloud.

**Shareability:** At the proverbial and literal touch of a button, you can share reporting with other stakeholders within your organization—from anywhere.

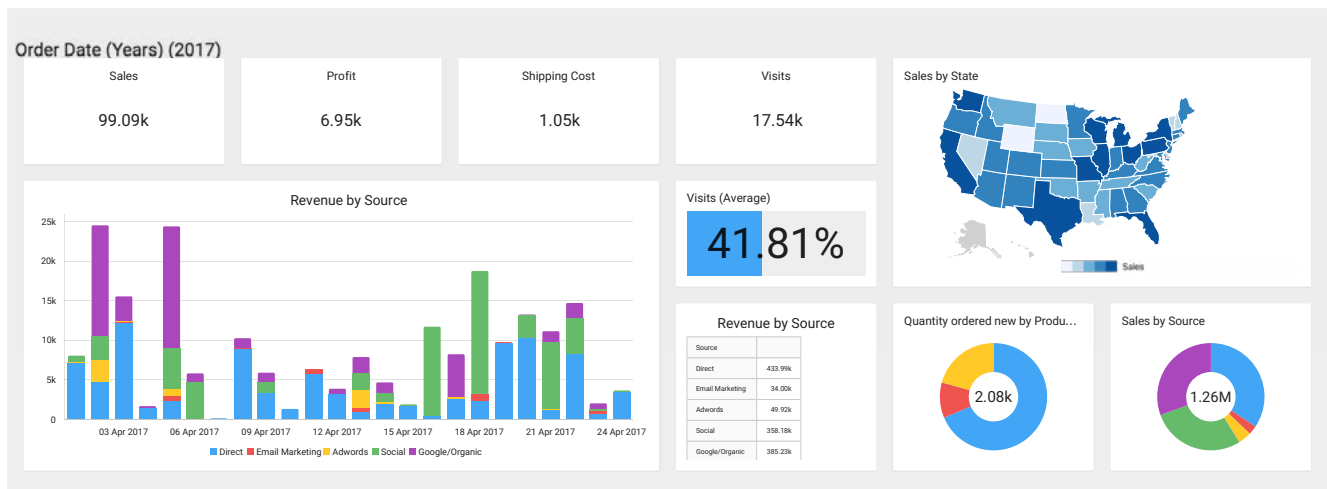
**Multiple integrations:** When new integrations become available, you don't have to pay extra or upgrade your software. They're automatically available to you.

**Coding optional:** You shouldn't need to know how to code to use a cloud-based data analysis tool. But, that tool should have options for those who know SQL and want to be able to run their own queries.

## COMMON METRICS TO TRACK

Every company is different, and every organization's data-tracking needs are unique. There are, of course, some common metrics that many businesses track, and we've broken them down here by department.

## C-LEVEL

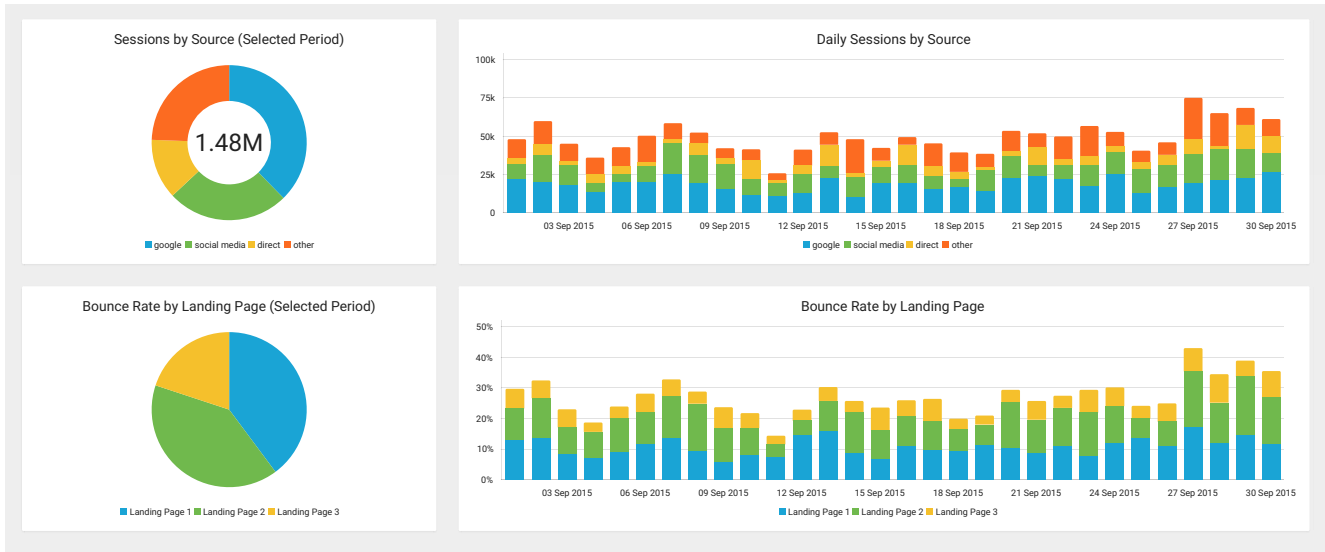


For CEOs and other company executives, gaining insight into the health of the business means quick access to information that's accurate, insightful and streamlined. There's a lot of data to track, but the most common metrics that company leadership is interested in are typically:

- Net profit
- Progress toward targets
- Revenue
- Revenue growth rate
- Expenses

These are numbers that are integral to the company's operations, and having easy access to this high-level data in one visual dashboard is crucial for busy executives who don't typically have time for more than a glance at numbers, but whose decision-making relies heavily on such information.

## MARKETING



\*This web analytics dashboard shows how data-driven marketers monitor KPIs to increase their website performance and the ROI on AdWord campaigns with [Slemma](#). Measure conversion rates and target your campaign spending to AdWords with higher return and landing pages with better click-through-rates.

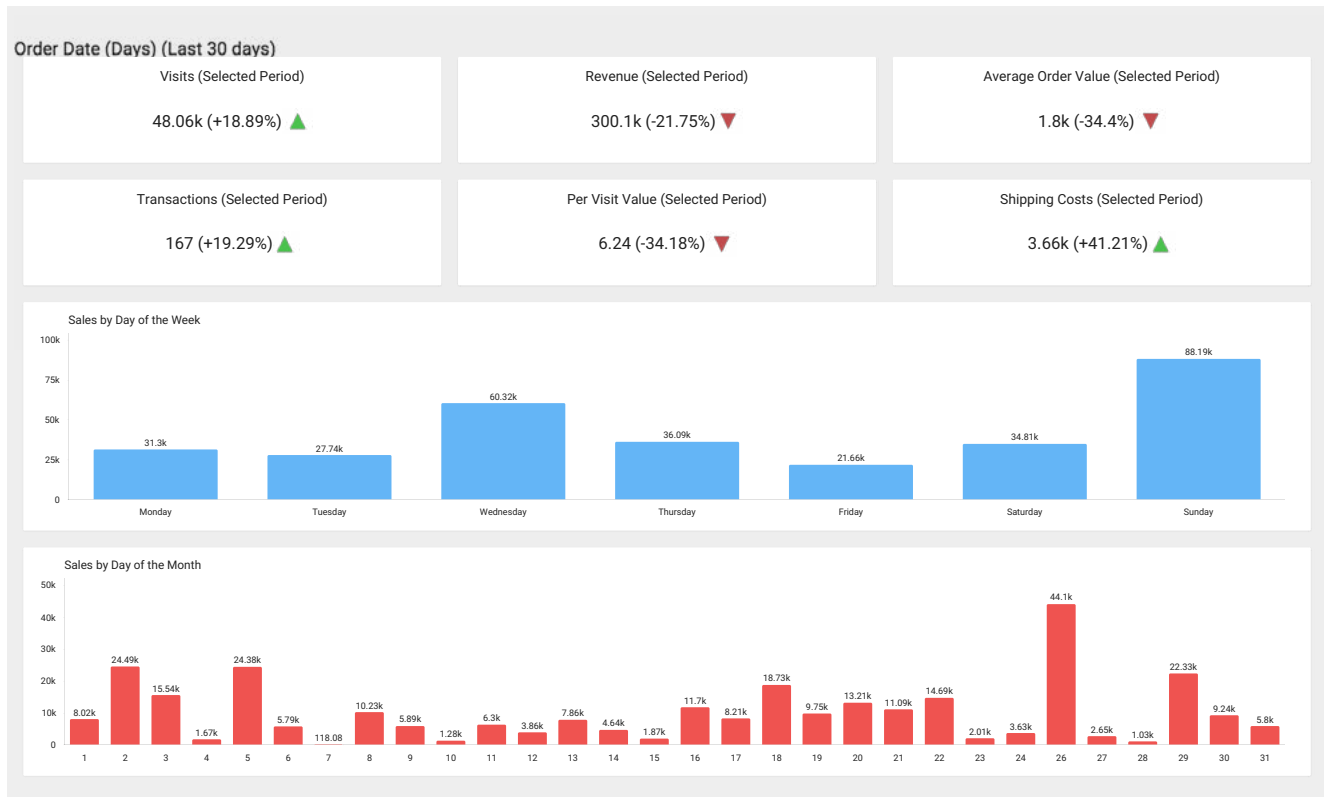
For marketing departments, metrics are everything. Measuring the effectiveness of marketing activities is vital to making the most of marketing spend. Marketing teams often oversee a lot of different platforms, each with their own reporting platforms, and need to be able to measure the effectiveness of such things as:

- Digital ad campaigns
- Email campaigns
- Blog content
- Social media activity
- Organic versus paid website traffic

Bringing all of this data together into one cohesive reporting dashboard is the only way marketing teams can have oversight of all their activity in order to truly connect with their audience across platforms.



## SALES

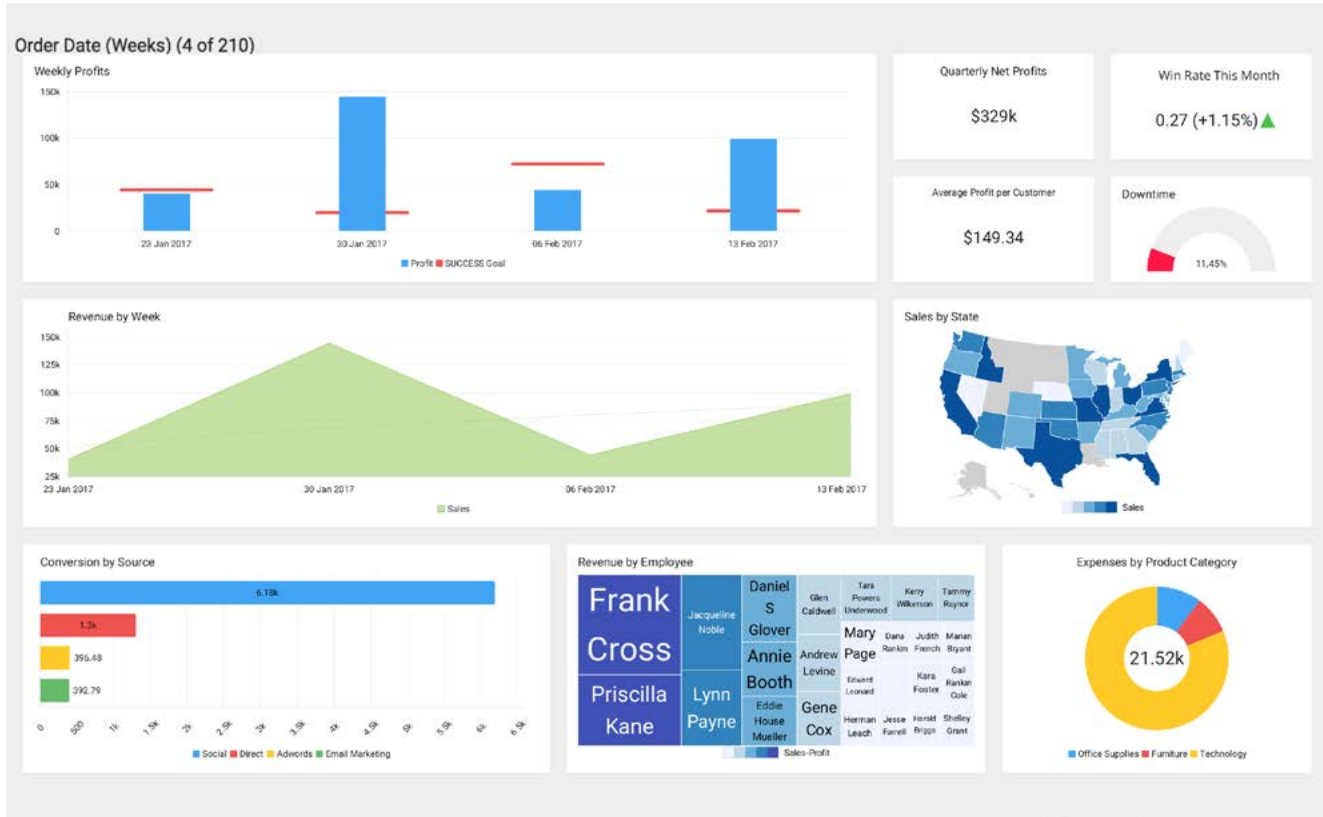


Sales professionals are often independent renegades who forge their own paths to revenue, and they don't always love face time with a computer, logging stats. Yet, sales reporting numbers are crucial for any business. That's why easy reporting tools that feed automated dashboards are so important for sales. Dashboards give sales real-time access to things like:

- Performance analysis
- New lead tracking
- New account tracking
- Overall sales growth and patterns

Deep insight into sales metrics that are accurate to the moment gives sales staff the information they need in the moment, and leadership the ability to better oversee, train and quantify the entire sales team.

## FINANCE



The domain of the CFO, financial metrics are key to company operation as a whole, giving insight and affecting decision-making for every arm of an organization.

Financial metrics include:

- Working capital
- Debt-to-equity ratio
- Accounts payable turnover
- Accounts receivable turnover
- Net profit margin
- Gross profit margin

## CUSTOMIZING A DASHBOARD

*"The only thing I don't like about my CRM solution is their dashboard and statistics. With their solution, I can't see my data the way that I want to see it, which is why I wanted a software like Slemma. I use Slemma to analyze the data from our different companies. I didn't like how my CRM pre-defined what was important in regards to data. I just wanted to see a breakdown of other information."*

—Alisha Purcell, PBG Events

With a dashboard tool that's easy to customize, you can control how your data is presented visually for whichever audience you have in mind. A good tool will also allow you to customize the look and feel to your own branding and embed images. Being able to customize the way your data is presented means choosing which data to present and how to present it in terms of things like bar charts, pie charts and percentages. With Slemma, you can present your data in the way that best reflects your company's bottom line.

## THE POWERFUL DEMOCRATIZATION OF DATA

“Slemma has had a huge impact both on how we report both internally and surface results to our clients. It’s a great intermediate tool which gives **90%** of the feature set of something like Tableau but without the steep learning curve and jaw-dropping price tag.”

—Sebastian Edwards, Head of Operations, Uprise Digital<sup>5</sup>

For organizations faced with an overwhelming onslaught of disorganized data, dashboards are the key to accurate, insightful data analytics. Cloud-based tools like Slemma’s make data analytics democratic for any organization, taking the reigns from IT and expensive data analysts and enabling any operator to create real-time dashboards viewable from any device.

To learn more about Slemma, [visit our website](#).

### READ ON ...

For more insight into data reporting in the cloud using Slemma, read our other white papers:

#### **How to Optimize Your CRM Data:**

Pipeline Analytics for Business Intelligence

#### **Slemma's Guide to Marketing Metrics:**

Bringing KPIs Together with Unified Dashboards

## ABOUT SLEMMMA

Slemma is a data analysis tool that enables users to create simple, easy-to-use and dynamic data reports from multiple data sets. The web-based tool connects to over 75 data warehouses, databases and cloud-service solutions. Slemma’s step-by-step Chart Wizard makes report generation quick and seamless, allowing organizations to visualize their third-party data in minutes.

Dynamic reports can be shared to both clients and colleagues alike. User permissions ensure that sensitive data can only be accessed, viewed and edited by individual members. Slemma’s data dashboards can be accessed on virtually any device for easy presentation. Our product is currently being used by companies and organizations including Xsolla, Crytek, Kount, Booking.com, Treasure Data and the Los Angeles Unified School District.