

# Sales Force/PowerBI/Tableau



Workbook Category	Workbook Title	Purpose/When to use	Description
Customer Facing	<a href="#">Customer Quarterly Business Reviews (QBR)</a>	<b>Purpose:</b> Download ready-to-use graphics and detail for customer-facing presentations <b>Uses:</b> Customer facing presentations, download customer detail	Customer's current fiscal / calendar year sales, historical sales trend and detail for QBRs with customer(s). There are four (4) options based on needs (calendar year vs fiscal year, PL3 vs PL6), as well as one (1) report specifically for distributor
Customer Orders	<a href="#">Go Gets Report</a>	<b>Purpose:</b> Identify orders/customers for Inside Sales teams to follow up on <b>Uses:</b> Identify potential acorns, identify customers sales rep or inside sales team should follow up on	Invoiced orders within the last 8 days
Customer Orders	<a href="#">Order Intake &amp; Backlog Report</a>	<b>Purpose:</b> Identify orders & customers with open / backlog orders <b>Uses:</b> View the trend of orders over current fiscal year, future sales from open orders with summary to help with forecasting; detailed order information to troubleshoot customer orders	Listing and summary of orders placed but not yet shipped (backlog)
Customer Orders	<a href="#">Backlog by Fiscal Year</a>	<b>Purpose:</b> Identify orders/customers with orders in Backlog <b>Uses:</b> View of future sales from orders not shipped with summary to help with forecasting; detailed order information to troubleshoot customer orders	Listing and summary of orders booked but not yet shipped (backlog)
Customer Segmentation	<a href="#">GSA Customer Acquisition &amp; Churn Analysis</a>	<b>Purpose:</b> Analyze customer base using customer classifications <b>Uses:</b> Identify New, Recurring, Returning, Not Yet Returned, or Lost Customers by product, sales region or territory for follow up on sales	Customer classification by Sales Region, Territory, Product level – dashboard with new customer and new customer sales year over year comparison
Customer Segmentation	<a href="#">Long Tail Performance</a>	<b>Purpose:</b> Analyze customer segmentation and their trends by customer count, order size and frequency <b>Uses:</b> Identify Long Tail, Mid Tail, and Large Tail Customers by time period or customer size	Customer classifications applied at the Customer Group level regardless of any filters applied (i.e. territory, product) with ability to drill down into product portfolio, historical sales and order KPIs
Customer Workflow	<a href="#">Assay Tracker</a>	<b>Purpose:</b> Track sales of customer-specific assays from early stage development to market <b>Uses:</b> Track trends in assay sales, use in discussions with customers	Summary and detail of 'designed in' customer-specific assays
Pricing Strategy	<a href="#">Customer Value Optimization Tool (CVO)</a>	<b>Purpose:</b> Empower LGC's commercial team to develop pricing strategies & evaluate pricing opportunities within their accounts <b>Uses:</b> Download and populate LGC CVO Tool (found <a href="#">here</a> on the SRC)	Customer comparison detail for populating the CVO tool
Sales Analytics	<a href="#">Databook Analysis</a>	<b>Purpose:</b> Identify customer and products trends <b>Uses:</b> Pivot information normally done in Excel, view top customers, distributor's top end users, and top products, view product, acorn and service plan analysis	Customer, product, acorn and service plan analysis by sales region or territory
Sales Performance	<a href="#">Sales Performance Tracker (Instrument vs Non-Instruments)</a>	<b>Purpose:</b> Track quarterly and annual performance by territory and products <b>Uses:</b> Track performance against target, business review with manager	Quarterly analysis against sales target by territory and instruments
Sales Performance	<a href="#">Sales Performance Tracker (Region)</a> <a href="#">Sales Performance Tracker (Territory)</a>	<b>Purpose:</b> Track quarterly and annual performance by region, territory, product and customer <b>Uses:</b> Track performance against target, business review with manager, view top customers against prior year quarter performance	Quarterly analysis against sales target by region, territory and product