Tatum Salesforce Reporting Quick Guide

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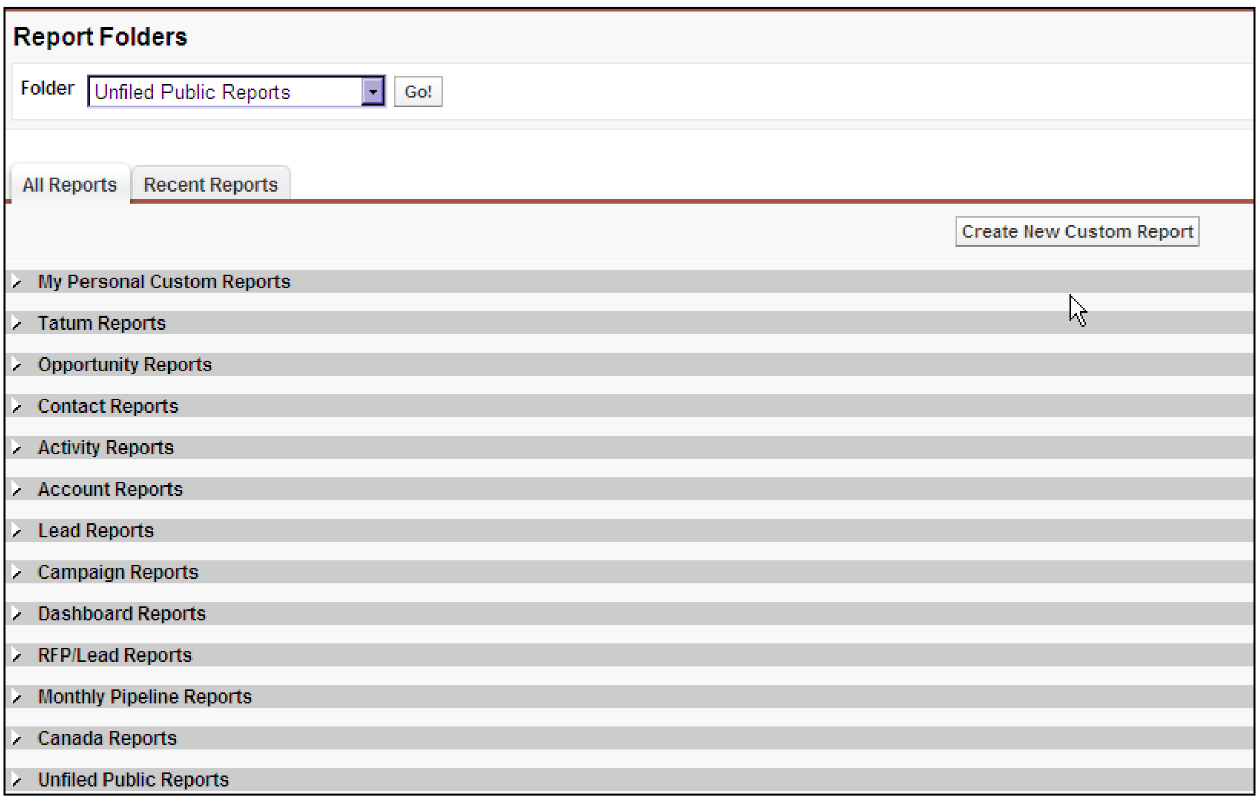
PUBLIC VERSUS PRIVATE REPORTS

The primary change in reporting is the number of available public reports.

In Tatum's instance of SFDC, all of leadership and the AAAs were able to create individualized reports for their market or segment. These reports could be saved publically so that any person could run them with the same parameters. Likewise, leadership and AAAs were able to edit and save these public reports, as well as delete them. This led to a proliferation of public reports and folders and difficulty locating reports.

In the new instance, all publically available reports have been created by the SFDC administration team and saved in distinct groups of reporting "Categories". This team has also created some generic Tatum reports, which have been saved in the Tatum Reports folder:



In the new system personal reports are used to keep from accumulating reports in the public area.

1) Any user can create a report and save it in the "My Personal Customer Reports"
2) Users can also copy public reports, modify them to the add or remove columns, and then save the reports to "My Personal Custom Reports"
3) Only the user can run the reports in "My Personal Custom Reports"
   a. This means that one user cannot design a report and then save it so another can run it
4) Users cannot schedule a report to run and be emailed automatically, which was not a commonly used feature

REPORT DATA HIERARCHY

All results that are shown in a report are based on the market hierarchy, which makes it easier to drill down to market levels. This hierarchy also forms the basis of the “My Team” filters found throughout Salesforce

- The hierarchy at Tatum is based upon the regional structure
- Healthcare and private equity reports will be run as national reports using account level codes to identify appropriate content
- If you have a regional role, your team and hierarchy would consist of all individuals who have roles either at the region or subordinate market.
- If you have a market role, your team would consist of all individuals who have roles at that market

EXAMPLE someone who has a role of Southeast Region would see a “team” consisting of the Atlanta, Carolinas, Nashville, Orlando, South Florida, and Tampa markets:

- This hierarchy allows you to “drill down” to get to the details at the market level
- This hierarchy is also used for forecasting and analytic purposes
- Regardless of place in the hierarchy, all Tatum full license users can see all opportunities regardless of location

PROCESS CHANGES & HOUSEKEEPING

As a reminder, the request to convert a lead into an account takes 24-72 hours. You will receive an email from the Salesforce administration team when this is complete.

All requests for new licenses or to deactivate licenses should go through the Knowledgesphere HR User Authorization Request (UAR) procedure.

If someone's previously active license is deactivated due to lack of use (which will happen after 30 days without logging in), please email SalesforceAdmin@spherion.com to get it reactivated

If you need contacts moved to another owner, please send the information and request to SalesforceAdmin@spherion.com

If you need a contact merged, please send the request to SalesforceAdmin@spherion.com

APPENDIX: COMMON REPORTS

- Tatum Activity Last Week
  - Shows all open and completed activities (both tasks and events) for the last week
  - Summarized by user, showing Activity Type, Subject, and Date
- Tatum Contacts
  - This is summarized by contact owner
  - To see details of the contacts, click “Show details” once the report is run
- Tatum Open Opportunities by Market
  - This shows open opportunities, summarized by the Pursuit Office as chosen on the opportunity screen
  - Shows only the opportunities of your team, which is based on the hierarchy above.
  - To see details of these opportunities, cluck “Show Details” once the report is run
- Tatum Open Opportunities by Region
  - This shows open opportunities, summarized by the Region field on opportunity
  - Shows only the opportunities of your team, which is based on the hierarchy above.
- Tatum Open Opportunities by Solution
  - This shows open opportunities, summarized by solution
  - These values are Interim/Seated, Project/Consulting, and Search
- Tatum Wins Last Week

PROCESS CHANGE: If an opportunity is won but the close date is not updated to be in the last week, then it will not show up on this report

  - This shows opportunities which were marked as won with a close date the previous week
  - This close date value is based on the “close Date” field on the Opportunity

OTHER USEFUL REPORTS IN OTHER FOLDERS

Reports [20]

Action	Report Name	Description	Folder ↑
Edit | Del | Export	Open Activity Summary	Show my open activities scheduled this week	Activity Reports
Edit | Del | Export	My Activity by Account Contact & Type	My Activity completed in the last 90 days by Account/Contact & Activity Type	Activity Reports
Edit | Del | Export	Campaign Member Analysis Report	Who has responded to my campaigns?	Campaign Reports
Edit | Del | Export	My Contacts with Opportunities	Who are the contacts involved in my current opportunities?	Contact Reports
Edit | Del | Export	My Contacts	Who are my contacts? List of all the contacts that you own.	Contact Reports
Edit | Del | Export	My Neglected Contacts	Which of my contacts have no activity in the last 90 days?	Contact Reports
Edit | Del | Export	My Retail Targets	List of "Retail " contacts owned by you	Contact Reports
Edit | Del | Export	My Leads	Who are my leads? List of all the leads that you own.	Lead Reports
Edit | Del | Export	My Neglected Leads	Which of my leads have no activity in the last 90 days?	Lead Reports
Edit | Del | Export	Leads by Source	My Team's Leads by Source	Lead Reports
Edit | Del | Export	Opportunities by Source	What sources are my opportunities coming from?	Opportunity Reports
Edit | Del | Export	Opportunity History Report	Show me the lifecycle of my opportunities scheduled to close this quarter	Opportunity Reports
Edit | Del | Export	My Opportunities Past Their Close Date	How can I find opportunities I need to update/close-out?	Opportunity Reports
Edit | Del | Export	Wins and Losses This Year	What are my Win and Loss totals so I can calculate my Win Rate?	Opportunity Reports
Edit | Del | Export	Pipeline Balance by Owner by Stage	How much does each rep on my team have in each stage?	Opportunity Reports
Edit | Del | Export	Pipeline Balance by Close Month	How much does each person on my team expect to close by month?	Opportunity Reports
Edit | Del | Export	Check My Close Dates	YELLOW if within 5 days of Close Date, RED if Close Date is in the past	Opportunity Reports
Edit | Del | Export	Win Rate by Deal Size	What is the win ratio by deal size for my team?	Opportunity Reports
Edit | Del | Export	Sales Presentation NBD - My Pipeline		Opportunity Reports