

BROCHURE

# Infor Birst salesanalytics

BUSINESSINTELLIGENCE

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## Make data-driven decisions to hit quotas

Sales leaders need to hit the target, grow a high-performing sales team, and forecast accurately. Data is supposed to help accomplish this, but a customer relationship management (CRM) system provides only half of the picture. A wealth of information about customers, prospects, and sales sits in various applications, including the enterprise resource planning (ERP), marketing automation, HR, learning management, and quote-to-cash systems. Even when bringing all this data together, arguments still ensue over the numbers with the marketing, services, and finance teams. To fix this issue, an organization needs a shared version of the truth.

## Birst sales analytics at a glance

Infor® Birst provides a complete picture of the business by bringing data from multiple systems into a trusted, single view of sales, revenue, forecast, and pipeline.

With Birst®, users are empowered to:

- Create a trusted and accurate forecast
- Hit quotas with better insights into pipeline
- Grow and retain a high-performing sales team
- Create sales, marketing, finance, and services alignment

## The Birst difference

Birst sales analytics place information in the hands of front-line sales reps, sales managers, and executives, as well as users across marketing, finance, and service teams, empowering everyone to make data-driven and consistent decisions.

Birst cloud BI and analytics provide:

- A complete suite of visual discovery, interactive analysis, dashboards, reports, mobile, and smart analytics
- An automated data refinery to unify multiple data sources into a single trusted and business-ready view
- Pre-built, best-practice-based sales analytic accelerators: reports, dashboards and KPIs for Infor, Salesforce®, NetSuite®, and Marketo®

## Birst sales analytics help achieve success in these scenarios

### Insights into pipeline

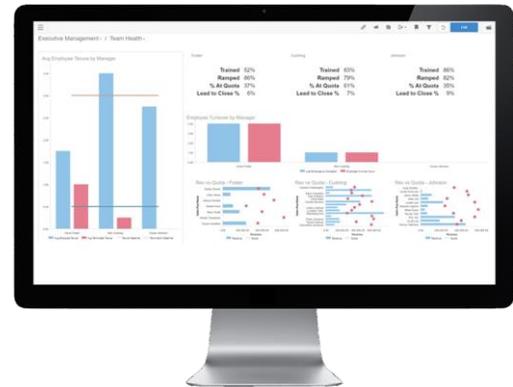
Analyze changes to the pipeline quickly and identify roadblocks:

- Pipeline velocity to identify fast and slow-moving deals
- Waterfall chart, including what's moving in and out of the quarter
- Sales bottlenecks and rep performance issues

### Pipeline velocity report



### Rep performance report



### Accurate forecasts

Create more predictable revenue using historical win rates, customers' digital journey, and the performance scores of the team:

- Forecast at rep, region, and account levels
- Predict future revenue based on past win rates
- Opportunity scorecard and likelihood to close

### Organizational productivity and performance

Improve productivity and empower reps, channel managers, and partners with:

- On-demand access to insights from mobile tablets and phones—online and offline
- Understand an opportunity's likelihood to close
- Insights into customer behavior
- Peer-to-peer scorecards
- Pipeline at individual rep and manager level

### Advanced sales operations

Streamline sales operations by going beyond what is possible with basic CRM reporting:

- Year-over-year or quarter-over-quarter timeseries analysis and snapshotting
- Quota rollups when territories change
- Support for multi-currency and non-standard fiscal calendars

## Prebuilt sales analytics accelerator

In addition to providing these solutions, Birst Sales Analytics Accelerator speeds the time to value in creating advanced analytics for Salesforce, including analytics on custom objects. This accelerator is built on best practices from hundreds of customers and includes out-of-the-box templates, KPIs, reports, and dashboards. Sample analytics include:

- **Pipeline analysis**—Movement and velocity; pipeline growth and drop off analysis; pipeline by product and opportunity type; pipeline by team and forecast category
- **Sales rep performance analysis**—Sales rep contribution; sales rep closing performance; sales rep scorecard; average deal size by sales team
- **Win rate analysis**—Win rate and deal size by account type and industry; win rate by lead source and opportunity type
- **Sales operations analysis**—Lead aging report; lead owner scorecard

## Sales analytics built for today and the future

Sales data is supposed to help in the running of a sales team, but a CRM system provides only half of the picture. By going beyond basic CRM reports with Infor Birst, organizations can unify all the sales, revenue, customer, forecast, and pipeline big data into a single and trusted view, and arrive at the right sales decisions faster and with confidence.

## Top 10 financial data services company empowers 1,000+ reps with sales analytics

A top 10 financial data services company, with a sales organization of over 1,000 reps, did not have a clear outlook on its sales forecast. With hundreds of thousands of customers, an ever-growing selection of products, and a growing sales force—the executive team could barely get on the same page on where to focus energy. The company tried to build sales dashboards with a legacy business intelligence platform but never achieved success. Birst was selected to enable the sales teams and management to better understand and focus on deals that had the best chance of closing. Today the entire sales organization uses Birst for sales reporting and analytics that drive weekly sales meetings. Over 1,000+ sales reps actively use Birst to manage their pipeline and sales activities achieving better sales performance by targeting the deals and products with the highest chance to close, while sales management works from a single forecast for the entire sales organization.

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