Oracle® Fusion Transactional Business Intelligence 11.1.1.9.0

Sales - CRM Sales Activity Subject Area

February 2015

Contents

Sales - CRM Sales Activity

Description

Sales activities are central to any sales process. A rep is continuously engaged in sales activities through the sales cycle. Specific sales activities such as providing a product demonstration and meeting a decision maker in the account organization are often built into sales methodologies as mandatory tasks. Progressive companies maintain customer relationships by having a recommended frequency of client visits and number of contacts to establish. Sales Managers and Executives expect a focused play of sales activities because targeted increased levels of activity indicate sales success. The Sales – CRM Sales Activity subject area enables you to build analyses to track and understand the level of activities occurring in sales teams. Sales reps also need this information to make sure that they are paying enough attention to the accounts/contacts that they care about and the leads and opportunities that they want to pursue. The subject area supports analyses for various activity types in both Task and Appointment functions.

This subject area can be used to answer business questions such as:

- Are there any work load balancing issues in my team, with a few members performing most of the sales activities?
- I need some of my team members to focus on the new product being introduced next quarter. Who should I recruit for this initiative, based on their upcoming activity levels?
- As a Sales Rep, I need to view my workload for the upcoming week/month. What are my urgent/overdue tasks for this period?
- How are the individuals on my team performing as regards completion of their planned tasks on opportunities closing this quarter?
- What are the Accounts that are being heavily pursued? Does this align with our business priorities and goals?
- How can I identify ’neglected‘ but strategic accounts to guide my team to focus on these?

The following job roles are used to secure access to this subject area:

- Sales Administrator
- Sales Manager
- Sales Representative
- Sales Executive

The following BI duty roles are used to secure access to this subject area:

- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

BI Product Offering

Oracle® Fusion Transactional Business Intelligence

BI Product Release

Release 9

Dimensions

Dimension Folder Name	Description	Special Considerations	Fusion Navigation
Activity	Holds descriptive attributes for a sales activity, such as Activity Name, Priority, Type (Call, Email, Meeting, etc), Function (Task/Appointment), Start Date, End Date.	Use Activity Function to differentiate between Tasks, Appointments, Call Reports and Activity Type for further break down, such as Call, Meeting, Email etc.	Navigator->Activity
Business Unit	Attributes of the BU such as Name, Status, Default Currency, etc.		FSM->All Tasks->Define Business Units->Manage Business Unit->(Goto Task)
Contact	Attributes of customer's contact, such as Name, Job Title, Phone and other key information.		Navigate->Customers->Manage Contacts->[Select a contact]->Edit Navigator->Customization->Application Composer->Standard Objects->Contact->Fields->Standard Navigator->Customization->Application Composer->Standard Objects->Contact->Fields->Custom
Contact -> Contact – Additional Attributes	Folder to hold additional, less commonly used contact attributes.		Same as above
Currency	Used to prefix amounts with the user's preferred currency.		NOT APPLICABLE
Customer	Contains all key attributes of a customer.		Navigate->Customers->[Select a Customer]->Edit Navigator->Customization->Application Composer->Standard Objects->Account->Fields->Standard Navigator->Customization->Application Composer->Standard Objects->Sales Account->Fields->Standard
Customer -> Customer – Additional	Folder to hold additional, less commonly used customer attributes.		Same as above

Attributes			
Customer Contact Profile	Stores contact profile attributes for an organization contact.		Navigator->Customization->Application Composer->Standard Objects->Customer Contact->Fields->Standard
Employee	Employee, often the sales resource. In this subject area, Employee is the owner of the Activity.		Navigator->Customization->Application Composer->Standard Objects->Resource->Fields->Standard
Employee -> Employee Organization	The internal org to which the employee belongs.		Same as above
Employee -> Sales Resource Hierarchy	The reporting hierarchy in a sales org. Used to report on rolled up metrics.		Same as above
Industry	Attributes of the Industry to which the customer belongs.		Navigator->Customers->[Select the customer]->Industry Section
Lead	Holds attributes of a sales lead.		Navigator->Customization->Application Composer->Standard Objects->Sales Lead->Fields->Standard
Marketing Source	Attributes related to marketing campaign such as Campaign Name, Region, and Status.		
Opportunity	Holds attributes of a sales lead.		Navigator->Customization->Application Composer->Standard Objects->Opportunity->Fields->Standard
Sales Geography Zone	Specific to Territory Management. Not applicable to other metrics.		NOT APPLICABLE
Secondary Dates	Folder for the less commonly used dates in reporting.		NOT APPLICABLE
Secondary Dates -> Secondary Dates – Additional Attributes	Folder for the less commonly used attributes amongst secondary dates.		NOT APPLICABLE
Time	Contains all key attributes for the canonical date (driving date) for the subject area. Although this date is displayed in generic terms (unlike a 'Secondary Date'), it has a specific business meaning depending on the metric that is used, as follows: **Activity facts –** Activity Start Date		NOT APPLICABLE

Time -> Time – Additional Attributes	Contains additional attributes of Canonical/Driving Date.		NOT APPLICABLE

Facts

Fact Name	Description	Special Considerations
Activity Facts	The measures under this folder are used to assess the level of sales activities performed by resources.	Activity measures may be used with the following dimensions, while building new reports/analysis: Time (Activity Start Date: Due date for Task, Start Date for Appointment), Secondary Dates, Activity, Employee, Customer, Contact, Lead, Opportunity, Marketing Source.

Metric/Measure	Description/Meaning	Calculation – where applicable
# of Activities	Number of activities of all Activity Functions and Types.	
Activity Duration	The duration of the activity expressed in milliseconds.	Please make appropriate conversions to other units of time, such as minutes. This can be done in OBIEE Answers

---