

## EXECUTIVE DASHBOARD ON SALESFORCE CRM ANALYTICS

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<p><b>Keyword:</b></p> <p>Analytics, Data-driven insights, Executive dashboards, Key performance indicators (KPIs), Real-time data synchronization</p>	<p><b>ABSTRACT</b></p> <p>In the current dynamic business environment, companies that want to stay competitive and grow must make use of data-driven insights. Initially designed as a cloud-based customer relationship management (CRM) solution, Salesforce has developed into an all-encompassing platform with an extensive range of tools and features, including advanced analytics capabilities for creating executive dashboards. CRM, or customer relationship management, includes all customer interactions and connections that are managed by a business. This involves keeping track of deals that are ongoing or have been completed, handling support inquiries, and nurturing leads from potential clients in addition to storing contact information. Regarding Salesforce, the architecture of the platform provides a strong basis for creating executive dashboards in its Analytics module. These dashboards can be used by executives to monitor key performance indicators (KPIs), track targets, and make data-driven decisions. These dashboards give leaders a thorough perspective of organizational performance by offering high-level data and visuals that make it easy to spot trends, patterns, and areas that need improvement. Executives can effectively drive strategic projects forward, capitalize on opportunities, and address obstacles proactively when they have realtime access to important metrics and actionable insights. These dashboards can compile data from multiple sources, including sales records, customer interactions, marketing campaigns, and support requests, into a single view by utilizing Salesforce's architecture, which is based on a multi-tenant cloud model. By easily integrating Salesforce with external data sources and combining data from several systems into a single, complete dashboard, executives may greatly improve their ability to make decisions. Through the use of a comprehensive perspective that integrates information from several sources, this integration gives executives access to a comprehensive image of the business environment. Executives may better understand</p>
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## **INTRODUCTION**

In the contemporary business landscape, where data reigns supreme, organizations grapple with the challenge of harnessing vast volumes of information to drive strategic decision-making and operational excellence. At the heart of this data-driven revolution lies Salesforce Customer Relationship Management (CRM) software, a powerful platform that enables businesses to streamline customer interactions, optimize sales processes, and cultivate lasting relationships. Yet, amidst the wealth of data generated within Salesforce CRM, lies a critical need for effective tools and methodologies to distill insights, uncover trends, and empower decision-makers at all levels of the organization. In response to this imperative, executive dashboards have emerged as indispensable assets, offering a window into the soul of an organization's performance. These dashboards serve as command centers for executives, providing a panoramic view of key performance indicators (KPIs), critical metrics, and actionable insights derived from Salesforce CRM analytics. They offer a holistic perspective on business operations, enabling leaders to monitor progress, identify opportunities, and navigate challenges with precision and agility. The significance of executive dashboards in the realm of Salesforce CRM analytics cannot be overstated. They serve as catalysts for informed decision-making, arming executives with the information they need to steer their organizations toward success. By aggregating data from disparate sources within Salesforce CRM, executive dashboards offer a comprehensive understanding of customer behavior, sales trends, marketing effectiveness, and overall business performance. Armed with this knowledge, executives can make data-driven decisions that drive revenue growth, enhance customer satisfaction, and fuel innovation.

Moreover, executive dashboards play a pivotal role in fostering a culture of accountability and transparency within organizations. By providing real-time visibility into key metrics and performance indicators, these dashboards promote alignment around strategic objectives and facilitate cross-functional collaboration. Executives can easily share insights with stakeholders, identify areas for improvement, and track progress towards goals, fostering a sense of ownership and empowerment at all levels of the organization. In addition to their role as decision support tools, executive dashboards serve as vehicles for organizational learning and continuous improvement. By enabling executives to monitor performance trends over time, identify patterns. As organizations navigate an increasingly complex and competitive business landscape, the need for actionable insights derived from Salesforce CRM analytics has never been greater. Executive dashboards represent a beacon of clarity in this sea of data, offering executives the visibility, agility, and foresight needed to thrive in the digital age. In the pages that follow, we will explore the key components, functionalities, and best practices for leveraging executive dashboards in Salesforce CRM analytics, and examine the transformative impact they can have on organizational performance and success.



## **PROPOSED METHODOLOGY**

Using a driver management system has significantly improved productivity, increased safety, and optimised driver operations for transportation organisations. Organisations have been able to more effectively deploy resources, minimise downtime, and fulfil customer needs thanks to the system's improved processes for driver recruiting, onboarding, scheduling, and dispatching. Supervisors can now keep an eye on performance, make sure rules are followed, and act quickly in the event of an emergency or a diversion from the intended route thanks to real-time tracking and monitoring features that have improved visibility into driver activity. Furthermore, the collaborative and communication functionalities of the system have enabled smooth coordination among drivers, dispatchers, and other relevant parties, leading to enhanced teamwork and adaptability to evolving operational requirements.

## **EXPERIMENTAL RESULTS**

Salesforce is an no #1 CRM tools which can easily manage to customer. Its was an different metadata which all used in design schema. It helps to show the how business growth revenue in different dimensional. it can be access easily in cloud helps to create flexible and scalable such as data object, mobile UI ,Analytics, workflow, identify. It was large ecosystem 2700+ partner and over 800 application with different features. Salesforce growing more and many different feature which might helps to complete UI and make easily. However when the lightning was invented in 2015 lots of easily to manage to make user friendly organization.

Its provide next generation UI and UX in salesforce it helps to create modern productivity booster in experience. There is different Analytics in salesforce while in organization lots of data which store in company so it can be make different report. i.e if company want to make an reports of all account and mixed with all contacts report so it can be make analytic joined reports and make the report dashboard in 7 different graphic user interface. Salesforce Bussiness process automation used in various condition thus as workflow, process builder and Approval process to make an email alert, create task, outbound message. some of the process done in business process. CRM is complicated application which mines customer data, which retrieve from all touch. The right type of customer and predicting trend in future purchase. CRM means an enterprise technology such sales cloud, service cloud, marketing cloud. Following are the some of the new features are recently update in salesforce. At the forefront of the dashboard are metrics such as research completion rate, data accuracy, and time-to-completion, offering immediate insights into the efficiency and efficacy of research methodologies employed. These KPIs serve as benchmarks for evaluating performance and identifying areas for improvement.

In addition to overall performance metrics, the dashboard offers detailed breakdowns of research tasks and methodologies utilized. Through custom reports, executives gain visibility into the distribution of research efforts, allowing for targeted analysis of resource allocation

and workflow optimization. Real-time updates and automation ensure that the dashboard remains current, empowering executives with timely data. The research methodology then focuses on the design of the executive dashboard, prioritizing usability and visual appeal. The dashboard is organized into sections or tabs, each dedicated to different types of metrics or business functions.

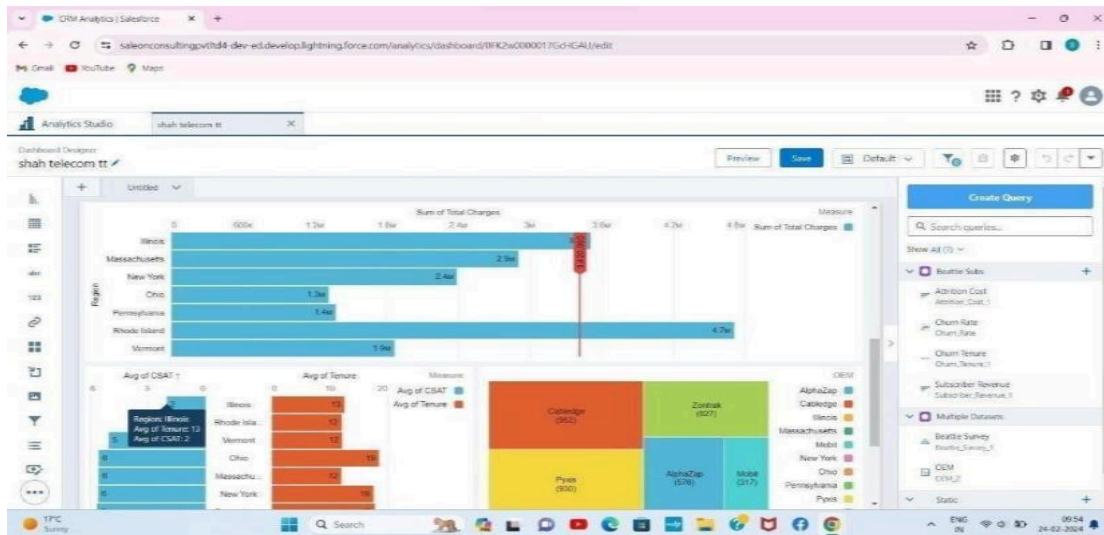
Charts, graphs, and tables are used to visualize data effectively, enabling executives to quickly grasp trends and patterns. Interactive features such as filters and drill-down capabilities allow for deeper analysis and exploration of the data. Finally, the research team develops the executive dashboard using appropriate tools and technologies, ensuring seamless integration with Salesforce CRM for real-time data updates. Whether leveraging Salesforce's native dashboard builder or third-party dashboarding solutions compatible with Salesforce, the goal is to create a user-friendly interface that provides.

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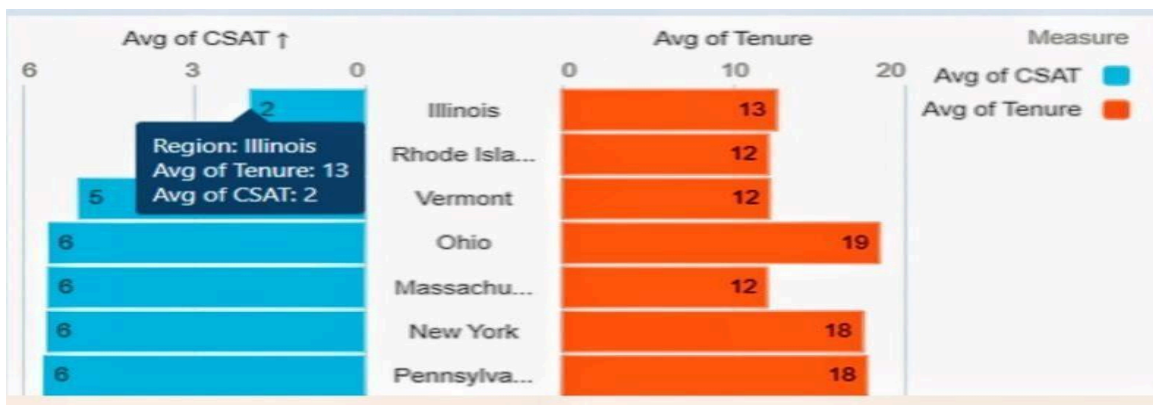
## RESULTS AND ANALYSIS



Fig No:1



**Fig No:2**



**Fig No:3**

**CONCLUSION**

In conclusion, the research underscores the pivotal role of executive dashboards within the Salesforce CRM ecosystem, serving as indispensable tools for organizational decision-makers. By harnessing the power of data analytics, these dashboards empower executives with timely insights into key performance indicators, enabling them to steer the organization towards its strategic goals. Executive dashboards offer a comprehensive view of critical business metrics,

such as sales performance, customer engagement, pipeline health, and marketing effectiveness. Through intuitive visualizations and customizable reporting features, executives can quickly assess the state of the business, identify trends, and pinpoint areas for improvement. Moreover, executive dashboards facilitate data-driven decision-making by providing actionable insights in real-time. Whether it's monitoring sales forecasts, tracking marketing campaign ROI, or analyzing customer satisfaction scores, executives can make informed decisions on resource allocation, process optimization, and strategic initiatives integrity. However, the effectiveness of executive dashboards hinges on several factors. Firstly, organizations must prioritize data quality and to ensure the accuracy and reliability of the insights presented. This necessitates robust data governance practices, including data cleansing, standardization, and validation procedures.

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