Optimize your business performance using LeadSquared Analytics

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Topics to be covered

➢ Analytics and its significance
➢ Different type of Framework
➢ Reports respect to Frameworks
➢ Different roles in LeadSquared
➢ Reports based on Role prospective
➢ Feature Based Reports
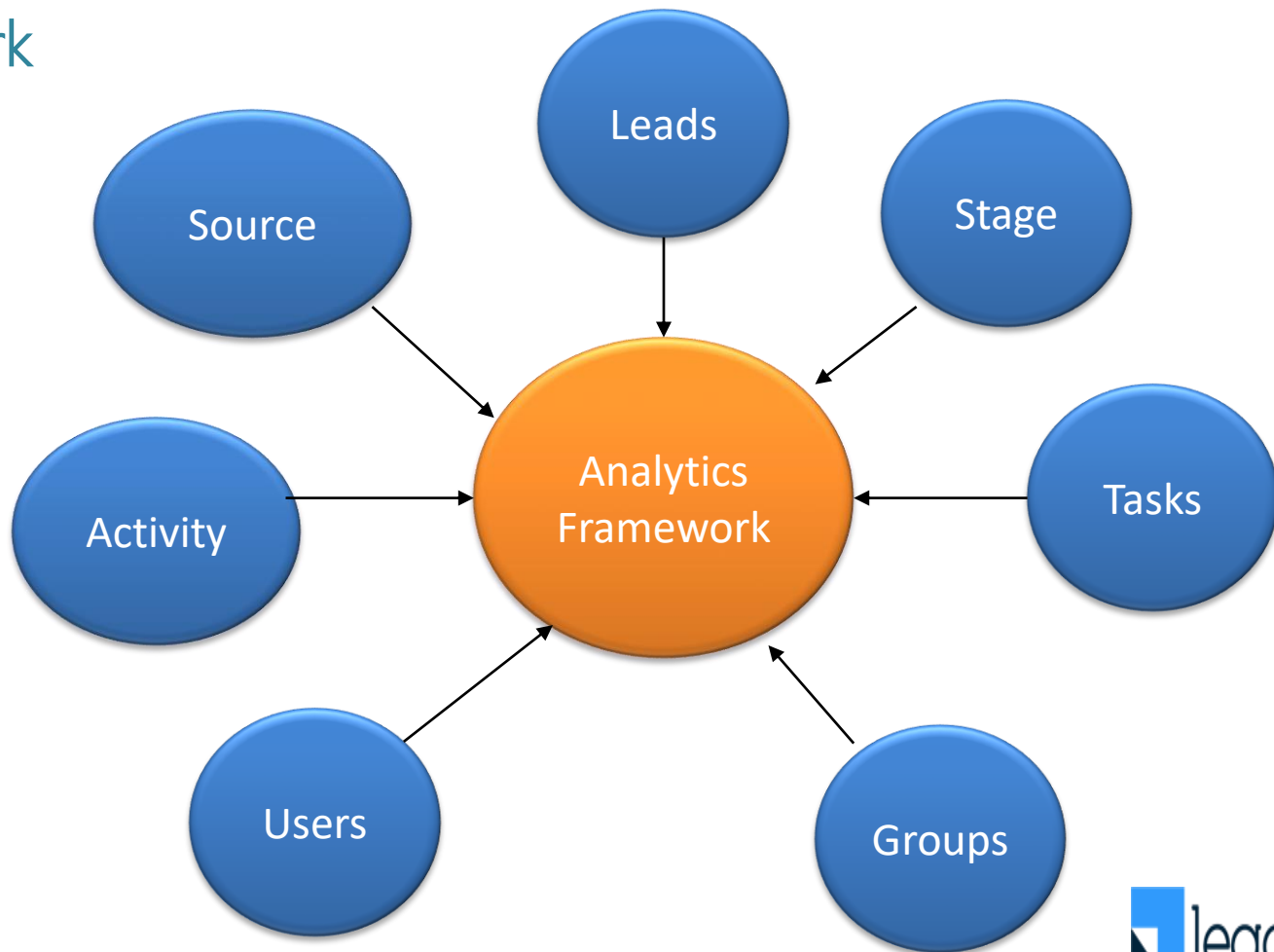➢ How to Share Reports and different report formats
➢ Dashlet Builder

Why Analytics...

- Business Performance
- Key Drivers (User, Source)
- Measure and track results across time range
- Taking right decisions

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Framework

Lead Dimension:

[Lead Assignment History](#)

Use Case: Over a time period how many lead is assigned from one user to different user

[Lead Dashboard](#)
Use Case: It gives us over all snapshot of overall Business

[Lead Distribution Analysis - 1 ,2,3, 4 field](#)
Example:
Education: Course ,City, Owner, Stage, Source
Finance: Stage ,Owner ,Product, City
IT Services: Owner, Industry, Sources ,Stage

[Leads Not Contacted](#)
Use Case: Leads where users have not contacted from particular time range

Activity Dimension:

[Activity list by Leads](#)

Use Case: How many types of activity happened on a particular lead and we will get summary

[Average Time for First Activity on New Leads](#)
Use Case: How much time it takes to act on leads

Stage Dimension:

Average time spent in Lead Stage
Use Case: It give idea how much time users are taking to move prospect from one stage to another

Lead Stage Change History Report
Use Case: How lead travel from one stage to another over a particular time period

Lead Stage changes by Owner
Use Case: Over the time period lead funnel in different stages

Lead Distribution - Stage by Custom Field
Use Case: On particular element how leads are distributed in the system

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Task Dimension:

Task Summary Report
Use Case: How users are adding tasks and completing over a time period

Leads with no Tasks
Use Case: To identify lead where no task has been added

Source Dimension:

Submission Log Summary
Use Case : To check one lead came from different sources and how many time it we got submission

Top Source Campaigns and Media
Use Case : Which Source Campaign working best in terms of lead capturing and which medium

Month-wise leads by sources
Use Case: Month on Month lead count

Conversion Analysis By Lead Source
Use Case : Where to invest where not to; over time period

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User Dimension:

User Productivity Summary
Use Case: How users are performing

Check-in and Check-out History
Use Case: To check when users are check in and check out

Activity Count by Leads
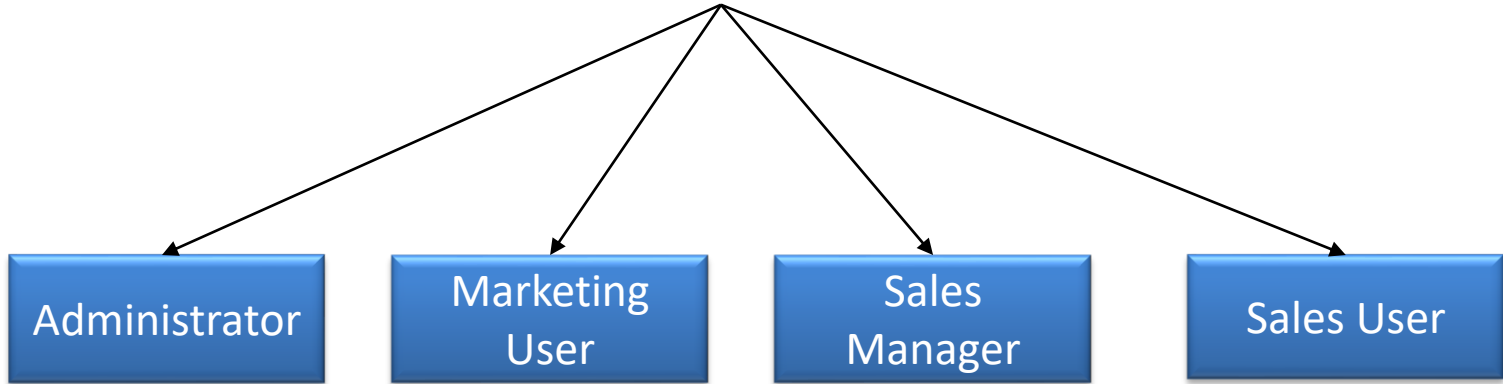Use Case: How many activity inserted on a lead over a time period

Group Dimension:

[Group-wise Lead Dashboard](#)

[Group-wise Lead Assignment History](#)

[Group-wise Not Contacted Leads](#)

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Sales User Reports

Reports Name	Accessible to
List of My Not Contacted Leads	Sales_User, Sales Manager
Task Summary of My Team	Sales_User
Productivity of My Team	Sales_User

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Sales Manager Reports

Report Name	Accessible to
[User Productivity Summary](#)	Administrator, Marketing_User, Sales_Manager
[Task Summary Report](#)	Administrator, Marketing_User, Sales_Manager
[Revenue Analysis](#)	Administrator, Marketing_User, Sales_Manager
[Revenue DashBoard](#)	Administrator, Marketing_User, Sales_Manager
[Average Time for First Activity on New Leads](#)	Administrator, Marketing_User, Sales_Manager
[Distribution by Lead Owner](#)	Administrator, Marketing_User, Sales_Manager
[Lead Dashboard](#)	Administrator, Marketing_User, Sales_Manager

Marketing User Reports

Report Name	Accessible to
Email Campaign Open Analysis	Administrator, Marketing_User
Email Campaign Send-Time Analysis	Administrator, Marketing_User
Tracked Web Event Summary	Administrator, Marketing_User
Marketing Funnel	Administrator, Marketing_User, Sales_Manager

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Administrator & General Reports

Report Name	Accessible to
Customer Conversion Analysis	Administrator, Marketing_User, Sales_Manager
Visitor to Customer Conversion Analysis	Administrator, Marketing_User, Sales_Manager
Conversion Analysis By Lead Source	Administrator, Marketing_User, Sales_Manager
Field Sales Activity Tracker	Administrator, Marketing_User, Sales_Manager, Sales_User
Real-time location of Users	Administrator, Marketing_User, Sales_Manager, Sales_User
User Location History Tracker	Administrator, Marketing_User, Sales_Manager, Sales_User

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Feature Reports

➢ Automation

A. Email Report

B. Particular automation Report

C. Lead level report

➢ Email Campaign

➢ Landing Pages

How to Share and in what format

- Download in Excel, PDF ,Word and Email
- Bookmark
- Schedule

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Dashlets

- Dashlet Builder App
- Dashlet Type:
  - [All Leads Access] : Lead Count Distribution By field
  - [All Leads Access] : Lead Count Distribution By two fields
  - [Sales User Access] : Lead Count Distribution By field
  - [Sales User Access] : Lead Count Distribution By two fields
- Limitation: only Tabular representation , no graphs/charts

Custom Report Requests

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