Optimize your business performance using LeadSquared Analytics

By Ashish Gupta
Sr. Manager Customer Success
Topics to be covered

➢ Analytics and its significance
➢ Different type of Framework
➢ Reports respect to Frameworks
➢ Different roles in LeadSquared
➢ 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
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 Transition Analysis**
Use Case: How lead travel from one stage to another over a particular time period and % Change

**Historical Data: Lead Growth Analysis by Stages**
Use Case: to check the trend of lead addition
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:

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
User Dimension:

User Productivity Summary
Use Case: How users are performing

Field Sales Tracking:
Use Case: To check when users are check in and check out and Location Travelled
Group Dimension:

Group-wise Lead Dashboard

Group-wise Lead Assignment History

Group-wise Not Contacted Leads
Roles in Leadsquared

- Administrator
- Marketing User
- Sales Manager
- Sales User
Role Based Sales Reports

Report Name

Revenue Analysis

Accessible to

Administrator, Marketing, User, Sales_Manager

Revenue DashBoard

Accessible to

Administrator, Marketing_User, Sales_Manager
# Marketing User Reports

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Accessible to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Campaign Open Analysis</td>
<td>Administrator, Marketing_User</td>
</tr>
<tr>
<td>Email Campaign Send-Time Analysis</td>
<td>Administrator, Marketing_User</td>
</tr>
<tr>
<td>Tracked Web Event Summary</td>
<td>Administrator, Marketing_User</td>
</tr>
<tr>
<td>Marketing Funnel</td>
<td>Administrator, Marketing_User, Sales_Manager</td>
</tr>
</tbody>
</table>
### Administrator & General Reports

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Accessible to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Conversion Analysis</td>
<td>Administrator, Marketing_User, Sales_Manager</td>
</tr>
<tr>
<td>Visitor to Customer Conversion Analysis</td>
<td>Administrator, Marketing_User, Sales_Manager</td>
</tr>
</tbody>
</table>
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
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

Custom Report Requests
Use LeadSquared to Capture, Engage and Convert Leads

Get Started with LeadSquared