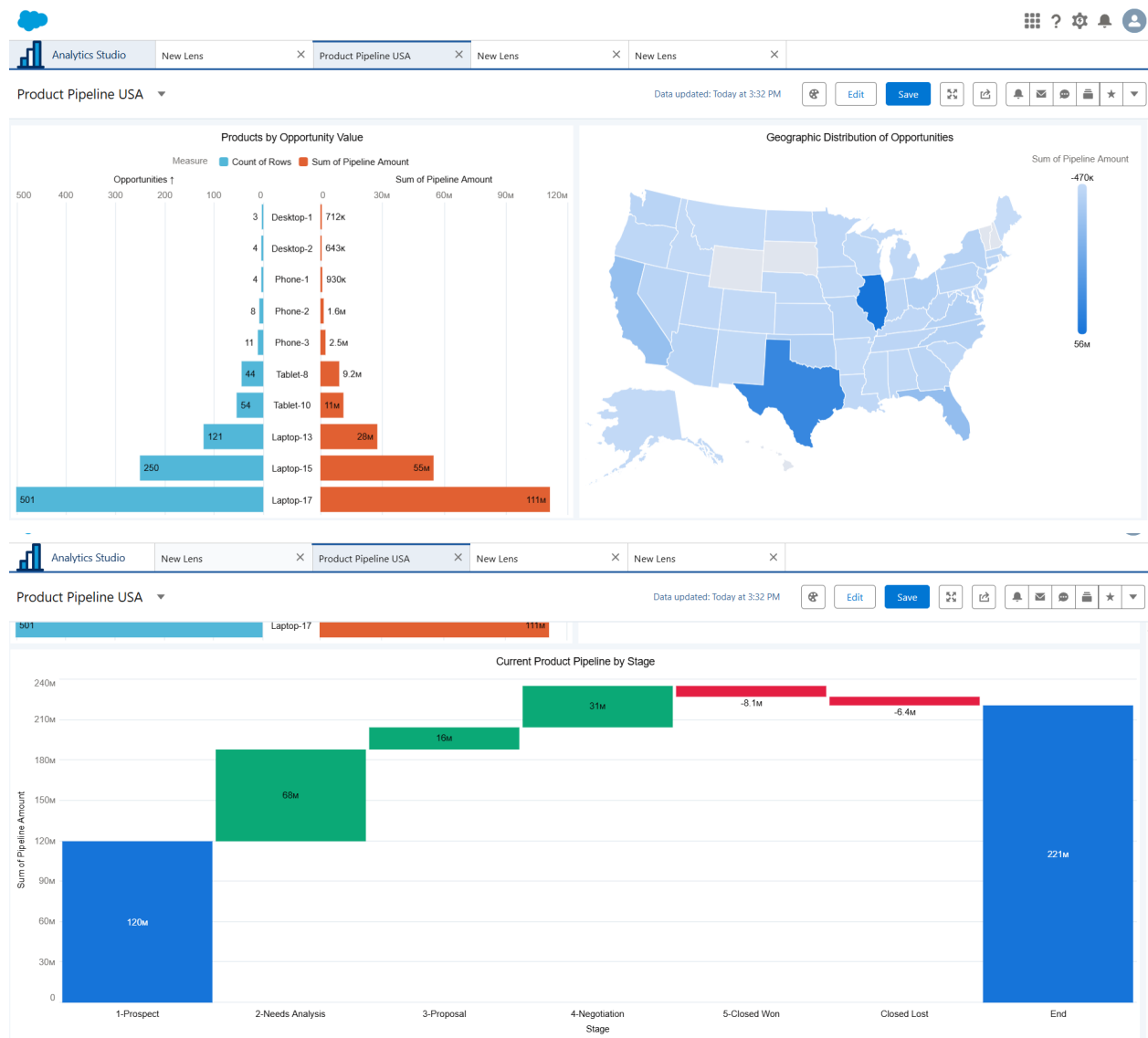


Create a Product Pipeline Dashboard with CRM Analytics Charts



Step 1: Import CSV File

How to load data into CRM Analytics

- I practiced importing a CSV file ([ProductPipelineUSA.csv](#)) into Salesforce CRM Analytics.

- This taught me how to create a dataset from a spreadsheet and verify the dataset attributes inside **Analytics Studio**.

Step-by-step technical process

- Opened **Analytics Studio** in the Salesforce Developer Org.
- Selected **Create** → **Dataset** → **CSV File**.
- Uploaded the **ProductPipelineUSA.csv** file.
- Verified dataset name as **ProductPipelineUSA** and completed the upload.
- Confirmed that the dataset was ready for use.

Business perspective gained

- Once the dataset is uploaded, it can be used to provide insights such as:
 - Breakdown of the **pipeline by sales stage** (e.g., prospecting, negotiation, closed won/lost).
 - **Geographic distribution** of opportunities across regions.
 - Comparison of **product values** to see which products contribute most to revenue.

Connecting the data to visualizations

- I learned that different charts highlight different insights:
 - A **bar chart** shows comparisons but doesn't display totals well.
 - A **waterfall chart** highlights how each stage adds or subtracts from the total pipeline value.
- Choosing the **right chart** is as important as uploading the data because it changes how the story is told.

Step 2: Adding a Waterfall Chart

What I Learned

1. How to create a dashboard from a dataset

- I learned how to take the dataset I uploaded ([ProductPipelineUSA](#)) and open it in a **lens** for exploration.
- By clipping the lens into the dashboard designer, I was able to transform the dataset into an interactive dashboard.

2. Data preparation before visualization

- The default chart was a simple bar chart with a row count, but I modified it to show something more meaningful:
 - Grouped opportunities by **Stage**.
 - Changed the measure from **Count of Rows** to **Sum of Pipeline Amount** (using aggregate function [SUM](#)).
- This adjustment showed the **total dollar value of opportunities by stage** instead of just counts.

3. Switching from Bar Chart to Waterfall Chart

- I clipped the exploration into the dashboard designer as “Stage_1.”
- Initially it displayed as a bar chart, but I changed the chart type to **Waterfall**.
- A **waterfall chart** works better because:
 - It shows the contribution of each stage to the total pipeline.
 - It highlights how opportunities progress or drop off across stages.

4. Dashboard design and saving

- Dragged and resized the chart on the canvas to make it more readable.
- Gave the chart the title “**Current Product Pipeline by Stage.**”

- Saved the dashboard as “**Product Pipeline USA.**”

Business Insights from the Waterfall Chart

- **Most deals are stuck in early stages** → The sales team needs to focus on moving these opportunities forward.
- **Closed deals have a strong win rate** → Once opportunities reach the final stages, they're more likely to convert successfully.
- **Pipeline visibility** → The chart makes it easy to spot where deals slow down and where the company is performing well.

Step 3: Adding a Map

What I Learned

1. How to group opportunities by location

- I used the same dataset (**ProductPipelineUSA**) and grouped opportunities by **State** instead of Stage.
- Changed the measure from **Count of Rows** to **Sum of Pipeline Amount** so the chart reflects the total dollar value of opportunities in each state.

2. Creating a Map Chart

- Clipped the dataset into the dashboard designer as **State_1**.
- Converted the bar chart into a **Map chart**.
- Adjusted the map settings to display **US States** only, giving a clear geographic view of opportunities.
- Added the title “**Geographic Distribution of Opportunities.**”

3. Dashboard design improvements

- Resized the existing waterfall chart to make space for the new map.
- Positioned both charts together in the dashboard for a more complete view of the pipeline.

- Saved the dashboard again as **Product Pipeline USA**.

Business Insights from the Map Chart

- **Illinois and Texas lead in opportunities** → These states represent the largest sales potential.
- **California and Florida are also strong** → Secondary focus areas for sales efforts.
- **Gaps on the East Coast** → Raises questions about why opportunities are limited there and whether new resources should be allocated.

Step 4: Adding a Pyramid Chart

What I Learned

1. How to compare products by opportunity value

- Opened the dataset (**ProductPipelineUSA**) and grouped opportunities by **Product**.
- Added two measures:
 - **Count of Rows** → number of product opportunities.
 - **Sum of Pipeline Amount** → total potential revenue for each product.
- Sorted products in ascending order to make comparisons easier.

2. Creating a Pyramid Chart

- Clipped the exploration into the dashboard and placed it alongside the waterfall and map charts.
- Converted the bar chart into a **Pyramid chart**, which shows:
 - **Opportunities** on one side.
 - **Pipeline Amount (revenue)** on the other side.
- Added labels and customized axis titles for clarity.

- Named the chart “**Products by Opportunity Value.**”

3. Dashboard layout

- Adjusted the sizes of all three charts (waterfall, map, pyramid) so they fit neatly together.
- Saved and previewed the dashboard, now showing a complete view of the product pipeline.

Business Insights from the Pyramid Chart

- **Top products drive the most revenue** → The pyramid chart makes it clear which products generate the largest pipeline value.
- **Opportunity counts vs. revenue** → Some products may have many opportunities but lower dollar value, while others have fewer opportunities but higher value.
- **Strategic focus** → This helps the company decide which products deserve more sales and marketing resources.