

Guide to Salesforce Wave Analytics

Catching up on the cloud-based BI platform designed to digest data points and give direction in real time



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In Bluewolf's latest "The State of Salesforce" report, 81% of Salesforce customers cited increasing the use of **predictive analytics** as the most important initiative for their sales strategies.

Ahead, industry experts take a close look at **Salesforce Wave: The latest business intelligence (BI) platform from Salesforce.com that is optimized for mobile access and data visualization.**

No topic is off limits: Features, use cases, cost, and capabilities. What challenges does it solve? And, most importantly, has it lived up to all the hype?

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Can Salesforce Wave answer data integration challenges?

Adam Bataran, Senior Director of Analytics, Bluewolf Group LLC

All software providers will tell you that their platforms can finally put an end to data silos -- but when it comes to data integration challenges, companies should exercise some healthy skepticism. Salesforce is an exception.

Salesforce clouds promise to bring lots of data together to provide a 360-degree view of customers, accounts and more into a single interface on a single platform, yet 76% of the more than 1,500 companies that took part in Blue Wolf Group LLC's 2015 "The State of Salesforce" report struggle with data integration challenges. Salesforce Wave -- or Salesforce Analytics Cloud -- may be able to change that.

Any organization that wants to remain competitive needs to be serious about analytics, and in fact, most are -- 68% of companies responding to "The State of Salesforce" plan to invest in analytics in the coming year. Their end goal? To help their business make data-driven decisions to achieve results. Analytics are crucial. Without data or insight, you're forced to rely on intuition and gut instincts.

Unfortunately, organizations large and small are plagued by these. We often hear, "I don't want to look at my data. It's a mess. I don't know where to start." Organizing and managing data so that you can derive insights can seem so daunting that many companies just ignore it. But you can't make business decisions based on a hunch -- your results will suffer. If you're

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struggling with unclean or siloed data, you must understand the root of the problem. Here, we'll cover the two biggest challenges companies face when integrating data from multiple clouds, or third-party data into your current Salesforce instance -- and what you can do to fix them now.

Challenge No. 1: Seeing your data

Getting access to data is only as valuable as being able to understand the context in which you want to use it. Think about it this way: You have tons of data, but are you really seeing insights that matter to your employees and your organization?

Imagine you're the head of customer service at your organization, and you want to understand the health of your customer today. You're interested in honing in on a specific set of data: revenue trends over time, the last dozen surveys completed, the top five product SKUs purchased during the past six months and only poor customer call center cases. With traditional [business intelligence \(BI\)](#) tools, it would be almost impossible to see this level of diverse and customized data, regardless of granularity, at the same time. You would need to run four separate reports, compare numbers and likely spend your entire day looking for an answer. This is why we see companies relying on intuition, not data, when drawing conclusions about their business -- it's just too complicated and time consuming to get the insights they want when they need them.

Tools like Salesforce Wave are huge differentiators here. With Wave, you can display any data at the same time on the same dashboard, regardless of

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its complexity of source or granularity. You no longer have to look at mass quantities of data to find that one insight you're seeking.

Challenge No.2: Structure data, then visualize

Traditional BI forces organizations to structure data in a certain way *before* they can optimize or visualize it. But this can be a huge task for some organizations that don't have the time or resources to manage and organize their data. Furthermore, once the data has been structured with complex schemas or pre-aggregations, changes in business requirements might cost you months of time to correct. Those experienced with moving data into an analytics tool are familiar with the barriers to the process, such as the need to denormalize data and transform standardized definitions.

With Wave, the barrier is much lower, since you don't need to structure data in a traditional schema. Wave can ingest all data from diverse data sets and effectively create the benefits of denormalized data on the fly. That said, bringing data into Salesforce Wave still takes some manipulation, particularly concerning [extract, transform, and load \(ETL\)](#) tasks, which is why Wave partners with cloud ETL tools like Informatica. While you don't typically have to do as much ETL work with Wave, some companies will probably need to do some data cleanup before moving information into Wave.

In my experience at Bluewolf, I've found this particularly important when it comes time to roll up or pre-aggregate data before a merge. With traditional

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BI tools, data is rolled up in a warehouse and pushed out to teams, but teams can't delve deeper to see specific opportunities or cases. For BI tools to handle mass volumes of data, that data needs be pre-aggregated. But by doing so, you lose the ability to drill down into your data -- and if you need to ever restructure your data after pre-aggregating, you're in for a long, painful process.

With Wave, companies have three significant benefits. First, teams can work at various degrees of hierarchy and aren't locked into rolled-up views. Second, you can drill down as far as you want into your data, since you don't have to pre-aggregate it. Third, since you didn't pre-aggregate your data, changing its structure is simple and fast.

Everyone preaches the gospel of clean data as the ultimate goal -- and while certainly commendable, it's lofty and requires a huge investment of time and resources with diminishing value of returns in some cases. The reality is that you and your company are running your business *today*. Whatever the data integration challenges you're faced with, that's what you have to work with. Rely on a tool like Wave to expose your best data, and use it to take action today.

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When is your data 'good enough' for predictive analytics projects?

John Hope, Director of Analytics, Bluewolf, an IBM company

In today's age of the customer, companies are striving for richer customer insights, and the value of data has never been stronger. But in some cases, they shy away from predictive analytics projects because they are *Waiting for Godot*: that is, waiting for data perfection before they begin.

In Bluewolf's latest "The State of Salesforce" report, 81% of Salesforce customers cited increasing the use of **predictive analytics** as the most important initiative for their sales strategies. But many business leaders approach the use of predictive analytics warily, because they misguidedly believe that **pristine data** is a requisite for successful use of these tools. In truth, no business has perfect data.

Rather than hinder you from implementing predictive tools, the existence of imperfect data gives an opportunity to identify points of weakness in your data sets and mature your strategy. The dramatic benefits of predictive analytics can be seen at every level of their use -- the key is to start work on a predictive analytics project.

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Use it or lose it

Predictive has a wide definition with many use cases. At a basic level, predictive analytics can be used to identify a key customer segment in your database. Using predictive analytics tools doesn't have to be an astronomical project -- you can find insight even in the poor data. If you don't start using your data, you won't have the opportunity to further iterate it and make it more useful to you.

For example, if you begin sorting service cases by product to identify trends in customer dissatisfaction and find that the product field is blank in many of these records, you've uncovered a core problem with the data: incompleteness. These kinds of insights are the building blocks of a more robust and insightful [data-driven business model](#).

Predictive data offers an edge

From basic to advanced uses, predictive analytics projects enable business decisions to be made proactively rather than reactively. Examples of business insights include identifying customers who are most likely to attrite, discover opportunities likely to have the most immediate impact, or predict which accounts carry the highest lifetime value. Data's power comes from its versatility. Almost any business decision can be made smarter with data as its foundation.

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We recently worked with a warehouse company and a media corporation; despite their being different businesses, both optimized their product pricing with [Salesforce's Wave Analytics](#) to gain insight into their most valuable assets. By moving this process out of Excel and uniting their data sources, both companies drastically improved their revenue by predicting value more efficiently.

Empower all parts of business with data

Data can add intelligence to every part of your business. With [Salesforce Wave](#), you can build dashboards and set up alerts to deliver these intelligent insights to each team in your business. When customers likely to attrite are identified, your marketing team will be notified and enabled [to tailor campaigns](#) to those customers to improve those relationships.

An automatic service message can be configured to be sent to a database segment, or certain contacts can be sent to a queue to be called by your service team to make sure those customers have a positive customer experience. Sales teams can be aided with predictions of the best products to sell or contracts to target for renewal. Big business goals for price optimization, retention, white space analysis and targeted marketing all begin with data.

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■ Handling unwieldy data with Salesforce Wave Analytics

Adam Bataran, Managing Director, GTM Global Salesforce Platforms, Bluewolf, an IBM Company

Organizations have bought into the promise of data-driven decision making. It's simply not enough to collect data with traditional [business intelligence \(BI\) tools](#); companies are looking to integrate different data sources to speed their ability to mine huge data sets and uncover new insights. Sales leadership is hungry for it.

Still, despite the ability to capture so much data, most sales teams are still struggling to access and consume it. And if a sales rep can't consume it, the data becomes irrelevant. [Bluewolf's recent report](#), based on responses from more than 1,500 Salesforce customers, revealed that access to data remains companies' biggest obstacle. Today, nearly half of all Salesforce customers have problems reconciling data from different sources.

As they interact with customers, sales reps are already making decisions every day. They need data that they can trust to better [influence their decision making](#). But all too often, data -- and its end goal, insight -- is too difficult to access, doesn't tell a complete story and is not actionable. Fortunately, organizations that believe in the promise of data are taking action: Nearly 70% of companies [increased their investment in analytics](#) this year.

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Salesforce [Wave Analytics Cloud](#) is a powerful tool to arm employees with recommended actions based on insights, which can help them make smarter day-to-day decisions and drive more meaningful customer moments. And we're seeing its influence gaining steam in the near future: Six percent of companies have already adopted it and 14% are planning to invest in the coming year.

Getting started with the Salesforce Wave Analytics Cloud

The best companies are moving up the analytics maturity scale by investing in predictive and prescriptive intelligence tools to lead data-driven insights and take the next best action. For organizations not ready for a major [cloud BI implementation](#) among all their sales constituents, here are some [recommendations to get started](#) with the Wave Analytics Cloud:

1. Align analytics use cases to business outcomes

For any BI platform to truly succeed, it must help increase employee productivity and drive results. In the realm of [CRM](#), that means the following:

- Increase customer acquisition
- Increase cross-sell/upsell or margin
- Reduce attrition
- Drive cost savings

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To get started, find one or more applications for Wave, such as the number of customer service cases that have been opened, purchase and delivery history, or pricing level. These kinds of metrics align with employees' goals and have direct financial effects on your business. When data is proactively refined with the intention of getting ahead of potential customer problems, reps can better focus on tactics that boost customer experience and loyalty and drive a company's desired outcome.

2. Survey your sales team

To see the power of Salesforce Wave Analytics, focus on examples of where customer-facing reps need a tremendous amount of data in a format that is simple to consume. Dashboards are about storytelling: They need to be clear and simple.

3. Try a proof-of-concept with organizational data

The Wave Analytics Cloud has so many capabilities: mobile experience, [Chatter](#) (or Salesforce collaboration application) integration, great visualizations with drill-down capabilities, speed and the ability to integrate with Salesforce are just a few examples. But to see those capabilities in action, you probably need to do a trial-run of Wave Analytics, which takes minimal effort.

4. Build an analytics roadmap

Successfully implementing data-driven decision-making across your organization does not happen by accident -- it takes planning. Regardless of the capabilities of tools like Salesforce Wave Analytics, organizations still

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need people to adopt processes that influence better action and drive business results. Analytics roadmaps help organizations prioritize investments and foster internal adoption by balancing new capabilities with the wants and needs of end users.

For most employees, reporting is not just a daily task but also the most time-consuming activity. **Clean, easily accessible data** reduces the time it takes to produce reports and derive insights, not only improving productivity and efficiency, but also increasing the impact of analytical data on a company's business outcomes.

About the author

With more than 10 years of Salesforce leadership, Adam Bataran has driven numerous transformational Salesforce initiatives concerning predictive analytics, BI integration, Sales Performance Analytics, the 360-degree view of the customer and guided insights. In his most recent role, he led turnaround efforts at a struggling Salesforce implementation at Iron Mountain to become a prominent enterprise reference account throughout New England. He was recognized by Salesforce for his accomplishments there as an Eagle Eyes Award recipient, one of only 18 companies awarded globally at Dreamforce 2013.

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Accenture serves up data for all via Salesforce Wave analytics

Bridget Botelho, Editorial Director, TechTarget

Accenture, one of the top IT services companies in the world, didn't have its own full-blown customer relationship management system a year ago. It went from zero to 60 when it adopted Salesforce Sales Cloud for its global workforce and ramped up to 25,000 users over a span of just five months.

The company has since adopted [Salesforce Wave Analytics Cloud](#) and is in the early phases of that rollout, with plans to make it the place where customers can find and use Accenture's toolset. "There was a lot of pressure from remote users to support mobile. We needed to give sales reps and directors the capabilities to do their job and not have IT get in the way," said Mark Martynus, managing director of app development and delivery at Accenture, speaking at the [Salesforce World Tour](#) event in Boston in April.

Accenture retired a number of its older systems as part of the Salesforce project and integrated Salesforce with a reporting platform from Microsoft, noted Sean Freeburger, managing director of business applications for Accenture's internal IT organization. "One of our focus areas with [integrating analytics](#) is to have a user focus, to bring the analytics close to the user," he said in an interview. "The idea is to bring the data to the people who actually

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make the business decisions, instead of having the data tucked away and only accessible to data scientists."

Like Salesforce, many business intelligence and analytics vendors are [focusing on visualization](#) to allow a wider audience to consume and use data. Wave's visualization capabilities can make it easier for users to access, explore and handle information.

That said, Salesforce Wave analytics is relatively new, and the company doesn't want to rush it out the door. Instead, Accenture is rolling out the app tactfully to ensure it becomes a platform that users find comfortable and advantageous, Martynus explained.

"Dashboard tools are a dime a dozen. We don't want it to be just a dashboard," he said. "We are looking at usability [and] making things easier for users."

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Has Salesforce Wave lived up to the hype?

Geneva Stephens, Sales Technology Program Manager

Data analysis is a cornerstone of doing business today. That can be both a gift and a curse. On one hand, businesses have more customer data than ever before. But businesspeople can also become overwhelmed with the sheer volume of data at their disposal and consequently, they neither quickly nor efficiently derive useful insight from it.

Organizations are gravitating [toward data visualization tools](#); especially those they can use in mobile environments. Data visualization tools enable business executives to get a quick read on issues, thereby making data [digestible for business executives on the go](#). The question remains [whether it is worthwhile](#) for everyday managers and employees to use them and how effective they can be in the hands of those with little to no data analysis training.

These tools have been available as add-ons to CRM systems, but in the fall of 2014, Salesforce.com unveiled its own native BI capability into its platform, known as the [Salesforce Analytics Cloud](#), or Salesforce Wave. Today, users have had time to see what Wave can do for their companies.

So is it yielding results and living up to its post-Dreamforce hype?

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Salesforce Wave rundown

When Salesforce Wave launched, there was ample excitement about the project and how it would compare with other BI tools on the market, including those from SAP, Oracle and IBM. Now, six months later, [Wave stands as a powerful tool](#), but only for certain companies and users because of its high price and capabilities.

Wave is first and foremost a mobile application enabling users to make use of large data files and turn them into easier-to-review graphs, charts and other data representations while on the go. In theory, executives should be able to drill down into key parts of the business with only a few clicks and little or no training in data analysis. The February 2015 launch of a few new products for the Analytics Cloud bolstered this idea:

Wave Mobile Connector. This tool enables users to import, in real time, a raw data set to a mobile device using Wave. The data can be housed anywhere the user chooses as long as it has been connected to Wave. This eliminates the frustration of having to make sense of unwieldy spreadsheets or other pieces of data on a mobile device, instantly turning perplexing information into a chart or graph -- all with responsive design to conform to any device's screen.

Mobile Dashboard Designer. This capability allows users to create customizable dashboards directly from the Wave app. Users can find their data within Wave and, with a few clicks, select the way it looks -- from a pie to a bar to another kind of chart. For example, this mobile capability will give

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a sales manager the ability to run budget graphs next to sales quotas and actuals, and then drill down and compare for each sales rep -- all within a few clicks on one dashboard.

Wave Links. This feature connects data and the Wave app itself with [Salesforce Chatter](#) and [CRM dashboards](#). It fully integrates Wave with Salesforce1 and users can shuttle between and share data between the two. Theoretically, this means that a manager can run an analysis, see it graphically and then send it out to Chatter, Salesforce's enterprise social media-like application. This enables the manager to solicit questions from the team or direct team members to view a dashboard in Salesforce without having to open up a laptop. With Chatter, colleagues can comment on the charts and collaborate in real time on the project's data.

Still skeptical

While all of these tools sound useful and provide exciting possibilities for analysts and executives alike, there are still questions about [Salesforce Wave's usefulness to non-data analyst types](#) and the amount of effort it will take IT to implement it.

While Wave is a powerful tool for many large enterprises, it won't simplify workflows as much as advertised. Analyzing large data sets requires data analysis expertise and a mastery of what the data itself represents. Giving the common salesperson or marketer access to this data, showing them which buttons to click and how to make a graph doesn't necessarily guarantee that the user can immediately identify what the data means.

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Making Wave mobile is helpful, but creating helpful content on the fly will likely require insight from business analysts or other power users dedicated to this type of internal analysis.

IT teams take note: Wave uses a new language, ASQL, rather than [SQL](#), which will likely need a new support infrastructure and might hinder capabilities data analysts might be more accustomed to in a SQL environment. While the everyday manager can and will do some analysis, real data analysis will likely stay at the desks of specialized data gurus. That is not a bad thing, but rather makes Wave similar to the other BI tools currently available, like [Tableau](#), and renders it as little more than a novelty to the average user.

SMBs need not apply?

The strength of the Salesforce Analytics Cloud is in turning large data from multiple sources into digestible, visual, real time analytics. Large companies with dedicated staffs of data analysts will gain greatly from this since it gives their business units out in the field a tool to respond faster in meetings and gain instant insight on business processes. But small- and medium-sized businesses will likely not have the resources to devote to this product.

The current pricing model indicates that Salesforce Wave may be cost-prohibitive for smaller companies. At \$40,000 per month, plus \$125 per user, this tool requires multimillion-dollar-ROI models to justify a company purchase. Add that expense to hiring extra IT and analytics personnel and

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the price begins to balloon. However, for a large multinational looking to improve insights, Wave will become more and more powerful with time.

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SearchSalesforce.com is the Salesforce community's resource for news, expert advice, technical tips and career guidance as well as a forum for community interaction. The site focuses on the Salesforce customer relationship management (CRM) platform as well as its ecosystem of partners.

Our coverage from award-winning editors and leading industry experts readies data-driven businesses looking to implement, configure, manage and use various aspects of the Salesforce platform, including the Sales, Marketing and Service Clouds, Salesforce Wave and Salesforce Lightning in one place.

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