



Sales Operations: Removing Manual Processes with Alteryx



Today's Speakers

- Tim Cozine - Capitalize Analytics
 - Sales Executive - West Coast
- Eric Soden - Capitalize Analytics
 - Managing Partner
- JT Morris - Capitalize Analytics
 - Senior Analyst
- Jeff Simmons - Qorvo Inc.
 - Sales Tools Technical Manager



Agenda

- Why Are We Here
- Sales Operations: Challenges & Solutions
- Demo: General Workflow Build & Use Case
- Alteryx Customer Story
- Demo: Sales Reporting
- Demo: Sales Territories / Geo-spatial Use Case
- Q&A



Why Are We Here?



Sales Operations: Challenges

- Data accuracy and quality in sales CRM is a constant battle.
- Lack of data integration between systems.
- Complicated, manual processes in Excel continue to be added to the team's workload.
- Sales territories are constantly changing.



Sales Operations: Side Affects

- Overwhelmed.
- 50+ hours/week just to “keep up”.
- Unable to disconnect.



Sales Operations: Solutions

- Capitalize Analytics
 - Full automation projects, training on how to automate processes, long-term support.
- Data Architecture & Integration
 - Silo'd data --> structured, organized data.



- Process Automation
 - Robotic Process Automation (RPA) - automating mouse and keyboard tasks.
 - Analytic Process Automation (APA) - automating data tasks for repeatable, reviewable workflows.



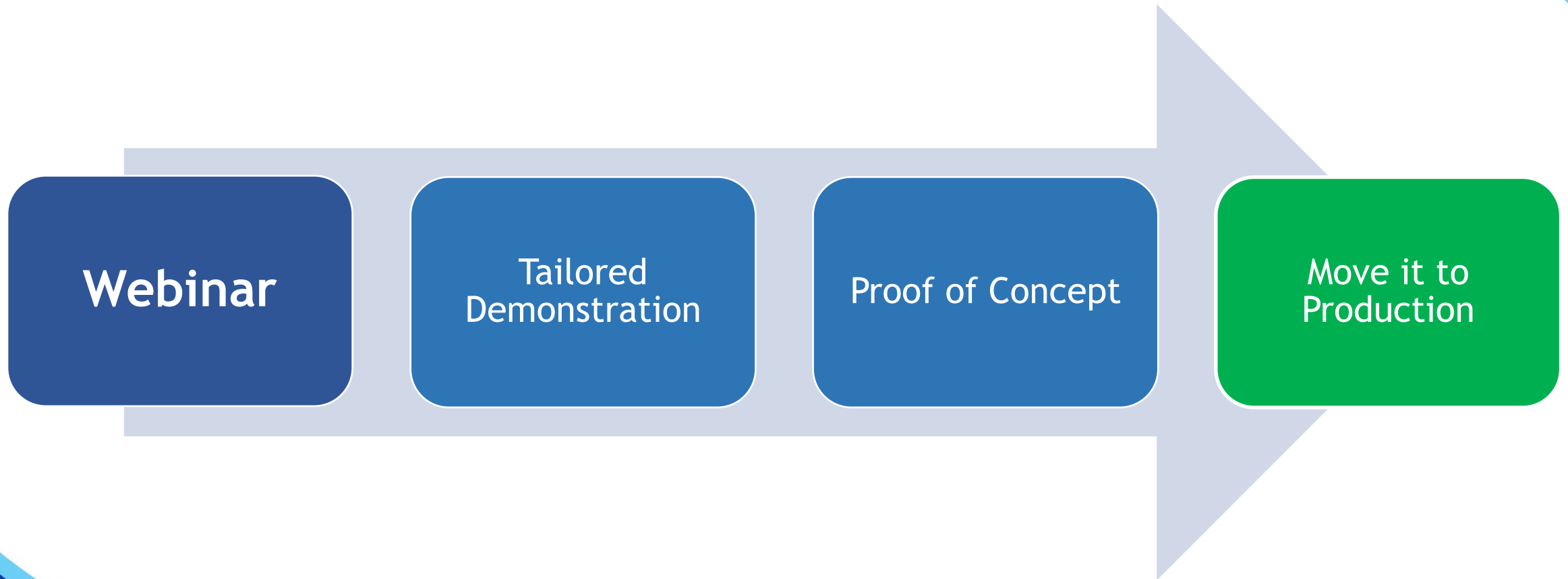
- Business Intelligence and Analytics
 - Customizable dashboards and reports.



Technology Partners



Where Are We Now?

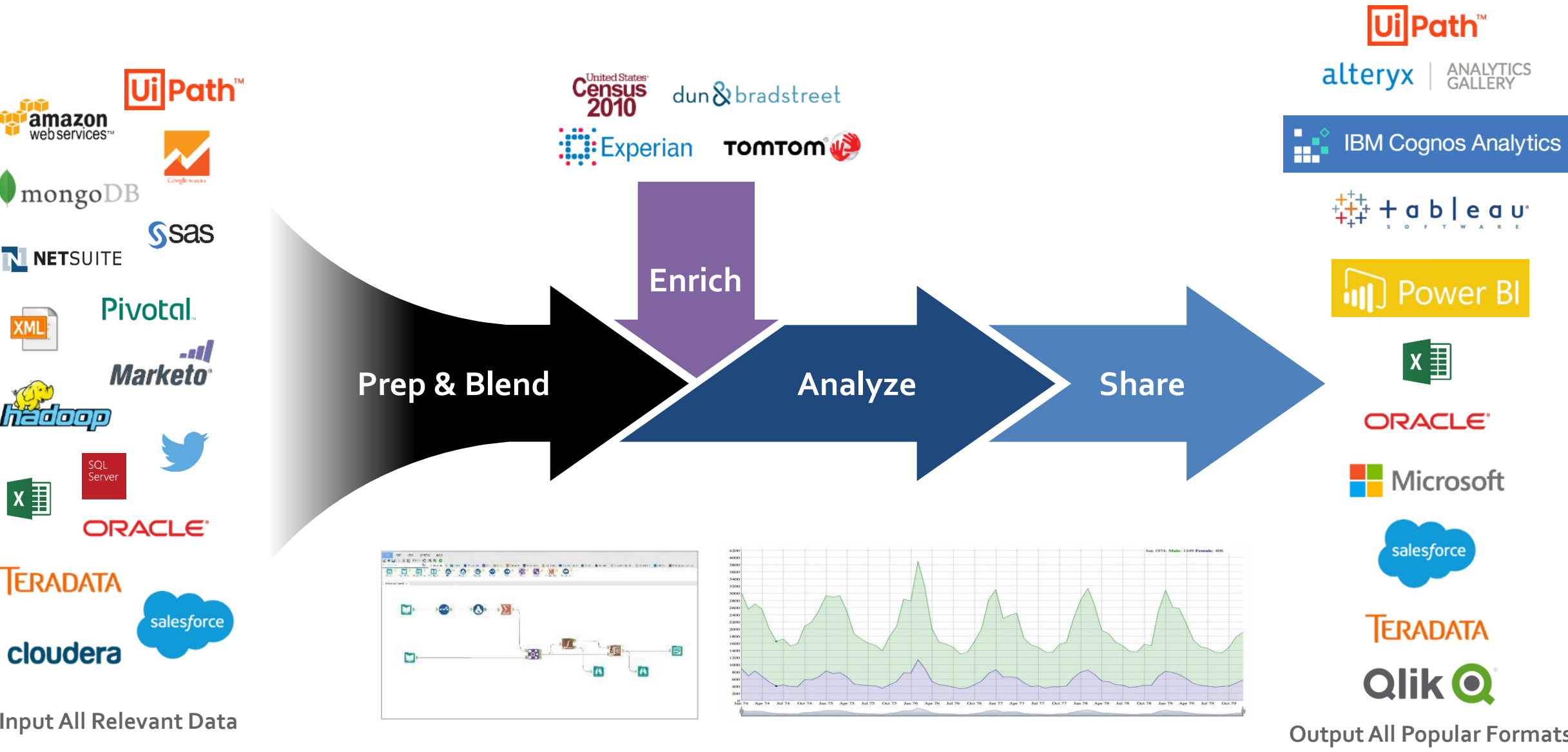




What is Alteryx? When to use Alteryx?

Eric Soden

The Leading Platform for Self-Service Data Analytics



When to use Alteryx?

- Data Exports - For other systems, clients, vendors, regulatory
- Data Imports - From other systems, clients, vendors
- Data Clean-up - Your data is probably spotless? 😊
- Automated Reconciliations and Exceptions
- Data preparation for reports and dashboards
- Automating Excel/SQL/Macro/Access processes
- Geospatial (Where?) or Predictive (What will happen?)





Alteryx Customer Story:

Jeff Simmons
Qorvo, Inc.

Jeff Simmons - Qorvo Inc.





Alteryx Demo: Sales Reporting

Eric Soden



Alteryx Demo: Sales Territories

JT Morris

Resources / Next Steps

- Will send a follow up note with presentation, archive link, contact info, etc.
- Tailored demonstration - timcozine@capitalizeconsulting.com
- Alteryx trial license - <https://capitalizeconsulting.com/alteryx-data-analytics/>
- Archived webinars - <https://capitalizeconsulting.com/webinars/>
 - Tax, Audit, Alteryx and RPA, Alteryx in HR, Alteryx and Tableau, Alteryx and Snowflake



THANK YOU

