Reporting Package Release Notes (v9.8)
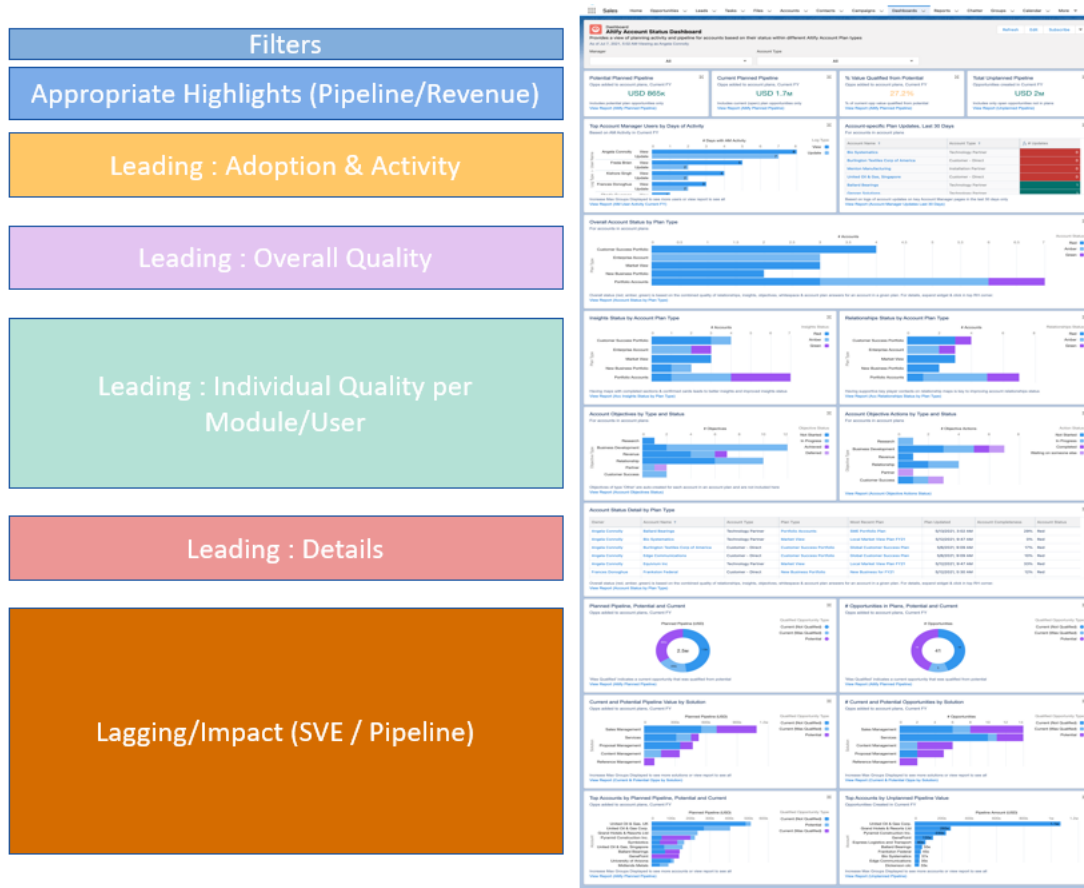
Altify

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Release Overview

A new and simplified reporting package is available with Altify. It improves upon an earlier reporting package by taking advantage of the RAG opportunity and account completeness fields which were introduced in v9.6, as well as the supplementary score fields introduced in v9.8. These fields make it easier to report in a consistent manner on the health of opportunities and accounts in Altify plans.

Dashboards give a full view of planning activity and KPIs for accounts and opportunities within each of the following Altify products: Account Manager, Opportunity Manager and Sales Process Manager. A consistent dashboard structure (as shown in the example below) is applied across the three products, including leading and lagging indicators, user activity and plan status details.

The dashboards capture the Altify point-of-view on the key set of metrics to use when tracking the adoption of, engagement with and impact of your Altify implementation. Dashboard widgets provide a full view of the following:

- **Leading Indicators (open opportunities)**
  - o User Activity

- o   Account/Opportunity Activity
- o   Plan Quality
- **Lagging Indicators (closed opportunities)**
  - o   Impact

Tailoring the Package for your Org

Depending on how your Salesforce org is configured, certain areas of the reporting package may require configuration.

For more information, see the Altify Online Help for Administrators.

Customization Options

Suggestions for tweaking or replacing the widgets that are your displayed in the dashboards are available on the Altify Online Help for Administrators. Some customizations are applicable to all three dashboards in the reporting package, while others are specific to a particular dashboard.

For assistance with any of the customizations, please contact your Customer Success, Sales or Support Representative.

Viewing Report Information

Click on a link below to view the data that is tracked by the widgets (reports) in each dashboard, the associated report types and the Altify custom fields that are included in report data.

- Altify Account Status Dashboard
- Altify Opportunity Status Dashboard
- Altify Sales Process Status Dashboard

Spring '21 Completeness Fields

The following new fields were added to the Opportunity Completeness and the Account Completeness records in Spring '21 (v9.8). A number of these fields are used by the new reporting package and all of them are available for customers to make use of for additional reports or customizations.

Altify_Account_Completeness__c new score fields

These fields hold the percentage scores behind the corresponding RAG status fields.

- Answers Score (*Answers_Score__c*)
- Insights Score (*Insights_Score__c*)
- Most Recent Plan Answers Score (*Most_Recent_Plan_Answers_Score__c*)

- Objectives Score (*Objectives_Score__c*)
- Relationships Score (*Relationships_Score__c*)
- Whitespace Score (*Whitespace_Score__c*)

Altify_Account_Completeness__c new summary statistic fields

- Answers Last Updated (*Answers_Last_Updated__c*): the date the account answers were last updated.
- Insights Map Card Count (*Insights_Map_Card_Count__c*): a count of all insights for this account
- Insights Map Card Owned And Validated (*Insights_Map_Card_Owned_And_Validated__c*): a count of all the insights that are confirmed and have owners.
- Insights Map Last Updated (*Insights_Map_Last_Updated__c*): the date the insight map was last modified.
- Insights Map Section Count (*Insights_Map_Section_Count__c*) : a count of all the insight map sections for this account.
- Objective Actions Closed Count (*Objective_Actions_Closed_Count__c*) : a count of all objective actions that are closed against this account.
- Objective Actions Last Updated (*Objective_Actions_Last_Updated__c*) : the most recent update date of an account objective action for this account.
- Objective Actions Open Count (*Objective_Actions_Open_Count__c*) : a count of all objective actions that are open against this account.
- Objective Actions Overdue Count (*Objective_Actions_Overdue_Count__c*): a count of all objective actions that are overdue against this account.
- Objectives Closed Count (*Objectives_Closed_Count__c*): a count of all objectives that are closed against this account.
- Objectives Last Updated (*Objectives_Last_Updated__c*): the most recent update date for an account objective.
- Objectives Open Count (*Objectives_Open_Count__c*): a count of all objectives that are open against the account.
- Objectives Overdue Count (*Objectives_Overdue_Count__c*): a count of all objectives that are overdue against this account.
- Relationship Supportive Key Player[1] Count (*Relationship_Supportive_Key_Player_Count__c*): a count of all relationship map contacts who are both a key player and a supporter/mentor.
- Relationships Contact Count (*Relationships_Contact_Count__c*): a raw count of all contacts on this account's relationship map.

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[1] A Key Player is a contact whose Political Status is Inner Circle or Political Structure.

- Relationships Key Player Count (*Relationships_Key_Player_Count__c*): a count of all relationship map contacts who are key players.
- Relationships Map Last Updated (*Relationships_Map_Last_Updated__c*): the date a relationship map contact was last updated

Opportunity__c new score fields

These fields hold the % scores behind the corresponding RAG status fields.

- Assessment Score (*Assessment_Score__c*)
- Decision Criteria Score (Decision_Criteria_Score__c
- Insights Score (*Insights_Score__c*)
- PRIME Score (*PRIME_Score__c*)
- Relationships Score (*Relationships_Score__c*)
- Strategy Score (*Strategy_Score__c*)

Opportunity__c new summary statistics fields

- Assessment Answer Count (*Assessment_Answer_Count__c*): a count of all assessment answers with Yes/No answers.
- Assessment Answer Last Updated (*Assessment_Answer_Last_Updated__c*): the date the assessment was last modified.
- Assessment Competitor Answer Count (*Assessment_Competitor_Anwser_Count__c*): a count of all competitor assessment answers with Yes/No answers.
- Assessment Competitor Count (*Assessment_Competitor_Count__c*): a count of competitors for this opportunity.
- Decision Criteria Last Updated (*Decision_Criteria_Last_Updated__c*): the date the decision criteria were last updated.
- Formal Decision Criteria Contact Count (*Formal_Decision_Criteria_Contact_Count__c*): a count of the contacts associated with formal decision criteria.
- Formal Decision Criteria Count (*Formal_Decision_Criteria_Count__c*): a count of all the formal decision criteria identified.
- Informal Decision Criteria Contact Count (*Informal_Decision_Criteria_Contact_Count__c*): a count of the contacts associated with informal decision criteria.
- Informal Decision Criteria Count (*Informal_Decision_Criteria_Count__c*): a count of all the informal decision criteria identified.
- Insight Map Card Count (*Insight_Card_Count__c*): a count of all insights for this opportunity.
- Insight Cards Owned and Validated (*Insight_Cards_Owned_And_Validated__c*): a count of all confirmed insights with owners for this opportunity.

- Insight Map Last Updated (*Insight_Map_Last_Updated__c*): the date the insight map was last updated.
- Insight Map Section Count (*Insight_Section_Count__c*): a count of all insight map sections for this opportunity.
- PRIME Action Closed Count (*PRIME_Action_Closed_Count__c*): a count of all closed prime actions for this opportunity.
- PRIME Action Open Count (*PRIME_Action_Open_Count__c*): a count of all open prime actions for this opportunity.
- PRIME Action Overdue Count (*PRIME_Action_Overdue_Count__c*): a count of all overdue prime actions for this opportunity.
- PRIME Actions Last Updated (*PRIME_Actions_Last_Updated__c*): the date a prime action was last updated.
- Rel Map Key Roles Uncovered Count (*Rel_Map_Key_Roles_Uncovered_Count__c*): a count of all the contacts with key buying roles identified for this opportunity.
- Rel Map Supportive Key Player Count (*Rel_Map_Supportive_Key_Player_Count__c*): a count of all relationship map contacts who are both a key player and a supporter/mentor.
- Relationship Map Contact Count (*Relationship_Map_Contact_Count__c*): a raw count of all contacts on this opportunity's relationship map.
- Relationship Map Key Player Count (*Relationship_Map_Key_Player_Count__c*): a count of all contacts on this opportunity's relationship map who are key players.
- Relationship Map Last Updated (*Relationship_Map_Last_Updated__c*): the day the relationship was last updated.