SALES ANALYTICS AI USE CASE | PLAYBOOK

The AI Sales Insights Playbook

How an enterprise sales team uses a Salesforce Analytics Agent and Tableau Next to turn plain-language questions into leadership-ready insights.

Sales | Revenue Operations | Executive Reporting

TECHNOLOGY STACK

Salesforce Sales Cloud (CRM data) · Tableau Next · Salesforce Analytics Agent (natural language AI)

EXECUTIVE SUMMARY

Ask a question, get a leadership-ready answer

Sales leaders need fast, reliable answers about pipeline, products and accounts, but that data is spread across many reports and dashboards. Working with ABSYZ, an enterprise sales organization deployed an AI-powered Analytics Agent built on Salesforce with Tableau Next. Leaders now ask questions in plain language and get instant KPI summaries, risk alerts and revenue insights, without building reports or navigating dashboards.

For sales leaders
Instant answers on pipeline health, stages and coverage

For RevOps teams
Fewer manual report requests to build and maintain

For executives
Leadership-ready insights on revenue realization and risk

THE CHALLENGE

Too many dashboards, too little time

Getting to the data

- **Dashboard overload**
  Leaders moved between multiple reports and dashboards to piece together one view of revenue and pipeline.
- **Manual report building**
  Every new leadership question meant building or changing reports by hand, often through analysts or RevOps.

Acting on the data

- **Late risk signals**
  High-risk accounts and stalled opportunities surfaced only in periodic reviews.
- **Slow executive reporting**
  Turning CRM data into summaries on product revenue, rep performance and revenue realization was slow and repetitive.

INSIDE THE SOLUTION

From question to insight in seconds

1

Ask

A leader types a question in plain language, no report or dashboard needed.

2

Analyze

The Analytics Agent reads CRM data on opportunities, products, pipeline and accounts via Tableau Next.

3

Answer

It returns a clear, leadership-ready summary with the KPIs, risks and drivers behind it.

4

Act

Leaders use the insight right away, in pipeline reviews, forecasts and executive meetings.

What leaders can ask the agent

Example questions

KPI SUMMARIES

"Summarize this quarter's pipeline health and coverage."

OPPORTUNITY STAGES

"Where are our open opportunities by stage, and what moved this month?"

HIGH-RISK ACCOUNTS

"Which key accounts are at risk, and why?"

PRODUCT PERFORMANCE

"Which products are driving the most revenue this year?"

REP PERFORMANCE

"How are sales reps performing against their pipeline?"

REVENUE REALIZATION

"How much of our pipeline will likely convert, and from which top accounts?"

THE RESULTS

Faster decisions from the same CRM data

Up to 60%

less time on reports

spent building reports and navigating dashboards

Seconds

to a KPI summary

on pipeline, products and key accounts

One

conversational interface

in place of multiple reports and dashboards

Earlier

risk visibility

into high-risk accounts and expected revenue realization

Figures are indicative ranges for this type of solution. Actual results vary by business, data quality and adoption.

SELF-ASSESSMENT

Is your sales team ready for an Analytics Agent?

Tick every statement that is true for your business today. Your answers can be saved with this PDF.

- [ ] Leaders check several reports and dashboards to answer one pipeline question.
- [ ] New leadership questions usually mean a new report request to analysts or RevOps.
- [ ] High-risk accounts are often spotted late, in periodic reviews.
- [ ] Preparing executive summaries on product and rep performance takes hours.
- [ ] Forecasting revenue realization relies on manual spreadsheets and judgment calls.

Ticked two or more?

An AI-powered Analytics Agent can likely give your leaders faster answers from the CRM data you already have.

The first question you'd ask the agent (optional)

LESSONS FOR SALES LEADERS

Four things to get right

01 Start with your top questions
List what leaders ask most and make sure the agent answers those first.

02 Clean CRM data comes first
Accurate opportunities, stages and accounts make answers trustworthy.

03 Keep dashboards for deep dives
Use the agent for fast answers, dashboards for detailed analysis.

04 Measure time to insight
Baseline report hours and decision speed before launch.

Ready to get answers from your CRM in seconds?

Talk to an ABSYZ expert about deploying an AI-powered Analytics Agent with Salesforce and Tableau Next for your sales leadership.

Book a consultation

www.absyz.com

About ABSYZ: a Salesforce consulting partner helping businesses design, build and scale customer experiences across Sales, Service, Analytics and AI.