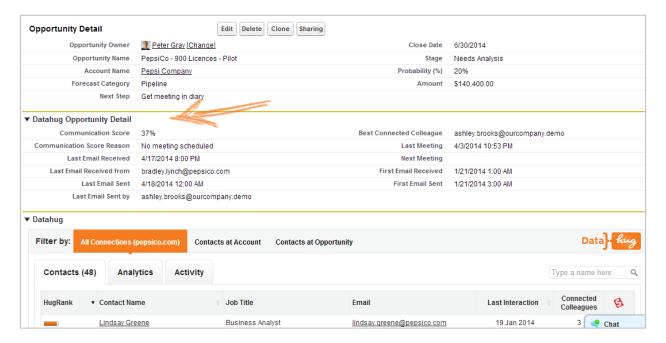# Datahug Pipeline Management

Datahug gives you a single view all Sales Activity with your prospects. You can track engagement and manage your pipeline efficiently and effectively using the Datahug reporting fields.

## Let's Get Started

Scroll down to the Datahug Opportunity Detail on an Opportunity page in Salesforce.



Datahug provides you with all the fields necessary to track your engagement with this Opportunity. You can see the last time you sent/received an email to/from the prospect as well as the last time you had a meeting.
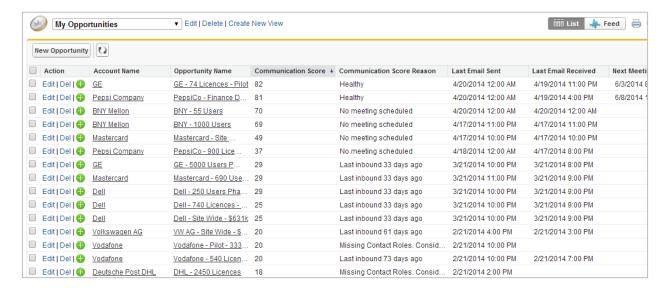


See the Appendix for a full list of the available fields and their explanation.

## Opportunity View

If you have an Opportunities view created in Salesforce you can easily add the Datahug fields to help manage and track your pipeline.

Here I've added in the Communication Score, Communication Score Reason, Last Email Sent, Last Email Received and the Next Meeting Date to my view.



| | Action | Account Name | Opportunity Name | Communication Score ↓ | Communication Score Reason | Last Email Sent | Last Email Received | Next Meeti |
|---|---|---|---|---|---|---|---|---|
| ☐ | Edit \| Del \| ⊕ | GE | GE - 74 Licences - Pilot | 82 | Healthy | 4/20/2014 12:00 AM | 4/19/2014 11:00 PM | 6/3/2014 8 |
| ☐ | Edit \| Del \| ⊕ | Pepsi Company | PepsiCo - Finance D... | 81 | Healthy | 4/20/2014 12:00 AM | 4/19/2014 4:00 PM | 6/8/2014 1 |
| ☐ | Edit \| Del \| ⊕ | BNY Mellon | BNY - 55 Users | 70 | No meeting scheduled | 4/20/2014 12:00 AM | 4/20/2014 12:00 AM | |
| ☐ | Edit \| Del \| ⊕ | BNY Mellon | BNY - 1000 Users | 69 | No meeting scheduled | 4/17/2014 11:00 PM | 4/17/2014 11:00 PM | |
| ☐ | Edit \| Del \| ⊕ | Mastercard | Mastercard - Site ... | 49 | No meeting scheduled | 4/17/2014 10:00 PM | 4/17/2014 10:00 PM | |
| ☐ | Edit \| Del \| ⊕ | Pepsi Company | PepsiCo - 900 Lice... | 37 | No meeting scheduled | 4/18/2014 12:00 AM | 4/17/2014 8:00 PM | |
| ☐ | Edit \| Del \| ⊕ | GE | GE - 5000 Users P... | 29 | Last inbound 33 days ago | 3/21/2014 10:00 PM | 3/21/2014 8:00 PM | |
| ☐ | Edit \| Del \| ⊕ | Mastercard | Mastercard - 690 Use... | 29 | Last inbound 33 days ago | 3/21/2014 11:00 PM | 3/21/2014 9:00 PM | |
| ☐ | Edit \| Del \| ⊕ | Dell | Dell - 250 Users Pha... | 29 | Last inbound 33 days ago | 3/21/2014 10:00 PM | 3/21/2014 9:00 PM | |
| ☐ | Edit \| Del \| ⊕ | Dell | Dell - 740 Licences - ... | 25 | Last inbound 33 days ago | 3/21/2014 10:00 PM | 3/21/2014 9:00 PM | |
| ☐ | Edit \| Del \| ⊕ | Dell | Dell - Site Wide - $631k | 25 | Last inbound 33 days ago | 3/21/2014 10:00 PM | 3/21/2014 9:00 PM | |
| ☐ | Edit \| Del \| ⊕ | Volkswagen AG | VW AG - Site Wide - $... | 20 | Last inbound 61 days ago | 2/21/2014 4:00 PM | 2/21/2014 3:00 PM | |
| ☐ | Edit \| Del \| ⊕ | Vodafone | Vodafone - Pilot - 333... | 20 | Missing Contact Roles. Consid... | 2/21/2014 10:00 PM | | |
| ☐ | Edit \| Del \| ⊕ | Vodafone | Vodafone - 540 Licen... | 20 | Last inbound 73 days ago | 2/21/2014 10:00 PM | 2/21/2014 7:00 PM | |
| ☐ | Edit \| Del \| ⊕ | Deutsche Post DHL | DHL - 2450 Licences | 18 | Missing Contact Roles. Consid... | 2/21/2014 2:00 PM | | |

This allows me to quickly see which deals are at risk due to poor communication with the prospect on my side. I can instantly see the last time I emailed them and the last them they emailed me.

## Opportunity Report

You can also easily add the Datahug fields to an Opportunities report.

Here I want to see the Communication Score and Reason as well as the last time I got an email from a Contact on the Opp.



| Opportunity Name | Account Name | Opportunity Owner ↑ | Amount | Stage | Communication Score | Communication Score Reason | Next Step | Probability (%) | Last Email Received | Last Email Received from |
|---|---|---|---|---|---|---|---|---|---|---|
| Forecast Category: Pipeline (11 records) | | | | | | | | | | |
| Shell - Pilot - 80 Users | Royal Dutch Shell | Jocelyn Jusino | $13,440.00 | Prospecting | 53% | No meeting scheduled | Get meeting in diary | 10% | 3/30/2014 9:00 AM | judy.carter@shell.com |
| GE - 785 Users Phase 2 | GE | Jocelyn Jusino | $103,620.00 | Needs Analysis | 18% | Last inbound 69 days ago | Call next week | 20% | 4/19/2014 11:00 PM | sammy.russell@ge.com |
| GE - 1256 Licences | GE | Jocelyn Jusino | $195,936.00 | Needs Analysis | 18% | Last inbound 94 days ago | Agree goals and timelines | 20% | 4/19/2014 11:00 PM | sammy.russell@ge.com |
| Amex - Pilot - 3825 Users | American Express | Jocelyn Jusino | $204,900.00 | Needs Analysis | 0% | No Contact Roles | Meeting on Thursday | 20% | 4/19/2014 8:00 PM | jeremy.bennett@americanexpress.com |

# Appendix

| Field | Description |
|---|---|
| Communication Score | The Communication Score shows how healthy your communication is with the Contacts on the Opportunity. |
| Communication Score Reason | The biggest contributor to the Communication Score. Acting on this will have the biggest impact on the Score. |
| Other People at Company | The number of people we know at the Company that are not Contacts on the Opportunity. |
| Best Connected Colleague | The employee with the strongest relationship with the Contacts on the Opportunity. |
| Last Email Received | The last time a Contact at the Opportunity sent us an email. |
| Last Email Received From | The last Contact at the Opportunity to send us an email. |
| Last Email Sent | The last time a Contact at the Opportunity was sent an email. |
| Last Email Sent by | The last employee to email a Contact at the Opportunity. |
| First Email Received | The first time a Contact at the Opportunity emailed us. |
| First Email Sent | The first time we emailed a Contact at the Opportunity. |
| Next Meeting | The date of the next meeting with a Contact at the Opportunity. |
| Last Meeting | The date of the last meeting with a Contact at the Opportunity. |
| Number of Sent Emails | The total number of emails sent to the Contacts at the Opportunity. |
| Number of Received Emails | The total number of emails received from the Contacts at the Opportunity. |
| Number of Meetings | The total number of meetings we've had with Contacts at the Opportunity. |