



## 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.



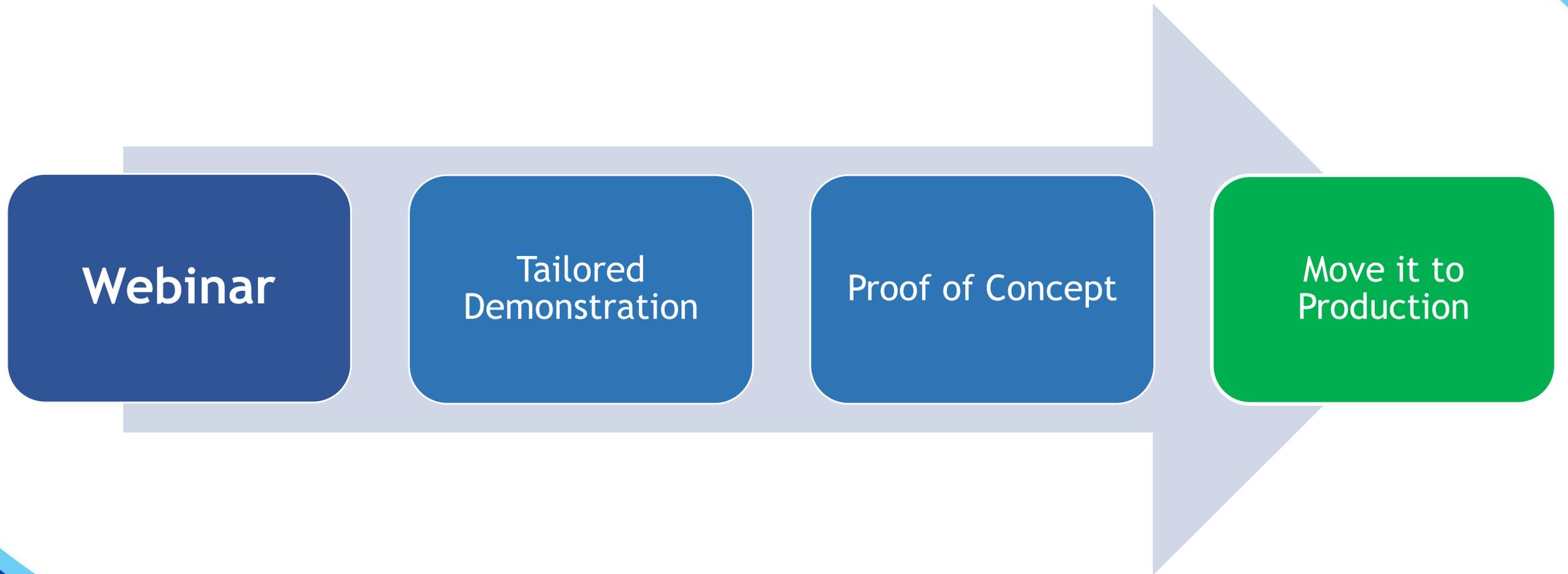
- Business Intelligence and Analytics
  - Customizable dashboards and reports.

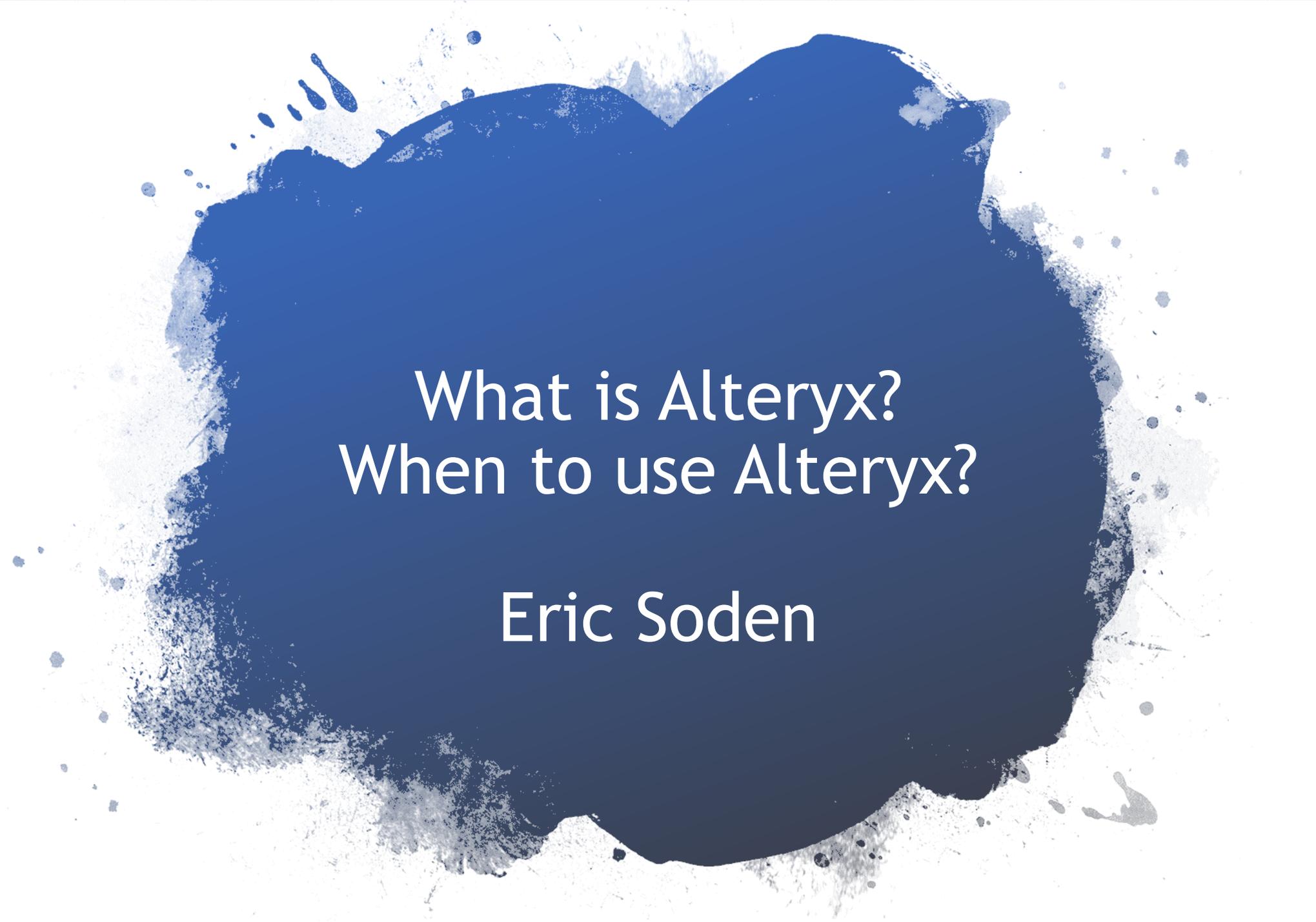


# Technology Partners



# Where Are We Now?





What is Alteryx?  
When to use Alteryx?

Eric Soden

# The Leading Platform for Self-Service Data Analytics



Input All Relevant Data

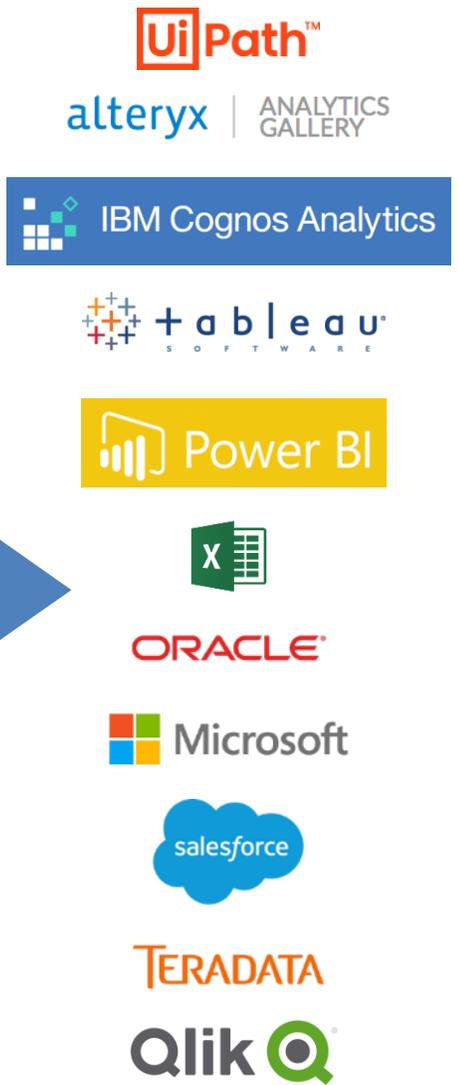
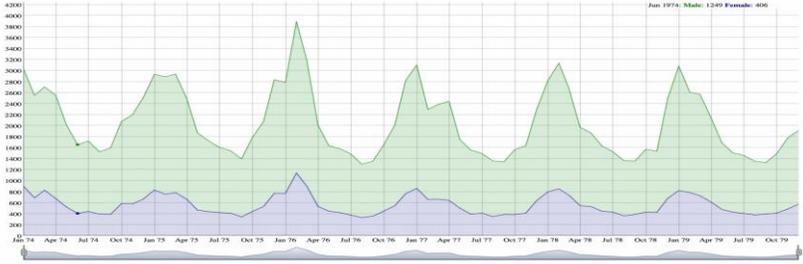
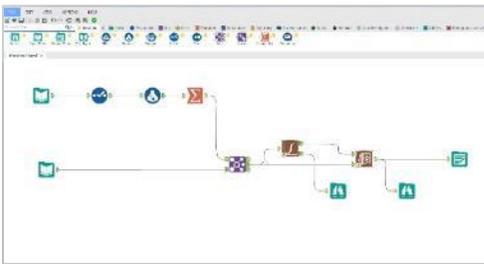


Enrich

Prep & Blend

Analyze

Share



Output All Popular Formats

# 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?)



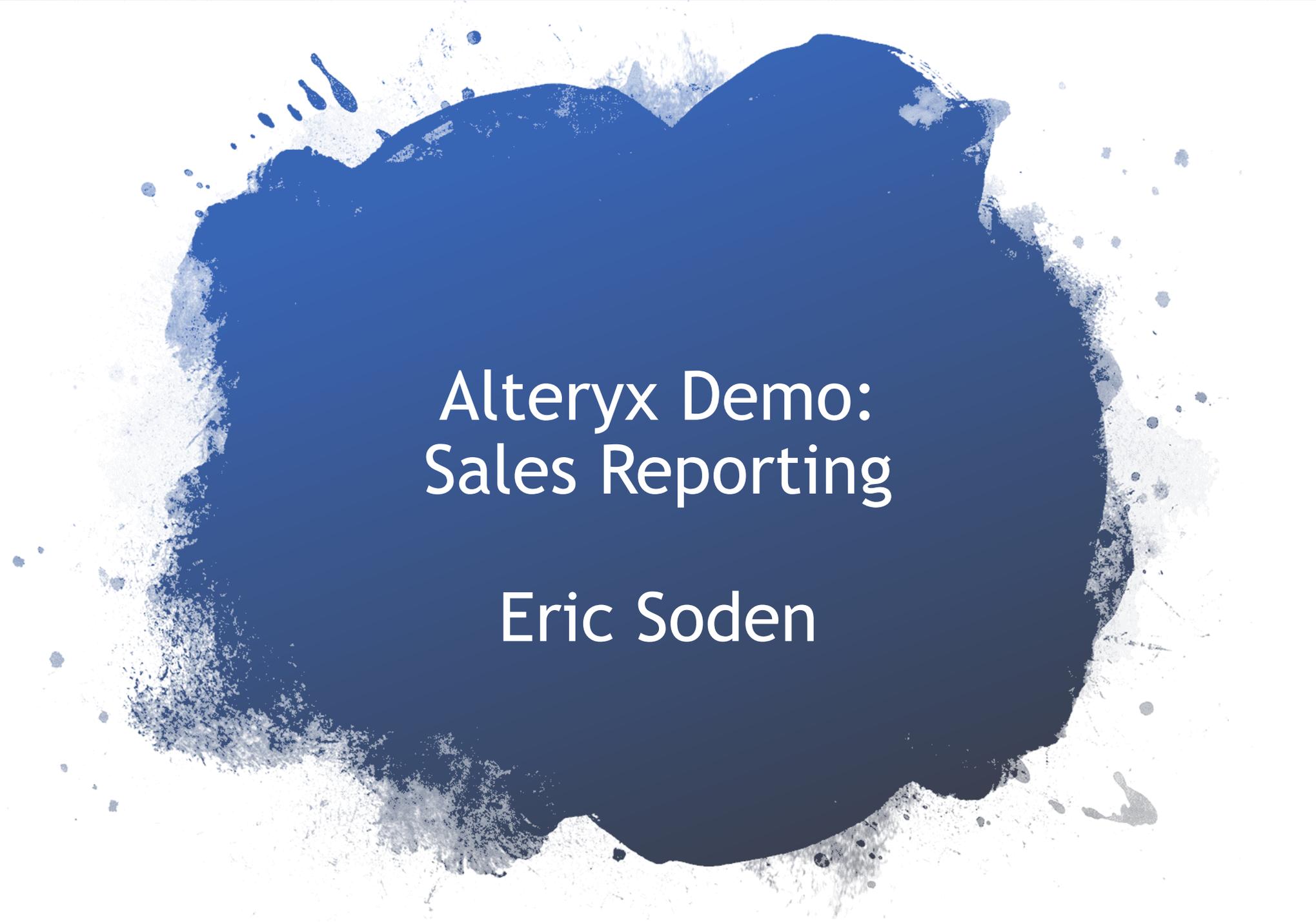


# Alteryx Customer Story:

Jeff Simmons  
Qorvo, Inc.

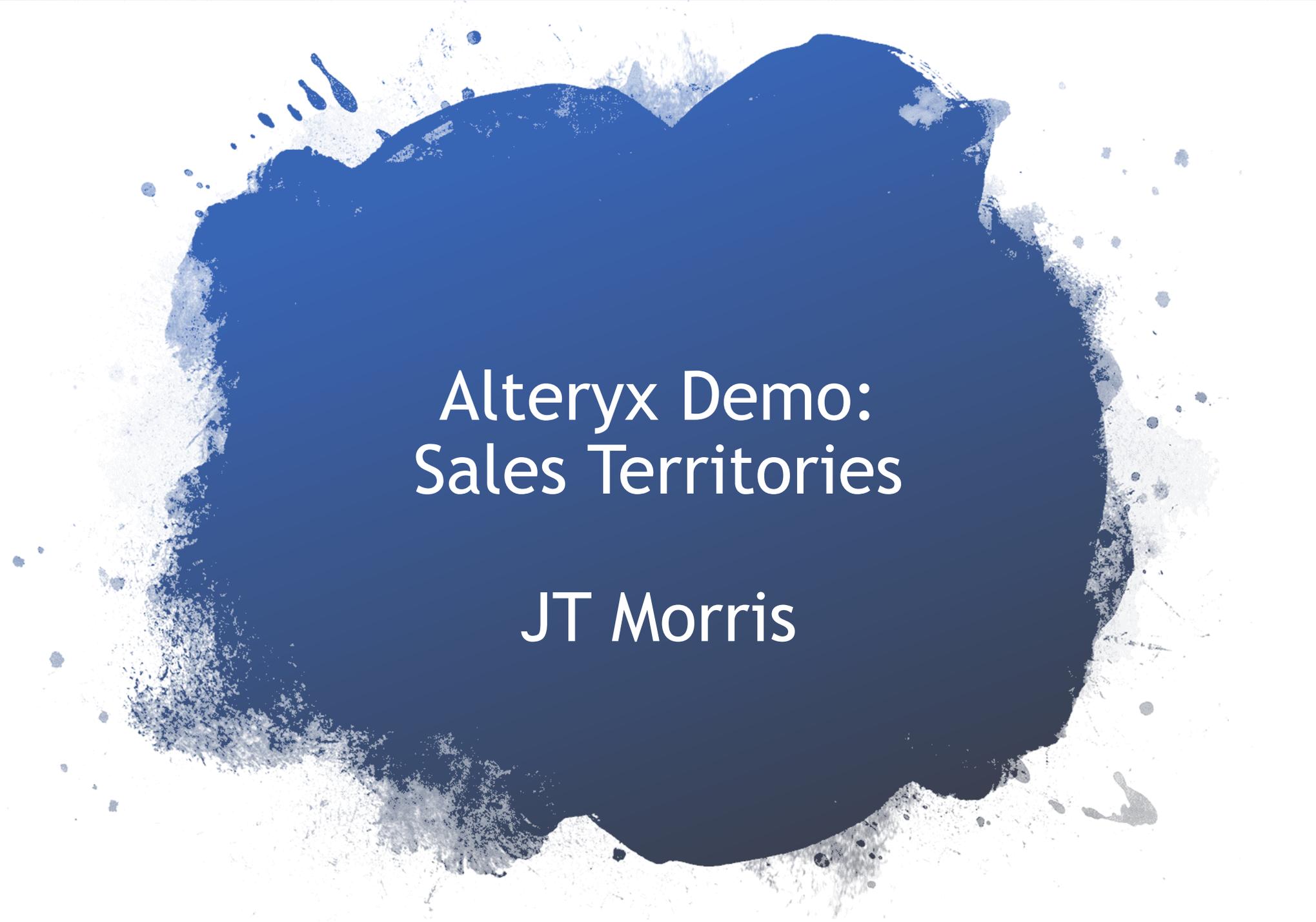
# Jeff Simmons - Qorvo Inc.





# 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](mailto: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

