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CRM Tips: How to Find the Right Analytics Tool

— David Taber, CIO

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CRM systems typically have a built-in reporting engine, and some are pretty amazing considering they're driven entirely by browser-based wizards. Most systems have some sort of dashboard system that give executives a little eye-candy.

Nevertheless, it won't be long before you need to go beyond the internal reports.

Here are some classic CRM reporting issues:

1. Let's face it: Few users can create an ad-hoc report that delivers what they want. Instead, they'll need lots of easy-to-use templates and examples. Yet a surprising number of CRM system vendors seem to think XML, SQL, PHP, or Reporting Services programming is just the thing for end users.
2. In the other extreme, CRM reporting can be too easy. Users often click through many wizards, not realizing that they've created reports with no meaning. Then they'll usually get into long arguments about why their reports deliver different numbers from the official ones.
3. The internal reporting systems don't scale well. Typically, the result set must be throttled at a few thousand rows. Big reports typically have to be exported to a spreadsheet or database file.
4. The internal reporting systems can't consolidate data that executives want into a single report. Joins are typically limited to two tables. Even with Salesforce.com's innovative custom reports, marketing, engineering, and finance users will be wanting more.
5. Many reporting systems do not have fine-grain access controls (or the controls aren't properly configured). Thus, users can report on things they really shouldn't see in the first place. There's also a lack of audit trails in some CRM reporting systems.

The Excel Alternative

One way to get beyond these issues is to turn to a proven classic, Excel. It's fairly powerful, very flexible, quite intuitive, and already runs on most PCs. People already know Excel's basic functions and can get up to speed with the quirks of CRM data quickly.

At first, Excel will most likely be used to make the format of the reports prettier. But it won't be long before analysts start hacking VB macros to filter and organize the data better.

Of course, herein lies the downside to Excel: Somebody will need to create and maintain those VB macros. Excel's spreadsheet is also a poor way to handle multi-dimensional analysis (which you'll need surprisingly soon with CRM data), time windows, or really big joins. Sure, it can hold a million rows—but

