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Section 1

Qualtrics Panels Research

Executive Summary

I currently work at Qualtrics, a market insights and survey software company. I specifically work in the Panels department deploying different services for corporate and academic accounts alike. Not long after joining the services team, my boss invited me to take leadership in designing reports that will drive more sales from our team. The majority of these reports are built within Salesforce.com, but some of the reports are built within excel. In one of these reports I will be implementing VBA principles in order to automate the report.

This particular report will provide intelligence into the different regions of academia. Often when speaking with professors or deans about the services we have available, sales representatives will be asked for examples of published papers or if other schools are using our services. This report will quickly pull up nearby schools that have spent money on our services, along with any publications that came as a result of Qualtrics services. Ideally this report will allow sales representatives to provide credible examples of how other schools are utilizing our services in order to drive forward more sales with compelling data.

Implementation

As described above, the purpose of this form is to be a resource for sales reps to present compelling arguments to professors. The program follows the following process:

1. When opened, the program first asks users to provide login credentials to their current Salesforce.com account. If correct information is provided the report will automatically scrap current data from Salesforce.com populating the "School Data" sheet. If the user does not have an active account, the report will instead use data from the last time that file had pulled data.
2. The "Publications" sheet outlines only a handful of publications that have come as a direct result of the Panels team. This data was compiled separately, and entered in manually.
3. On the main "Find" sheet a user is able input the name of the University they are currently researching.
4. Within the ribbon there are a couple different functions the user can choose from:
    a. University comparisons – This will pull up a list of all the universities in the headquartered in the same region (state, country, etc.) that is currently purchasing panels, along with how much they are spending. In addition, this will outline some of the published papers that have come as a result of Qualtrics Panels work.
        i. In order to accomplish this, the program will compare the "Headquarters" column of the "Find" sheet and scrape through the entire "School Data" tab in order to find universities that

are in the same region, and also have Qualtrics Panels spend greater than $0.
    ii. From there, the program pulls data from the "School Data" sheet, along with data that matches up with the university name with the data from the "Publications" sheet and pulls any publications from that sheet, then returns back to the "School Data" sheet for more universities.
    iii. All data pulled from "School Data" and "Publications" sheets is presented on the well formatted "Find" sheet.
    iv. If the name of the university provided does not match with any of the data within "School Data" a message box will appear asking the user to confirm the name of the university matches up with the appropriate Salesforce.com account name.
b. Publications – This will outline the different published papers that we have record of from this specific university.
    i. This is the same step that is completed in the university comparisons procedure, but only for the current university.
c. Export to PDF – This will export the data requested (either just the publications or university comparisons) into a clean PDF file that can presented to the professor and university in question.
    i. The way it does this is by creating a separate sheet, adding a script at the top, and pulling data from the "Find" sheet, then formatting the entire document to make it more presentable for the end client and finally exporting as a PDF.

Learning and Conceptual Difficulties

This project covers information from the entire class. Analyzing the data and comparing the different data sets were not especially difficult. On the other hand, more complex functions such running an agent through Salesforce.com to log in and pull data, was more of a challenge. In addition, setting up the ribbon correctly was a more difficult assignment for me because I had missed that class period. Ultimately, I now feel confident with the agent class, along with the ribbon wizard which combined made this project possible.

Assistance

I did not receive a significant amount of assistance for any part of this project. At one point Dr. Gove helped with the agent class, but other than that everything was completed on my own.