

# INSIGHTSQUARED

Sell Smart in Q4

Presented by:

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# Agenda

- Meeting Introduction
- What's Different About Q4?
- Four Q4 Management Elements
  - Pipeline Assessment
  - Pipeline Distribution
  - Opportunity Mix
  - New Opportunities
- Techniques & Reports
  - InsightSquared Reports
  - Management Techniques
- Q & A

# Four Q4 Elements



# Four Q4 Elements (1 of 2)

## Pipeline Assessment

- **Pipeline Quality** – Is your pipeline information strong enough to make tough decisions? Where do your reps stand?
- *Are we truly setting ourselves up to meet corporate goals for the end of year?*

## Pipeline Distribution

- **Velocity** – Do your metrics measure the ideal length of stages in the sales cycle?
- *Will my pipeline of opportunities close in time to meet corporate goals?*

## Four Q4 Elements (2 of 2)

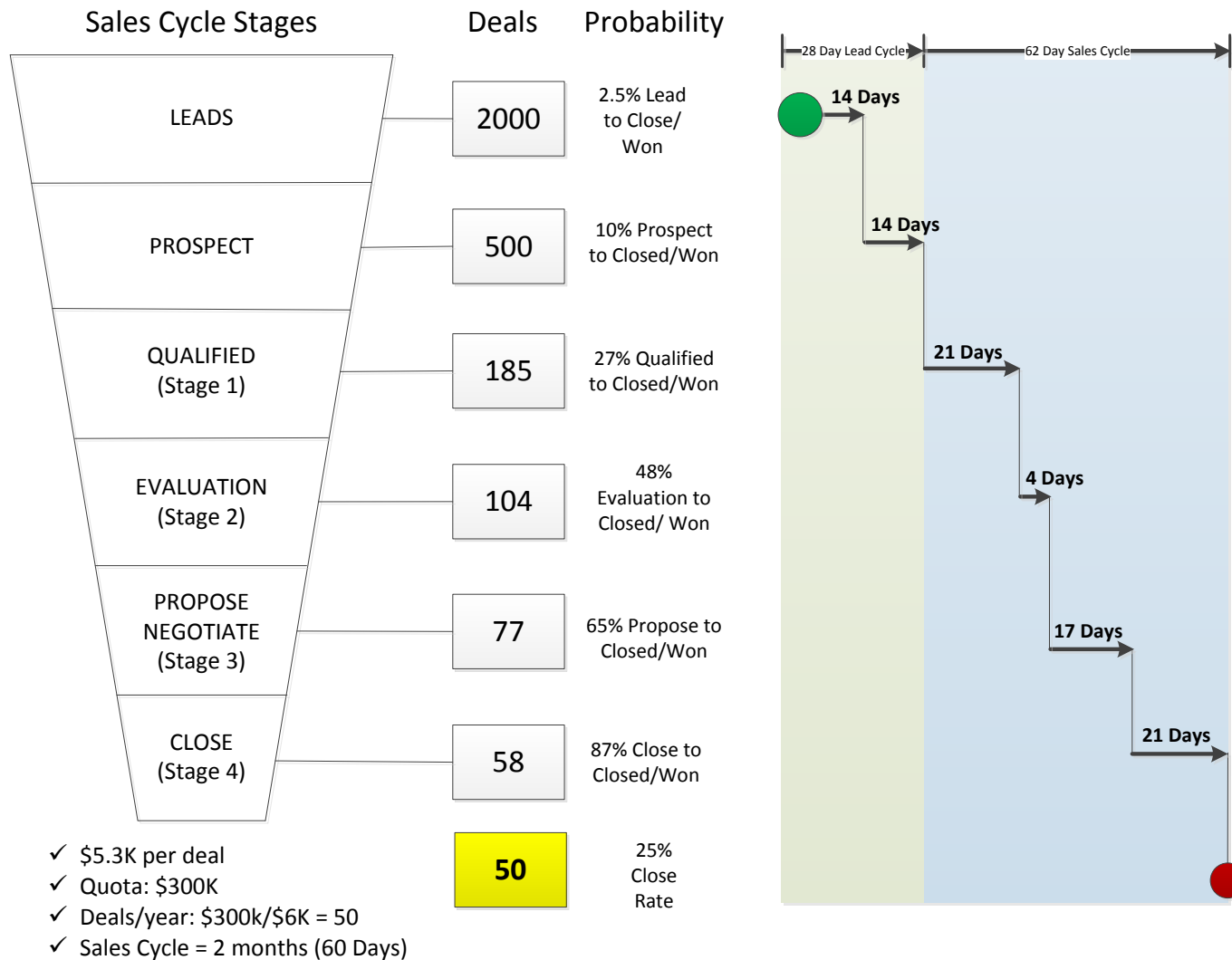
### Opportunity Mix

- **Characteristics** – Attributes of opportunities we have in the pipeline. (Size, Product mix, Customer Type, Competition, etc.)
- *Where and what are the ideal opportunities in the revenue stream that we should focus on to optimize Q4?*

### New Opportunities

- **Leads/Prospects** - New opportunities that can still be created and managed for this year **AND/OR** next year?
- *How can we exploit Marketing leads and current prospects to finish Q4, and avoid a Q1 “hangover”?*

# Sales Funnel Metrics



# InsightSquared Reports:

## Pipeline Assessment



# Key reports used for Pipeline Assessment

- Employee Scorecard
  - Average Sales Cycle times, rep and team
  - Average Deal Size
  - Sales Revenue trending
  - Number of Deals and Total Pipeline by Sales Stage
- Sales Funnel by Employee
  - Closing Percentage at each stage (stage vs. won)
- Sales Cycle by Employee
  - Average Aging Per Stage, rep and team
- Tactics for Pipeline Assessment
  - Ideal Pipeline Calculation



# Employee Scorecard

Provides trending to evaluate the reps' pattern of sales behavior

Employee Dashboard > By Employee > Johann Wolfgang Dobereiner > Scorecard

Email

Scorecard Compare Activity Calculator

## Johann Wolfgang Dobereiner

Filtering

Bookings Below Monthly Goal

Month Quarter

\$15,300

\$18,864

This vs. Last

This Quarter

Last Quarter

\$100K

\$75,000

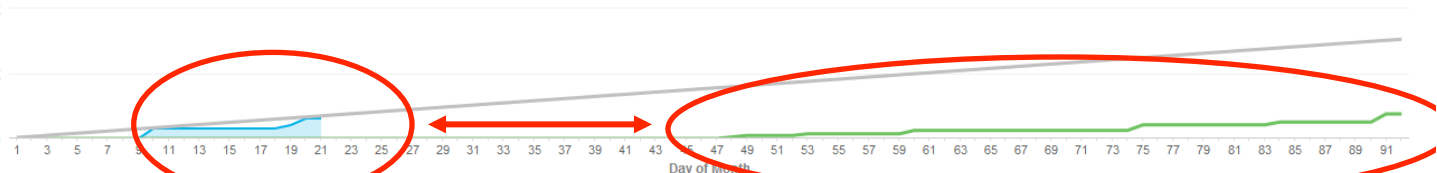
\$75,000

This Quarter Goal

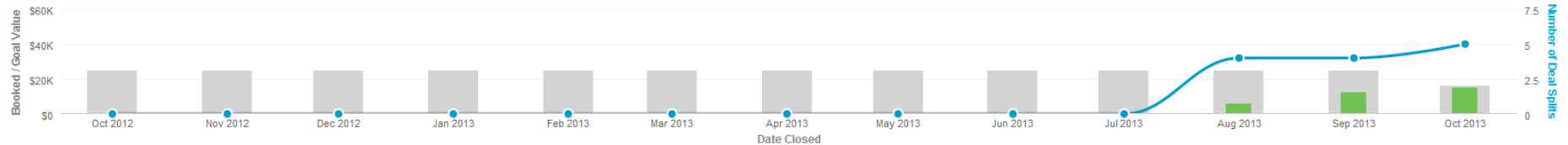
Last Quarter Goal

\$50K

\$0



### Monthly Bookings, Previous 12 Months



### Total Current Pipeline

Stage Name	Stage Count	Stage Value
Stage 1	9	\$108,624
Stage 2	12	\$71,868
Stage 3	7	\$38,868
Stage 4	3	\$12,660
<b>Total</b>	<b>31</b>	<b>\$232,020</b>

← Total Current Pipeline

Pipeline Assessment

Pipeline Distribution

Opportunity Mix

New Opportunities

# Sales Funnel by Employee

## Shows Win percentages at each Pipeline Stage

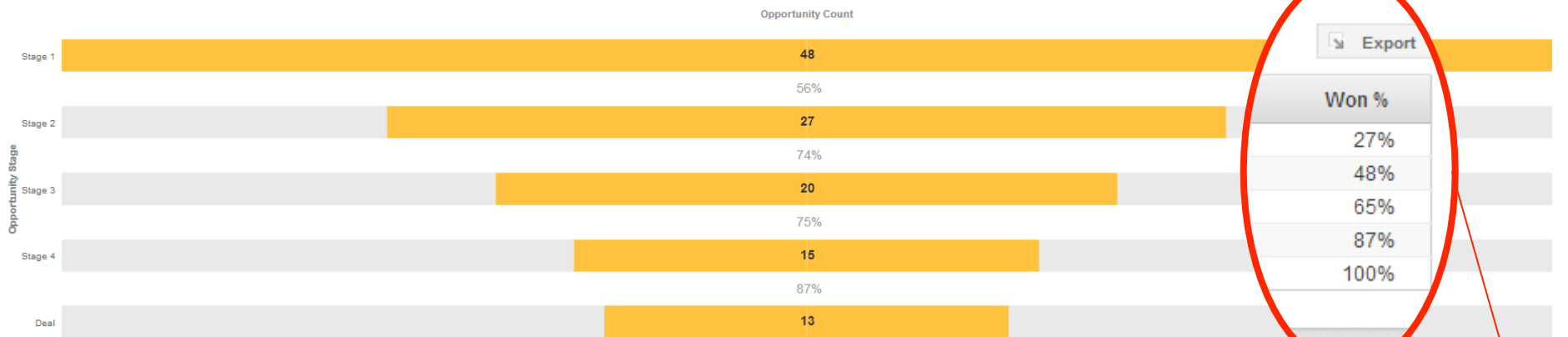
Sales Funnel > By Employee > Johann Wolfgang Dobereiner

What are Johann Wolfgang Dobereiner's conversion rates for closed opportunities?

27% win rate for opportunities with close dates in the previous 12 months.

Custom Last This To Date Trailing

7D 30D 90D 12M



Stage	Count	% Conversion to Next	Conversion % from Top	Unconverted	Won %
Stage 1	48	56%	N/A	21	27%
Stage 2	27	74%	56%	7	48%
Stage 3	20	75%	42%	5	65%
Stage 4	15	87%	31%	2	87%
Deal	13	N/A	27%		100%

# Sales Cycle by Employee

Provides stage average age for each sales stage by individual rep, selected reps or team

Sales Cycle > By Employee Email About

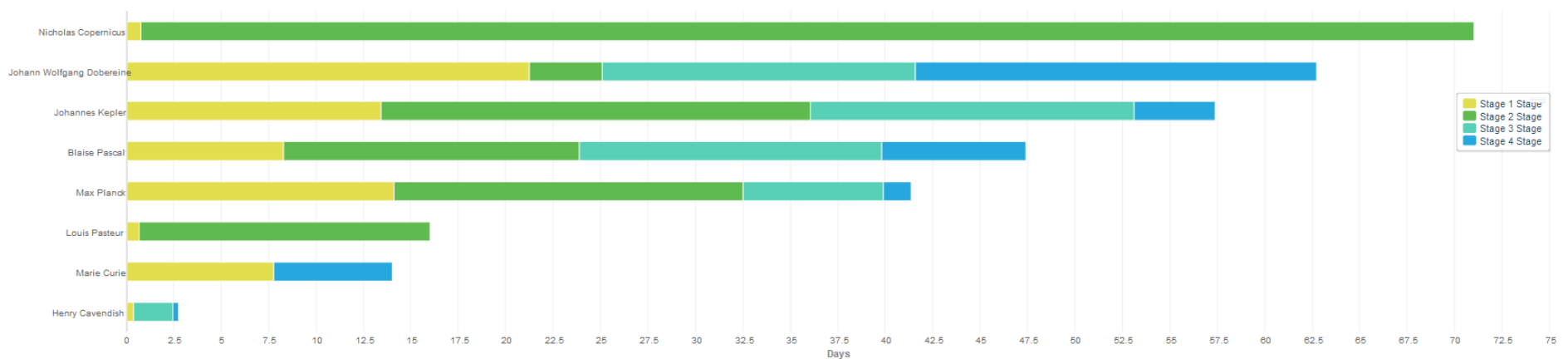
Over Time **By Employee** By Account By Won/Lost

How long is the sales cycle for each employee?

51 days on average for deals won this year to date

Custom Last This **To Date** Trailing

WTD MTD QTD **YTD**



SELECTION **All** **Top 15** None Filtering

Export

Opportunity Owner	# Completed Opportunities	Stage 1 Stage	Stage 2 Stage	Stage 3 Stage	Stage 4 Stage	Total Days
<input checked="" type="checkbox"/> Nicholas Copernicus	1	0.8	70.2	0.0	0.0	71.0
<input checked="" type="checkbox"/> Johann Wolfgang Dobreiner	13	21.2	3.8	16.5	21.1	62.7
<input checked="" type="checkbox"/> Johannes Kepler	53	13.4	22.6	17.0	4.3	57.4
<input checked="" type="checkbox"/> Blaise Pascal	61	8.3	15.6	15.9	7.6	47.4
<input checked="" type="checkbox"/> Max Planck	3	14.1	18.4	7.4	1.5	41.3
<input checked="" type="checkbox"/> Louis Pasteur	1	0.7	15.3	0.0	0.0	16.0
<input checked="" type="checkbox"/> Marie Curie	1	7.7	0.0	0.0	6.3	14.0
<input checked="" type="checkbox"/> Henry Cavendish	4	0.3	0.0	2.1	0.3	2.6
<b>8 Selected</b>	<b>137</b>	<b>11.3</b>	<b>17.1</b>	<b>15.5</b>	<b>7.2</b>	<b>51.0</b>
<b>Overall</b>	<b>137</b>	<b>11.3</b>	<b>17.1</b>	<b>15.5</b>	<b>7.2</b>	<b>51.0</b>

Use aging values to calculate the percent of sales cycle time at each stage.

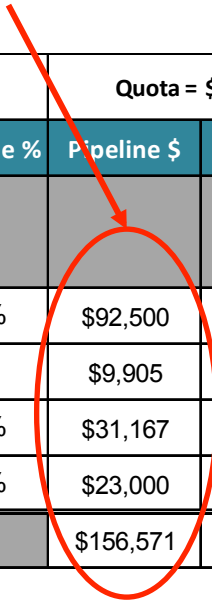
# Ideal Pipeline Calculation

Allows you to determine what the funnel should look like for each sales rep at each stage in their pipeline. This chart shows Johann’s ideal & actual funnels.

The formula for Pipeline \$ for each stage is calculated as follows:

$$\frac{(\text{Quota \$ for Qtr} * \% \text{ of Time Spent at "X" Stage})}{(\text{Sales Cycles in Qtr} \times \text{Probability \% at "X" Stage})}$$

Revenue Shortfall = \$60,000		Average Deal Size = \$5,300		Quota = \$75,000		Sales Cycles-Qtr = 1	
Sales Stage	NO of Opportunities	Probability	Timeline %	Pipeline \$	Pipeline Deals	Actual Pipeline \$	Actual Pipeline Deals
Leads	2000	3%					
Prospect	500	10%					
Qualified (S1)	185	27%	33%	\$92,500	18	\$108,624	9
Evaluation (S2)	104	48%	6%	\$9,905	2	\$71,868	12
Proposal (S3)	77	65%	27%	\$31,167	6	\$38,868	7
Close (S4)	58	87%	33%	\$23,000	5	\$12,660	3
<b>Closed/Won</b>	50	<b>100%</b>		\$156,571	26	<b>\$232,020</b>	<b>31</b>
<b>Closed/Lost</b>	135	<b>0%</b>					



# InsightSquared Reports:

## Pipeline Distribution



# Key reports used for Pipeline Distribution

- Sales Cycle by Employee
  - Aging Detail (identifies outliers or aberrations)
- Forecast by Employee
  - Detailed Sales trending based on history and pipeline
  - Provides pipeline list of opportunities to perform analysis.
- Tactics for Velocity improvement
  - Outlier analysis
  - Stale Opportunity Analysis
  - Forced Calculation of Shortened Sales Cycle

# Pipeline Outlier Analysis

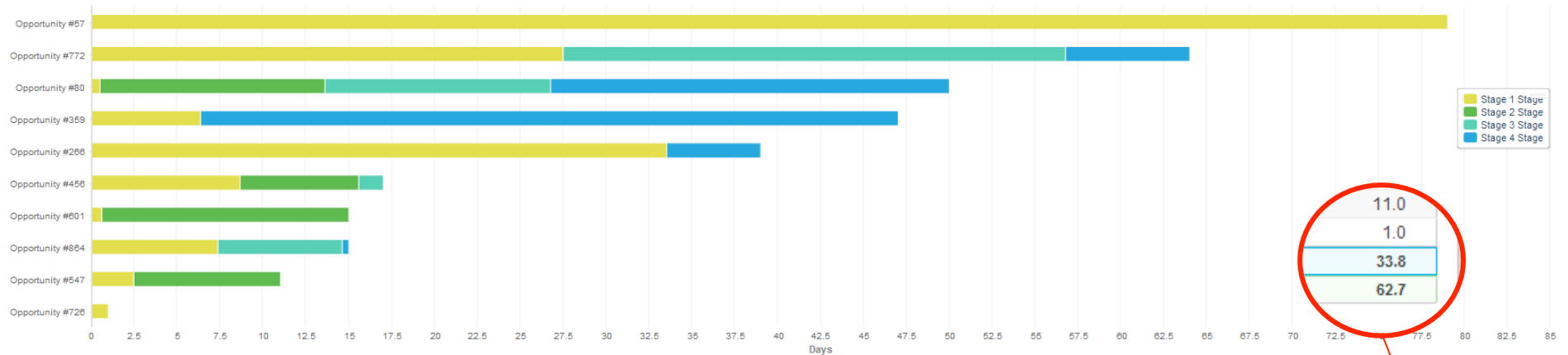
3 deals have substantially skewed Johann's pipeline, providing a 30+ day window

Sales Cycle > By Employee > Johann Wolfgang Dobreiner

## How long has each opportunity taken?

62.7 days on average for deals created this year to date

Custom Last This To Date Trailing  
WTD MTD QTD YTD



SELECTION  
All Top 15 None Filtering

Deal Date	Opportunity	Stage 1 Stage	Stage 2 Stage	Stage 3 Stage	Stage 4 Stage	Total Days
<input type="checkbox"/> 10 Oct 2013	Opportunity #18	0.6	6.8	11.5	183.1	202.0
<input type="checkbox"/> 29 Aug 2013	Opportunity #572	1.0	0.0	151.8	0.2	153.0
<input type="checkbox"/> 22 Sep 2013	Opportunity #3	107.5	0.0	0.0	14.5	122.0
<input checked="" type="checkbox"/> 29 Sep 2013	Opportunity #57	79.0	0.0	0.0	0.0	79.0
<input checked="" type="checkbox"/> 20 Oct 2013	Opportunity #772	27.5	0.0	29.3	7.3	64.0
<input checked="" type="checkbox"/> 29 Sep 2013	Opportunity #80	0.5	13.1	13.1	23.2	50.0
<input checked="" type="checkbox"/> 10 Oct 2013	Opportunity #359	6.3	0.0	0.0	40.7	47.0
<input checked="" type="checkbox"/> 10 Oct 2013	Opportunity #266	33.5	0.0	0.0	5.5	39.0
<input checked="" type="checkbox"/> 17 Aug 2013	Opportunity #456	8.7	6.9	1.4	0.0	17.0
<input checked="" type="checkbox"/> 19 Oct 2013	Opportunity #601	0.6	14.4	0.0	0.0	15.0
<input checked="" type="checkbox"/> 13 Sep 2013	Opportunity #864	7.4	0.0	7.2	0.4	15.0
<input checked="" type="checkbox"/> 18 Aug 2013	Opportunity #547	2.5	8.5	0.0	0.0	11.0
<input checked="" type="checkbox"/> 22 Aug 2013	Opportunity #726	1.0	0.0	0.0	0.0	1.0
<b>10 Selected</b>		<b>16.7</b>	<b>4.3</b>	<b>5.1</b>	<b>7.7</b>	<b>33.8</b>
<b>Overall</b>		<b>21.2</b>	<b>3.8</b>	<b>16.5</b>	<b>21.1</b>	<b>62.7</b>

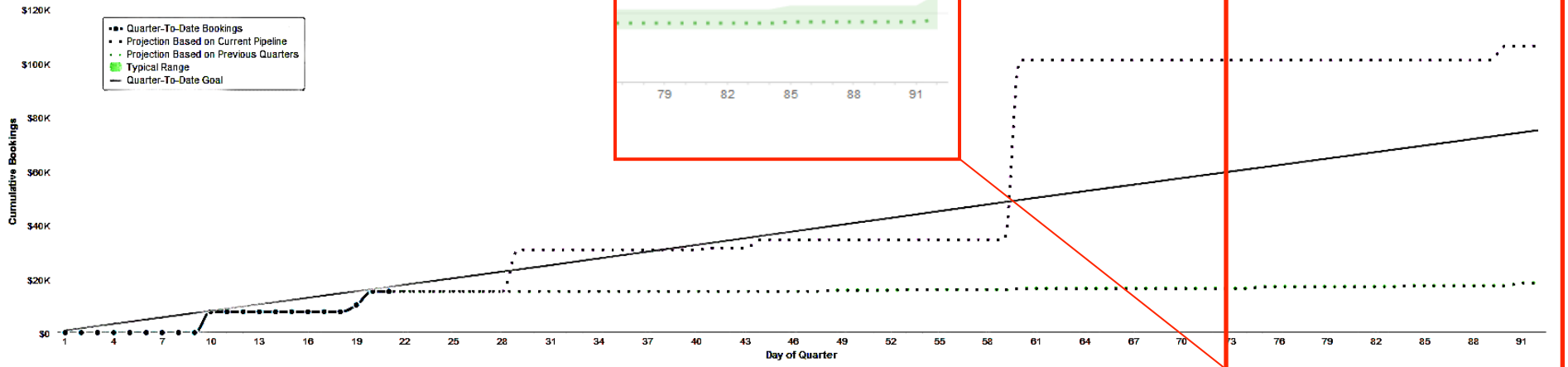
# Stale Pipeline Analysis

Shows historical performance and projections based on previous quarters (green), and on the discounted pipeline {amount \* close % by stage} (purple)

Forecast > By Employee > Johann Wolfgang Dobereiner

What is Johann Wolfgang Dobereiner's bookings forecast?

\$106,188 this quarter based on our pipeline





# Stale Pipeline Analysis (continued)

Consider eliminating every deal that is >2x the corporate aging experience

Close Date	Opportunity	Stage	Days in Stage	Total Value (USD)	Personal Win Rate	Company Win Rate	Forecast Contribution (USD)
11/29/2013	Opportunity #836	Stage 1	48	\$10,200	27%	34%	\$2,754
11/29/2013	Opportunity #592	Stage 1	53	\$60,000	27%	34%	\$16,200
11/29/2013	Opportunity #610	Stage 1	53	\$1,188	27%	34%	\$321
12/29/2013	Opportunity #127	Stage 1	53	\$1,188	27%	34%	\$321
11/29/2013	Opportunity #171	Stage 1	66	\$5,040	27%	34%	\$1,361
11/29/2013	Opportunity #374	Stage 1	69	\$14,700	27%	34%	\$3,969
11/29/2013	Opportunity #255	Stage 1	69	\$1,188	27%	34%	\$321
11/29/2013	Opportunity #389	Stage 1	75	\$7,560	27%	34%	\$2,041
11/29/2013	Opportunity #61	Stage 1	136	\$7,560	27%	34%	\$2,041
10/29/2013	Opportunity #512	Stage 2	3	\$600	48%	50%	\$288
10/29/2013	Opportunity #591	Stage 2	8	\$600	48%	50%	\$288
11/29/2013	Opportunity #848	Stage 2	10	\$6,600	48%	50%	\$3,168
11/10/2013	Opportunity #778	Stage 2	11	\$1,188	48%	50%	\$570
11/29/2013	Opportunity #401	Stage 2	11	\$4,200	48%	50%	\$2,016
11/29/2013	Opportunity #814	Stage 2	12	\$2,880	48%	50%	\$1,382
11/29/2013	Opportunity #326	Stage 2	16	\$4,200	48%	50%	\$2,016
11/29/2013	Opportunity #143	Stage 2	18	\$14,400	48%	50%	\$6,912
11/29/2013	Opportunity #874	Stage 2	36	\$3,600	48%	50%	\$1,728
11/29/2013	Opportunity #468	Stage 2	40	\$14,400	48%	50%	\$6,912
11/29/2013	Opportunity #731	Stage 3	8	\$12,600	65%	60%	\$8,190
11/29/2013	Opportunity #747	Stage 3	12	\$1,188	65%	60%	\$772
12/29/2013	Opportunity #333	Stage 3	13	\$7,500	65%	60%	\$4,875
11/13/2013	Opportunity #139	Stage 3	17	\$4,800	65%	60%	\$3,120
11/29/2013	Opportunity #877	Stage 3	17	\$6,900	65%	60%	\$4,485
10/29/2013	Opportunity #518	Stage 3	59	\$2,520	65%	60%	\$1,638
10/29/2013	Opportunity #51	Stage 3	142	\$3,360	65%	60%	\$2,184
10/29/2013	Opportunity #191	Stage 4	4	\$2,940	87%	86%	\$2,558
10/29/2013	Opportunity #26	Stage 4	24	\$2,520	87%	86%	\$2,192
10/29/2013	Opportunity #612	Stage 4	36	\$7,200	87%	86%	\$6,264
10/20/2013	Opportunity #772	Won	1	\$5,040	100%	100%	\$5,040
10/19/2013	Opportunity #601	Won	2	\$2,520	100%	100%	\$2,520
10/10/2013	Opportunity #266	Won	11	\$1,188	100%	100%	\$1,188
10/10/2013	Opportunity #18	Won	11	\$5,544	100%	100%	\$5,544
10/10/2013	Opportunity #359	Won	11	\$1,008	100%	100%	\$1,008

Age Criteria (2x)

42 Days

8 Days

35 Days

42 Days

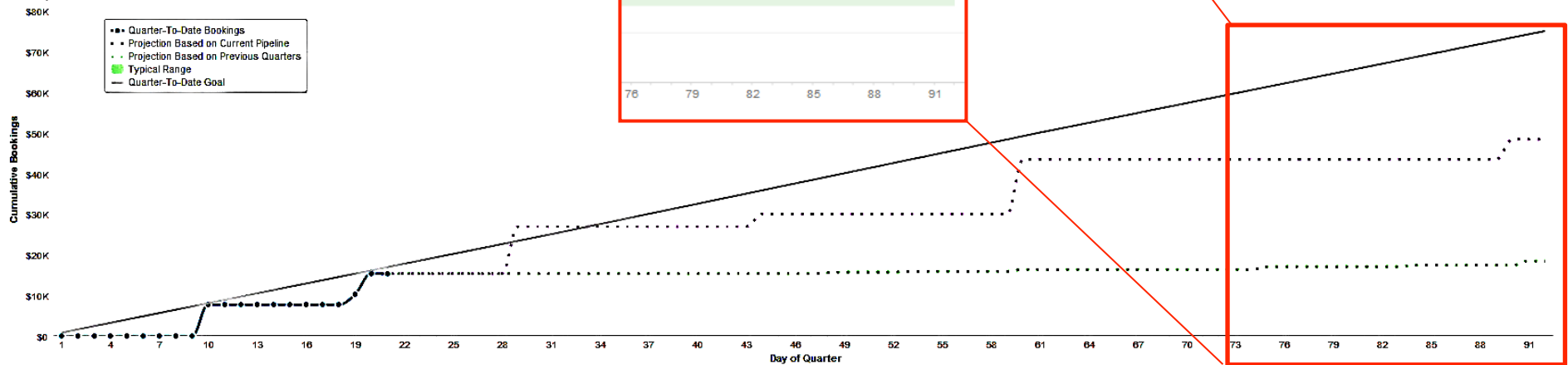
# Stale Pipeline Analysis (continued)

Eliminating 2x aged deals now shows a potential pipeline gap

Forecast > By Employee > Johann Wolfgang Dobereiner

### What is Johann Wolfgang Dobereiner's bookings forecast?

\$106,188 this quarter based on our pipeline



Email  
This Next  
This M This Q

# Forced Calculation Analysis

- Calculate the Accelerator

$$\text{Revenue Shortfall} \div \text{Total Revenue} = \text{Accelerator}$$

$$60,000 \div 75,000 = 86\%$$

- Calculate the Sales Cycle Reduction

$$\text{Average Sales Cycle (days)} \times \text{Accelerator} = \text{Reduced Sales Cycle}$$

$$60 \text{ Days} \times 86\% = 52 \text{ days}$$

- Identify Tactics to meet Reduced Sales Cycle Target
- The above equation assumes you only need to hit the Q4 target. Accelerator is also applicable to YTD gap analysis.

**“Necessity is the mother of invention”**

# InsightSquared Reports:

## Opportunity Mix



# Key reports used for Opportunity Mix

- Win/Loss by Reason
  - Identifies patterns or types of opportunities that are won or lost more frequently
- Win Factors
  - Provides insights into most successful opportunities
- Tactics for Opportunity Mix Analysis
  - Identify characteristics of winning opportunities to prioritize
  - Identify characteristics of lost opportunities to cut deals from pipeline and avoid unnecessary sales effort
  - Opportunity re-sizing (unforced/forced)

# Won/Loss Analysis

Identify characteristics for lost Opportunities to remove similar deals from the pipeline

Won/Lost > By Reason Email

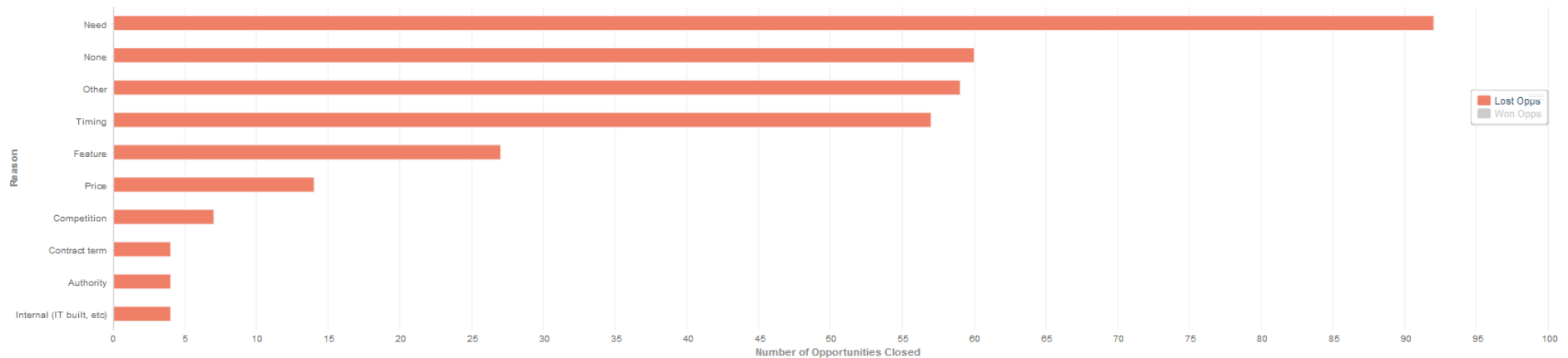
By Created Date | By Lead Source | By Close Date | By Employee | **By Reason**

## Why did these opportunities close ?

92 Opportunities were lost to need in this year to date

Custom Last This **To Date** Trailing

WTD MTD QTD **YTD**



SELECTION

All Top 15 None Filtering

Export

Reason	Lost Opps	Lost %	Lost Value	Won Opps	Won %	Won Value	Total Opps	Total Value
<input checked="" type="checkbox"/> Need	92	28%	\$572,724	0	0%	\$0	92	\$572,724
<input checked="" type="checkbox"/> None	60	18%	\$512,529	134	98%	\$743,114	194	\$1,255,643
<input checked="" type="checkbox"/> Other	59	18%	\$429,708	2	1%	\$2,196	61	\$431,904
<input checked="" type="checkbox"/> Timing	57	17%	\$382,716	1	0.7%	\$5,545	58	\$388,261
<input checked="" type="checkbox"/> Feature	27	8%	\$304,901	0	0%	\$0	27	\$304,901
<input checked="" type="checkbox"/> Price	14	4%	\$150,156	0	0%	\$0	14	\$150,156
<input checked="" type="checkbox"/> Competition	7	2%	\$76,500	0	0%	\$0	7	\$76,500
<input checked="" type="checkbox"/> Contract term	4	1%	\$9,431	0	0%	\$0	4	\$9,431
<input checked="" type="checkbox"/> Authority	4	1%	\$46,848	0	0%	\$0	4	\$46,848
<input checked="" type="checkbox"/> Internal (IT built, etc)	4	1%	\$60,000	0	0%	\$0	4	\$60,000
<b>10 Selected</b>	<b>328</b>	<b>100%</b>	<b>\$2,545,513</b>	<b>137</b>	<b>100%</b>	<b>\$750,855</b>	<b>465</b>	<b>\$3,296,368</b>
	328		\$2,545,513	137		\$750,855	465	\$3,296,368

# Winning Opportunity Analysis

Provides characteristics of winning deals to factor into Opportunity Mix Assessment

Win Factors > By Value

Email About

By Value By Value Changes By Close Date Changes

## How does opportunity value influence our ratios?

Custom Last This To Date Trailing

29% win rate for opportunities created this year to date

WTD MTD QTD YTD



SELECTION

All Top 15 None Filtering

Export

Opportunity Value Range	Win Rate	Closed Opportunities	Wins	Losses	Open Opportunities
<input checked="" type="checkbox"/> Less than \$2,000	24%	135	32	103	23
<input checked="" type="checkbox"/> \$2,000 to \$4,000	40%	67	27	40	26
<input checked="" type="checkbox"/> \$4,000 to \$6,000	48%	48	23	25	18
<input checked="" type="checkbox"/> \$6,000 to \$8,000	29%	52	15	37	14
<input checked="" type="checkbox"/> \$8,000+	19%	112	21	91	28
<b>5 Selected</b>	<b>29%</b>	<b>414</b>	<b>118</b>	<b>296</b>	<b>109</b>
Average	29%	414	118	296	109

# Winning Opportunity Analysis (continued)

Win Factors > By Value Changes

Email About

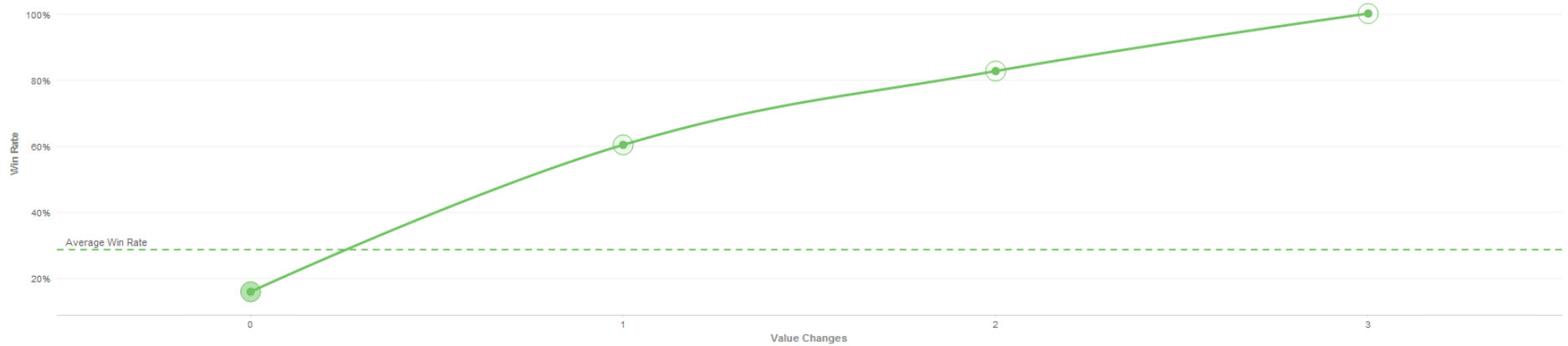
By Value **By Value Changes** By Close Date Changes

## How do value changes influence our ratios?

Custom Last This **To Date** Trailing

29% win rate for opportunities created this year to date

WTD MTD QTD **YTD**



SELECTION **All** Top 15 None Filtering

Export

Value Changes	Win Rate	Opportunities	Wins	Losses	Open Opportunities
<input checked="" type="checkbox"/> 0	16%	310	49	261	91
<input checked="" type="checkbox"/> 1	60%	78	47	31	16
<input checked="" type="checkbox"/> 2	83%	23	19	4	1
<input checked="" type="checkbox"/> 3	100%	3	3	0	1
<b>4 Selected</b>	<b>29%</b>	<b>414</b>	<b>118</b>	<b>296</b>	<b>109</b>
	29%	414	118	296	109



# Winning Opportunity Analysis (continued)

Win Factors > By Close Date Changes

Email About

By Value By Value Changes **By Close Date Changes**

## How do close date changes influence our ratios?

29% win rate for opportunities created this year to date

Custom Last This To Date Trailing

WTD MTD QTD **YTD**



SELECTION

All Top 15 None Filtering

Export

Close Date Changes	Win Rate	Closed Opportunities	Wins	Losses	Open Opportunities
<input checked="" type="checkbox"/> 0	19%	270	52	218	67
<input checked="" type="checkbox"/> 1	46%	89	41	48	22
<input checked="" type="checkbox"/> 2	40%	42	17	25	11
<input checked="" type="checkbox"/> 3	70%	10	7	3	8
<input type="checkbox"/> 4	0%	2	0	2	0
<input type="checkbox"/> 5	0%	0	0	0	1
<input type="checkbox"/> 8	100%	1	1	0	0
<b>4 Selected</b>	<b>28%</b>	<b>411</b>	<b>117</b>	<b>294</b>	<b>108</b>
	<b>29%</b>	<b>414</b>	<b>118</b>	<b>296</b>	<b>109</b>

# Opportunity Resizing

- **Unforced Assessment** identifies specific opportunity characteristics that allow you to increase deal size organically without artificially increasing the price.
  - Early stage deals may be priced higher
  - Additional components may be bundled with deal
  - Avoiding discounts based on year-end.
  - Letting deals slip into next year by moving close dates out, and not changing the revenue.
- **Forced Assessment** uses a formula to add more revenue per deal. Typically this is calculated using the Accelerator. This is not generally a good Q4 strategy except for new deals (see New Opportunities).

# InsightSquared Reports:

## New Opportunities



# Key reports used for New Opportunities

- Lead Aging by Employee
  - Assists in identifying Leads for rep follow up & qualification
- Pipeline Contribution by Lead Source
  - Identifies campaigns that have generated the most value &/or opportunities. We can use this to set up new Q4 campaigns.
- Tactics for New Opportunities
  - Sales cycle length permits new deals (we have 4 SC's here)
  - Focus on Q4 lead generation &/or prospecting for more top of funnel support- Q4 Campaigns
  - Re-Prioritize or decompose existing late stage opportunities & re-start them at early stage
  - Address Q1 leads & prospecting as part of Q4 strategy

# Lead Aging by Employee

Review the current lead pool for each rep to find prospecting opportunities

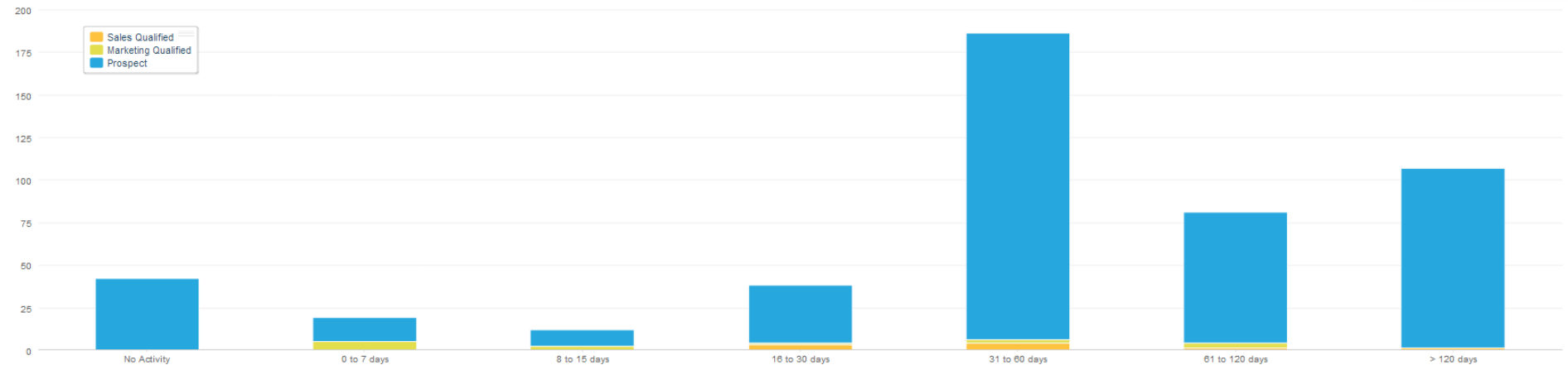
Lead Aging > By Employee > Johann Wolfgang Dobreiner

When was the last activity for leads owned by Johann Wolfgang Dobreiner by status?

89% of leads created in the date range have had no momentum for the last 30 days

Email Custom Last This To Date Trailing

WTD MTD QTD **YTD**



SELECTION All Top 15 None Filtering

Export

Status	No Activity	0 to 7 days	8 to 15 days	16 to 30 days	31 to 60 days	61 to 120 days	> 120 days	Total
<input checked="" type="checkbox"/> Prospect	42	14	10	34	180	77	106	463
<input type="checkbox"/> Dead	10	3	2	16	100	62	40	233
<input type="checkbox"/> Nurture	75	0	0	0	43	4	0	122
<input checked="" type="checkbox"/> Marketing Qualified	0	5	2	1	2	3	0	13
<input checked="" type="checkbox"/> Sales Qualified	0	0	0	3	4	1	1	9
<b>3 Selected</b>	<b>42</b>	<b>19</b>	<b>12</b>	<b>38</b>	<b>186</b>	<b>81</b>	<b>107</b>	<b>485</b>
	127	22	14	54	329	147	147	840

# Pipeline Contribution by Lead Source

Identify campaigns that could produce the most leads in this Quarter

Pipeline Contribution > By Lead Source

Email About

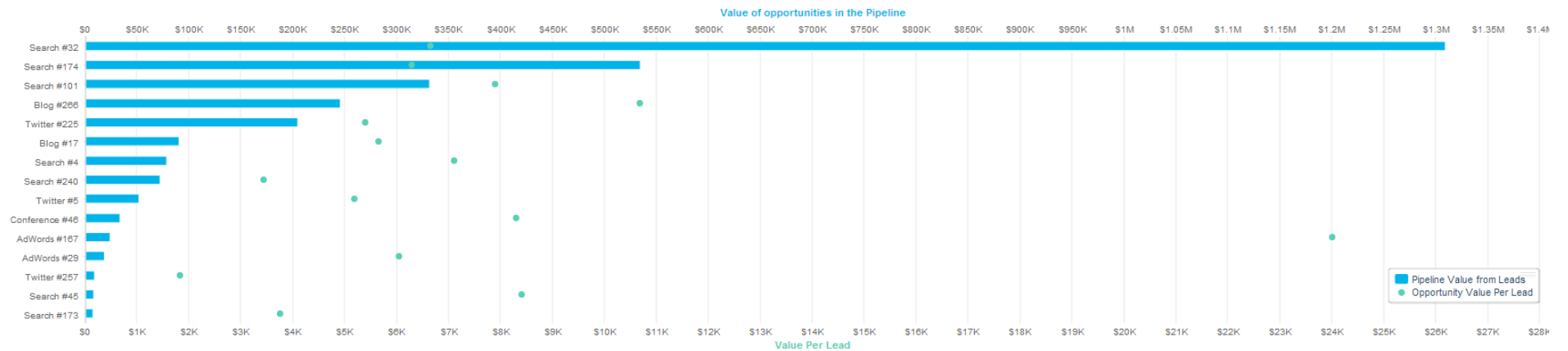
By Created Date **By Lead Source**

## What are our best lead sources?

Custom Last This **To Date** Trailing

\$3,020,217 of opportunity value added from 460 leads this year to date

WTD MTD QTD **YTD**



SELECTION: All **Top 15** None INTERVAL:  Default  Filtering

Export

Lead Source	Number of Leads	Opportunity Value Per Lead	Pipeline Value from Leads
<input checked="" type="checkbox"/> Search #32	197	\$6,644	\$1,308,899
<input checked="" type="checkbox"/> Search #174	85	\$6,284	\$534,108
<input checked="" type="checkbox"/> Search #101	42	\$7,889	\$331,322
<input checked="" type="checkbox"/> Blog #266	23	\$10,675	\$245,520
<input checked="" type="checkbox"/> Twitter #225	38	\$5,389	\$204,764
<input checked="" type="checkbox"/> Blog #17	16	\$5,645	\$90,324
<input checked="" type="checkbox"/> Search #4	11	\$7,101	\$78,108
<input checked="" type="checkbox"/> Search #240	21	\$3,434	\$72,108
<input checked="" type="checkbox"/> Twitter #5	10	\$5,180	\$51,804
<input checked="" type="checkbox"/> Conference #46	4	\$8,295	\$33,180
<input checked="" type="checkbox"/> AdWords #167	1	\$24,000	\$24,000
<input checked="" type="checkbox"/> AdWords #29	3	\$6,040	\$18,120
<input checked="" type="checkbox"/> Twitter #257	5	\$1,824	\$9,120



# Ten Tactics for Q4

## Ten Tactics for Q4

Here are the ten management tactics we discussed for Q4:

1. Conduct a Q4 Ideal Pipeline Snapshot for each rep & team.
2. Conduct Outlier analysis to correct/refocus sales cycle for each rep. Eliminate aberrations from pipeline
3. Eliminate/reprioritize Stale Opportunities in each pipeline
4. Shorten the Sales Cycle by doing a forced cycle reduction.
5. Identify winning opportunity characteristics to prioritize
6. Identify lost opportunities characteristics of to eliminate deals & avoid unnecessary sales effort
7. Opportunity re-sizing strategy for all reps (unforced/forced)
8. Add new deals (if sales cycle permits) by focusing on Q4 lead generation &/or prospecting
9. Re-Prioritize or decompose existing late stage opportunities and re-start them at earlier stage
10. Focus on Q1 leads and prospecting as part of Q4 strategy



# Reports by Strategy/Tactic

Q4 Strategies	IS2 Report	Tactic
Pipeline Assessment	Employee Dashboard Sales Funnel by Employee Sales Cycle by Employee	1. Conduct a Q4 Ideal Pipeline Snapshot for each rep & team.
Pipeline Distribution	Sales Cycle by Employee  Forecast by Employee	2. Conduct Outlier analysis to correct/refocus sales cycle for each rep. Eliminate aberrations from pipeline  3. Eliminate/reprioritize Stale Opportunities in each pipeline  4. Shorten the Sales Cycle by doing a forced cycle reduction.
Opportunity Mix	Win Factors Win/Loss by Reason	5. Identify of winning opportunity characteristics to prioritize 6. Identify lost opportunities characteristics of to eliminate deals & avoid unnecessary sales effort 7. Opportunity re-sizing strategy for all reps (unforced/forced)
New Opportunities	Lead Aging by Employee  Pipeline Contribution by Lead Source	8. Add new deals (if sales cycle permits) by focusing on Q4 lead generation &/or prospecting 9. Re-Prioritize or decompose existing late stage opportunities and re-start them at earlier stage 10. Focus on Q1 leads and prospecting as part of Q4 strategy

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