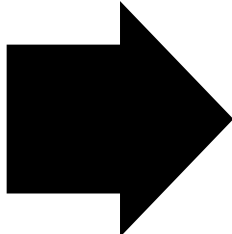


WHY ANALYSE?

BOB APOLLO



“Analytics are the key that enables the VP of sales, sales operations and front-end sales organizations to move from a culture based only on gut feeling and perception-based decision making to one based on factual data supporting tactical and strategic decision making”

13.2%  **\$6.4b**
CAGR **2018**

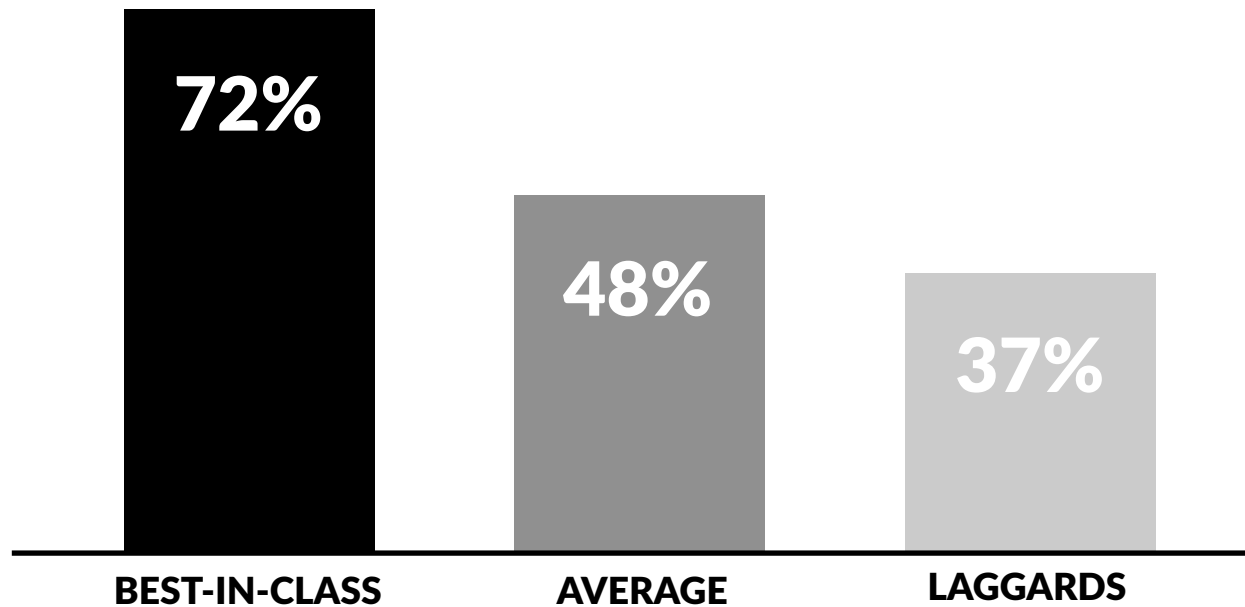
+58%

2015-16

Compelling

THE CASE FOR ANALYTICS

% OF SALES PEOPLE ON QUOTA

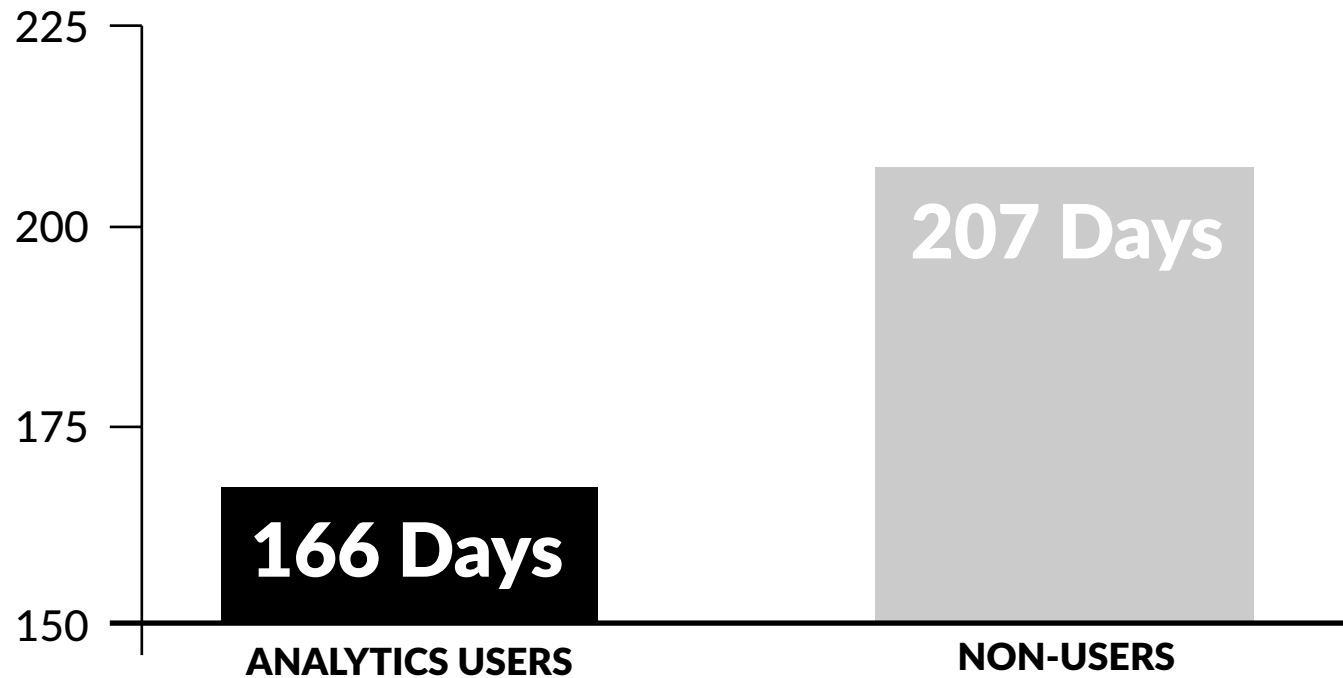


ANALYTICS ADOPTION

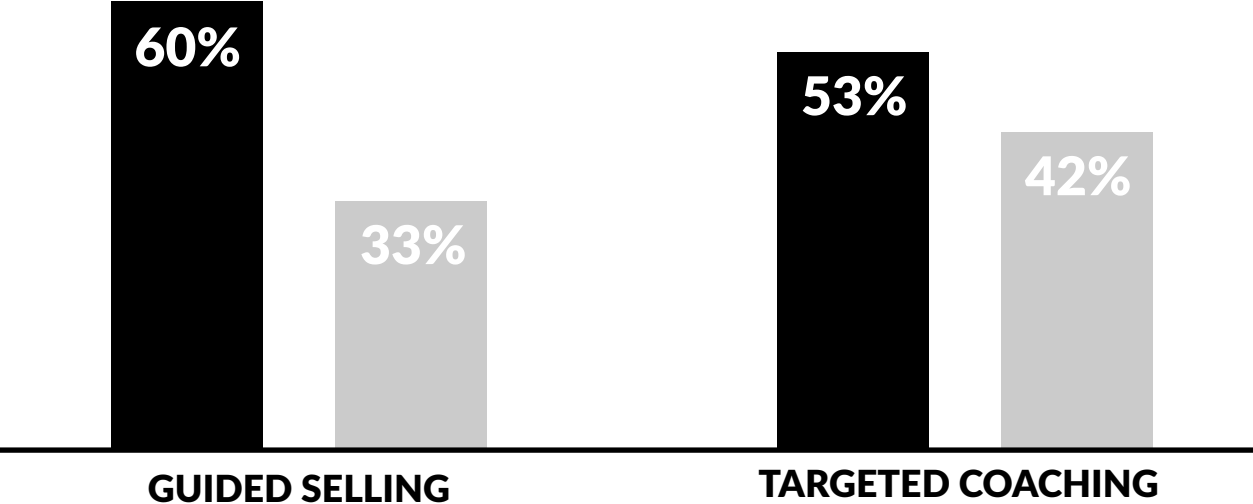
[ABERDEEN GROUP]



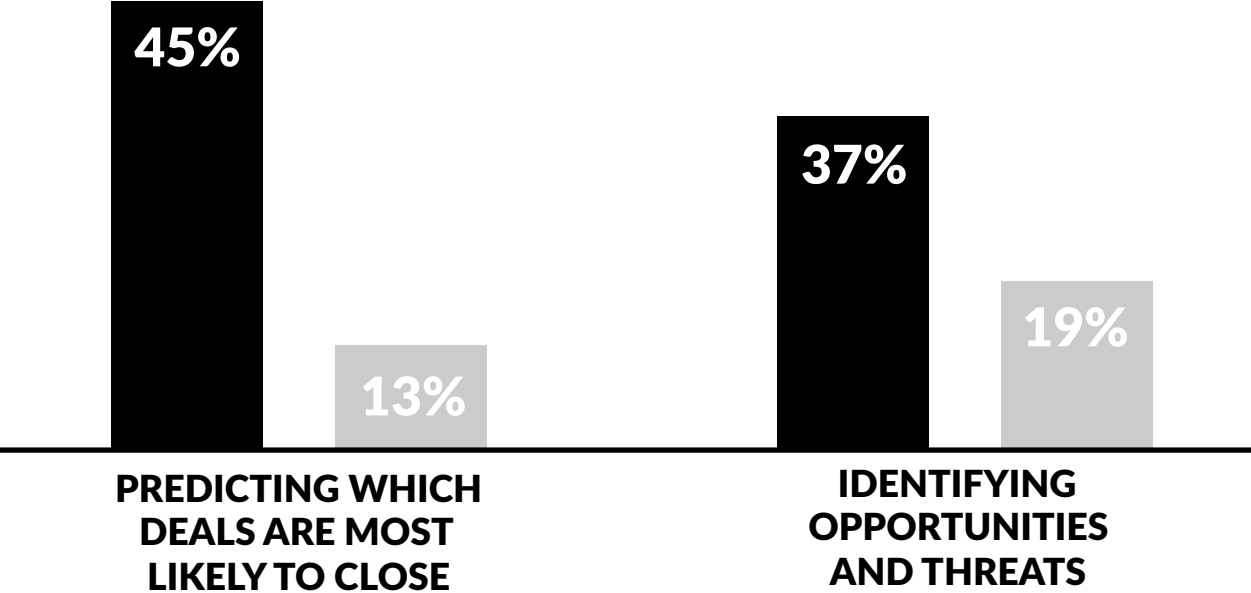
AVERAGE SALES CYCLE LENGTH



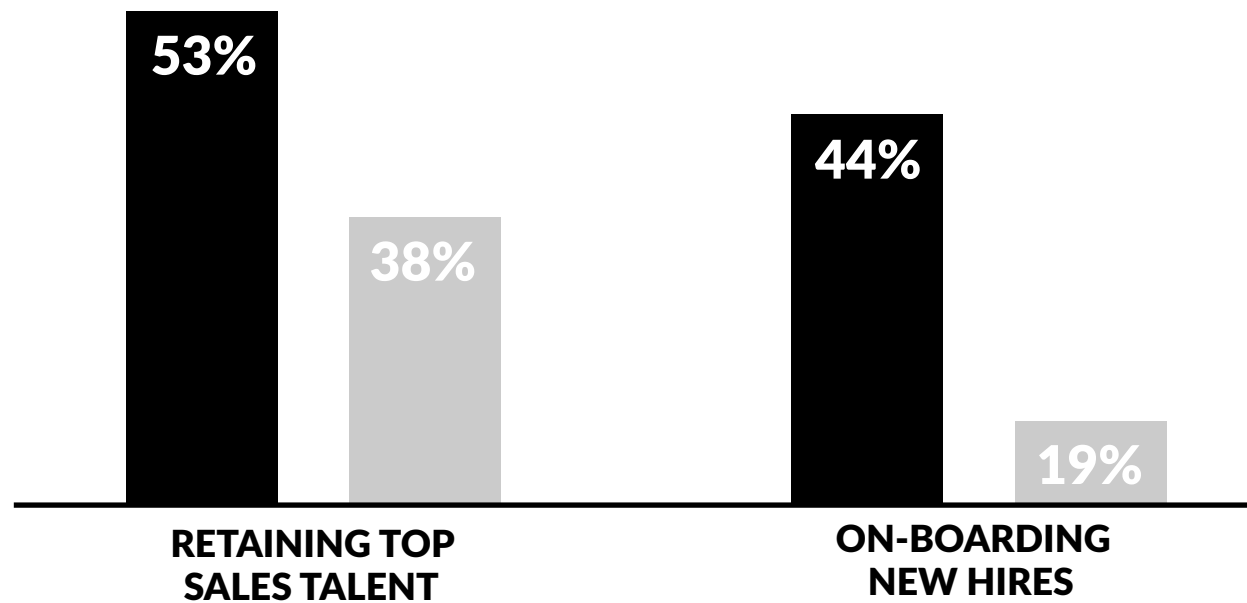
BEST PRACTICE ADOPTION



SUPERIOR ABILITY TO FOCUS



BETTER PEOPLE MANAGEMENT






93% BETTER AT
WALKING AWAY
FROM BAD DEALS

THE OPEN HOUSE GROUP

LAYING THE FOUNDATIONS

A clear glass cloche with a rounded top and a small knob. The text "YOU CAN'T ANALYSE IN A VACUUM" is printed in the center in a light gray, sans-serif font. The cloche is empty and sits on a flat surface.

YOU CAN'T
ANALYSE IN
A VACUUM



CRITICAL DATA POINTS

- Opportunity **size**
- Opportunity **stage**
- Opportunity **age**
- Opportunity **attributes**
- Time in **stage**
- Level and type of **activity**
- History of **change**

POTENTIAL OPPORTUNITY ATTRIBUTES

- Opportunity owner/team etc.
- Organisational size, sector, location, etc.
- Lead source
- Product/service type
- “Fit factors”: structural, behavioural, situational
- Compelling event
- Formal budget
- Momentum
- Other factors that influence your chances of winning

ACTIVITY DATA

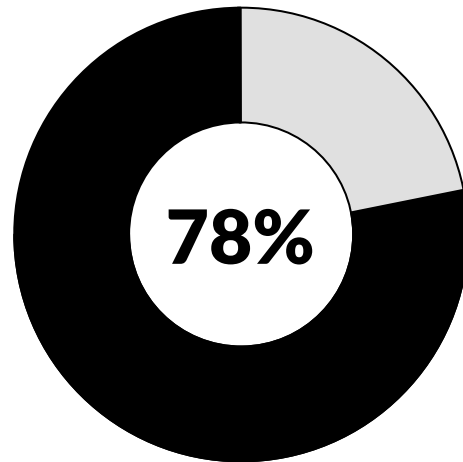
- Calls
- Conversations
- Meetings
- Demonstrations
- Proposals
- Frequency/recency

MACRO VARIABLES

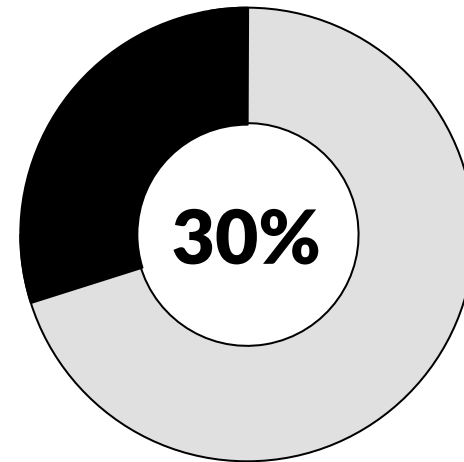
Particularly for transactional/high-volume environments:

- Price points
- Promotions
- Competitive activity
- Market dynamics
- Seasonality
- Other external influences

“Our sales management team is highly confident in the data available from our CRM system.”



**WORLD-CLASS
SALES ORGANISATIONS**



**ALL
SALES ORGANISATIONS**

DEFINING YOUR SALES PROCESS

The critical **foundation**:

- Clear, universally applied stage **definitions**
- Unambiguous **milestones** between stages
- Accurate **assignment** of deals to stage
- Minimise opportunity for **error**
- **Key fields** completed
- Embedded in **CRM**

ACTIONABLE ANALYTICS

Assess your priorities:

- Effectiveness vs. Efficiency
- Opportunity Management
- Pipeline Management
- Forecast Accuracy
- New Hire Onboarding
- People Development
- Winning Habits vs. Losing Behaviours

SOME INTRIGUING QUESTIONS

- What percentage of opportunities by volume and value convert to a sale from this stage?
- How does this opportunity's value compare to our average won deal size?
- How does this opportunity's age compare to our average won deal duration?
- How many times has this opportunity's value changed?
- How many times has the opportunity's close date changed?
- How has the volume and value of our pipeline evolved over time?
- What are the common characteristics of won and lost deals?

CHOOSING THE RIGHT PLATFORM: 3 KEY PRINCIPLES

1. Avoid IT dependency
2. Tap into collective experience
3. Insist on intimate integration with CRM

AUDIENCES FOR ANALYTICS



**SALES
PEOPLE**



**SALES
MANAGERS**



**SENIOR
EXECUTIVES**

SALES PEOPLE



Tool

Sales Opportunity Dashboard

Application

- Lead/opportunity scoring
- Target/prioritise opportunities
- Identify/prioritise actions
- Guided selling (know and do)

Benefits

- More effective selling
- Improved quota performance

SALES MANAGERS



Tool

Team Performance Dashboard

Application

- Patterns of success and failure
- Proactive pipeline management
- Identify opportunities at risk
- Identify coaching/training needs

Benefits

- More accurate revenue forecasting
- Progressively improve team performance

SENIOR EXECUTIVES



Tool

Executive Dashboard

Application

- Establish/monitor KPIs
- Reliable revenue forecasting
- Identification of risk factors
- Enhanced market planning/segmentation

Benefits

- Greater confidence in results
- Improved return on resources

ANALYTICS IN ACTION

Which opportunities are we most likely to win?

92 opportunities above average win rate of 22% in the next 90 days

This Next Forward



**PROCESS
IMPROVEMENT**

**TARGETED
ACTIONS**

**ANALYTICS
IN ACTION**

**SKILLS
TRAINING**

**INDIVIDUAL
COACHING**

Value

\$10K

\$1K

\$100.00



Age (Days)

0

25

50

75

100

125

150

175

225



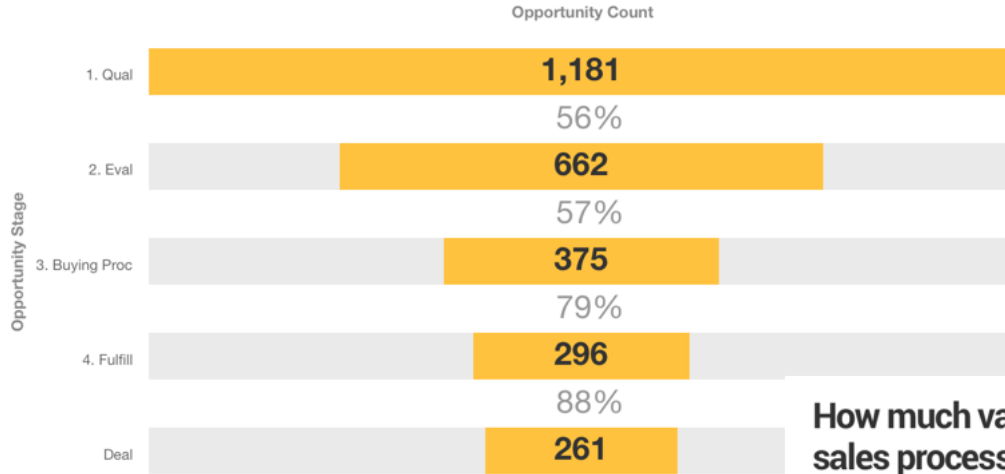
HOW IS OUR PIPELINE SHAPING UP?

What are our conversion rates for closed opportunities?

22% win rate for opportunities with close dates in the previous 12 months.

Custom Last This To Date **Trailing**

7D 30D 90D **12M**

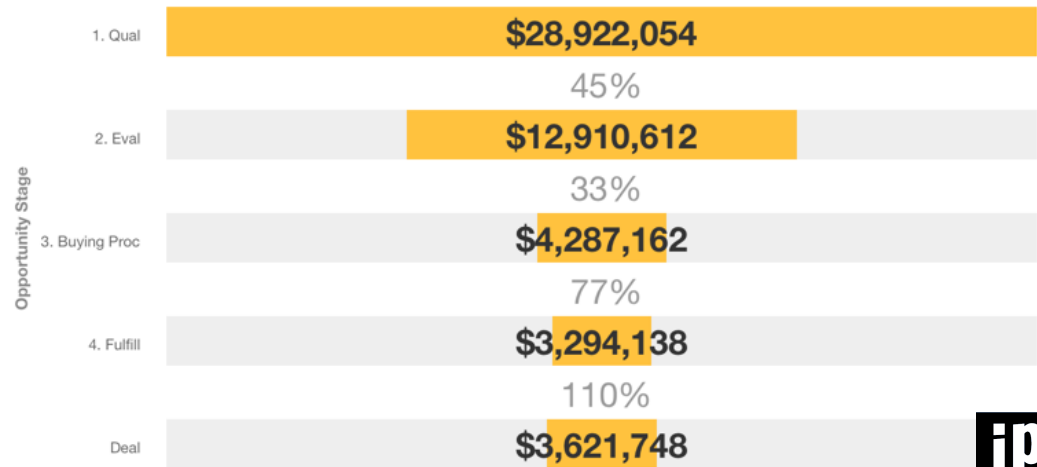


How much value reaches the end of the sales process?

13% of opportunities' original value in the previous 12 months.

Custom Last This To Date **Trailing**

7D 30D 90D **12M**

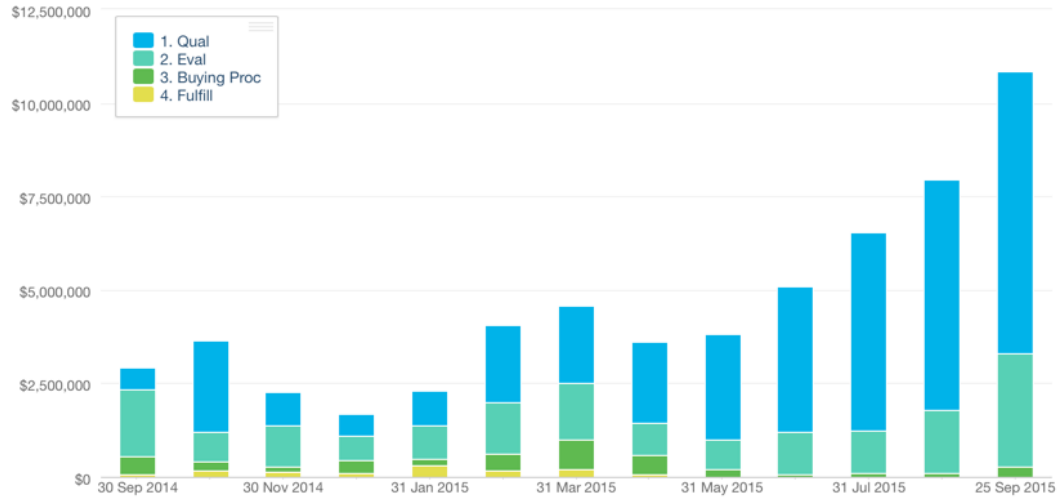


How is our pipeline value changing?

\$10,860,155 in the pipeline today

Custom Last This To Date **Trailing**

7D 30D 90D **12M**

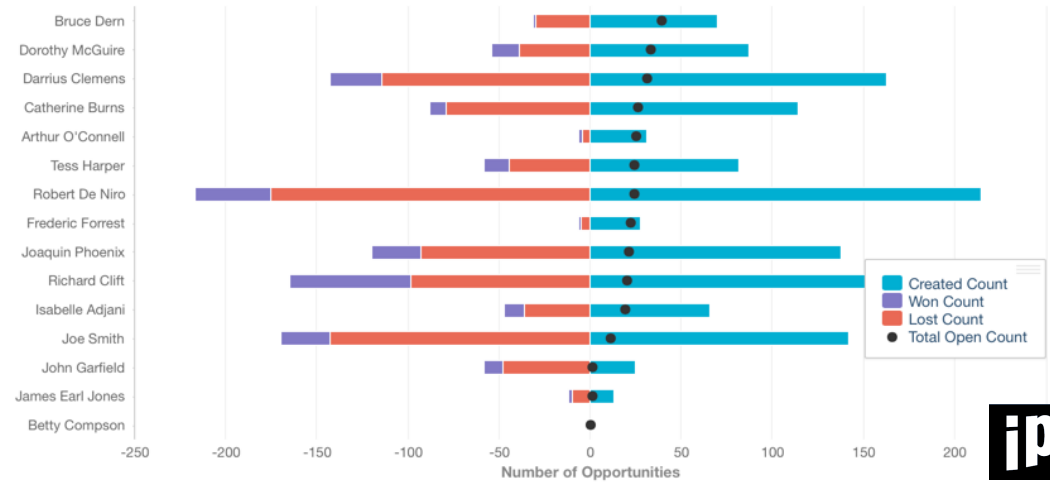


How are my employees' pipelines changing?

174 opportunities added to our pipeline in the previous 12 months

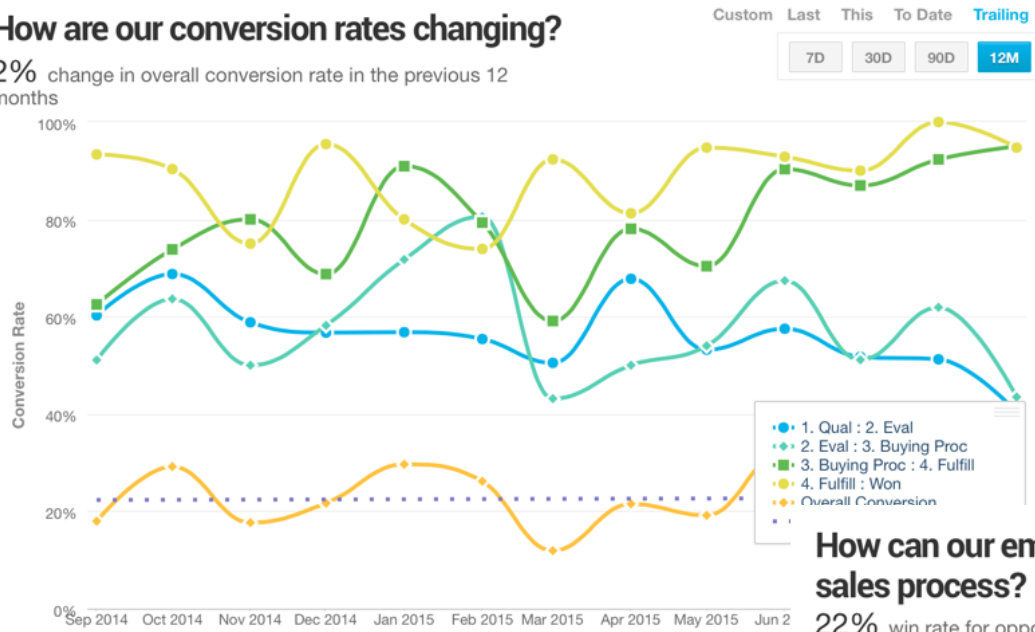
Custom Last This To Date **Trailing**

Yest Last Wk Last M Last Q Last Y



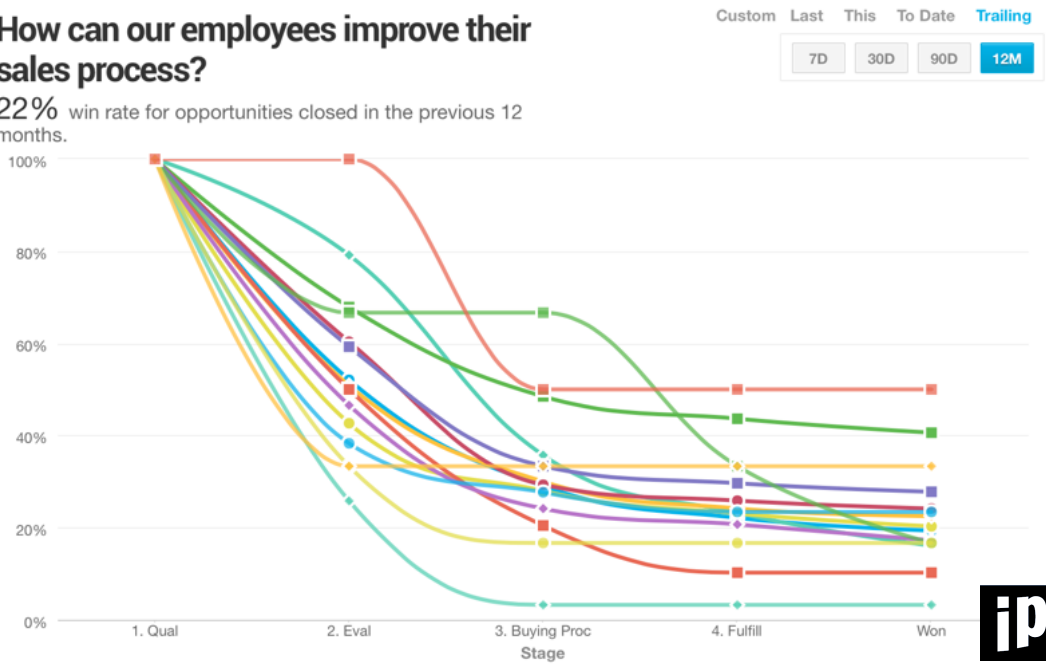
How are our conversion rates changing?

2% change in overall conversion rate in the previous 12 months



How can our employees improve their sales process?

22% win rate for opportunities closed in the previous 12 months.



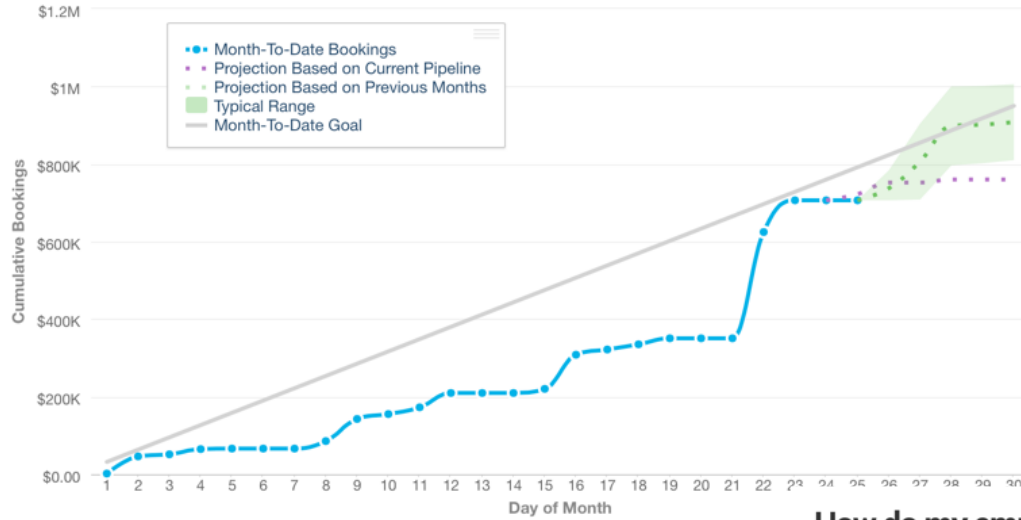
WHAT ARE WE GOING TO CLOSE?

What is our bookings forecast?

\$760,052 this month (September) based on our pipeline

This Next

This M This Q

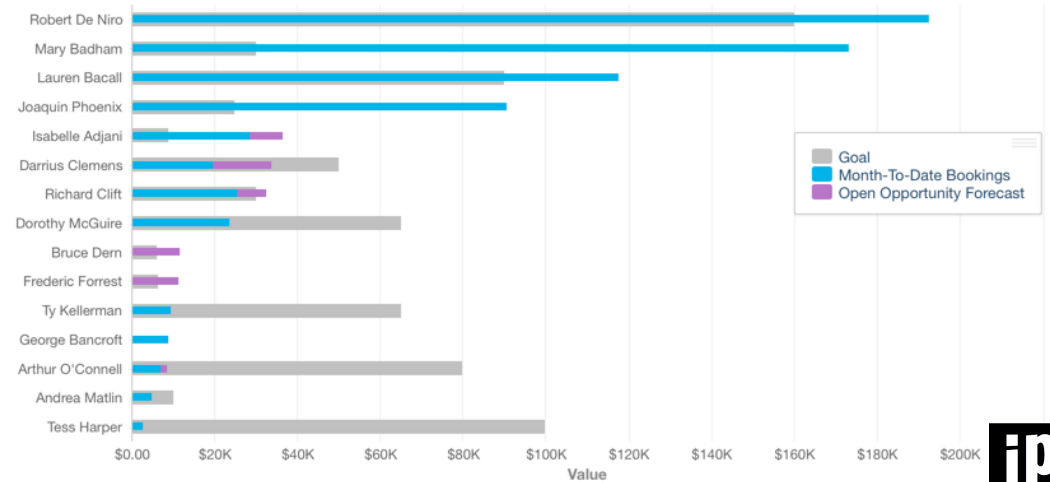


How do my employee forecasts compare?

\$760,052 forecasted from the pipeline this month (September)

This Next

This M This Q



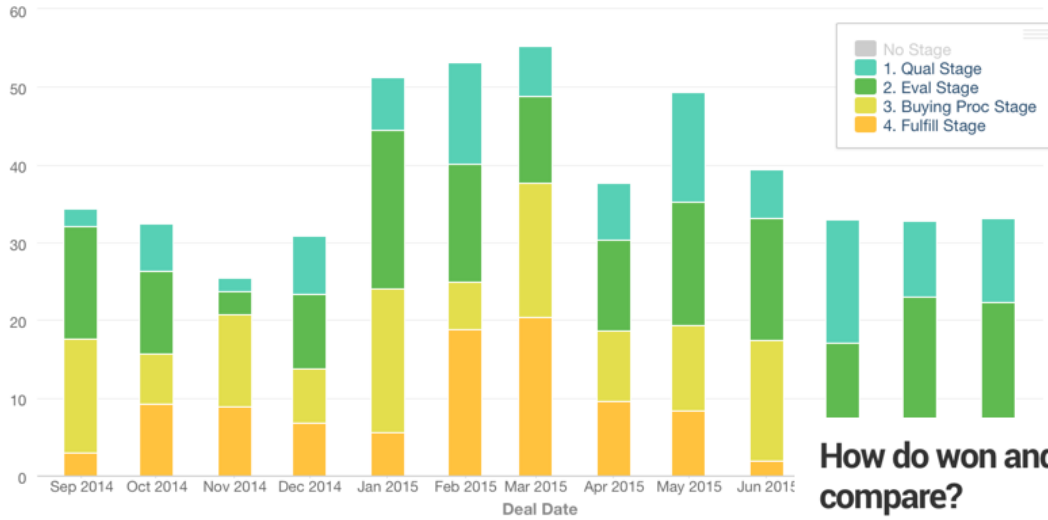
IS TIME A FACTOR?

How long is our current sales cycle?

39 days on average for deals won in the previous 12 months

Custom Last This To Date **Trailing**

7D 30D 90D **12M**

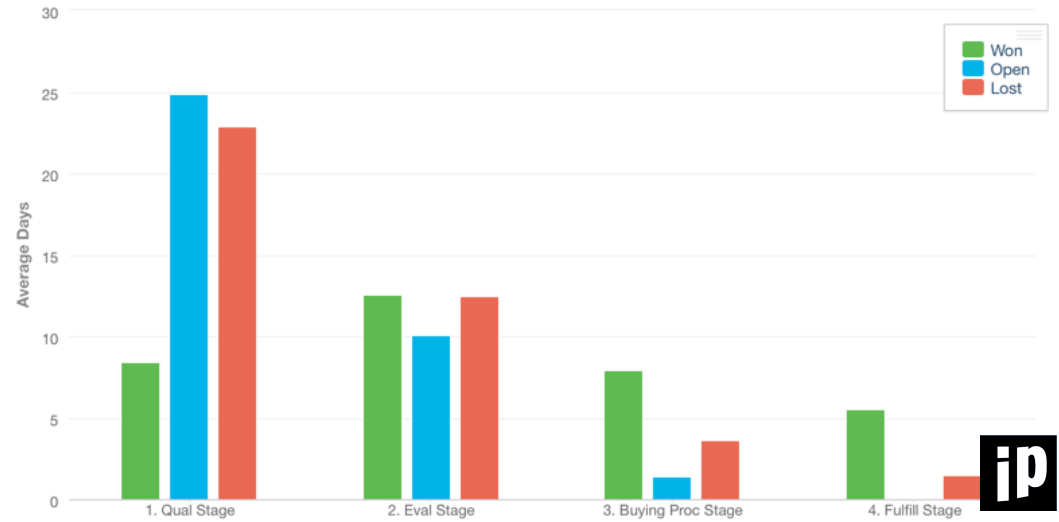


How do won and lost opportunities compare?

238 opportunities created in the previous 12 months were subsequently won.

Custom Last This To Date **Trailing**

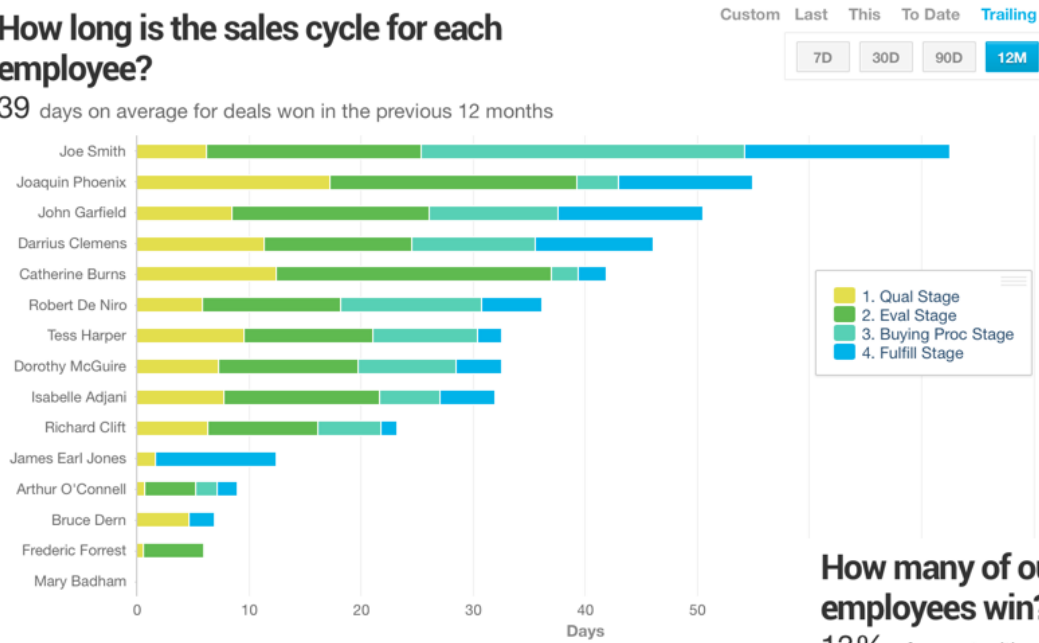
7D 30D 90D **12M**



HOW DO PEOPLE COMPARE?

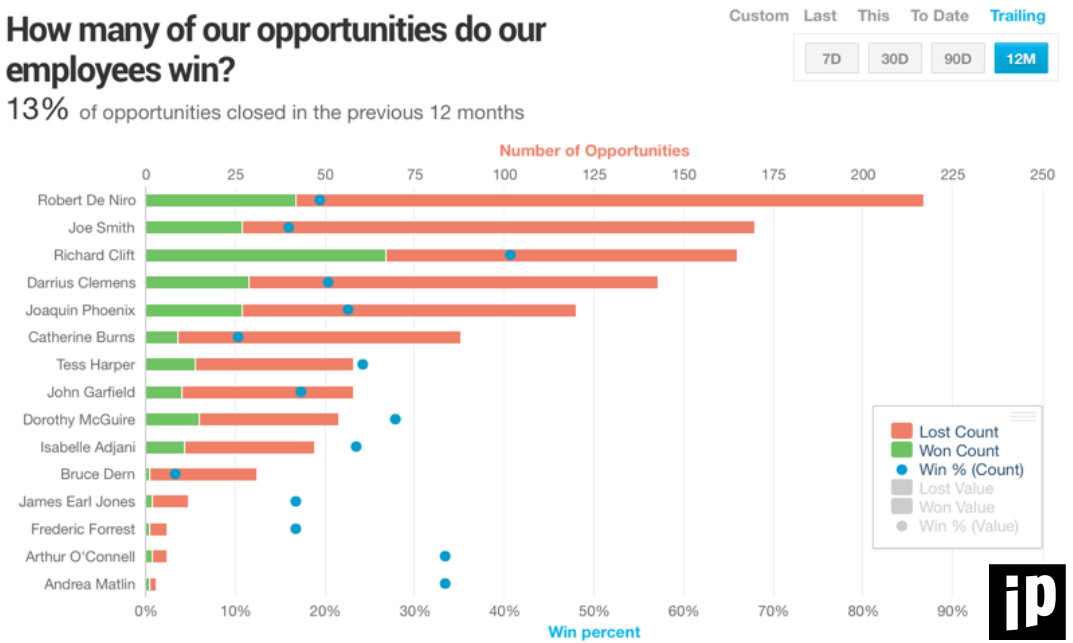
How long is the sales cycle for each employee?

39 days on average for deals won in the previous 12 months



How many of our opportunities do our employees win?

13% of opportunities closed in the previous 12 months

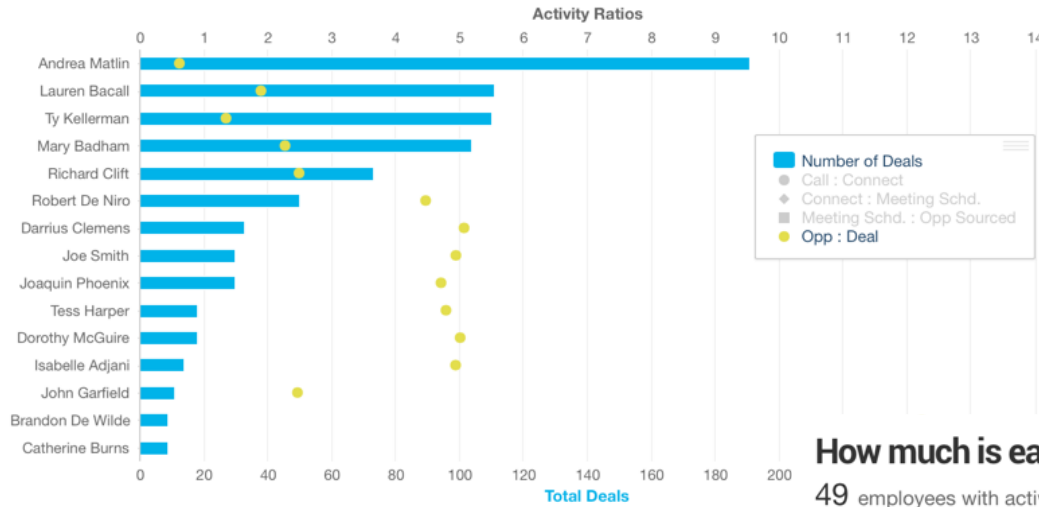


What is the efficiency of my employees' activity?

Activity ratios using activity date

Custom Last This To Date **Trailing**

7D 30D 90D **12M**



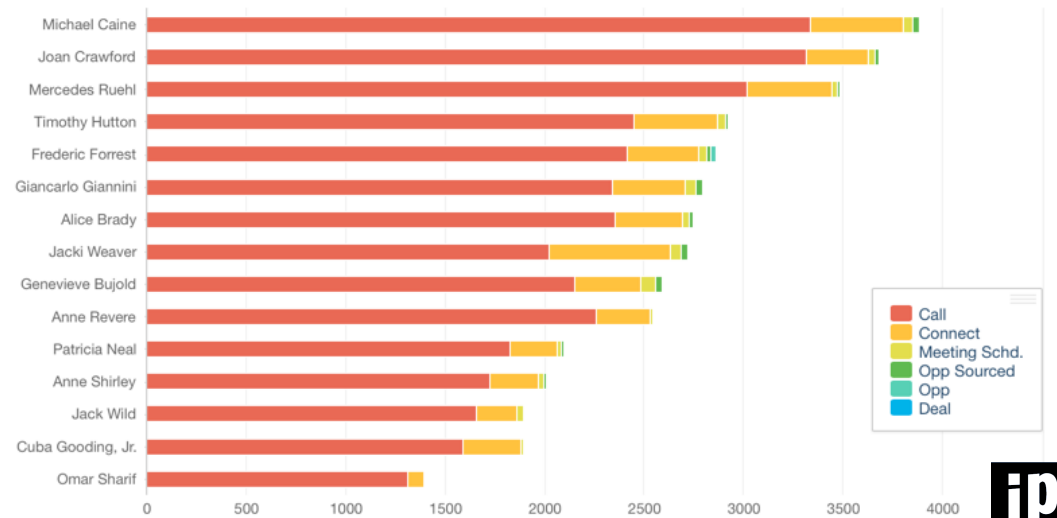
SELECTION

How much is each employee doing?

49 employees with activity in the previous 90 days

Custom Last This To Date **Trailing**

7D 30D **90D** 12M



SELECTION



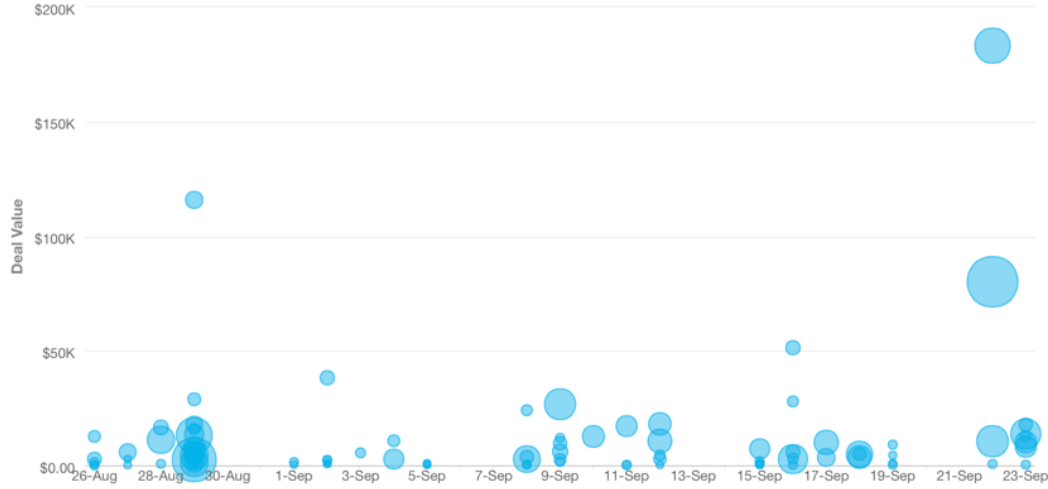
THE POWER OF VISUALISATION

What are our recent deals?

92 deals in the previous 30 days

Custom Last This To Date **Trailing**

7D 30D 90D 12M

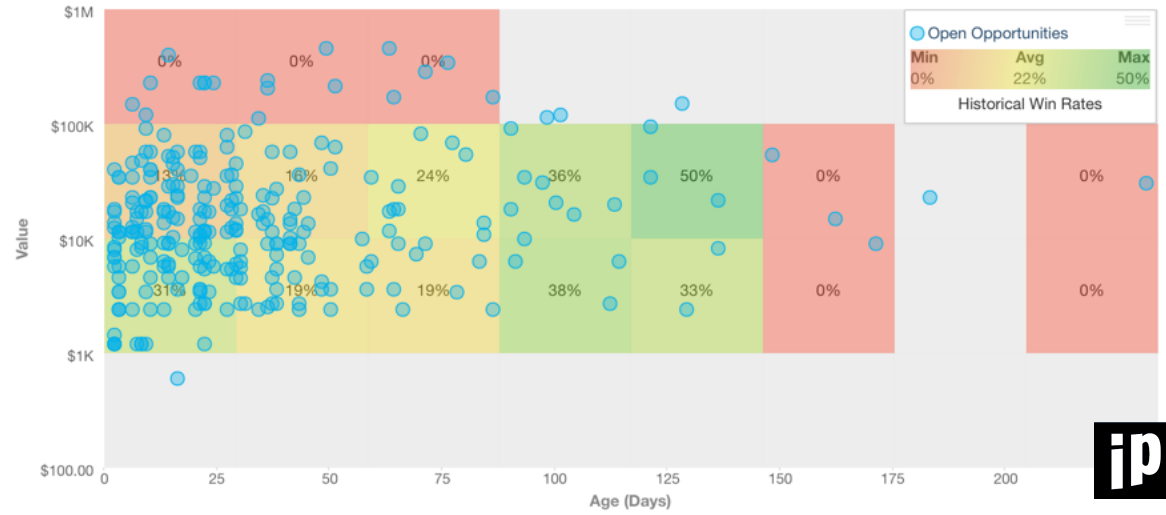


Which opportunities are we most likely to win?

92 opportunities above average win rate of 22% in the next 90 days

This Next **Forward**

7D 30D 90D 12M



PUTTING ANALYTICS TO WORK

PUTTING ANALYTICS TO WORK

- Sales analytics breaking through into mainstream
- Best-in-class sales organisations already highly engaged
- Impact on short and long-term performance
- Critical foundations: data and process
- Avoid IT dependency
- Tap into collective experience
- Insist on intimate CRM integration
- Establish buy-in by aligning with the needs of your audiences
- Ask intelligent questions: why and what-if
- Focus on patterns of success and failure

SALES

ANALYTICS:

THE FINAL FRONTIER?



**MORE
SPOCK**

**LESS
KIRK**

ip

IT'S TIME TO BOLDLY GO!

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