

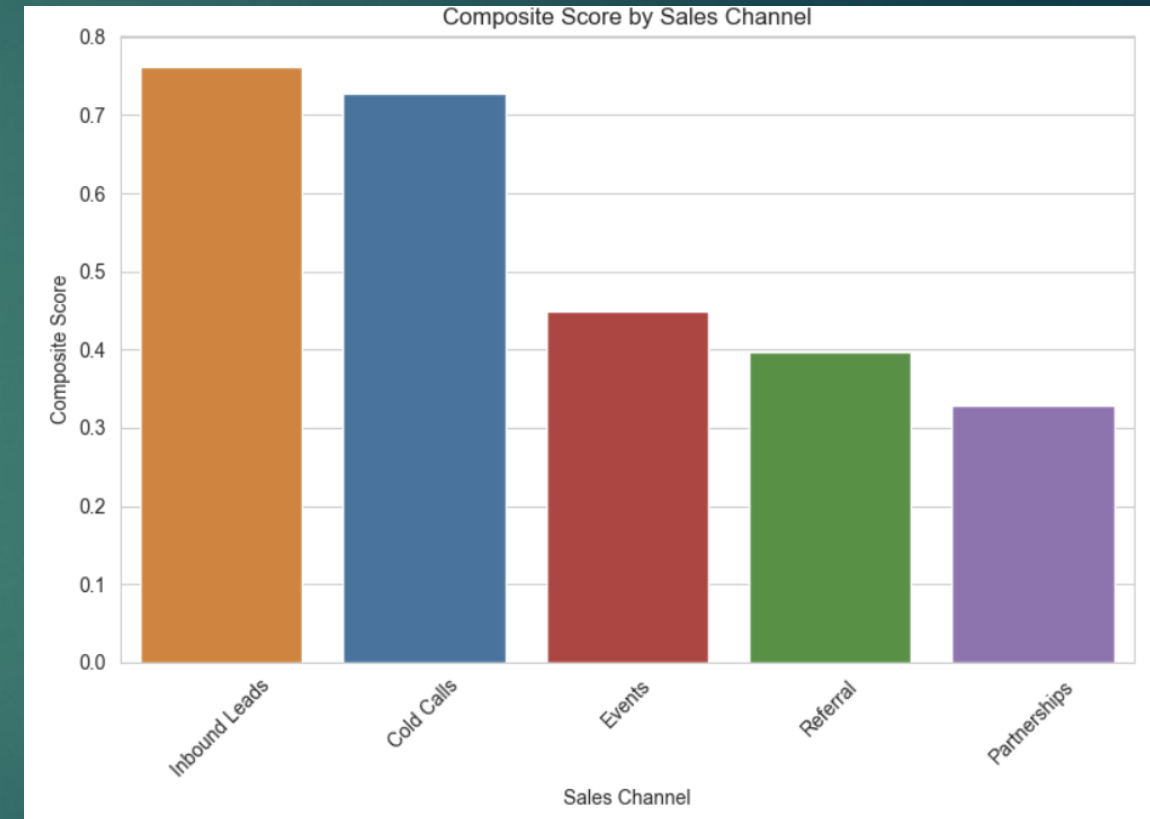


Sales Case Study

EFFECTIVE STRATEGIES FOR DRIVING GROWTH AND EFFICIENCY

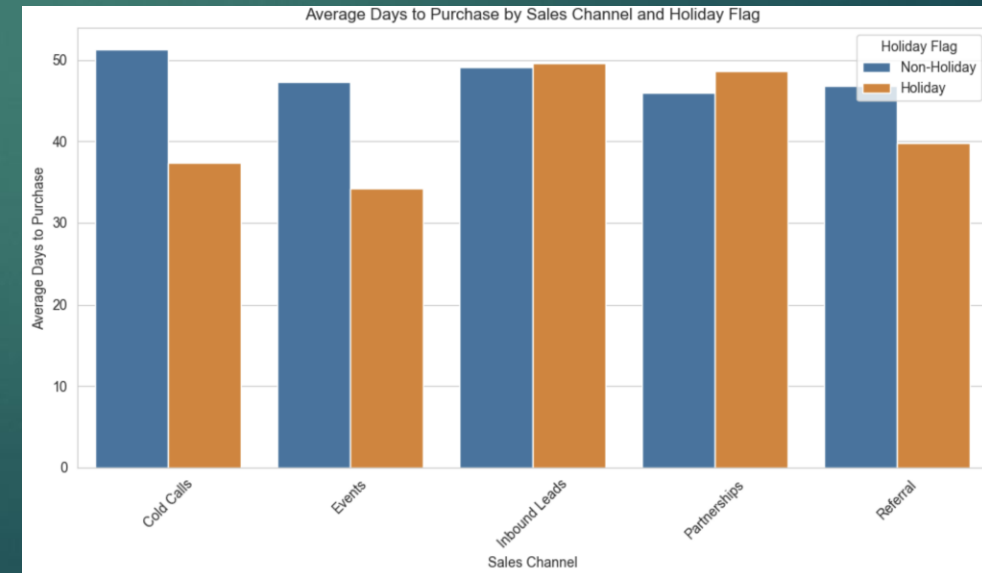
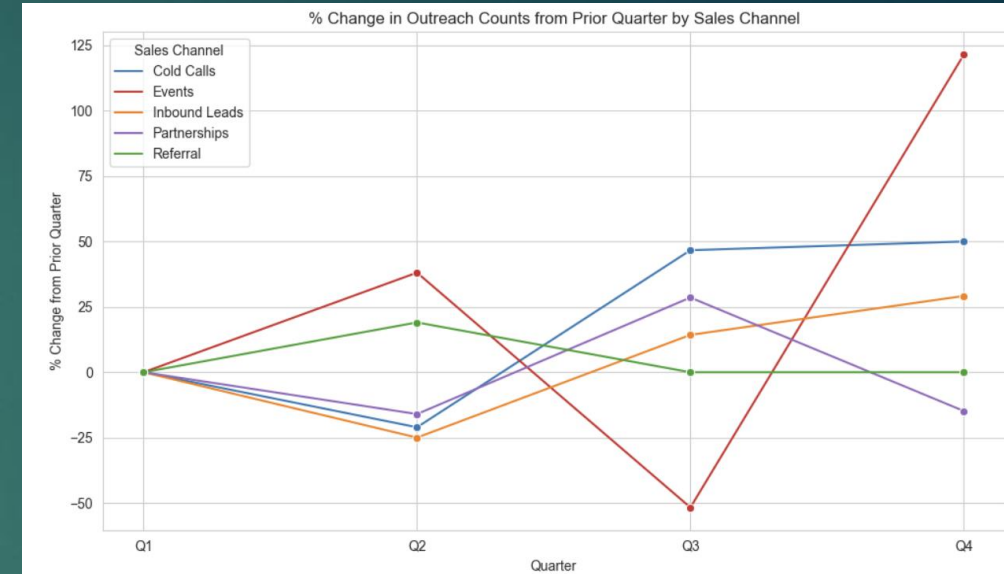
Executive Summary & Key Insights

- ▶ Inbound Leads is best in terms of overall performance, while Partnerships is worst
- ▶ Events consistently underperforms year-to-year in Q3
- ▶ Partnerships has highest churn rate
- ▶ For budget reductions, pull resources from Events and Partnerships



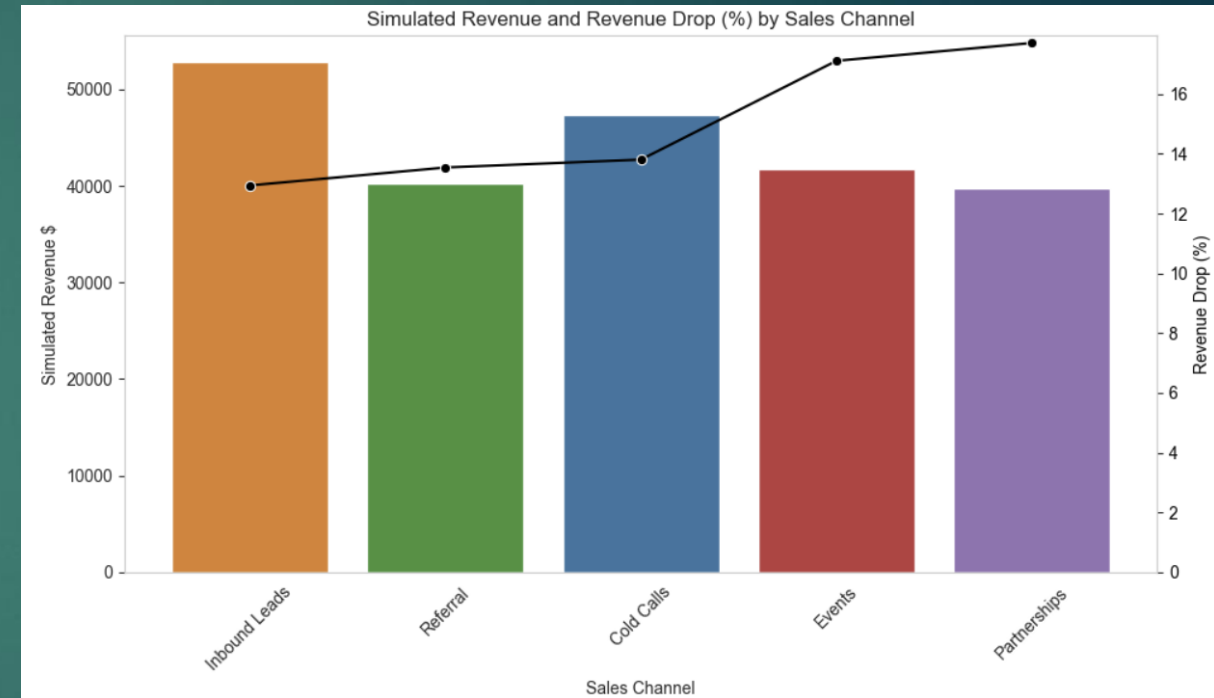
Sales Channel Analysis

- ▶ Ranked Composite Performance
 - ▶ Avg. revenue per customer, CAC/revenue ratio, churn rate, avg. order value, deal velocity
- ▶ Seasonality Effects
 - ▶ Events has drastic reduction in Q3 (> 50%) compared to prior quarter
 - ▶ Cold Calls/Events has shorter timeline when outreach is on holidays



Scenario Testing/Budget Impact

- ▶ Churn Rate Logistic Regression
 - ▶ Partnerships has nearly double odds of churning (channel alone subpar predictor)
- ▶ Predicting Cold Call Revenue
 - ▶ Customer increase of 15% will result in \$7,600 total revenue increase
- ▶ 20% Budget Reduction: Churn Rate Impact
 - ▶ Revenue decrease scaled for each channel based directly on churn rate
 - ▶ Inbound Leads is most resilient, whereas Events/Partnerships will have greater revenue reductions.



Strategic Recommendations

- ▶ Cold Calls has fewest total customers, but 2nd best composite score. This suggests Cold Calls is very efficient and that we should increase their budget.
- ▶ Based on the holiday period findings, we should conduct an A/B test that shifts a % of Cold Call/Events outreach efforts into holiday periods
 - ▶ Test results will show whether adjustment results in improved revenue (total and by quarter)
- ▶ While Partnerships has highest churn rate, we have not yet identified the best predictors so we should iterate on our initial logistic regression model
 - ▶ Given that Partnerships has lowest performance score, there is good opportunity for coaching
- ▶ Based on performance analyses and simulated budget reductions, overall recommendation is to reallocate resources from Events/Partnerships to the other 3 channels
 - ▶ This strategy will help mitigate revenue loss and maintain revenue efficiency by emphasizing investment in channels with a stronger performance.