Gmail — Enrico Borriello <borriello.enrico@gmail.com>

Pipeline Spreadsheet / Forecasting

Brandon Hurlbert <brandon.hurlbert@gmail.com> — Sat, Mar 18, 2023 at 5:00 AM
To: Enrico Borriello <borriello.enrico@gmail.com>

Happy Saturday! I tried to provide a high-level overview below (spending about an hour on this). Is this enough to get started? It's hard for me to explain so many excel formulas through narrative (so started thinking it's easier for you to follow the logic on some of this just looking at the file. I need to follow up on some of the more complex formulas:

AE Pipeline Summary:

Overview:

- Want to be able to create visualizations/summaries that drive the weekly forecasting process for AEs (Account Executives) (also known as "Reps" – Sales Representatives) tasked with winning "new business" (new customers).
- Three views are important:
  - ***Pipeline Summary*** – Summary view by Account Executive (AE) of all the accounts forecasted to be changed to "Closed Won" status with the ability to drill down on detail for select months (Column "G") by changing picklist (Cell "D9"). Monthly view (Columns "V" through "BE" would ideally only show current and future months) – unlike current design).
    - Ideally would like some visualizations (by individual AEs) and across AEs. Including some summary of total team combined
  - ***Prospects (Pre-FTB):*** Summary table view of accounts associated with AE selected in Pipeline Summary tab (Cell "D9"). This shows all the accounts with an FTB (first time booking date) (Column "G") in the future. Would like table to show only current and future months (Columns "U" through "AS")
  - ***Customers (Post-FTB) Detail:*** Summary table view of accounts associated with AE selected in Pipeline Summary tab (Cell "D9"). This shows all the accounts with an FTB (first time booking date) (Column "G") in the past (or today). I would like table to show only current and future months (Columns "J" through "AS")

Inputs:

Current Process:

- ***Pre-FTB Report:*** Data is pasted from Salesforce report into Columns "F" through "L." (long-term would love this data to be automatically updated from CSV file process).
  - Columns "A" through "E" ; same for columns "M" through "Q" - contain formulas used to sort the ordering of accounts in the Prospects (Pre-FTB) Detail and Customers (Post FTB) detail tabs. If you can do this in other ways, it may not be needed.
  - This contains anticipated Sales from customers that we are trying to "win"

- ***Post-FTB Report:*** Data is pasted from Salesforce report into Columns "F" through "L." (long-term would love this data to be automatically updated from CSV file process).
  - Columns "A" through "E" ; same for columns "M" through "Q" - contain formulas used to sort the ordering of accounts in the Prospects (Pre-FTB) Detail and Customers (Post FTB) detail tabs. If you can do this in other ways, it may not be needed.
  - This contains predicted Sales from customers that have done business with us that we are trying to grow.
- ***Current Month Quotas:*** Data is pasted from Salesforce into Columns "B" through "D." Column "A" just combines first and last name for lookup purposes. This data will be updated less frequently than the "Pre-FTB Report" and "Post FTB" report tabs (but I would still like it to be updatable automatically via CSV).
  - These are the goals salesperson must hit each month.
- **Lookup:**
  - Tab is mainly used for formatting, sorting and lookup purposes across spreadsheet (you may be able to remove if you can accomplish in other ways).
    - Column "E" – need some way to be able to select any rep with any information in Pre-FTB, Post-FTB, and Current Month Quota tabs.

Spreadsheet Explanation:

- Easiest way to understand logic is through formulas – though there are a few I don't understand myself (and will follow up):
  - Pipeline Summary (Cells "G14," "G15," "G17," "G18" and "G24"

On Thu, Mar 9, 2023 at 3:28 PM Brandon Hurlbert <brandon.hurlbert@gmail.com> wrote: