Opportunity Pipeline

Contoso Insurance

Forecast Adjustment

0

$20.9M Revenue Won	$21.4M Revenue In Pipe...
$28.85M Owner Goal	146% Forecast %

Revenue Won, Revenue In Pipeline and Owner Goal by Owner

● Revenue Won ● Revenue In Pipeline ◆ Owner Goal

Owners (left to right): Renee Lo, David So, Dan Ju..., Greg W..., Spence..., Jeff Hay, Eric Gr..., Anne W..., Alicia T..., Alan St..., Julian I..., Molly C..., Sanjay ...

Value by PipelineStep

	100%
1-Prospect	$7,273K
2-Pre-Pipe...	$6,107K
3-Pipeline	$4,929K
4-Mandate	
5-Close	$908K
	12.5%
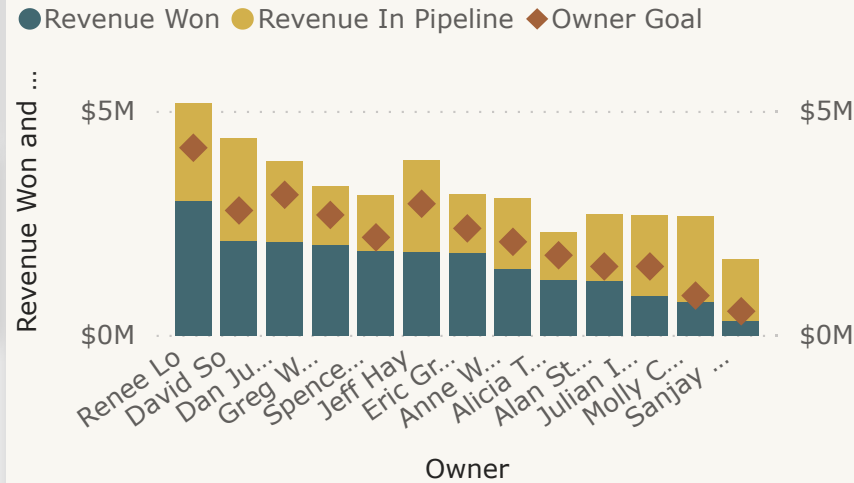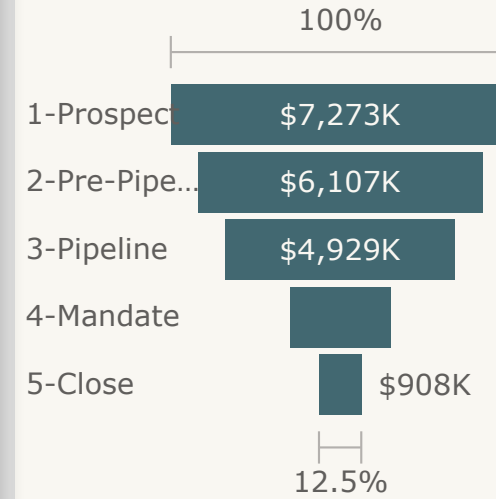
Revenue Won by Product and New or Renewal

New or R... ● New ● Renewal

Products: Business, Farm, Auto, Life, Home

Ne...
- [ ] Select all
- [ ] New
- [ ] Renewal

Pro...
- [ ] Select all
- [ ] Auto
- [ ] Business
- [ ] Farm
- [ ] Home
- [ ] Life

Owner
- [ ] Select all
- [ ] Alan Steiner
- [ ] Alicia Thomber
- [ ] Anne Weiler
- [ ] Dan Jump
- [ ] David So
- [ ] Eric Gruber
- [ ] Greg Winston
- [ ] Jeff Hay
- [ ] Julian Isla
- [ ] Molly Clark
- [ ] Renee Lo
- [ ] Sanjay Shah
- [ ] Spencer Low
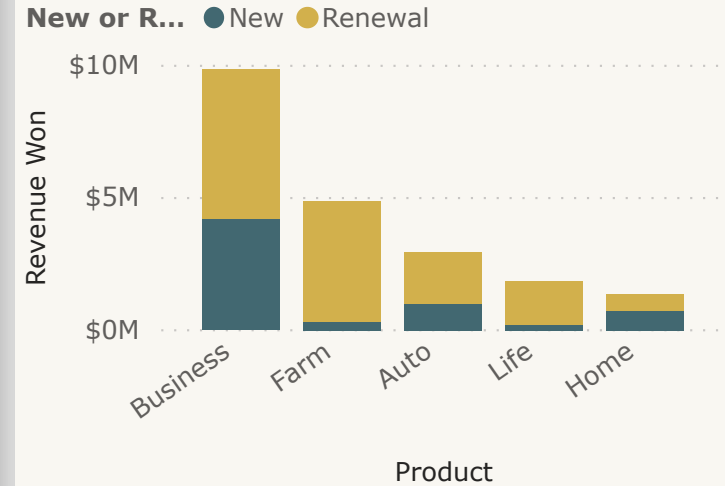
Opportunity Count In Pipeline and Opportunity Count by Product and ...
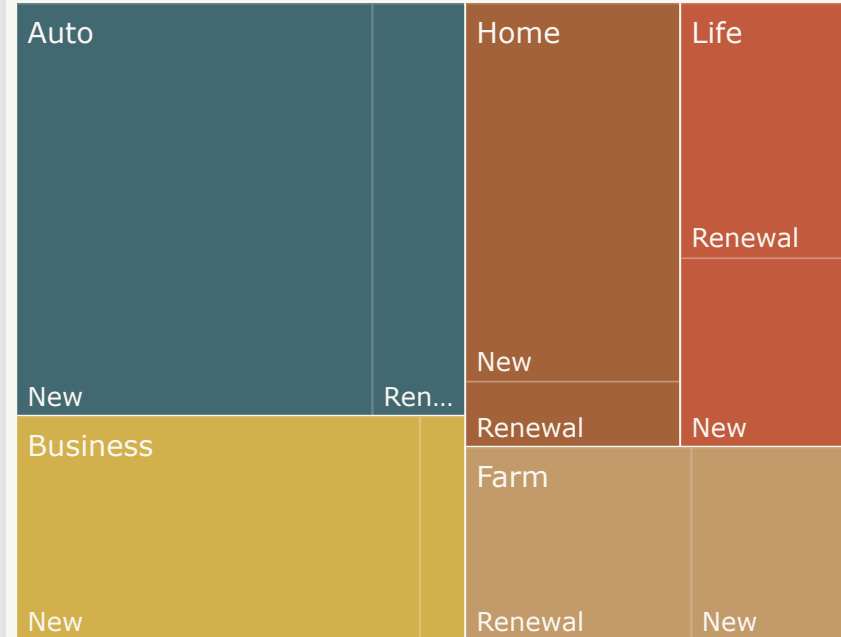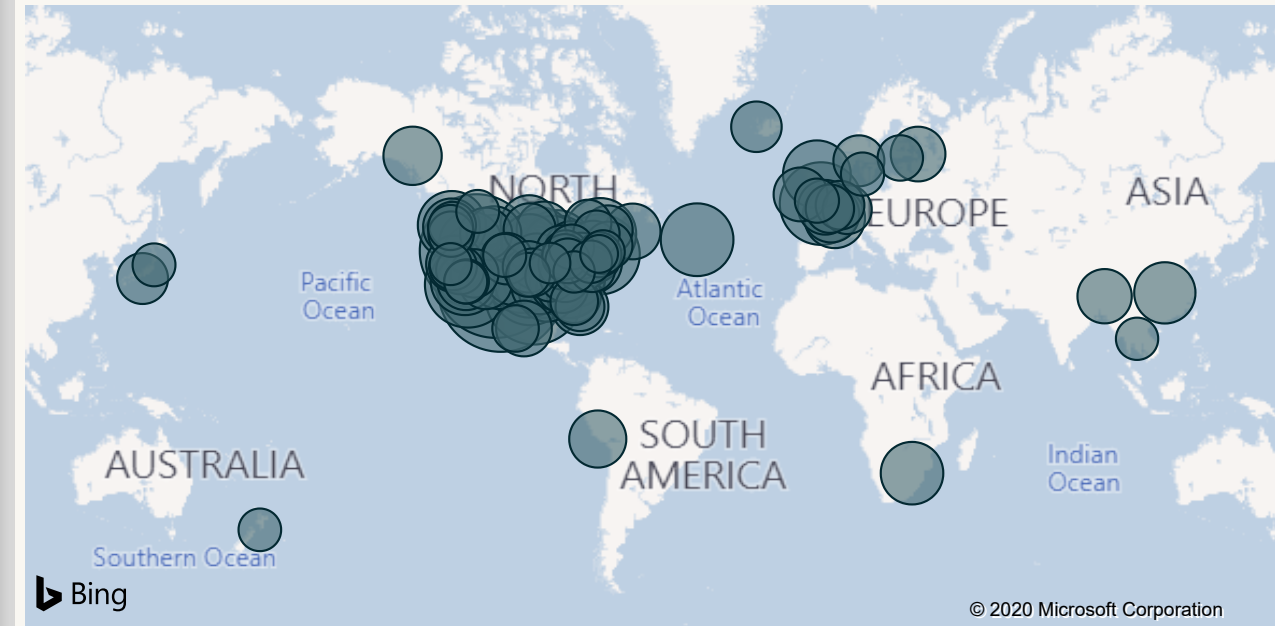
Auto — New / Ren...
Business — New
Home — New / Renewal
Life — Renewal / New
Farm — Renewal / New

Revenue by Location

NORTH, EUROPE, ASIA, AFRICA, SOUTH AMERICA, AUSTRALIA

Pacific Ocean, Atlantic Ocean, Indian Ocean, Southern Ocean

Bing

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Contoso Insurance

Opportunity Health

19	$844K
Opportunity Count	Total Value

19.58	$844.0K
Avg Days Remaining	Value In Pipeline

Days Remaining in Pipeline, Probability Estimate, Value, Account Name, Owner and Product LOB by OpportunitySeq and PipelineStep
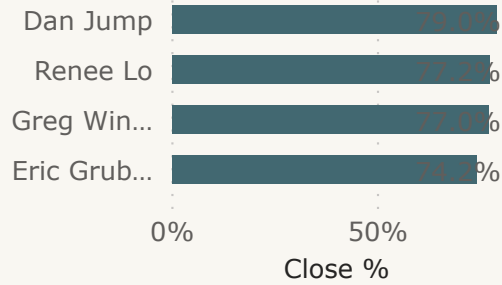
PipelineStep ● 1-Prospect ● 2-Pre-Pipeline ● 3-Pipeline ● 4-Mandate ● 5-Close

Owner
- [ ] Select all
- [ ] Alan Steiner
- [ ] Alicia Thomber
- [ ] Anne Weiler
- [ ] Dan Jump
- [ ] David So
- [ ] Eric Gruber
- [ ] Greg Winston
- [ ] Jeff Hay
- [ ] Julian Isla
- [ ] Molly Clark
- [ ] Renee Lo
- [ ] Sanjay Shah

New or Renewal
- [ ] Select all
- [ ] New
- [x] Renewal

Product
- [ ] Select all
- [ ] Auto
- [x] Business
- [ ] Farm
- [ ] Home
- [ ] Life
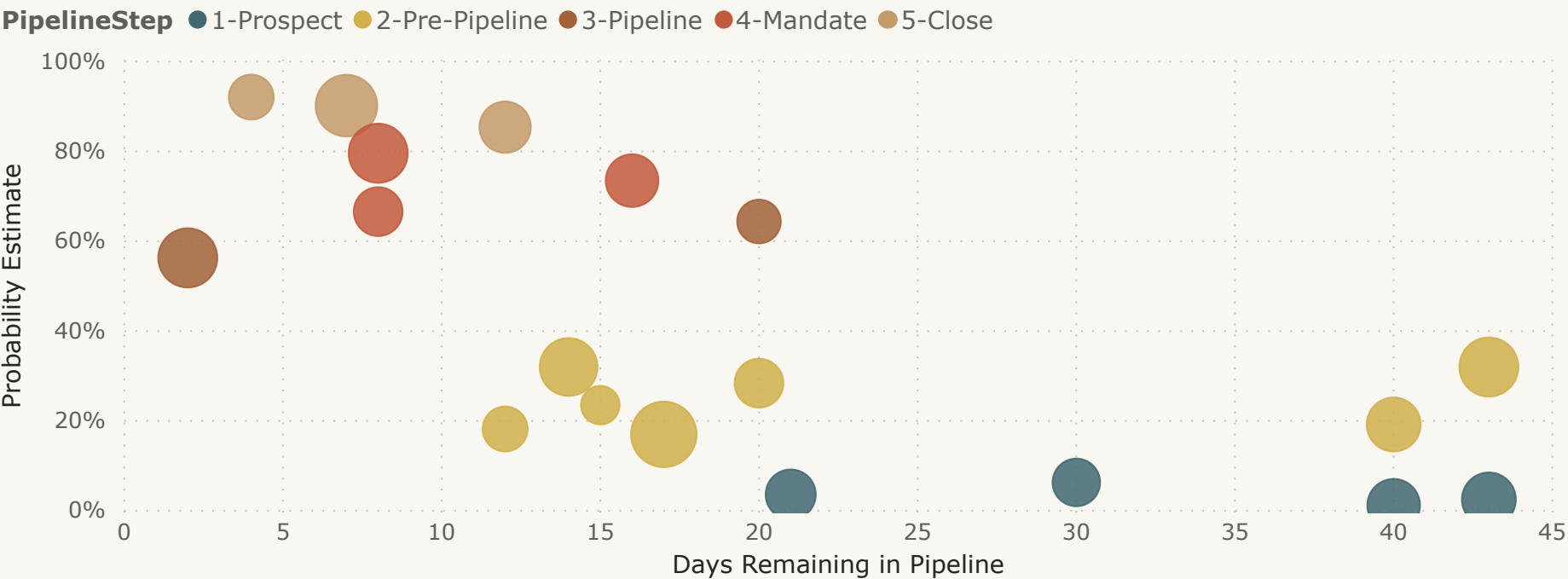
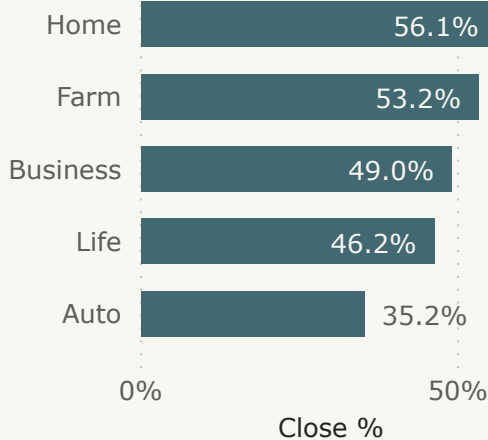| CloseDate	Account Name	Owner	Product	Value	Topic
11/29/2020	Cormier-Kerluke	David So	Business	$40,1...	Vision-oriented transitional Business s
11/20/2020	McClure, Hansen and Wilkinson	Greg Winston	Business	$42,3...	Visionary disintermediate Business att
11/15/2020	Runolfsson, Feeney and Fritsch	Alicia Thomber	Business	$61,6...	Universal demand-driven Business int
11/28/2020	Botsford-Smitham	Spencer Low	Business	$29,5...	Synchronised bi-directional Business p
11/10/2020	Hyatt and Sons	Renee Lo	Business	$56,2...	Reduced mobile Business capacity
12/21/2020	Ledner-Boehm	Molly Clark	Business	$45,5...	Phased scalable Business forecast
12/21/2020	Medhurst and Sons	Renee Lo	Business	$58,1...	Organized reciprocal Business hierarcl

Influence on Win/Loss and Renewal Ratios

Close % by Owner

Owner	Close %
Dan Jump	
Renee Lo	
Greg Win...	
Eric Grub...	

0%   50%
Close %

Close % by New or Renewal

New or Renewal	Close %
Renewal	84.6%
New	24.3%

Close % by Product

Product	Close %
Home	56.1%
Farm	53.2%
Business	49.0%
Life	46.2%
Auto	35.2%

0%   50%
Close %

Key influencers   Top segments

What influences Status to be   [Won ▼]   ?

When...   ....the likelihood of Status being Won increases by

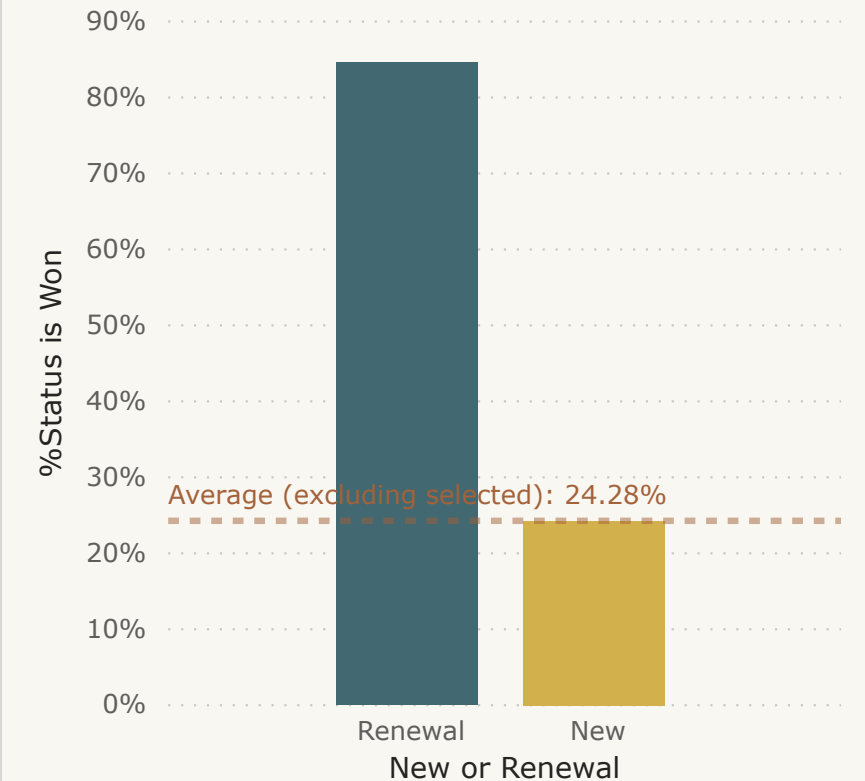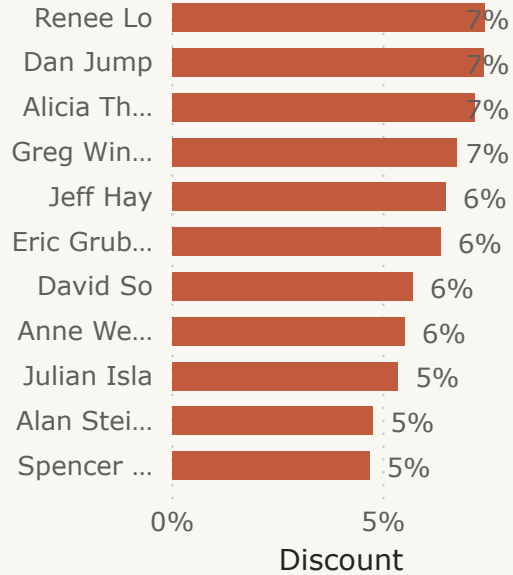| **New or Renewal is Renewal** | 3.48x |
Campaign is New Regulation Notification	2.05x
Territory is Japan	2.00x
Campaign is Loyalty Campaign	1.95x
Industry is Transportation Services	1.91x
Industry is Medical Specialties	1.89x

Sort by: **Impact**   Count

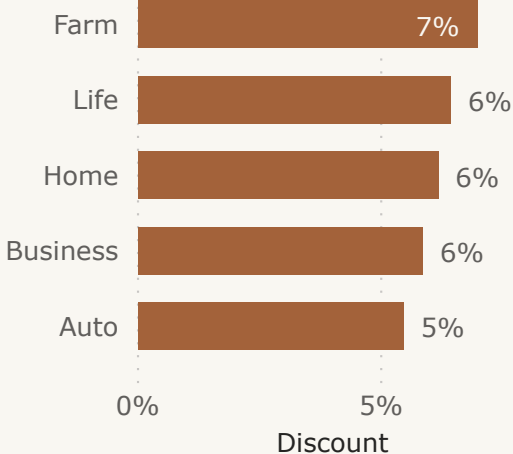← Status is more likely to be Won when New or Renewal is Renewal than otherwise (on average).

90%
80%
70%
60%
50%
40%
30%
Average (excluding selected): 24.28%
20%
10%
0%

%Status is Won

Renewal   New
New or Renewal

☐ Only show values that are influencers

Influence on % Discount Offered

Contoso Insurance

Discount by Owner

Owner	Discount
Renee Lo	7%
Dan Jump	7%
Alicia Th...	7%
Greg Win...	7%
Jeff Hay	6%
Eric Grub...	6%
David So	6%
Anne We...	6%
Julian Isla	5%
Alan Stei...	5%
Spencer ...	5%

Discount (0% – 5%)

Discount by Product

Product	Discount
Farm	7%
Life	6%
Home	6%
Business	6%
Auto	5%

Discount (0% – 5%)

Key influencers   Top segments

What influences Discount to [Increase ▾] ?

When...   ....the average of Discount increases by

- **State or Province is MIC** — 3.32%
- Territory is China — 2.88%
- Industry is Medical Specialties — 2.78%
- Territory is Mexico — 2.61%
- Campaign Name is New Regulation Notification — 2.56%
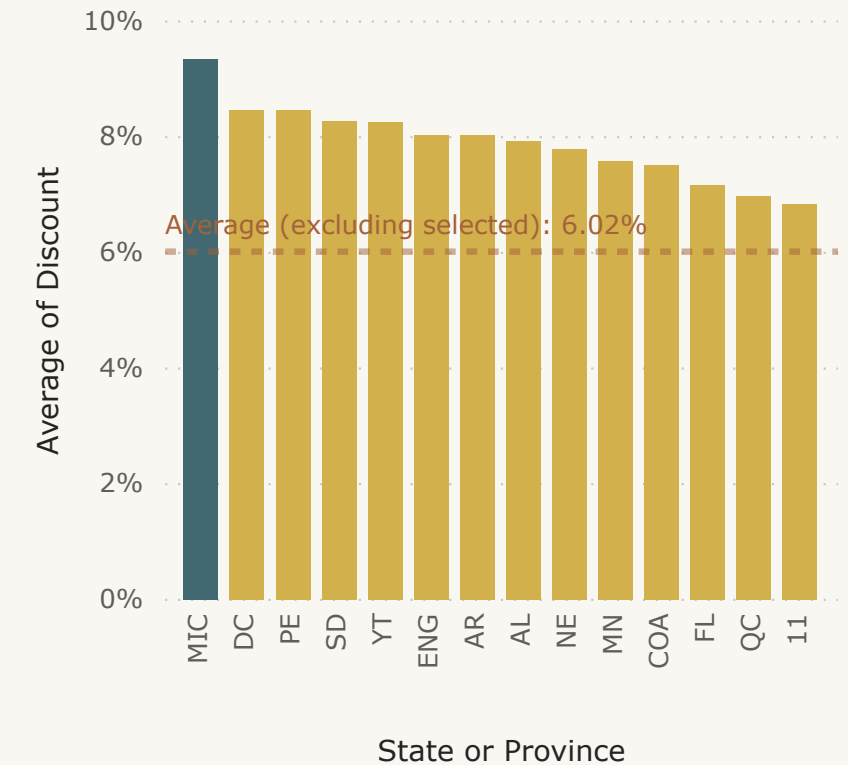- Campaign Name is Loyalty Campaign — 2.56%
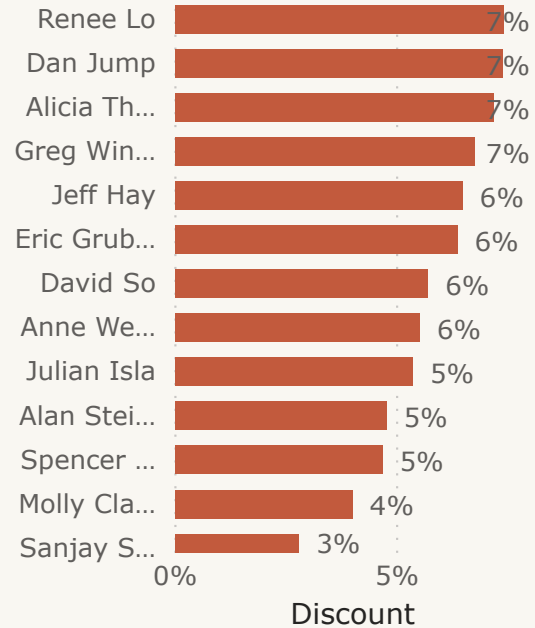- Industry is Medical/Dental — 2.31%

Sort by: **Impact**   Count

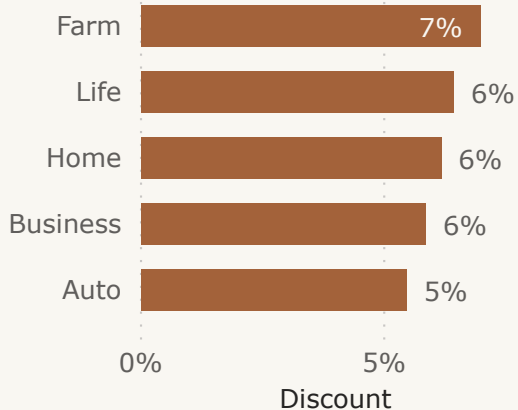← Discount is more likely to increase when State or Province is MIC than otherwise (on average).

Average (excluding selected): 6.02%

Average of Discount (0% – 10%)

State or Province: MIC, DC, PE, SD, YT, ENG, AR, AL, NE, MN, COA, FL, QC, 11

☐ Only show values that are influencers

Contoso Insurance

Influence on Days to Close

Discount by Owner

Owner	Discount
Renee Lo	7%
Dan Jump	7%
Alicia Th...	7%
Greg Win...	7%
Jeff Hay	6%
Eric Grub...	6%
David So	6%
Anne We...	6%
Julian Isla	5%
Alan Stei...	5%
Spencer ...	5%
Molly Cla...	4%
Sanjay S...	3%

Discount by Product

Product	Discount
Farm	7%
Life	6%
Home	6%
Business	6%
Auto	5%

Key influencers   Top segments

What influences DaysToClose to [Increase ▾] ?

When...   ....the average of DaysToClose increases by

Decision Maker Identified is False — 14.21

Purchase Process is Unknown — 12.22

Purchase Process is Committee — 7.4
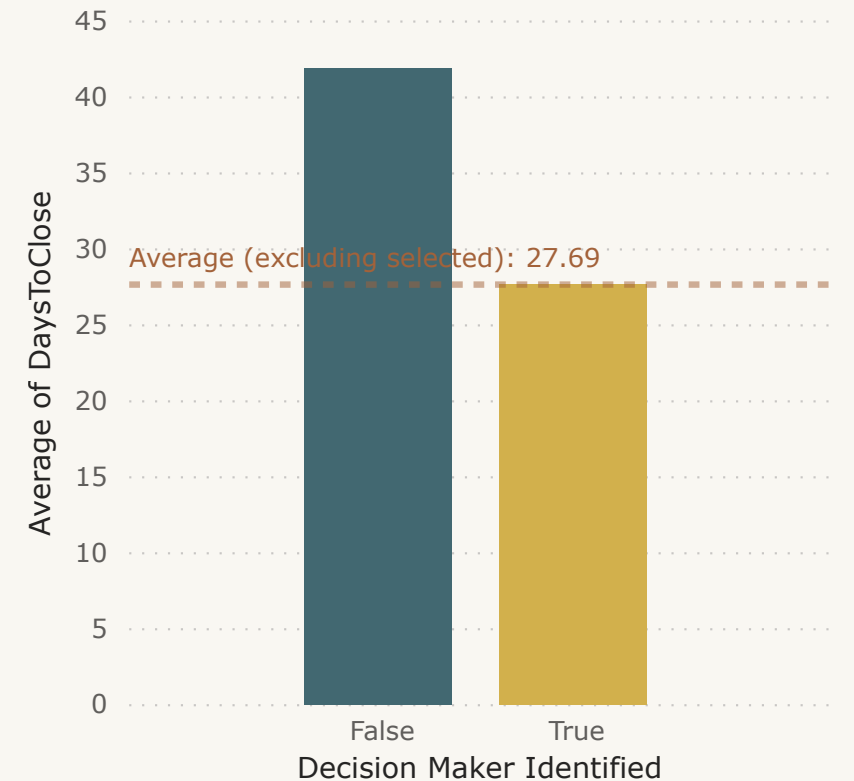
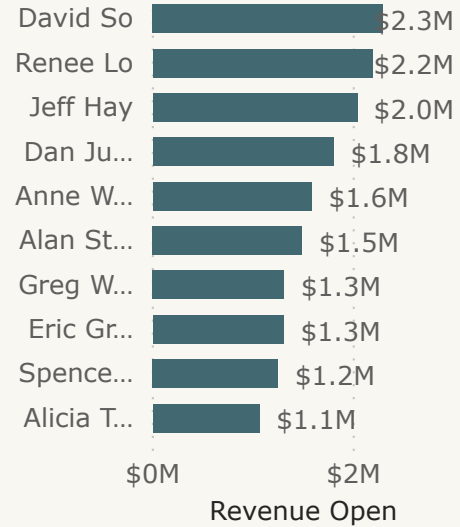Industry is Major Pharmaceuticals — 5.72

Owner is Dan Jump — 4.84

Sort by: Impact   Count

← DaysToClose is more likely to increase when Decision Maker Identified is False than otherwise (on average).

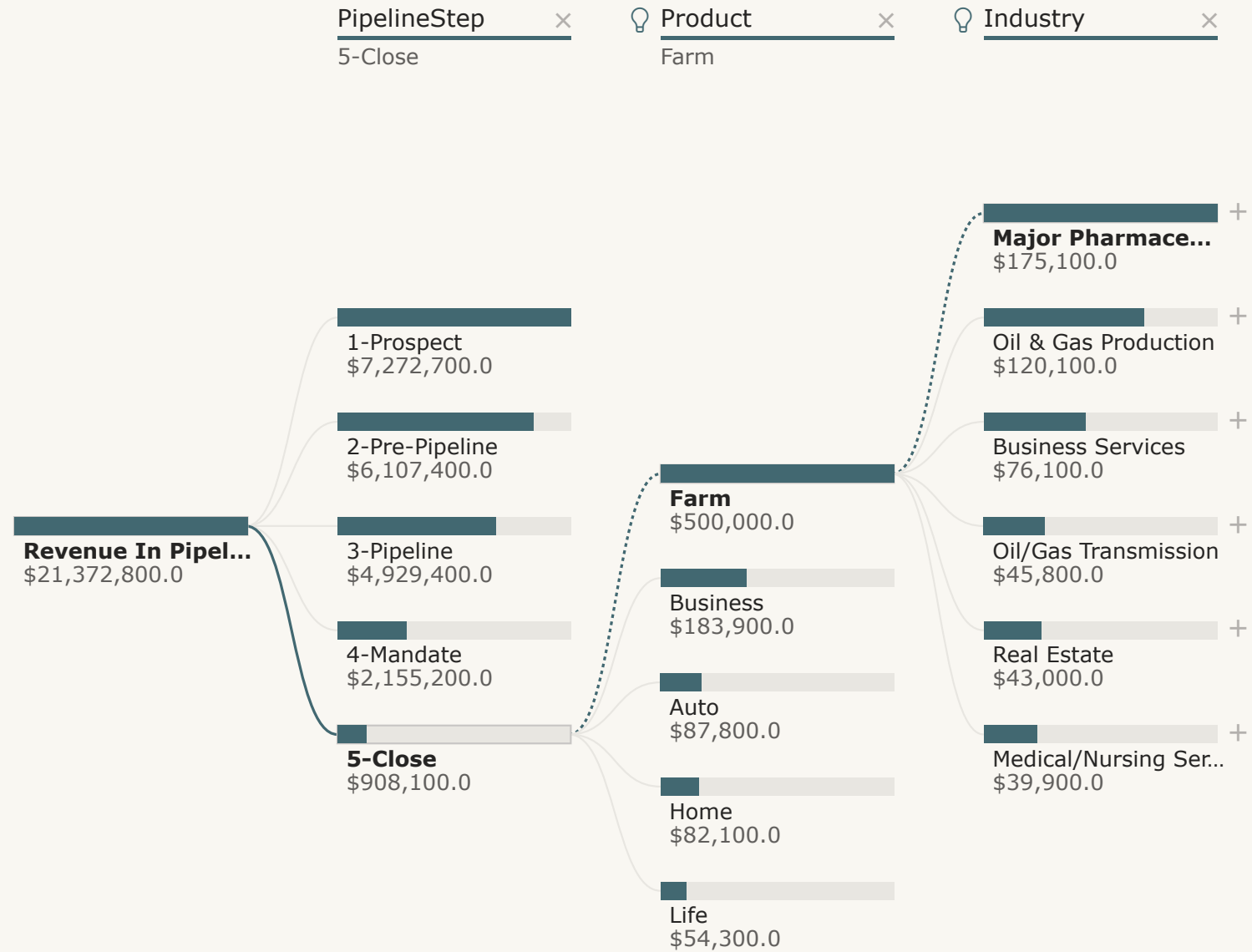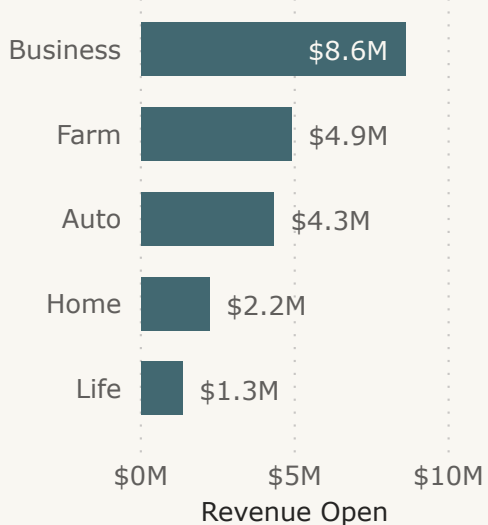Average (excluding selected): 27.69

Decision Maker Identified: False, True

Average of DaysToClose

☐ Only show values that are influencers

Revenue Decomposition Tree

Contoso Insurance

Revenue Open by Owner

Owner	Revenue Open
David So	$2.3M
Renee Lo	$2.2M
Jeff Hay	$2.0M
Dan Ju...	$1.8M
Anne W...	$1.6M
Alan St...	$1.5M
Greg W...	$1.3M
Eric Gr...	$1.3M
Spence...	$1.2M
Alicia T...	$1.1M

Revenue Open

Revenue Open by Product

Product	Revenue Open
Business	$8.6M
Farm	$4.9M
Auto	$4.3M
Home	$2.2M
Life	$1.3M

Revenue Open

PipelineStep ✕
5-Close

Product ✕
Farm

Industry ✕

Revenue In Pipel...
$21,372,800.0

- 1-Prospect $7,272,700.0
- 2-Pre-Pipeline $6,107,400.0
- 3-Pipeline $4,929,400.0
- 4-Mandate $2,155,200.0
- **5-Close** $908,100.0

Farm $500,000.0

- Business $183,900.0
- Auto $87,800.0
- Home $82,100.0
- Life $54,300.0

- **Major Pharmace...** $175,100.0
- Oil & Gas Production $120,100.0
- Business Services $76,100.0
- Oil/Gas Transmission $45,800.0
- Real Estate $43,000.0
- Medical/Nursing Ser... $39,900.0

Marketing Campaign Effectiveness

Contoso Insurance

Ne...
- New
- Renewal

Prod...
- Select all
- Auto
- Business
- Farm
- Home
- Life

Source Campaign
- Select all
- Agency Newsletter
- Agent Insights
- Corporate Annual Report
- Homebuilders Show
- Loyalty Campaign
- New Car Promo
- New Regulation Notification

Owner
- Select all
- Alan Steiner
- Alicia Thomber
- Anne Weiler
- Dan Jump
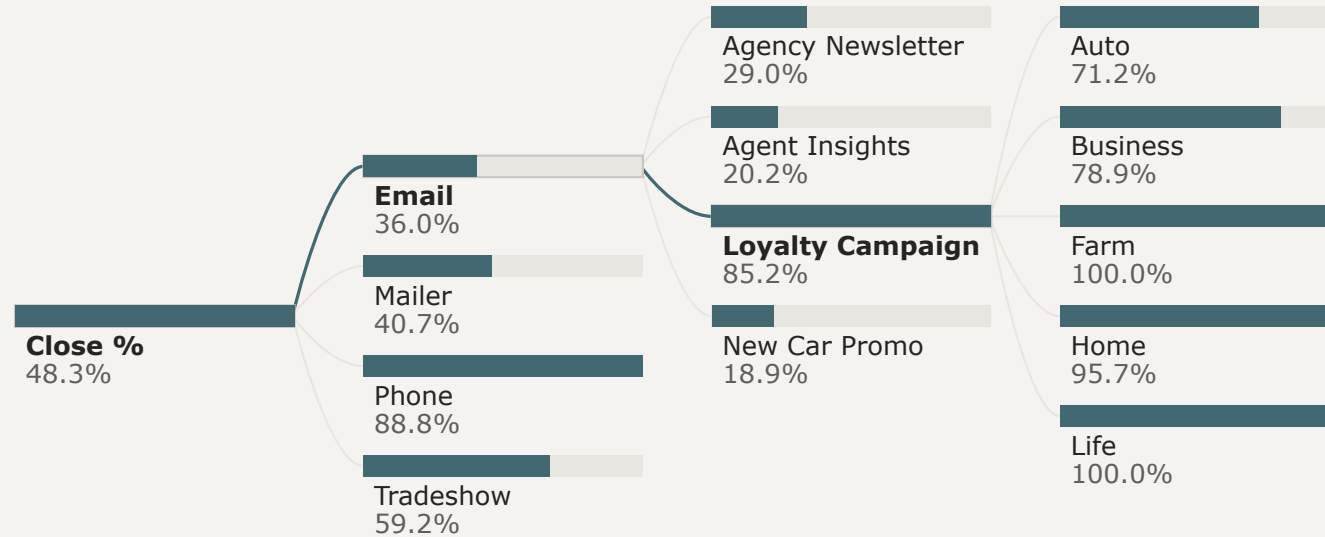- David So
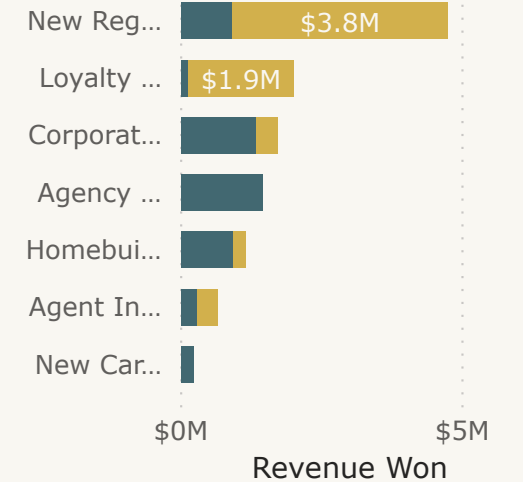- Eric Gruber
- Greg Winston
- Jeff Hay
- Julian Isla

Type	Campaign	Product
Email	Loyalty Campaign	

Close %
48.3%

Email 36.0%
Mailer 40.7%
Phone 88.8%
Tradeshow 59.2%

Agency Newsletter 29.0%
Agent Insights 20.2%
Loyalty Campaign 85.2%
New Car Promo 18.9%

Auto 71.2%
Business 78.9%
Farm 100.0%
Home 95.7%
Life 100.0%

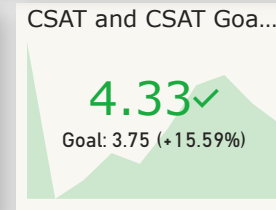## Revenue Won by Campaign and New or Renewal

New ... ● New ● Renewal

New Reg... — $3.8M
Loyalty ... — $1.9M
Corporat...
Agency ...
Homebui...
Agent In...
New Car...

$0M $5M
Revenue Won

Revenue Won by Product

Home $0.9M
Auto $1.1M
Farm $3.8M
Busine... $5.7M
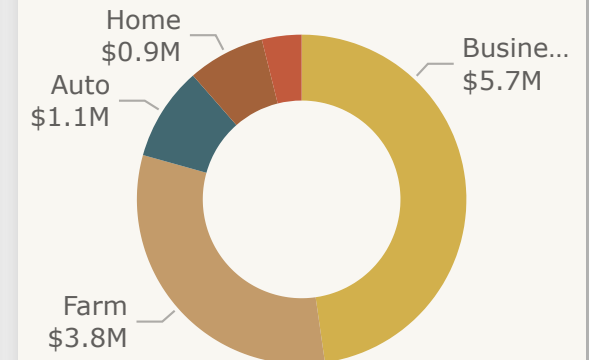
KPI Summary - Last 30 Days

Contoso Insurance

Product: All

Topic	Case Count	Resolution Minutes	Escalations	SLA Compliance
Auto | Payment In...	142	30.8	12%	92% ⭐
Auto | Claim Paym...	122	37.8	34%	78% ⭐
Auto | General	119	23.1	2%	99% ⭐
Home | Payment I...	96	37.2	15%	84% ⭐
Home | Claim Pay...	92	41.4	28%	66% ⭐
Life | Payment Inq...	82	41.8	18%	67% ⭐
Life | Claim Payme...	80	40.5	18%	69% ⭐
Auto | Coverage Q...	66	56.4	27%	55% ⭐
Life | General	64	21.4	3%	97% ⭐
Total	**1,667**	**37.6**	**20%**	**78%**

Topic	Case Count	Cases MoM%	CSAT	CSAT Impact
Auto | Payment In...	142	8.4% ⬇	3.89	-0.76%
Auto | Claim Paym...	122	27.1% ⬊	4.54	0.31%
Auto | General	119	28.0% ⬊	4.58	0.56%
Home | Payment I...	96	35.2% ⬊	3.88	-0.73%
Home | Claim Pay...	92	16.5% ⬇	4.50	0.15%
Life | Payment Inq...	82	-17.2% ⬇	3.78	-0.57%
Life | Claim Payme...	80	33.3% ⬊	4.54	0.30%
Auto | Coverage Q...	66	46.7% ⬊	4.03	-0.25%
Life | General	64	48.8% ⬊	4.70	0.29%
Total	**1,667**	**20.4%**	**4.33**	**0.00%**

Case Count by RELA...
1,667

Escalations and Esc...
20% ✓
Goal: 20% (+1.02%)

SLA Compliance an...
78% !
Goal: 90% (-13.55%)

Avg Resolution Time...
37.6 ✓
Goal: 60.00 (+37.25%)

CSAT and CSAT Goa...
4.33 ✓
Goal: 3.75 (+15.59%)

Case Count by Severity

13.92%
64.07%

Severity
- Normal
- High
- Low

Case Count by Origin and Severity

Severity ● High ● Low ● Normal

Origin	Normal	High
Phone	444	97
Chat	265	109
Email	246	118
SMS	113	

Case Count by DAY and New or Renewal

New or Renewal ● New ● Renewal

Oct 11   Oct 18   Oct 25   Nov 01

Contoso Insurance

New Cases - Last 30 Days

Subject	Case Count ▾	Escalations	SLA Compliance	Resolution Minutes	CSAT	CSAT Impact - Subject
Claim Payments	408	35%	70%	40.4 🚩	4.59	1.92%
Payment Inquiry	400	17%	83%	36.2 🚩	3.89	-3.26%
General	286	3%	98%	24.1 🚩	4.68	1.58%
Coverage Question	212	27%	52%	52.6 🚩	4.27	-0.27%
Account Set-up	150	9%	71%	42.8 🚩	4.53	0.42%
Address Change	122	21%	80%	39.7 🚩	4.13	-0.24%
Login Question	89	20%	97%	28.0 🚩	4.20	-0.25%
Total	**1,667**	**20%**	**78%**	**37.6**	**4.33**	**0.00%**
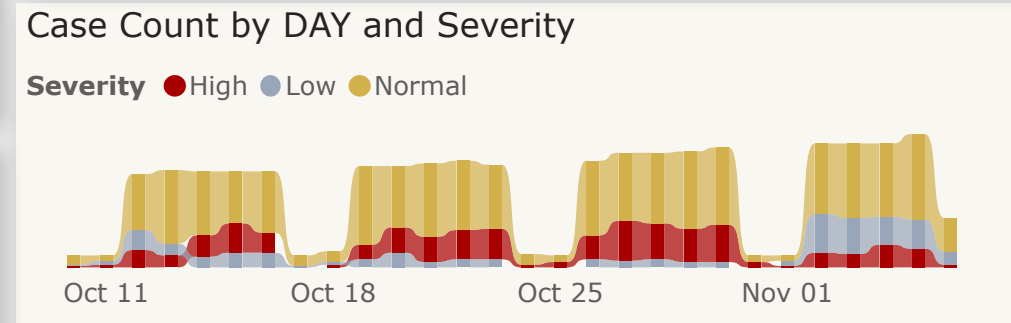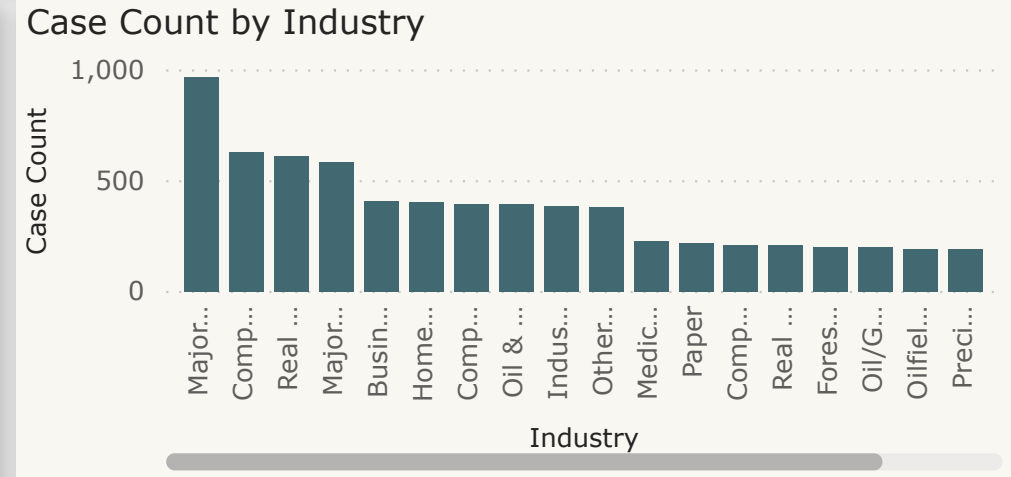
New or Renewal	Case Count ▾	Escalations	SLA Compliance	Resolution Minutes	CSAT	CSAT Impact - Products
⊟ **New**						
Auto	428		93%	29.3 🚩	4.21	-0.84%
Home	265		83%	37.3 🚩	4.13	-1.09%
Business	164		79%	37.7 🚩	4.18	-0.14%
Life	150		82%	31.1 🚩	4.04	-0.71%
Farm	74		89%	29.6 🚩	4.35	-0.24%
⊟ **Renewal**						
Life	192	23%	69%	41.0 🚩	4.70	1.18%
Total	**1,667**	**20%**	**78%**	**37.6**	**4.33**	**0.00%**

Case Count by Industry

Case Count: 1,000 / 500 / 0

Industry: Major.., Comp.., Real.., Major.., Busin.., Home.., Comp.., Oil &.., Indus.., Other.., Medic.., Paper, Comp.., Real.., Fores.., Oil/G.., Oilfiel.., Preci..

Case Count by DAY and Severity

Severity ● High ● Low ● Normal

Oct 11   Oct 18   Oct 25   Nov 01

Case Count by YEAR MONTH and Product

Product ● Auto ● Business ● Farm ● Home ● Life

May 2020   Jun 2020   Jul 2020   Aug 2020   Sep 2020   Oct 2020   Nov 2020

YEAR MONTH

Influence on SLA Compliance

Contoso Insurance

By Owner

Owner	SLA Compliance
Sanjay S...	82%
Molly Cla...	79%
David So	79%
Alicia Th...	79%
Jeff Hay	77%
Anne We...	77%
Spencer ...	77%

SLA Compliance

By Region

Region	SLA Compliance
Auto	83%
Life	75%
Home	75%
Farm	69%
Business	69%

SLA Compliance

Key influencers | Top segments

What influences Is SLA Violation to be [True ▾] ?

When... | ....the likelihood of Is SLA Violation being True increases by

- **Subject is Coverage Question** — 2.32x
- Severity is High — 2.16x
- Is Escalated is True — 2.13x
- City is Orange — 1.65x
- Industry is Medical Specialties — 1.65x
- Product is Business — 1.40x

Sort by: _Impact_ Count

Is SLA Violation is more likely to be True when Subject is Coverage Question than otherwise (on average).
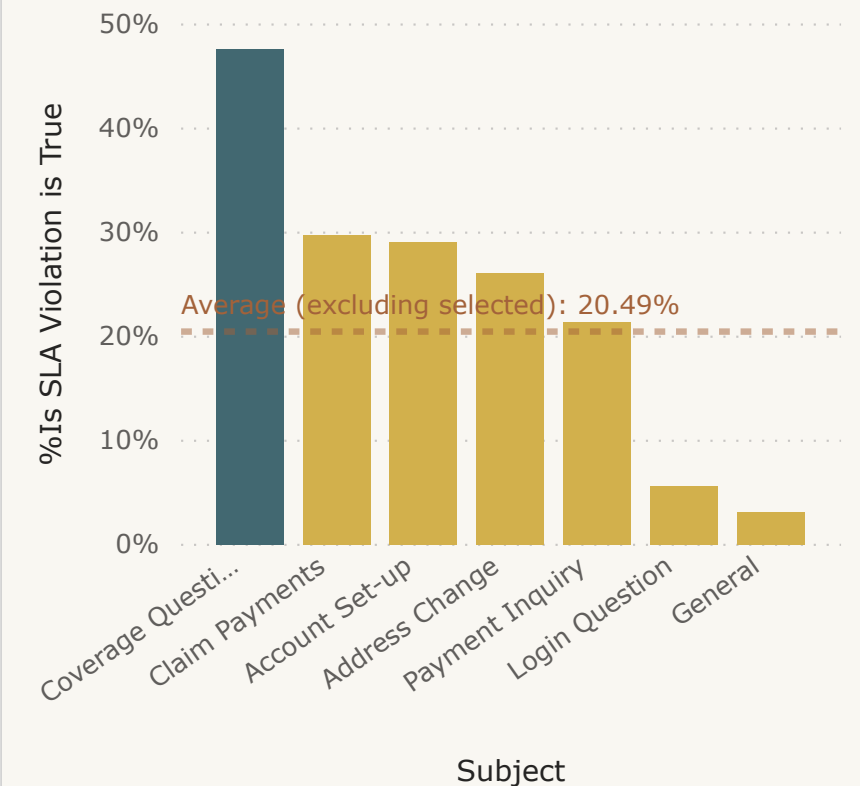
Average (excluding selected): 20.49%

%Is SLA Violation is True

Subject: Coverage Questi..., Claim Payments, Account Set-up, Address Change, Payment Inquiry, Login Question, General

☐ Only show values that are influencers