



Sales pipeline management

SaaS company operating in the energy domain

Enhanced visibility into the sales pipeline hygiene, growth and sales representatives' performance leveraging Tableau CRM to provide valuable business insights to the Revenue Operations team



SaaS company needs real-time visibility into its sales pipeline

Picture this...

You’re looking for an opportunity to provide real-time and historical trend information on the growth sales funnel, gap to plan, coverage, deal discounting and other key indicators (such as win rate, close rate, funnel creation etc.)

You turn to Accordion.

We partner with your team to enhance visibility into the sales pipeline hygiene, growth and sales representatives’ performance leveraging Tableau CRM to provide valuable business insights to the Revenue Operations team including:

- 1) Capturing hygiene of the open pipeline and corresponding drivers to initiate corrective actions, along with a leaderboard by individual sales representatives, to promote healthy competition, while maintaining data confidentiality via role-based security.
- 2) Providing real-time visibility into growth (sales) pipeline by tracking open pipeline, gap to plan, coverage etc. and other growth metrics such as win rate, average sales cycle, average deal size, and new business customer conversion rate, along with corresponding trends, by individual business segments.
- 3) Enhancing visibility into deal scoring of opportunities (based on discounts offered on the deals), by sales representatives, to identify/recognize top sales representatives contributing to ‘green’ deals.
- 4) Enhancing the Trading and Risk support dashboard to help monitor open cases, review case creation trends, better allocate resources to work open cases, and track customer NPS scores accurately.

Your value is enhanced

You have automated self-serve analytics and reporting capabilities with comprehensive visibility into the sales funnel to identify potential red flags. You also have also enhanced ability to proactively identify hygiene issues with high business impact and have proactive discussions with respective sales representatives to address concerns.

SALES PIPELINE MANAGEMENT

KEY RESULT

- Improved the lead conversion rates by ~20%
- Reduced the non-hygienic leads by 15 pps

VALUE LEVERS PULLED

- Real-time dashboards in Salesforce
- Sales pipeline management
- Growth dashboard - Funnel trends

Situation

- There was an opportunity to provide real-time and historical trend information on the growth sales funnel, gap to plan, coverage, deal discounting and other key indicators (such as win rate, close rate, funnel creation etc.)
- Partnered with the client to develop multiple dynamic Tableau CRM dashboards in Salesforce environment to help manage the sales funnel and improve forecast accuracy. These dashboards provide visibility into the growth pipeline with an overview of key business metrics.

Accordion Value Add

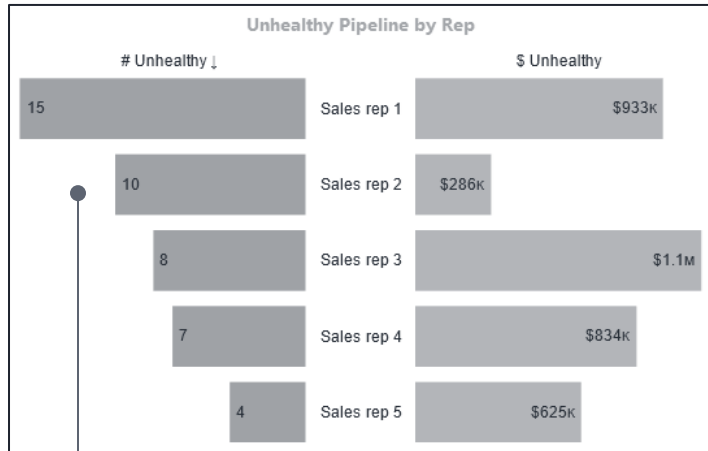
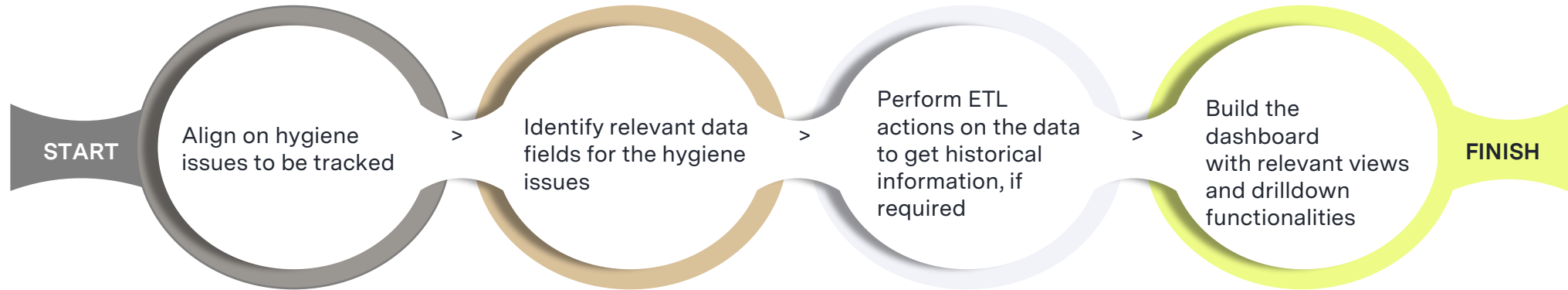
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- Enhanced visibility into deal scoring of opportunities (based on discounts offered on the deals), by sales representatives, to identify/recognize top sales representatives contributing to 'green' deals
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Impact

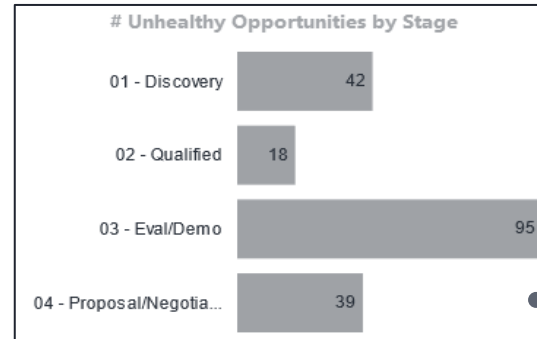
- Automated self-serve analytics and reporting capabilities enabled comprehensive visibility into the sales funnel and identification of potential red flags
- Enhanced ability for company to proactively identify hygiene issues with high business impact, and also have proactive discussions with respective sales representatives to address concerns

Sales pipeline management

Provides visibility into hygiene of sales pipeline and the corresponding drivers through a Tableau CRM dashboard for initiating timely corrective actions



Unhealthy opportunities' leader board to promote competition among sales representatives



Drivers of unhealthy opportunities by stage and impact



Key metric for pipeline hygiene, calculated as ratio of ARR of unhealthy opportunities to ARR of total opportunities

Hygiene issues tracked:

Primary issues

- Past due date
- Inactive for more than 30 days
- Incorrect forecast category
- Age greater than 365 days (Early stage)

Secondary issues

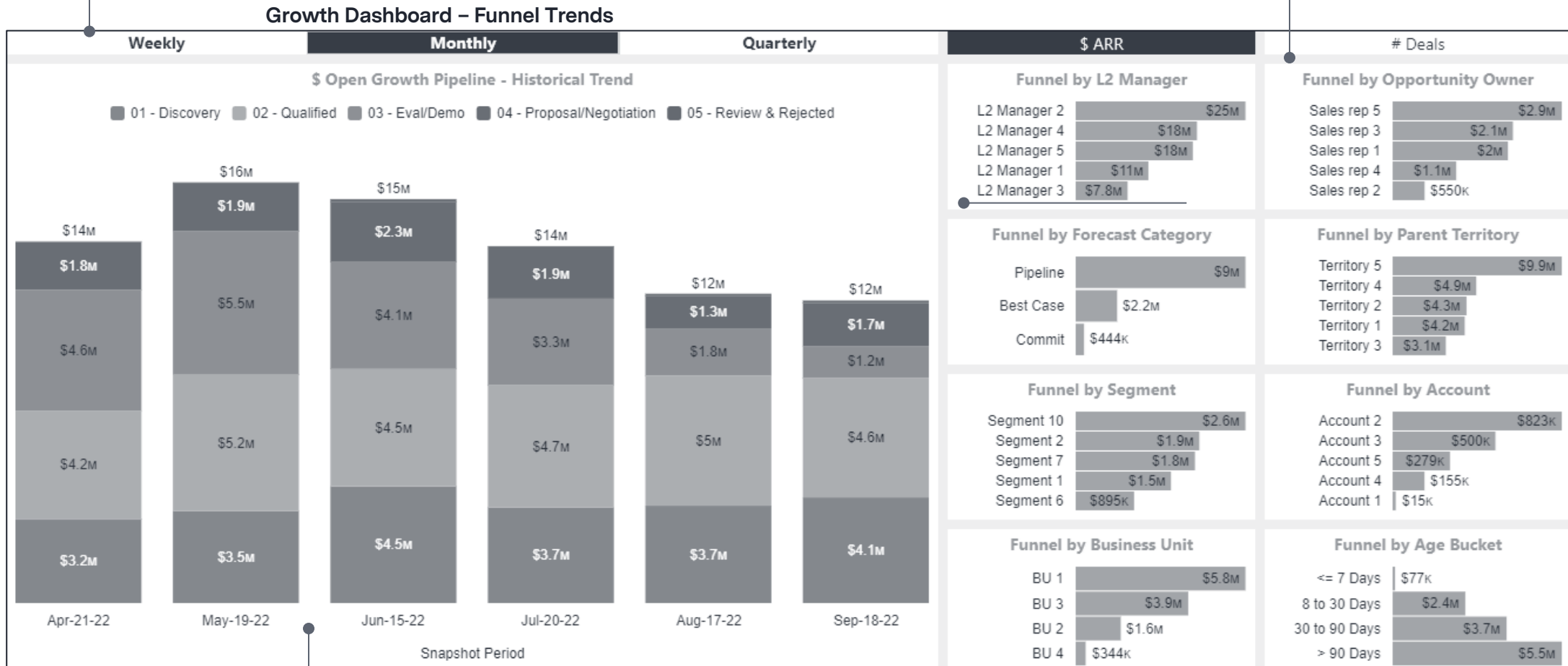
- Next step missing
- Net ARR missing
- Zero net change on renewal
- Close date pushed over 2 quarters
- Stage 4 > 30 days
- Next steps not updated (30 days)

Growth dashboard – Funnel trends

Showcases historical trends of open growth pipeline by various dimensions – L2 Manager, Opportunity Owner, Segment, Business Unit etc.

Flexibility to toggle between weekly, monthly and quarterly views

Flexibility to toggle between \$ value and count of deals



Visualization of open pipeline at various points of time in history

Distribution of open opportunities with respect to various dimensions