

# RevOps Data Analyst – Case Study

PTV LOGISTICS

Bowtie Metrics & GTM Performance

PTV Logistics GmbH

## Case Study Overview

### Objective:

- Understand GTM models
- Departments and KPIs
- Toolstack
- Technical skills

# The Bowtie Model



- ▶ End to End GTM Journey
- ▶ Teams work collaborative, no siloed
- ▶ Metrics can be measured seamlessly

# Bowtie Metrics to Measure

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## Volume metrics:

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- Leads, MQLs, SQLs, Opportunities, Closed Won
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## Efficiency metrics:

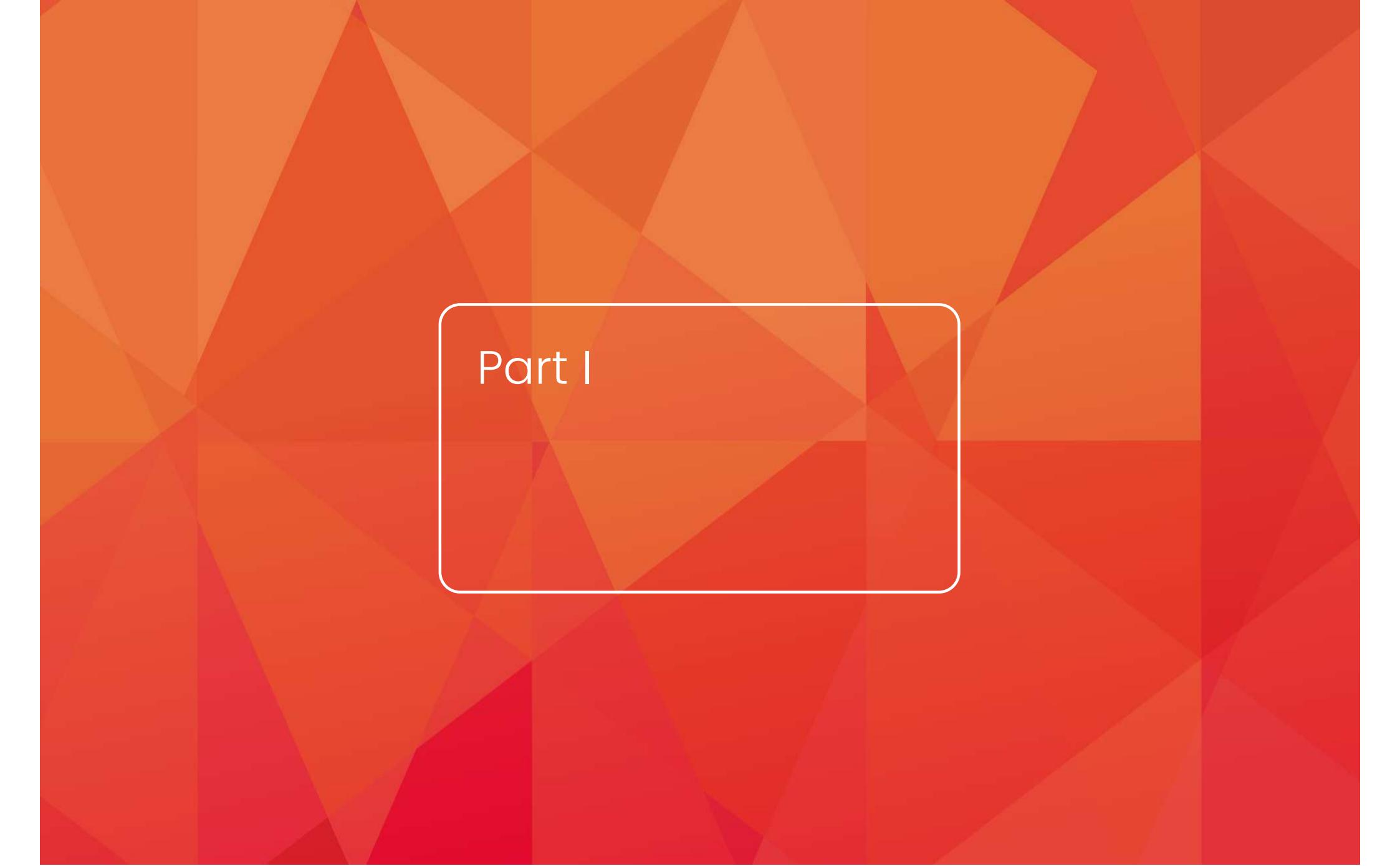
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- Conversion rates
  - Win rate
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## Velocity metrics:

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- Sales cycle length
- Time-in-stage



# Part I

# Which GTM Models do you think PTV Logistics has?

- ▶ Name the models, why do you think that PTV Logistics operates on those and describe what are the main characteristics of those models.

Now that you have defined the Models, which departments will you map across the bowtie for the different models?

- ▶ Copy the bowtie visuals and map which departments will work across the bowtie
- ▶ Please, also explain within each departments which roles are involved in each step

# Which KPIs would you define to measure the performance by department?

- ▶ Please list all the departments and which KPIs are important to measure its performance
- ▶ Explain why those KPIs are important and how they will help to identify potential gaps and improvements. Please provide some examples.
- ▶ Can you also explain how you would calculate those KPIs?

# Tool stack in SaaS

- ▶ At PTV we have different tools across the Bowtie: HubSpot, Dynamics 360, internal databases for product related insights, Chargebee or Zendesk.
- ▶ Can you map those tools in the bowtie (you do not need exactly to know where they belong in our organization but for which use cases they can be used). After mapping them, can you make a proposal for:
  - ▶ Think of datapoints around lead generation and handoff from Marketing to Sales. Hubspot is the lead generation tool and Dynamics where sales get the lead as Marketing Qualified Leads.
  - ▶ Make a datapoint mapping proposal between hubSpot and Dynamics: what is important to take into account to map datapoints, how information should be synced? In which direction should the sync happen and why? Prepare an excel to present.

# Executive Bowtie View

- If you could present only 5 KPIs to leadership:
  - - Which would you choose?
  - - Why?
- Focus on clarity and decision impact.



## Part II

# Requirements

- ▶ For the following task you will need:
  - A recent version of Python
  - The NumPy and pandas libraries
  - The file "opportunities.xlsx"
  - The file "test.py"
- ▶ You only need to submit the "test.py" once you are done. Please make sure that your code runs before you do so, and that it is well commented.

# Dataset

- ▶ Take a look at the "opportunities.xlsx" file. This spreadsheet contains (fictional) sales opportunity data for the year 2025. An opportunity is the chance to sell a deal to a customer consisting of one or several products. Each entry contains the following information:
  - ID - an identifier for each opportunity
  - ProductName - the product that has been/will be sold
  - CustomerName - the customer with which the deal has been/will be made
  - ACV - the annualized contract value of the deal
  - Status - whether the deal has been won/lost or is still open
  - CloseDate - the actual/estimated date on which the deal will be won
  - StartDate - the date on which the customer will start to generate income (ACV)
- ▶ Note that a single opportunity can have multiple products in it, and as such, the dataset can contain duplicate opportunity IDs.

# Instructions

*Note: You don't have to follow the exact structure provided in "test.py" if you can think of a different way to complete the task*

1. Complete Section 1 of "test.py" so that the entries from each column of "opportunities.xlsx" are stored in an array
2. Some opportunities show an estimated CloseDate in 2025 but their status is still open. These opportunities need to be identified so that they can be updated. Complete Section 2 to find these opportunities and print their IDs
3. Complete Section 3 to calculate the total ACV of all the closed (Won) deals that **start** in 2026
4. Assuming the average success rate of the sales department in winning an open deal is 25%, complete Section 4 to estimate the **total** ACV which will be earned in March 2026. **Hint:** you will need to use the StartDate
5. The sales department needs to be assessed to see how their ability to generate ACV has changed throughout 2025. Complete Section 5 to calculate a metric of your choice. Include a brief comment in this function (no more than 100 words) to explain your reasoning