

### What Actions Should Be Taken?

## Recommended Actions

• Review forecasting approach Based on the Largest Laggards:

- Review the Upsell & Renewal sales motions for Strategic Accounts Marketing Channel
- Review the New Logo sales motion from Social Channels

#### Largest Laggards ▲ PYV\$ PYV% & Leaders and Lag Upsell West Strategic Accounts Marketing (\$7,755,166) (90%) Laggard West Renewal Strategic Accounts Marketing (91%) Laggard (89%) Laggard West New Logo Social West (61%) In the Middle New Logo Outbound West (63%) In the Middle Upsell Website

# **Benefits**

- Reduced forecast Variances
- \$Increased sales of 3.5M+

#### Costs

- \$20K deep dive analysis
- Implementation Costs TBD

#### Timeline



# Why Do We Care?

Given the underperformance of the West Region in Q4, we should review the largest underperforming areas compared to prior year around Upsell and Renewals in the Strategic Account Marketing channel and New Logo acquisition via Social Media. We should also review our forecasting approach for the region. This deeper dive will take a few months to diagnose and implement corrective actions so we should start as soon as