



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

Region	Type	Lead Source Standardized	PYV\$	PYV%	Leaders and Lag
West	Upsell	Strategic Accounts Marketing	(\$7,755,166)	(90%)	Laggard
West	Upsell	Unknown	(\$4,749,036)	(36%)	In the Middle
West	Renewal	Strategic Accounts Marketing	(\$3,743,061)	(91%)	Laggard
West	PoC	Unknown	(\$2,584,227)	(50%)	In the Middle
West	New Logo	Social	(\$1,817,251)	(89%)	Laggard
West	New Logo	Outbound	(\$1,232,813)	(61%)	In the Middle
West	Upsell	Website	(\$1,199,502)	(63%)	In the Middle
West	Renewal	Jigsaw	(\$1,189,391)	(100%)	No Sales
West	Upsell	Jigsaw	(\$1,076,626)	(78%)	Laggard
West	New Logo	Jigsaw	(\$1,016,611)	(63%)	In the Middle

Benefits

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

Costs

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

What has Changed?