

2020-Q4 Sales Miss

Owner (change)

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WEST REGION Q4 (DEFAULT)

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Region in West

Qtr in Q4

Segments

Choose Date

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# 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 Lagg
West	Upsell	Strategic Accounts Marketing	(\$7,755,166)	(90%)	Laggard
West	Renewal	Strategic Accounts Marketing	(\$3,743,061)	(91%)	Laggard
West	New Logo	Social	(\$1,817,251)	(89%)	Laggard
West	New Logo	Outbound	(\$1,232,813)	(61%)	In the Middle
West	Upsell	Website	(\$1,196,522)	(63%)	In the Middle

## Benefits

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

## Costs

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

## Timeline

