

# What is the 2020-Q4 West Region Sales Issue?



### 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	A PYVS	△ PYV%	0 Leaders and Lag
West	Upsell	Strategic Accounts Marketing	(\$7,755,166)	(90%)	Laggard
West	Upsell	Unknown	(\$4,749,036)	(35%)	In the Middle
West	Renewal	Strategic Accounts Marketing	(\$3,743,051)	(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	Jgstw	(\$1,016,611)	(63%)	In the Middle

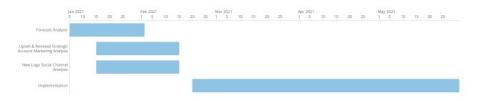
#### Benefits

- · 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 possible. The stakes are high going into following quarters and the opportunity to increase sales is in the millions of dollars while the cost is the likely just the labor to do the analysis and implement the changes.