

Your Challenge:

Take the data in the following sheets to present give a summary of the current state of the fictional Cloud Tools Inc. company. In the following sheets you will find data around sales rep and manager productivity, client services productivity, and marketing campaign results.

Questions we would like answered include:

-What is going well and what need improvment in the sales org

-Are there any sales reps or managers that stand out, both good and bad, and what changes, if any, would you recommend

-How has the services team has been performing and are there any areas that need improvement.

-How have campaigns been performing and do you have any recomendations around where we should invest our marketing budget in 2015.

Tips:

Be creative. There are no wrong answers in this project if you can back up your thoughts with well calculated reasons and data. Feel free to make different assumptions and state them to the group.

If you have any questions, feel free to reach out to Sidhanth Mally at sidhanth@saaslabs.co

Sales Results

Sales Rep Quotas

Analysis

Sales Rep	Manager	1/1/2014	2/1/2014	3/1/2014	4/1/2014	5/1/2014	6/1/2014	7/1/2014	8/1/2014	9/1/2014	1/1/2014	2/1/2014	3/1/2014	4/1/2014	5/1/2014	6/1/2014	7/1/2014	8/1/2014	9/1/2014	Total Sales/Rep	Average Sales/Rep	Avg Sales/Manager	Total Sales Rep Quotas	Actual Sales more/less than Quotas
Rep 1	Manager 1	\$124,000	\$11,000	\$110,000	\$103,000	\$66,000	\$4,600	\$49,500	\$62,000	\$54,500	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$584,600	\$64,956	\$407,662	\$450,000	Higher
Rep 2	Manager 1	\$4,500	\$39,000	\$3,600	\$55,000	\$5,700	(\$1,200)	\$44,000	\$129,000	\$8,010	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$287,610	\$31,957		\$450,000	Lower
Rep 3	Manager 1	\$5,500	\$19,299	\$4,600	\$1,110	\$1,000	\$111,100	\$96,000	\$76,000	\$12,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$326,609	\$36,290		\$450,000	Lower
Rep 4	Manager 1	\$88,000	\$24,000	\$74,000	\$1,655	\$30,000	\$55,000	\$11,000	\$24,000	\$6,500	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$314,155	\$34,906		\$450,000	Lower
Rep 5	Manager 1	\$12,500	\$50,500	\$56,000	\$27,500	\$37,500	\$62,000	\$62,000	\$22,500	\$62,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$392,500	\$43,611		\$450,000	Lower
Rep 6	Manager 1	\$75,000	\$49,500	\$54,500	\$61,000	\$27,500	\$56,000	\$56,000	\$105,000	\$56,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$540,500	\$60,056	\$527,500	\$450,000	Higher
Rep 7	Manager 2	\$37,500	\$44,000	\$125,000	\$49,500	\$62,000	\$54,500	\$54,500	\$12,500	\$54,500	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$494,000	\$54,889		\$900,000	Lower
Rep 8	Manager 2	\$27,500	\$366,500	\$8,000	\$44,000	\$56,000	\$22,000	\$125,000	\$75,000	\$125,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$849,000	\$94,333		\$450,000	Higher
Rep 9	Manager 2	\$62,000	\$12,500	\$8,500	\$12,500	\$54,500	\$12,500	\$1,000	\$37,500	\$38,500	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$239,500	\$26,611		\$450,000	Lower
Rep 10	Manager 3	\$56,000	\$75,000	\$100,000	\$75,000	\$125,000	\$75,000	\$8,500	\$27,500	\$8,500	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$550,500	\$61,167	\$555,938	\$450,000	Higher
Rep 11	Manager 3	\$54,500	\$37,500	\$161,500	\$37,500	\$10,000	\$37,500	\$100,000	\$62,000	\$100,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$600,500	\$66,722		\$450,000	Higher
Rep 12	Manager 3	\$125,000	\$27,500	\$33,000	\$27,500	\$8,500	\$27,500	\$300,000	\$56,000	\$71,500	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$676,500	\$75,167		\$450,000	Higher
Rep 13	Manager 3	\$1,000	\$62,000	\$19,500	\$62,000	\$100,000	\$62,000	\$33,000	\$54,500	\$33,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$427,000	\$47,444		\$450,000	Lower
Rep 14	Manager 3	\$8,500	\$56,000	\$77,500	\$56,000	\$77,500	\$56,000	\$19,500	\$125,000	\$19,500	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$495,500	\$55,056		\$900,000	Lower
Rep 15	Manager 3	\$100,000	\$54,500	\$55,000	\$54,500	\$33,000	\$54,500	\$77,500	\$1,000	\$77,500	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$507,500	\$56,389	\$513,375	\$450,000	Higher
Rep 16	Manager 3	\$300,000	\$125,000	\$39,500	\$125,000	\$19,500	\$125,000	\$55,000	\$8,500	\$55,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$852,500	\$94,722		\$450,000	Higher
Rep 17	Manager 3	\$33,000	\$1,000	\$56,000	\$1,000	\$77,500	(\$10,000)	\$39,500	\$100,000	\$39,500	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$337,500	\$37,500		\$450,000	Lower
Rep 18	Manager 4	\$19,500	\$8,500	\$28,000	\$8,500	\$55,000	\$8,500	\$61,000	\$61,000	\$62,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$312,000	\$34,667		\$900,000	Lower
Rep 19	Manager 4	\$77,500	\$100,000	\$34,500	\$100,000	\$39,500	\$100,000	\$39,500	\$33,000	\$19,500	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$543,500	\$60,389		\$900,000	Lower
Rep 20	Manager 4	\$55,000	\$12,500	\$33,000	\$300,000	\$33,000	\$300,000	\$2,000	\$19,500	\$24,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$779,000	\$86,556	\$513,375	\$900,000	Lower
Rep 21	Manager 4	\$39,500	\$33,000	\$37,500	\$33,000	\$60,000	\$33,000	\$55,000	\$77,500	\$50,500	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$419,000	\$46,556		\$450,000	Lower
Total Sales/Month		\$1,306,000	\$1,208,799	\$1,119,200	\$1,235,265	\$978,700	\$1,245,500	\$1,289,500	\$1,169,000	\$977,510											\$10,529,474		\$11,700,000	
Avg Sales/Month		\$62,190	\$57,562	\$53,295	\$58,822	\$46,605	\$59,310	\$61,405	\$55,667	\$46,548														

	1/1/2014	2/1/2014	3/1/2014	4/1/2014	5/1/2014	6/1/2014	7/1/2014	8/1/2014	9/1/2014	Analysis	Calculations
Customer Accounts (BOM)	2580	2666	2743	2869	2953	3066	3190	3319	3395	Avg Growth Rate /Month Avg Churn Rate/ Month	116 11
Growth (Accounts)	102	97	131	99	121	127	141	90	138		
Churn (Accounts)	16	20	5	15	8	3	12	14	9		
Customer Accounts (EOM)	2666	2743	2869	2953	3066	3190	3319	3395	3524		
Book of Business (BOM)	\$25,541,689	\$26,835,689	\$28,013,287	\$29,124,397	\$30,344,122	\$31,313,723	\$32,558,199	\$33,835,798	\$34,963,798	Avg Book of Business (BOM) Growth/Month Avg Churn/Month	\$1,169,942 \$15,907
Growth (\$MRR)	\$1,306,000	\$1,208,799	\$1,119,200	\$1,235,265	\$978,700	\$1,245,500	\$1,289,500	\$1,169,000	\$977,510		
Churn (\$MRR)	\$12,000	\$31,201	\$8,090	\$15,540	\$9,099	\$1,024	\$11,901	\$41,000	\$13,304		
Book of Business EOM	\$26,835,689	\$28,013,287	\$29,124,397	\$30,344,122	\$31,313,723	\$32,558,199	\$33,835,798	\$34,963,798	\$35,928,004		

Marketing Campaign Funnel

Name	Date	MQL	SAL	SQL	Trials	Closed	MRR	Cost	ROI	Conversion rate
Salesforce Summit	2/15/2014	1235	845	545	134	89	\$651,494	\$500,000	30.30%	7.21%
CS Users Whitepaper	3/13/2014	323	245	221	38	12	\$68,988	\$10,000	589.88%	3.72%
Chicago Sales Conference	6/10/2014	600	410	290	26	12	\$25,000	\$100,000	-75.00%	2.00%
Hong Kong Sales Conference	7/10/2014	900	621	557	208	55	\$100,000	\$50,000	100.00%	6.11%
Cloud Best Practices Seminar	8/18/2014	444	345	309	102	88	\$310,000	\$25,000	1140.00%	19.82%

Funnel Definitions

MQL - Marketing Qulified Lead that was vetted by the Marketing Development Reps

SAL - Sales Accepted Lead that became owned by a Sales Development Rep

SQL - Lead passed to an Account Executive after setting up a first meeting

Trial - Official trial with 5+ users with a clear start and end date

Closed - Closed deal

MRR - Monthly Recurring Revenue from the deals that were closed

Cost - Campaign Cost

***Note: You can assume that all the deals that will close from each of these campaigns has closed (ex: Cloud Best Practices started 8/18/14 but we assume those are the final results)**