What Is Opportunity History

❑ **Metadata**

- 307,987 Records from 2010 to Now
- 60,845 Unique Opportunities
- More than $ 7.3 billion worth of opportunities in total
- Opportunities of $ 4.6 billion won all over the world
- 1070 sellers and account managers covered

❑ **Crucial Variables**

Opportunity Name	Opportunity ID	Region
Fiscal Year	Fiscal Period	Opportunity Currency
Stage Change	Stage Duration	Won
Created Date	Forecast	Last Stage Change Date
From Stage	To Stage	Opportunity Close Date
Won/Lost Reason	Gross Amount Currency	Gross Amount
Gross Amount Converted	Probability (%)	Expected Revenue
Close Date	Last Modified	Forecast Category
Legal Status	Account Name	Owner
Owner Role	Last Modified By	Data Quality Score
Data Quality Description		

# Why Should We Learn From It

- To see the strategy trend of AOL and forecast opportunities

- To get information on Won / <u>Lost</u> Opportunities
  - Which stage did we lose / win
  - Reason of win / lost cases
  - Other demographic difference between won / lost cases

- Data on behavior of sellers and clients

- Completely one-click replicable for future data using R code

A Quick Peek On Raw Data

I. Overview of Opportunity History

Number of Opportunities from Q1 2010 to Q2 2014

	2010	2011	2012	2013	2014 N	2014 E
Conversion Rate	94%	94%	95%	59%	52%	52%
■ Won	6460	7695	9765	12642	7432	14,609
■ Lost	405	453	548	8608	6836	13,438

Insight

1. **With the implement process of SFDC, sellers started recording lost opportunities since 2013, meaning calculating conversion rate would only be meaningful after 2013.**

2. **Number of won cases has been growing steadily at about 25% every year.**

3. **Although won opportunities increased from 2013 to 2014E, conversion rate has decreased.(61% for first 7 months of 2013 compared to 52% for 2014)**

I. Overview of Opportunity History

Number of Opportunities from Q1 2010 to Q2 2014

	2010	2011	2012	2013	2014 N	2014 E
■ Won	922,515,239.11	957,899,355.67	999,734,170.62	1,107,233,776.1	616,236,699.99	1,056,405,771.4
□ Lost	593,249,964.61	10,820,415.32	214,362,334.96	906,854,146.73	940,543,217.14	1,612,359,800.8
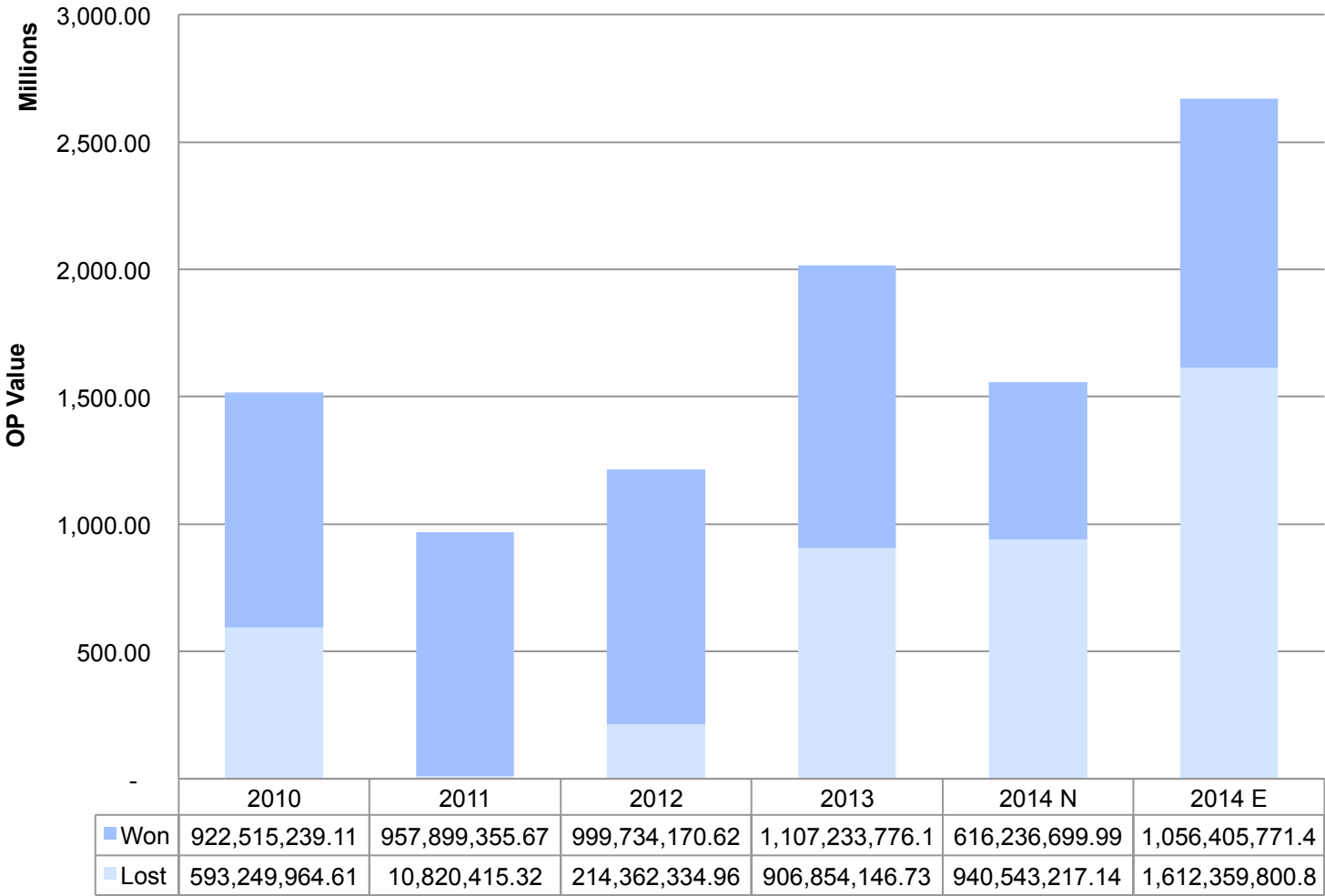
Insight

1. **Total won value of 2014 is estimated to be slightly more than 1000 Millions, close to that of 2013.**

2. **The total value of opportunities has grown 25% from 2013 to estimated 2014 full year.**

I. Overview of Opportunity History

Value of Opportunities in Different Currencies
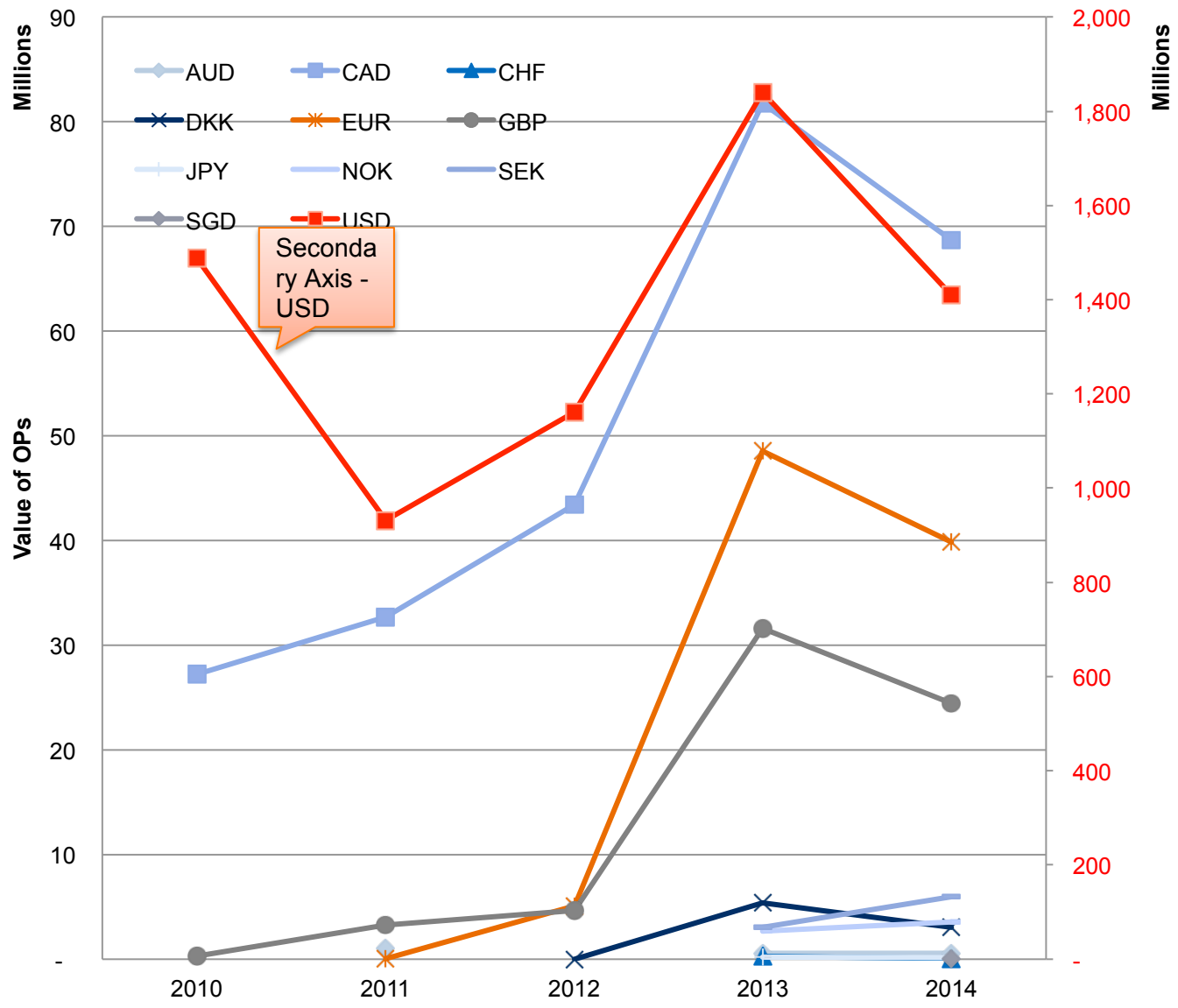
Insight

1. **International businesses are growing rapidly.**

2. **Canada, Euro area, UK and German market are the biggest new clients.**

I. Overview of Opportunity History

Opportunities Distribution of 2014 by Currency

Legend:
- AUD
- CAD
- CHF
- DKK
- EUR
- GBP
- JPY
- NOK
- SEK
- SGD
- USD

Pie chart labels:
- AUD 0.04%
- CHF 0.00%
- DKK 0.20%
- EUR 2.56%
- GBP 1.57%
- JPY 0.01%
- NOK 0.23%
- SEK 0.38%
- SGD 0.01%
- CAD 4.41%
- USD 90.59%
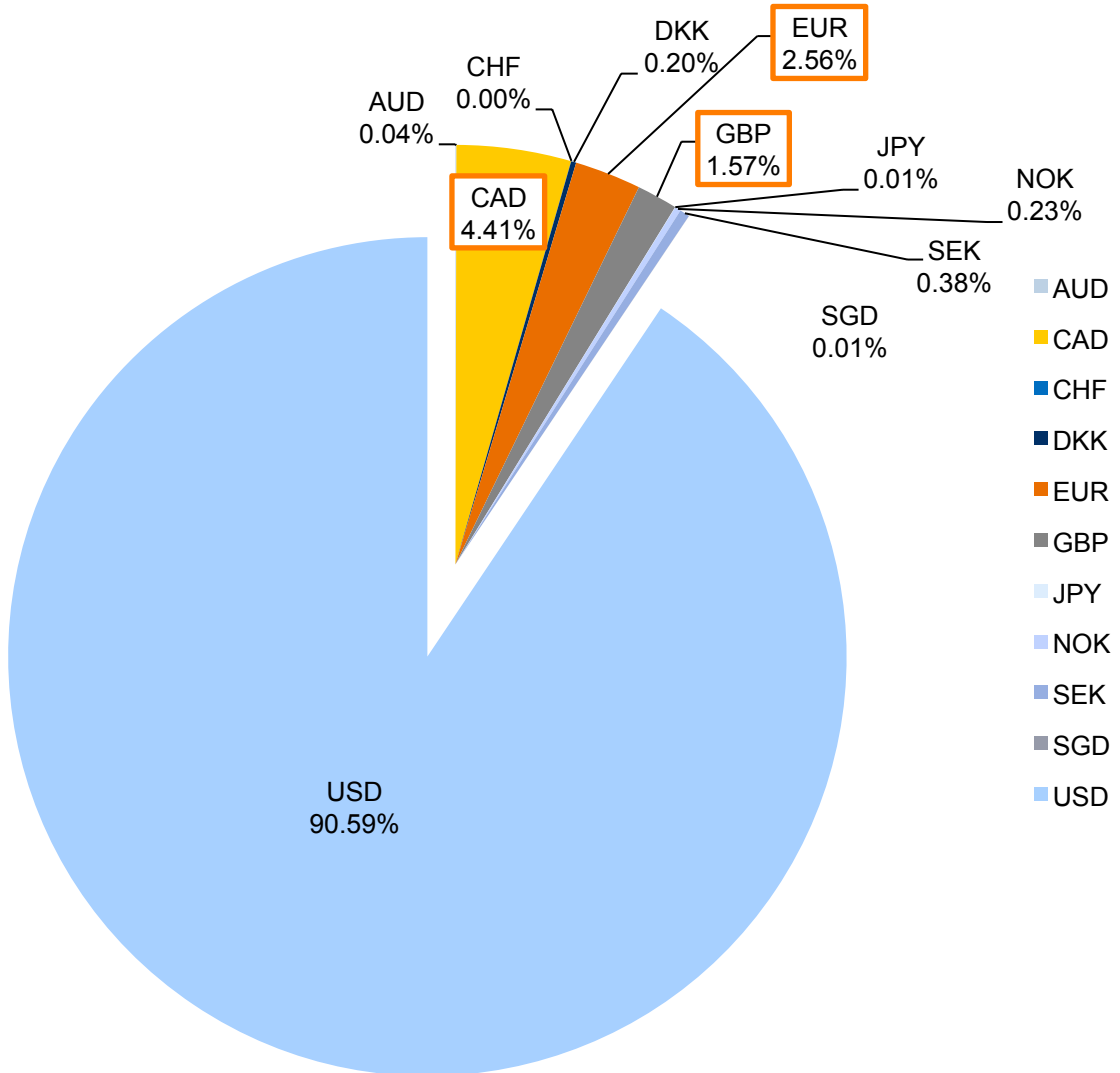
Insight

1. By 2014 1H, international opportunities accounts for about 10% of the whole cake.

2. International businesses are growing rapidly, from 4.2% in total in 2012 to 9.4% in 2014 1H.

3. From 2013 to now, international opportunities are having a slightly higher conversion rate of 56% than USD's 51.3%.

4. The average gross amount of international opportunities converted to USD is 35,173, much lower compared to 123,095 for US cases.

I. Overview of Opportunity History

Trending of Opportunities Number Percentage by Region

	2010	2011	2012	2013	2014
Advance	36.7%	26.9%	24.7%	25.1%	24.0%
National - East	0.5%	1.1%	15.1%	20.6%	23.1%
National - West	0.4%	0.3%	7.0%	12.0%	12.7%
Strategic - East	0.0%	0.3%	7.9%	13.6%	12.6%
National - Central	0.9%	0.2%	5.0%	9.0%	10.0%
Strategic - West	0.5%	0.4%	6.4%	8.7%	8.7%
Strategic - Central	0.3%	0.7%	7.4%	8.9%	8.4%
East	27.8%	30.4%	10.7%	0.4%	0.4%
Central	13.1%	17.5%	7.1%	0.6%	0.1%
West	19.8%	22.1%	8.5%	1.0%	0.0%
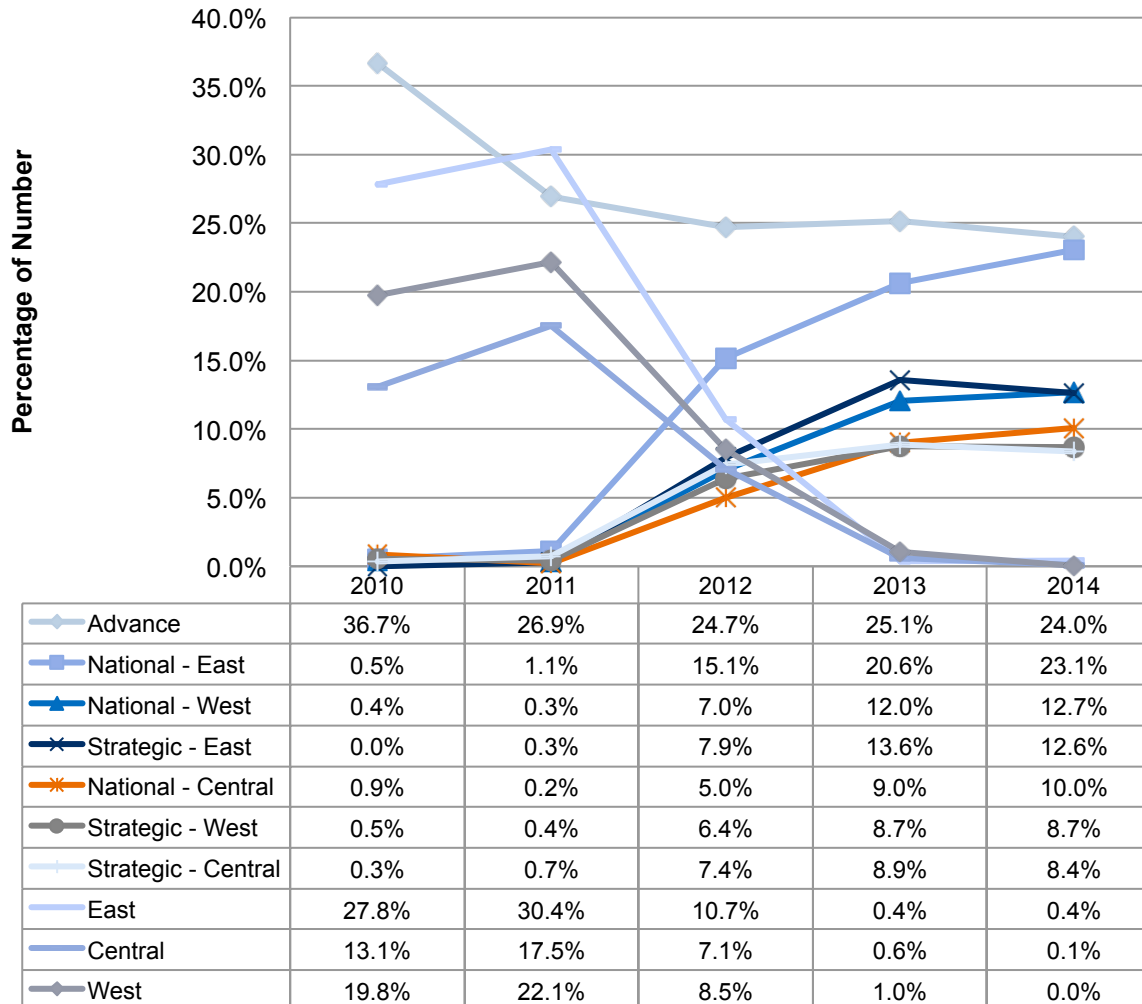
Insight

1. **Categorizing of regions has changed completely. Before 2012: East, Central, West. After 2012: Strategic, National, Advance.**

2. **Advance and National – East currently have the largest share of opportunities, which added up to near 50% of the cases.**

I. Overview of Opportunity History

Trending of Opportunities Value Percentage by Region

	2010	2011	2012	2013	2014
Strategic - East	0.0%	4.9%	14.0%	19.2%	18.4%
Strategic - Central	0.0%	1.3%	10.3%	18.1%	15.1%
National - East	0.4%	3.1%	13.3%	13.2%	13.3%
Strategic - West	0.3%	2.3%	9.7%	12.5%	11.1%
National - West	0.1%	0.7%	6.3%	9.8%	8.3%
National - Central	0.9%	0.7%	3.2%	6.8%	8.2%
Advance	36.3%	17.2%	22.4%	7.9%	5.8%
Central	6.3%	16.0%	4.4%	0.4%	0.1%
East	6.9%	30.2%	5.8%	0.3%	0.1%
West	6.1%	19.3%	4.3%	0.3%	0.0%
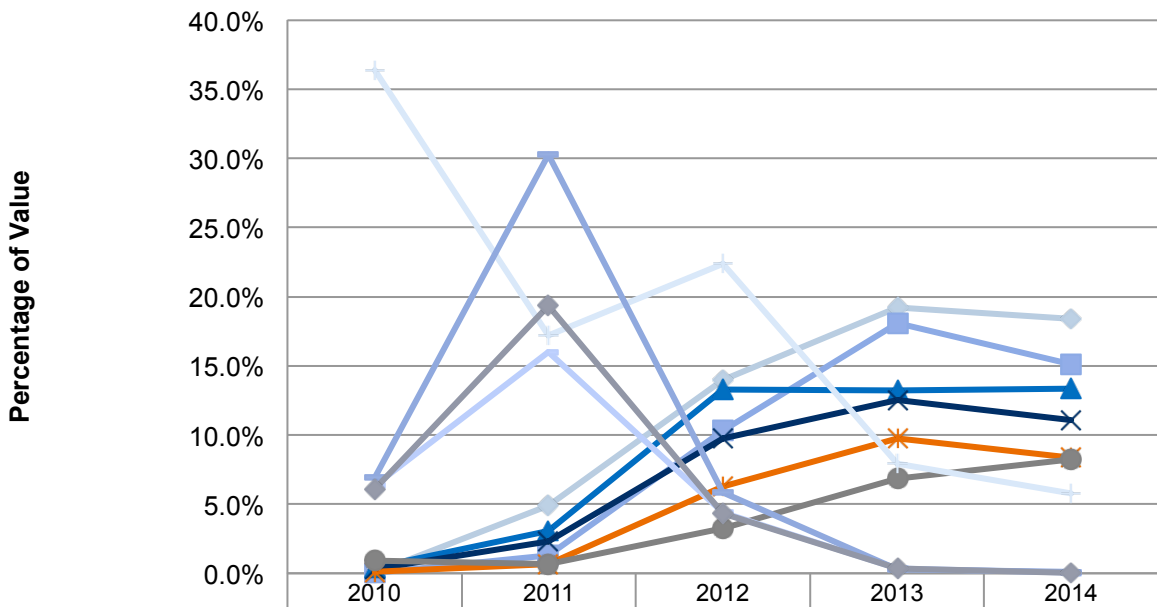
Insight

1. **The top three region of 2014 is Strategic East, Strategic Central, and National East.**

2. **Advance holds 24% of the cases by number, but only consists of 5.8% by value.**

II. Reasons For Won / Lost Cases

Top Ten Reasons For Won Cases

Reason	Percentage	Number
Inventory: Ad Products	28.9%	7227
Inventory: Targeting	12.5%	3123
Past Performance: ROI	12.4%	3115
Past Performance: Delivery	10.6%	2663
Budget	7.7%	1923
Creativity: Sales Solution	5.3%	1322
Pricing	5.2%	1306
Past Performance	4.2%	1048
Ad Products	3.9%	983
Relationship	2.2%	554

II. Reasons For Won / Lost Cases

Top Ten Reasons For Lost Cases

Reason	Percentage	Number
Budget	29.6%	351
Administration	16.5%	196
Ad Products	10.8%	128
Inventory: Ad Products	7.9%	94
Pricing	6.5%	77
Error	4.9%	58
Relationship	4.5%	53
Postponed	4.1%	49
Inventory	2.9%	34
Inventory: Targeting	2.6%	31

III. Stage Analysis

Stage Name and Its According Probability

Probability	10	25	50	75	90	100
Stage Name	Discovery	Plan Requested	Negotiations Proposal Plan Sent Pitched Yield Management	Verbal Yes Negotiation Accepted	IO Outstanding Written Yes Verbal Commit	Closed Won Completed Approved

Insight

1. **Besides the 10-50-90 system, probability of 25 and 75 are also used for European cases.**

III. Stage Analysis

Discovery moves to…

Stage Move	Number	%
Discovery to Closed Lost	8643	35.6%
Discovery to Closed Won	7473	30.8%
Discovery to Negotiations	3908	16.1%
Discovery to IO Outstanding	3797	15.7%
Discovery to Plan Sent	103	0.4%
Discovery to Written Yes	101	0.4%
Discovery to Verbal Yes	90	0.4%
Discovery to Plan Requested	60	0.2%
Discovery to Completed	60	0.2%
Discovery to Rejected	5	0.0%
Discovery to Pitched	2	0.0%
Discovery to Approved	1	0.0%
Discovery to Negotiation	1	0.0%
Discovery to Verbal Commit	1	0.0%
Discovery to Yield Management Approved	1	0.0%
Discovery to Proposal	0	0.0%

III. Stage Analysis

Negotiations moves to…

Stage Move	Number	%
Negotiations to Closed Won	2723	41.7%
Negotiations to IO Outstanding	1838	28.1%
Negotiations to Closed Lost	1682	25.7%
Negotiations to Discovery	252	3.9%
Negotiations to Yield Management Approved	24	0.4%
Negotiations to Rejected	4	0.1%
Negotiation to Negotiation	3	0.0%
Negotiation to IO Outstanding	1	0.0%
Pitched to Discovery	4	0.1%
Pitched to Pitched	4	0.1%

III. Stage Analysis

IO Outstanding moves to…

Stage Move	Number	%
IO Outstanding to Closed Won	7530	91.5%
IO Outstanding to Closed Lost	546	6.6%
IO Outstanding to Negotiations	92	1.1%
IO Outstanding to Discovery	63	0.8%
IO Outstanding to Proposal	0	0.0%

III. Stage Analysis

Closed Lost Comes From…

Stage Move	Number	Percentage
Closed Lost from Discovery	8961	66.9%
Closed Lost from Negotiations	1790	13.4%
Closed Lost from Plan Sent	722	5.4%
Closed Lost from Closed Won	654	4.9%
Closed Lost from IO Outstanding	626	4.7%
Closed Lost from Plan Requested	334	2.5%
Closed Lost from Verbal Yes	207	1.5%
Closed Lost from Written Yes	89	0.7%
Closed Lost from	8	0.1%
Closed Lost from Proposal	4	0.0%

III. Stage Analysis

Closed Won Comes From…

Stage Move	Number	Percentage
Closed Won from IO Outstanding	18753	41.3%
Closed Won from Discovery	13163	29.0%
Closed Won from Negotiations	7895	17.4%
Closed Won from	2871	6.3%
Closed Won from Written Yes	1076	2.4%
Closed Won from Verbal Yes	638	1.4%
Closed Won from Plan Sent	498	1.1%
Closed Won from Closed Lost	300	0.7%
Closed Won from Plan Requested	156	0.3%
Closed Won from Proposal	6	0.0%

IV. Process Time Analysis

From % to %	Process Time (Days)
10% to 50%	22.7
50% to 90%	89
90% to 100%	30.4

Note: The calculation of process time excludes all the same day move, where the process time between stages is zero.

Possible Other Uses

Seller Analysis for Management or HR
Client Analysis

The Imperfection of Data