

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
Fiscal Year
Stage Change
Created Date
From Stage
Won/Lost Reason
Gross Amount Converted
Close Date
Legal Status
Owner Role
Data Quality Description

Opportunity ID
Fiscal Period
Stage Duration
Forecast
To Stage
Gross Amount Currency
Probability (%)
Last Modified
Account Name
Last Modified By

Region
Opportunity Currency
Won
Last Stage Change Date
Opportunity Close Date
Gross Amount
Expected Revenue
Forecast Category
Owner
Data Quality Score



Why Should We Learn From It

- To see the strategy trend of AOL and forecast opportunities
- To get information on Won / Lost 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

RStudio

File Edit Code View Plots Session Build Debug Tools Help

Go to file/function

Project1.R* mydata*

60,844 observations of 17 variables

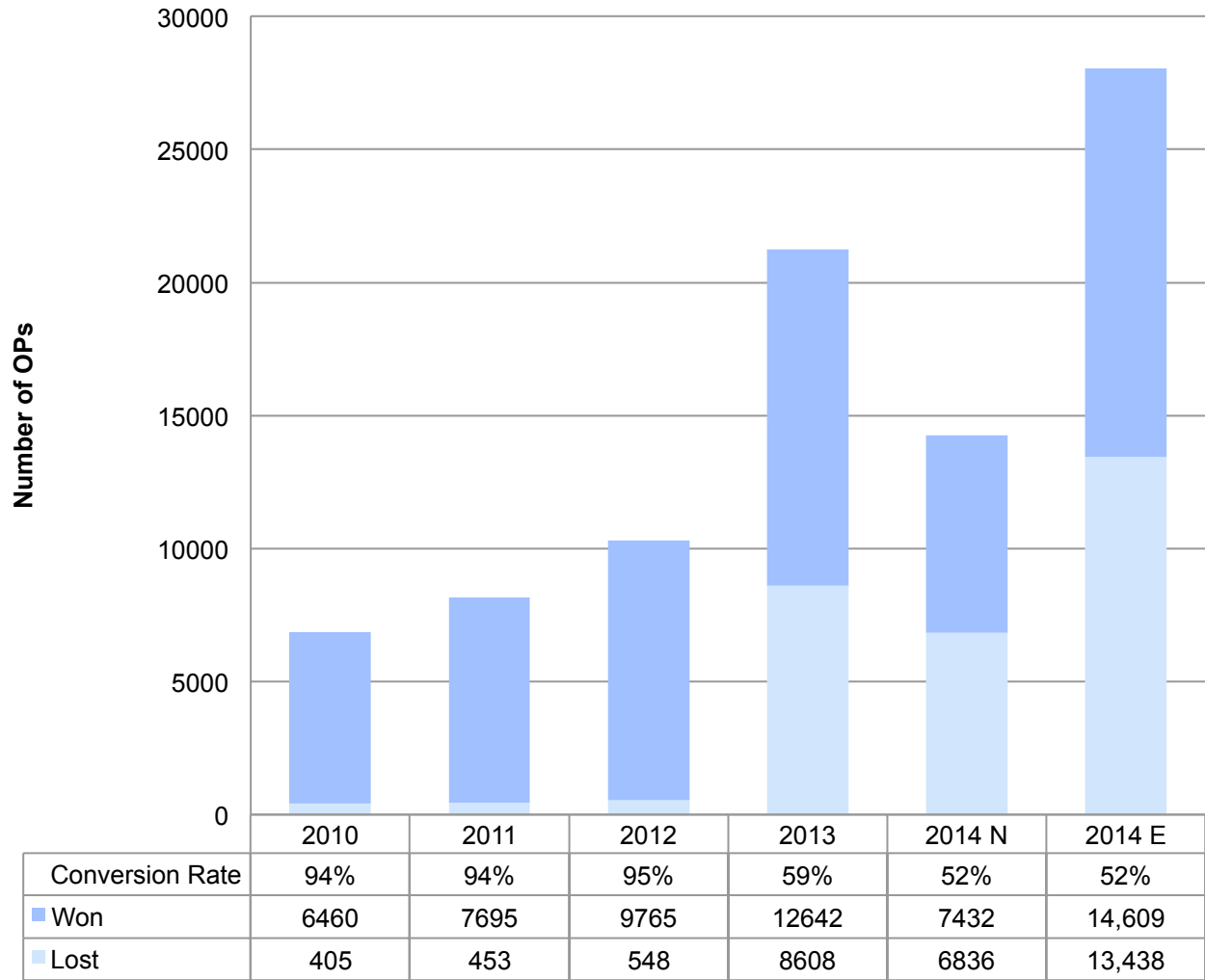
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43	AOL_CP 22Squared: SET Tacoma Q2 2010	0063000000X6CVF	Atlanta	USD	Q1-2010	2010	1	11/23/2009	1/4/2010	80000	80000	Approv
44	AOL CP 22 Squared: SET Tundra Q2 2010	0063000000X6CXE	Atlanta	USD	Q1-2010	2010	1	11/23/2009	1/4/2010	75000	75000	Approv
45	AOL_CP 22Squared: SET Corolla Q2 2010	0063000000X6883	Atlanta	USD	Q1-2010	2010	1	11/23/2009	1/4/2010	132500	132500	Approv
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48	AOL_CP 22Squared: SET Tacoma Q3 2010	0063000000X6CNG	Atlanta	USD	Q1-2010	2010	1	11/23/2009	1/4/2010	80000	80000	Not Ap
49	AOL_CP 22Squared: SET Camry Q4 2010	0063000000X68Pr	Atlanta	USD	Q1-2010	2010	1	11/23/2009	1/4/2010	100000	100000	Approv
50	AOL_CP 22Squared: SET Tacoma Q4 2010	0063000000X6CVG	Atlanta	USD	Q1-2010	2010	1	11/23/2009	1/4/2010	80000	80000	Approv
51	AOL CP 22 Squared: SET Tundra Q4 2010	0063000000X6CWg	Atlanta	USD	Q1-2010	2010	1	11/23/2009	1/4/2010	75000	75000	Approv
52	AOL_CP 22Squared: SET Corolla Q4 2010	0063000000X6B84	Atlanta	USD	Q1-2010	2010	1	11/23/2009	1/4/2010	132500	132500	Approv
53	AOL_CP Mars Video upfront 2010_Cesar_Digita Chicago	0063000000X6MZW	Chicago	USD	Q1-2010	2010	1	11/25/2009	1/4/2010	263112	263112	Not Ap
54	AOL_Media Storm_FOX American Idol_Jan2010	0063000000X6cav	New York	USD	Q1-2010	2010	1	11/30/2009	1/4/2010	64076	64076	Approv
55	RealNetworks [GameHouse] Search 2010-2011	0063000000X6frQ	West	USD	Q1-2010	2010	1	11/30/2009	1/4/2010	100000	100000	Approv
56	Nutrisystem, Inc. TML 2010	0063000000X6mWe	Dallas	USD	Q1-2010	2010	1	12/3/2009	1/4/2010	43000	43000	Approv
57	GM, Auto In-Market Buick/GMC 1:1 conquest BT Q12010	0063000000X7exh	Detroit	USD	Q1-2010	2010	1	12/9/2009	1/4/2010	145417	145417	Approv
58	Consumer Cellular Search Jan-Mar 2010	0063000000YCoe2	Los Angeles	USD	Q1-2010	2010	1	12/9/2009	1/4/2010	25000	25000	Approv
59	Travelocity 2010 Leadback Campaign	0063000000YDA0J	Atlanta	USD	Q1-2010	2010	1	12/10/2009	1/4/2010	1827931	1827931	Approv
60	Consumer Reports Auto Q1	0063000000YDEDF	Chicago	USD	Q1-2010	2010	1	12/11/2009	1/4/2010	18000	18000	Approv
61	Harrah's St. Louis Display 2009 NYE	0063000000YDHLf	Atlanta	USD	Q1-2010	2010	1	12/14/2009	1/4/2010	7130	7130	
62	MEC: Xerox Search Q1 '10	0063000000YDKVY	New York	USD	Q1-2010	2010	1	12/14/2009	1/4/2010	1222	1222	Approv
63	Gamefly.com_Search_1.1-3.31.10	0063000000YDPjL	Los Angeles	USD	Q1-2010	2010	1	12/15/2009	1/4/2010	7000	7000	Approv
64	Dish Network_2010AOLSearch	0063000000YDO2o	San Francisco	USD	Q1-2010	2010	1	12/15/2009	1/4/2010	375000	375000	Approv
65	GM Auto In-Market, Saturn Retention BT Q1Q42010	0063000000YDTgo	Detroit	USD	Q1-2010	2010	1	12/16/2009	1/4/2010	81906	81906	
66	Papa John's Search Q1 2010	0063000000YDXTC	Midatlantic	USD	Q1-2010	2010	1	12/16/2009	1/4/2010	508000	508000	Not Ap
67	Nationwide Search Brand 2010	0063000000YDToC	Detroit	USD	Q1-2010	2010	1	12/16/2009	1/4/2010	86000	86000	Approv
68	Helzberg Valentine's Day Q1 2010	0063000000YDZXA	Detroit	USD	Q1-2010	2010	1	12/17/2009	1/4/2010	40000	40000	
69	Adchemy_Auto CPA_2010	0063000000YDDcE	San Francisco	USD	Q1-2010	2010	1	12/17/2009	1/4/2010	300000	300000	Not Ap
70	Travelocity 2010 Canada Leadback Campaign	0063000000YDaPW	Dallas	USD	Q1-2010	2010	1	12/17/2009	1/4/2010	287218	287218	
71	BONUS.charity plan.Ny Network.Q1.2010	0063000000YDCvO	Detroit	USD	Q1-2010	2010	1	12/17/2009	1/4/2010	0	0	Approv
72	Lifestreet_CPA_2010	0063000000YDLR7	San Francisco	USD	Q1-2010	2010	1	12/18/2009	1/4/2010	116000	116000	
73	Clear AOL Search '09-'10	0063000000YDmK8	Chicago	USD	Q1-2010	2010	1	12/18/2009	1/4/2010	30000	30000	Not Ap
74	Air Canada Online Fares January 2010	0063000000YEQ95	Canada	CAD	Q1-2010	2010	1	12/21/2009	1/4/2010	165600	165600	
75	Universal McCann: Kohl's 2010 Spring Homepages	0063000000YEP1X	New York	USD	Q1-2010	2010	1	12/21/2009	1/4/2010	1963059	1963059	Approv
76	Harrah's Entertainment Geo Subnet 2010 CPM North Kansas City	0063000000YEYzI	Atlanta	USD	Q1-2010	2010	1	12/22/2009	1/4/2010	31726	31726	
77	DraftFCB: Merck - Zetia CPC 2010	0063000000YEAeJ	New York	USD	Q1-2010	2010	1	12/22/2009	1/4/2010	270000	270000	Approv
78	Harrah's Entertainment Geo Subnet 2010 CPM Louisiana Downs	0063000000YEYX1	Atlanta	USD	Q1-2010	2010	1	12/22/2009	1/4/2010	13468	13468	

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I. Overview of Opportunity History

Number of Opportunities
from Q1 2010 to Q2 2014

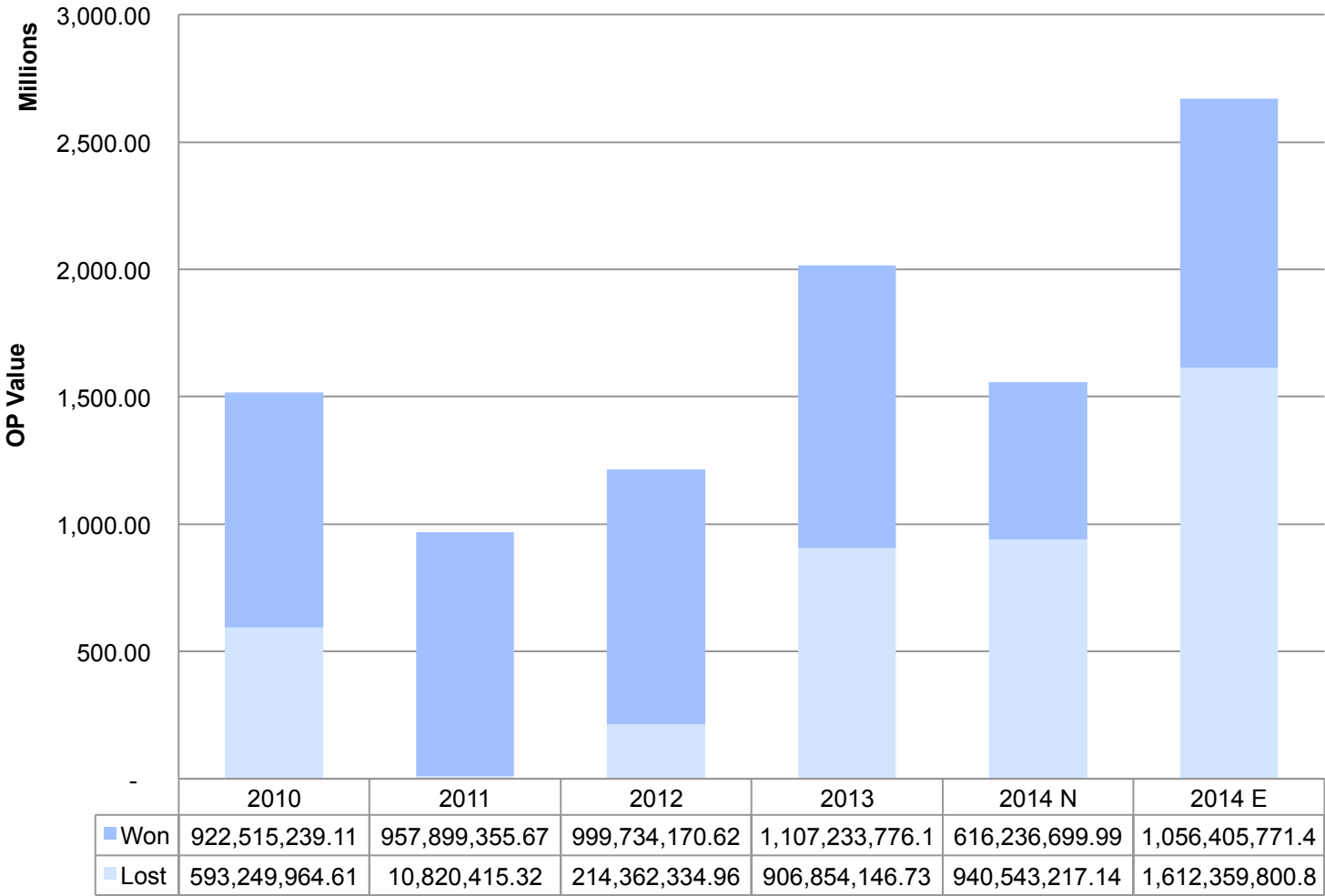


Insight

- 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

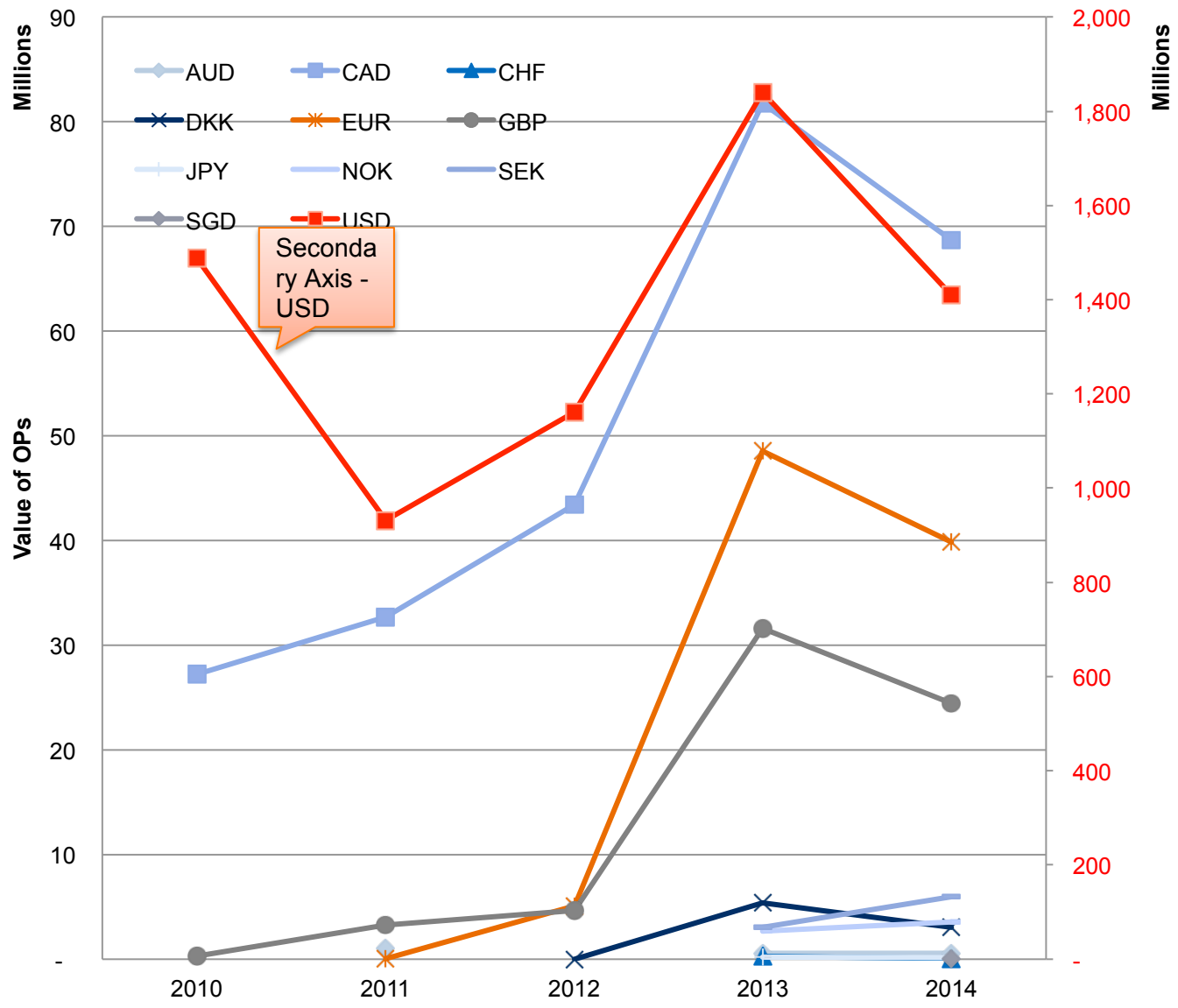


Insight

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

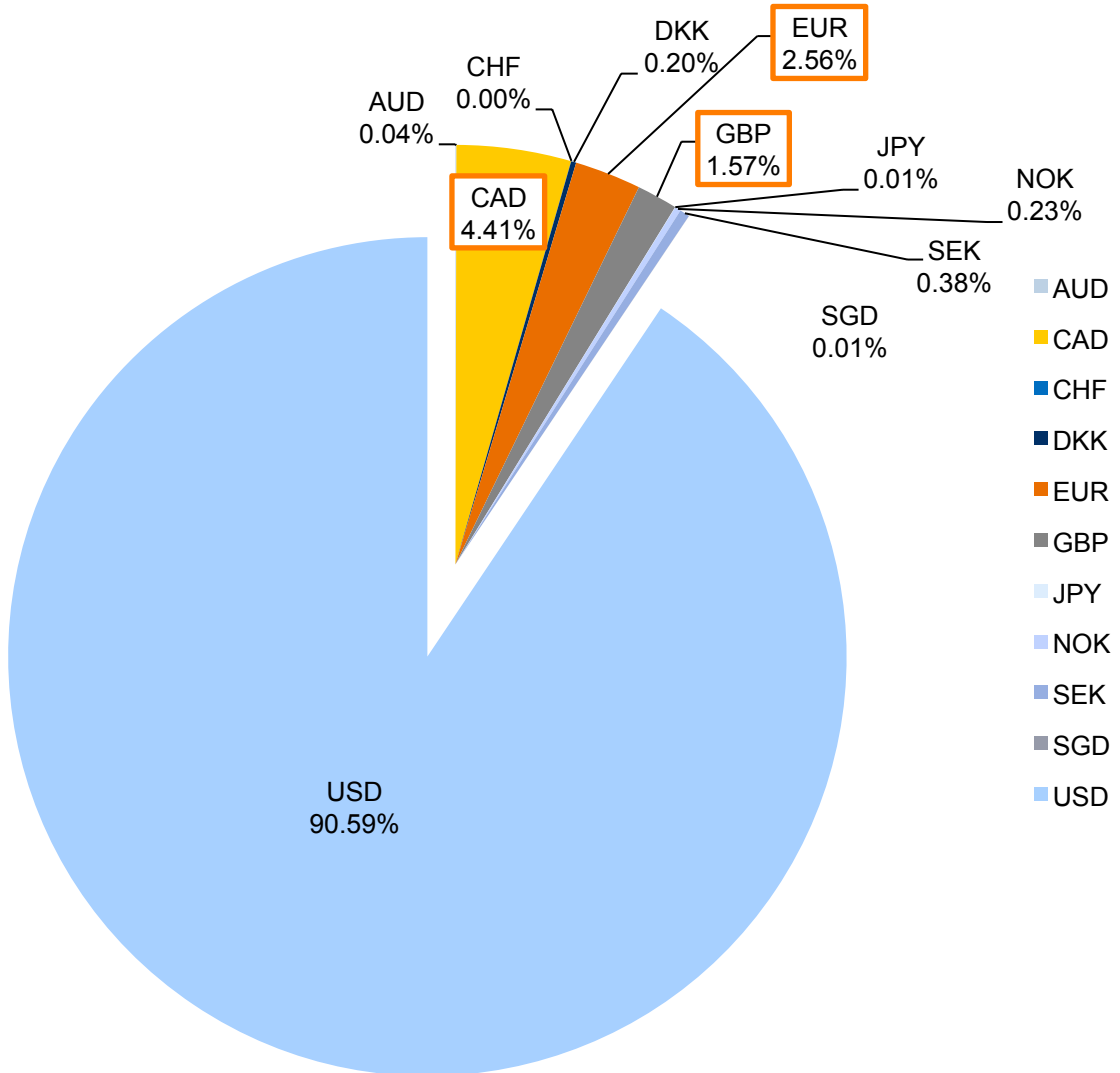


Insight

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

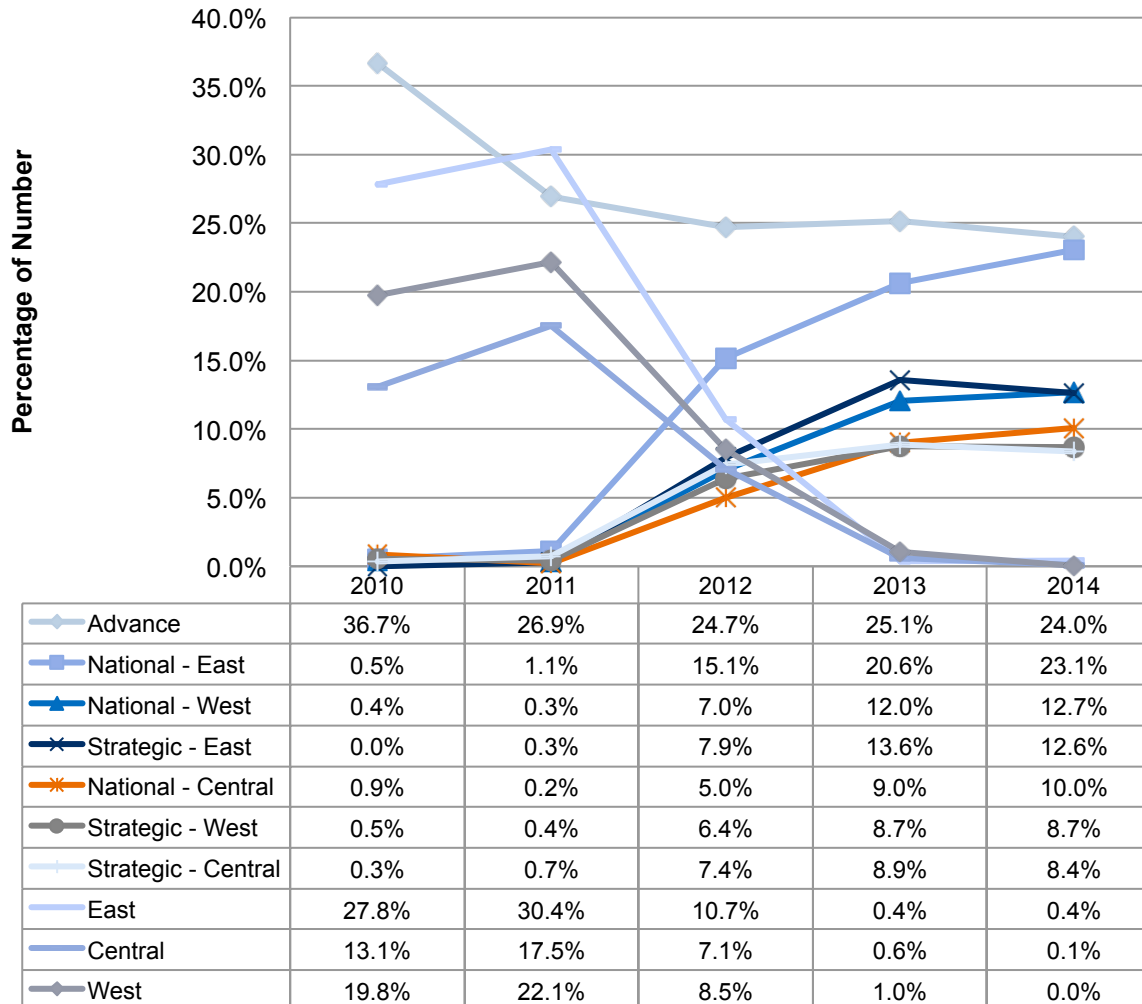


Insight

- 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

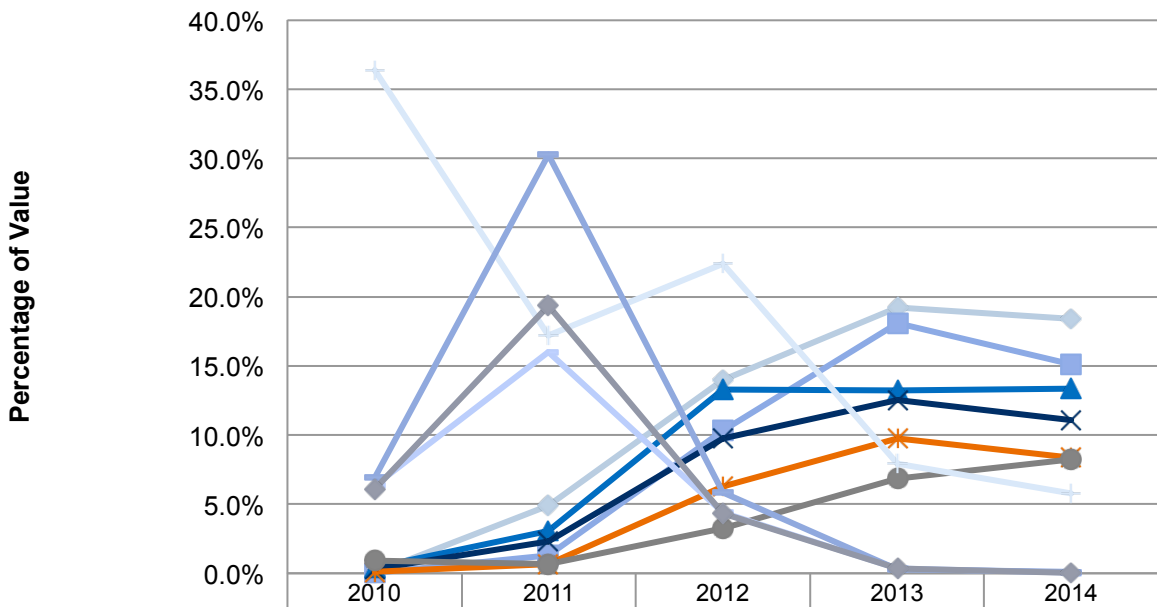


Insight

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



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