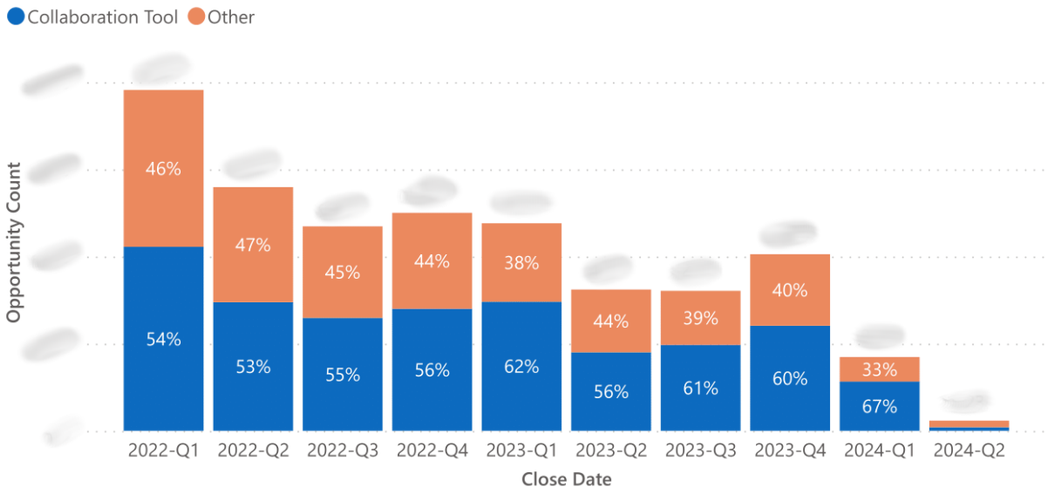
All Competitor Deals (#) | All Competitor Deals ($) | Won & Loss Overview | Closed Lost Deals by Competitor & Deal Range | Core Closed Lost Reasons | All Closed Lost Reasons | Win Rate | All Deals by Product Type | Segment Comparison

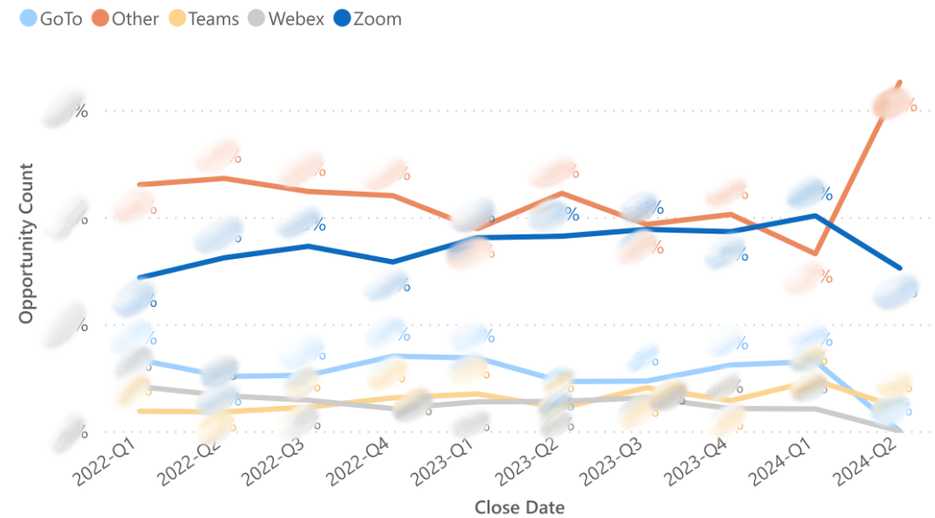
ALL DEALS (#) BY COMPETITOR

Collab Tool/Other (#) as % of Deals Over Time

Hover to view opportunity count



Filtered Competitor (#) as % of Deals Over Time



Collab Tool/Other (#) as % of Deals Over Time

Collab Tool or Other	2022-Q1	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-Q
Collaboration...	%	%	%	%	%	%	%	%	
GoTo	%	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	%	
Teams	%	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	%	
Webex	%	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	%	
Zoom	%	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	%	
Other	%	%	%	%	%	%	%	%	

QoQ of Collab Tool/Other (#) % of Deals Over Time

Collab Tool or Other	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-Q
Collaboration...	%	%	%	%	%	%	%	
	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	
	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	
	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	
	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	
	%	%	%	%	%	%	%	

FILTERS

Close Date
All

BFT (Bucket)
All

Closed Won / Loss
All

Early / Late Stage
Late Stage

Opportunity Type
All

Product Type
All

Collab Tool or Other
Multiple selections

Marketing Sub Segment
All

Company Segment
All

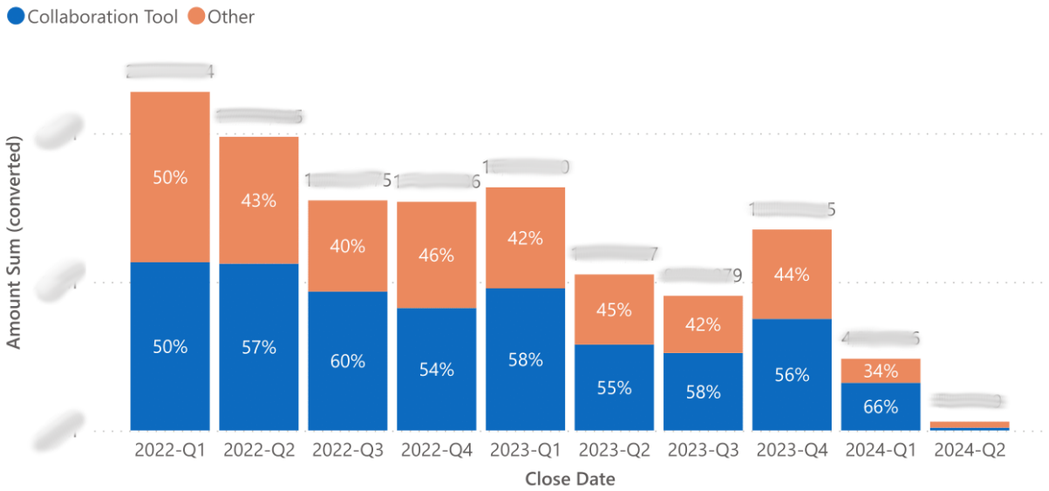
Reset Filters

All Competitor Deals (#) | **All Competitor Deals ($)** | Won & Loss Overview | Closed Lost Deals by Competitor & Deal Range | Core Closed Lost Reasons | All Closed Lost Reasons | Win Rate | All Deals by Product Type | Segment Comparison

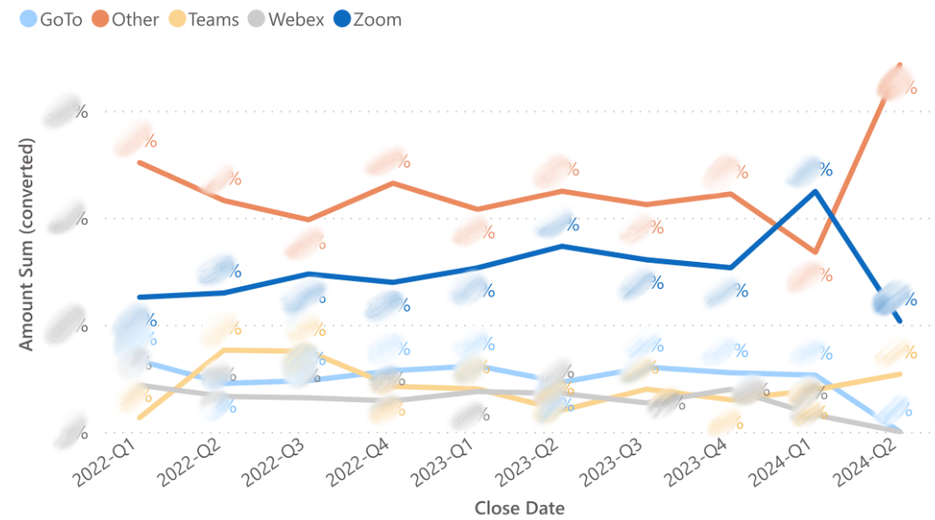
ALL DEALS ($) BY COMPETITOR

Collab Tool/Other ($) as % of Deals Over Time

Hover to view amount sum (converted)



Filtered Competitor ($) as % of Deals Over Time



Collab Tool/Other ($) as % of Deals Over Time

Collab Tool or Other	2022-Q1	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-Q
Collaboration...	%	%	%	%	%	%	%	%	
GoTo	%	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	%	
Teams	%	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	%	
Webex	%	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	%	
Zoom	%	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	%	
Other	%	%	%	%	%	%	%	%	

QoQ of Collab Tool/Other (#) % of Deals Over Time

Collab Tool or Other	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-Q
Collaboration...	%	%	%	%	%	%	%	
GoTo	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	
Teams	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	
Webex	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	
Zoom	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	
Other	%	%	%	%	%	%	%	

FILTERS

Close Date
All

BFT (Bucket)
All

Closed Won / Loss
All

Early / Late Stage
Late Stage

Opportunity Type
All

Product Type
All

Collab Tool or Other
Multiple selections

Marketing Sub Segment
All

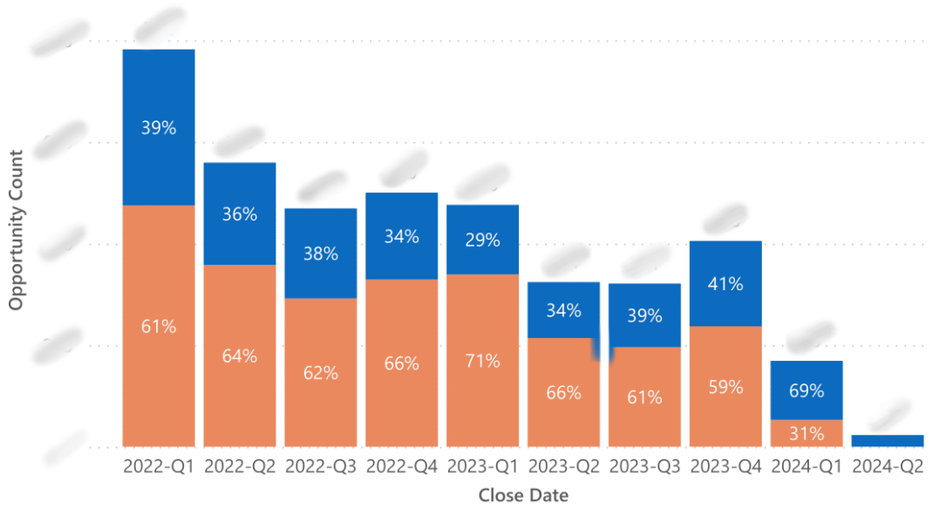
Company Segment
All

Reset Filters

All Competitor Deals (#) | All Competitor Deals ($) | **Won & Loss Overview** | Closed Lost Deals by Competitor & Deal Range | Core Closed Lost Reasons | All Closed Lost Reasons | Win Rate | All Deals by Product Type | Segment Comparison

ALL DEALS (#) BY CLOSED LOST AND WON

Closed Lost/Won (#) as % of Deals Over Time



Collab Tool/Other (#) as % of Deals Over Time

Child rows are win/lose rates (i.e., closed won/lost (#) as % of collab tool/other over time)

Collab Tool or Ot...	2022-Q1	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024
Collaboratio...	%	%	%	%	%	%	%	1%	
Closed Lost	%	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	%	
Other	%	%	%	%	%	%	3%	%	
Closed Lost	%	%	%	%	%	%	%	0%	
Closed Won	%	%	%	%	%	%	%	0%	

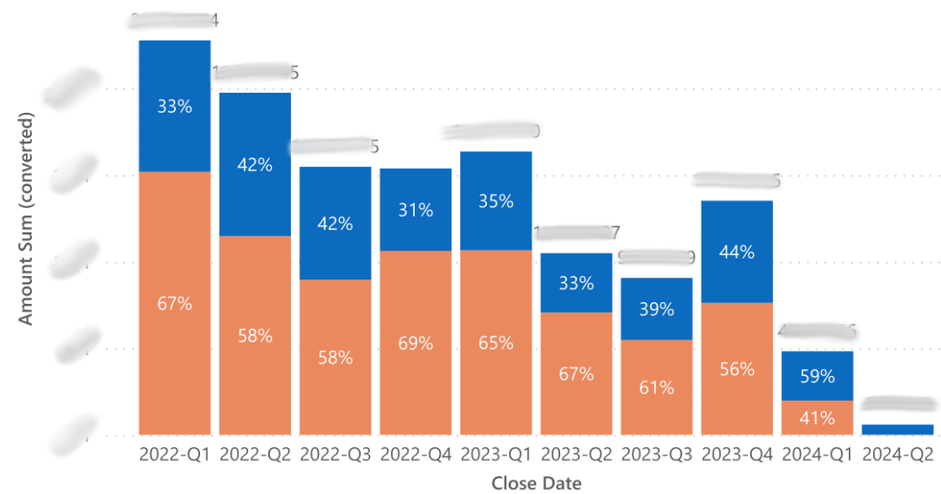
QoQ of Closed Lost (#) % of Deals Over Time

Only Closed Lost QoQ shown since Closed Won is the same % of opposite sign

Stage Mapping	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-Q1	2
Closed Lost	%	%	%	%	%	%	%	3%	
Collaboration...	%	%	%	%	%	%	%	%	-
Other	%	%	%	%	%	%	%	%	-

ALL DEALS ($) BY CLOSED LOST AND WON

Closed Lost/Won ($) as % of Deals Over Time



Collab Tool/Other ($) as % of Deals Over Time

Child rows are win/lose rates (i.e., closed won/lost ($) as % of collab tool/other over time)

Collab Tool or Ot...	2022-Q1	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024
Collaboratio...	%	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	%	
Closed Won	%	3%	%	%	%	%	%	%	
Other	%	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	%	
Closed Won	%	%	%	3%	%	%	%	%	

QoQ of Closed Lost ($) % of Deals Over Time

Only Closed Lost QoQ shown since Closed Won is the same % of opposite sign

Stage Mapping	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-Q1	20
Closed Lost	%	%	%	%	%	%	%	%	
Collaboratio...	%	%	%	%	2%	%	%	%	
Other	%	%	%	%	%	%	%	%	

FILTERS

Close Date
All

BFT (Bucket)
All

Closed Won / Loss
All

Early / Late Stage
Late Stage

Opportunity Type
All

Product Type
All

Collab Tool or Other
Multiple selections

Marketing Sub Segment
All

Company Segment
All

Reset Filters

TOTAL CLOSED LOST DEALS BY COMPETITOR

Competitors	Deals Lost (#)	Deals Lost ($)	Total Deals (#)	Total Deals ($)
Zoom	913	$26,110K	913	26,110K
GoTo	299	$8,941K	299	8,941K
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Total	2493	$79,019K	2493	79,019K

CLOSED LOST DEALS - DEAL RANGE & CORE REASON

Closed Lost Reasons per Deal Range (#) as % of Closed Lost Deals Over Time

Deal Range	2022-Q1	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024
100K+	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
No Budget, Too ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Lost Sales Mom...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Blank, No Reason	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
50K-100K	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
No Budget, Too ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Lost Sales Mom...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Blank, No Reason	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
<50K	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
No Budget, Too ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Lost Sales Mom...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Blank, No Reason	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

QoQ of Closed Lost Reasons per Deal Range (#) % of Closed Lost Deals Over Time

Deal Range	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-Q1	202
100K+	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
No Budget, To...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Lost Sales Mo...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Blank, No Reas...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
50K-100K	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
No Budget, To...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Lost Sales Mo...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Blank, No Reas...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
<50K	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
No Budget, To...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Lost Sales Mo...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Blank, No Reas...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

FILTERS

Close Date
All

BFT (Bucket)
All

Closed Won / Loss
Closed Lost

Early / Late Stage
Late Stage

Opportunity Type
All

Product Type
All

Collab Tool or Other
Multiple selections

Marketing Sub Segment
All

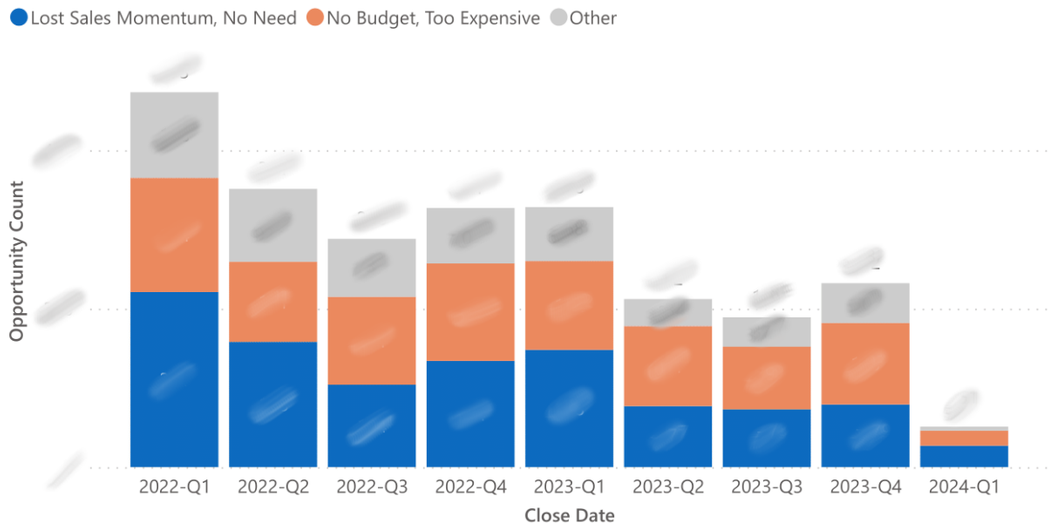
Company Segment
All

Closed Lost Reason
All

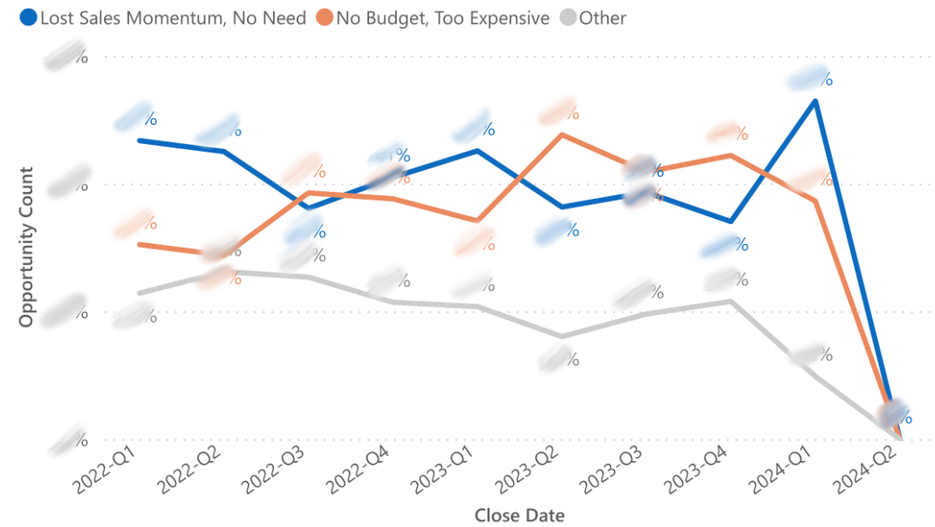
Reset Filters

CORE CLOSED LOST REASONS

Core Closed Lost Reasons (#) Over Time



Core Closed Lost Reasons (#) as % of Closed Lost Deals Over Time



Closed Lost Reasons per Collab Tool/Other (#) as % of Closed Lost Deals Over Time

Collab Tool or Other	2022-Q1	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024
Collaboration T...	%	%	%	%	%	%	%	%	
GoTo	%	%	%	%	%	%	%	%	
Lost Sales M...	%	%	%	%	%	%	%	%	
No Budget, T...	%	%	%	%	%	%	%	%	
Other	%	%	%	%	%	%	%	%	
Teams	%	%	%	%	%	%	%	%	
Lost Sales M...	%	%	%	%	%	%	%	%	
No Budget, T...	%	%	%	%	%	%	%	%	
Other	%	%	%	%	%	%	%	%	
Webex	%	%	%	%	%	%	%	%	
Lost Sales M...	%	%	%	%	%	%	%	%	
No Budget, T...	%	%	%	%	%	%	%	%	
Other	%	%	%	%	%	%	%	%	
Zoom	%	%	%	%	%	%	%	%	

QoQ of Closed Lost Reasons per Collab Tool/Other (#) % of Closed Lost Deals Over Time

Collab Tool or Other	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024
Collaboration...	%	%	%	%	%	%	%	
GoTo	%	%	%	%	%	%	%	
Lost Sales ...	%	%	%	%	%	%	%	
No Budget,...	%	%	%	%	%	%	%	
Other	%	%	%	%	%	%	%	
Teams	%	%	%	%	%	%	%	
Lost Sales ...	%	%	%	%	%	%	%	
No Budget,...	%	%	%	%	%	%	%	
Other	%	%	%	%	%	%	%	
Webex	%	%	%	%	%	%	%	
Lost Sales ...	%	%	%	%	%	%	%	
No Budget,...	%	%	%	%	%	%	%	
Other	%	%	%	%	%	%	%	
Zoom	%	%	%	%	%	%	%	

FILTERS

Close Date
All

BFT (Bucket)
All

Closed Won / Loss
Closed Lost

Early / Late Stage
Late Stage

Opportunity Type
All

Product Type
All

Collab Tool or Other
Multiple selections

Marketing Sub Segment
All

Company Segment
All

Closed Lost Reason
Multiple selections

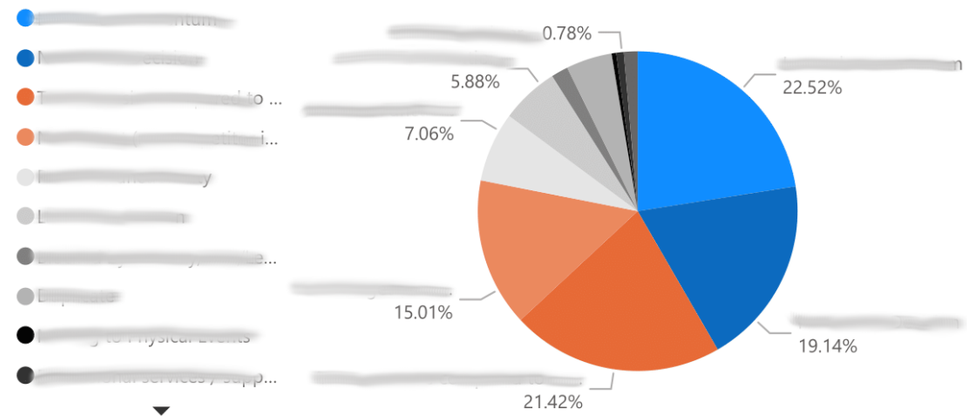
Reset Filters

ALL CLOSED LOST REASONS - TOTAL

Total Amount Sum & Count of Closed Lost Reasons

Reason	Amount Sum	Count	Sum % of Total	Count % of Total
Lost sales momentum	[illegible]	[illegible]	[illegible]	[illegible]
No Need / Decision	[illegible]	[illegible]	[illegible]	[illegible]
Too expensive compared to competitor	[illegible]	[illegible]	[illegible]	[illegible]
No budget (no competitor involved)	[illegible]	[illegible]	[illegible]	[illegible]
Product Functionality	[illegible]	[illegible]	[illegible]	[illegible]
Late To Evaluation	[illegible]	[illegible]	[illegible]	[illegible]
Blocked by Security/Risk/Legal	[illegible]	[illegible]	[illegible]	[illegible]
Duplicate	[illegible]	[illegible]	[illegible]	[illegible]
Moving to Physical Events	[illegible]	[illegible]	[illegible]	[illegible]
Professional services / support offerings	[illegible]	[illegible]	[illegible]	[illegible]
Wrong Contact/ No influence	[illegible]	[illegible]	[illegible]	[illegible]
Total	[illegible]	[illegible]	[illegible]	[illegible]

All Closed Lost Reasons % (Drill down to filtered competitor)



ALL CLOSED LOST REASONS

Closed Lost Reasons (#) as % of Closed Lost Deals Over Time

Reason	2022-Q1	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024
Lost sales mome...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
No Need / Decis...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Too expensive c...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
No budget (no c...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Product Functio...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Late To Evaluation	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Blocked by Secu...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Duplicate	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Moving to Physi...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Professional ser...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Wrong Contact/...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

QoQ of Closed Lost Reasons (#) % of Closed Lost Deals Over Time

Reason	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	202
Lost sales momen...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
No Need / Decision	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Too expensive co...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
No budget (no co...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Product Function...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Late To Evaluation	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Blocked by Securi...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Duplicate	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Moving to Physic...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Professional servi...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Wrong Contact/ ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

FILTERS

Close Date
All

BFT (Bucket)
All

Closed Won / Loss
Closed Lost

Early / Late Stage
Late Stage

Opportunity Type
All

Product Type
All

Collab Tool or Other
Multiple selections

Marketing Sub Segment
All

Company Segment
All

Closed Lost Reason
Multiple selections

Reset Filters

All Competitor Deals (#) | All Competitor Deals ($) | Won & Loss Overview | Closed Lost Deals by Competitor & Deal Range | Core Closed Lost Reasons | All Closed Lost Reasons | **Win Rate** | All Deals by Product Type | Segment Comparison

CLOSED WON DEALS - COLLAB TOOL/OTHER

Closed Won Deals (#) as % of Collab Tool/Other Over Time

e.g. in Q1 2022, 36.01% of all Collab Tool deals were closed won

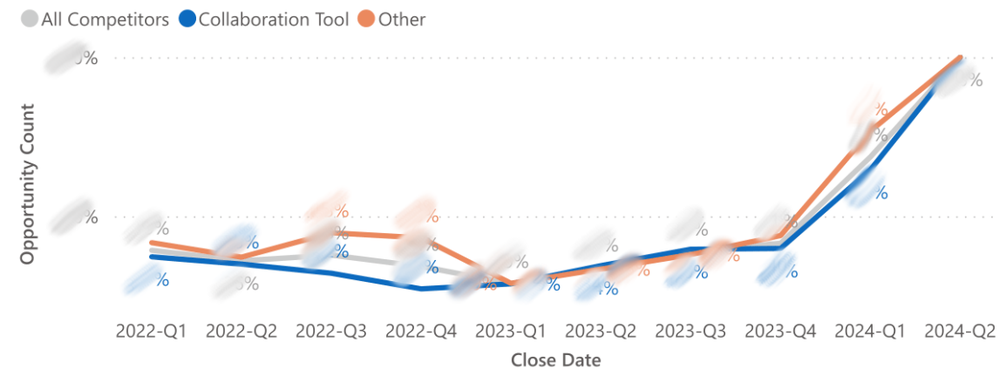
Collab T...	2022-Q1	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-Q1
Collabo...	%	%	%	%	%	%	%	%	%
Other	%	%	%	%	%	%	%	%	%

QoQ of Closed Won Deals (#) % of Collab Tool/Other Over Time

Collab Tool or Other	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-Q1
Collaboration Tool	%	%	%	%	%	%	%	%
Other	%	%	%	%	%	%	%	%

Closed Won Deals (#) as % of Collab Tool/Other/All Over Time

Win Rate per Collab Tool/Other/All by Close Date; unaffected by "Closed Won/Loss" filter



CLOSED WON DEALS - FILTERED COMPETITOR

Closed Won Deals (#) as % of Filtered Competitor Over Time

e.g. in Q1 2022, 32.69% of all GoTo deals were closed won

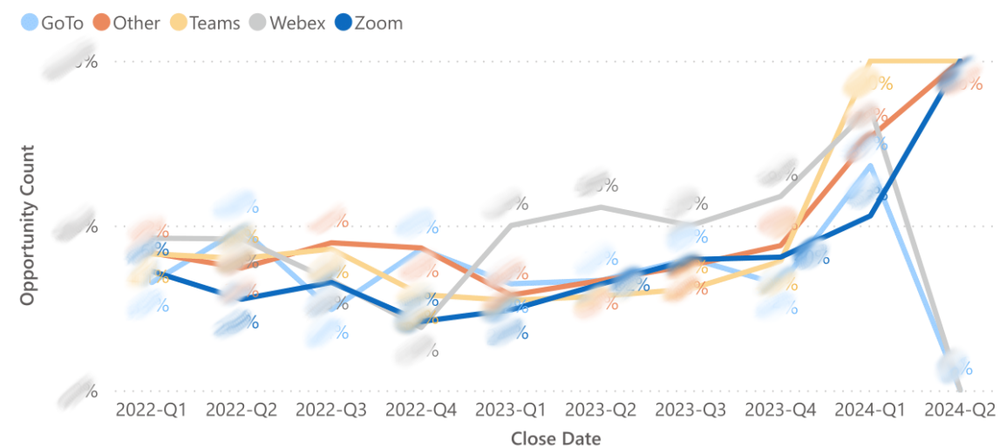
Filtered ...	2022-Q1	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-Q1
GoTo	%	%	%	%	%	%	%	%	%
Other	%	%	%	%	%	%	%	%	%
Teams	%	%	%	%	%	%	%	%	%
Webex	%	%	%	%	%	%	%	%	%
Zoom	%	%	%	%	%	%	%	%	%

QoQ Closed Won Deals (#) % of Filtered Competitor Over Time

Filtered Competitor	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-Q1
GoTo	%	%	%	%	%	%	%	%
Other	%	%	%	%	%	%	%	%
Teams	%	%	%	%	%	%	%	%
Webex	%	%	%	%	%	%	%	%
Zoom	%	%	%	%	%	%	%	%

Closed Won Deals (#) as % of Filtered Competitor Over Time

Win Rate per Filtered Competitor by Close Date; unaffected by "Closed Won/Loss" filter



FILTERS

Close Date
All

BFT (Bucket)
All

Closed Won / Loss
All

Early / Late Stage
Late Stage

Opportunity Type
All

Product Type
All

Collab Tool or Other
Multiple selections

Marketing Sub Segment
All

Company Segment
All

Reset Filters

CLOSED WON / LOST DEALS - PRODUCT TYPE

Closed Won Deals (#) as % of Product Type Over Time

e.g. in Q1 2022, 14.08% of all Ehub deals (#) were closed won

Product Type	2022-Q1	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-(
Ace	%	%	%	%	%	%	%	%	
EHub	%	%	%	%	%	%	%	%	
Forums	%	%	%	%	%	%	%	%	
Go Live	%	%	%	%	%	%	%	%	
Platform	%	%	%	%	%	%	%	%	

Attach Rate % Over Time

e.g. in Q1 2022, 17.10% of all deals (#, unfiltered) included Ehub as a product type

Product Type	2022-Q1	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-(
Ace	%	%	%	%	%	%	%	%	
EHub	%	%	%	%	%	%	%	%	
Forums	%	%	%	%	%	%	%	%	
Go Live	%	%	%	%	%	%	%	%	
Platform	%	%	%	%	%	%	%	%	
Target	%	%	%	%	%	%	%	%	

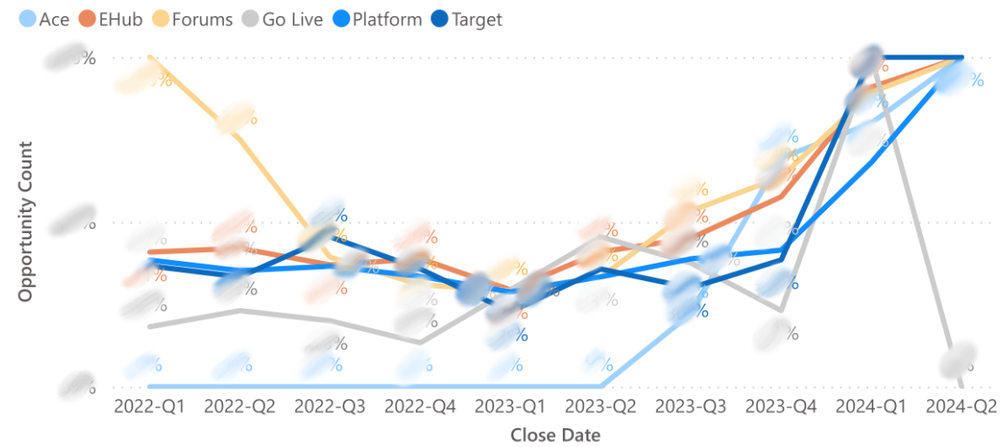
Closed Lost Reasons (#) as % of Product Type Over Time

This table is already filtered to Closed Lost; unaffected by "Closed Won/Loss" filter

Product Type	2022-Q1	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2
⊟ Ace	%	%	%	%	%	%		%	1
Lost Sales ...	%	%	%	%	%	%	%	%	
No Budget, ...	%	%	%	%	%	%	%	%	
Other	%	%	%	%	%	%	%	%	
⊟ EHub								%	1
Lost Sales ...	%	%	%	%	%	%	%	%	1
No Budget, ...	%	%	%	%	%	%	%	%	
Other	%	%	%	%	%	%	%	%	
⊟ Forums	%							%	1
Lost Sales ...	%	%	%	%	%	%	%	%	1
No Budget, ...	%	%	%	%	%	%	%	%	
Other	%	%	%	%	%	%	%	%	

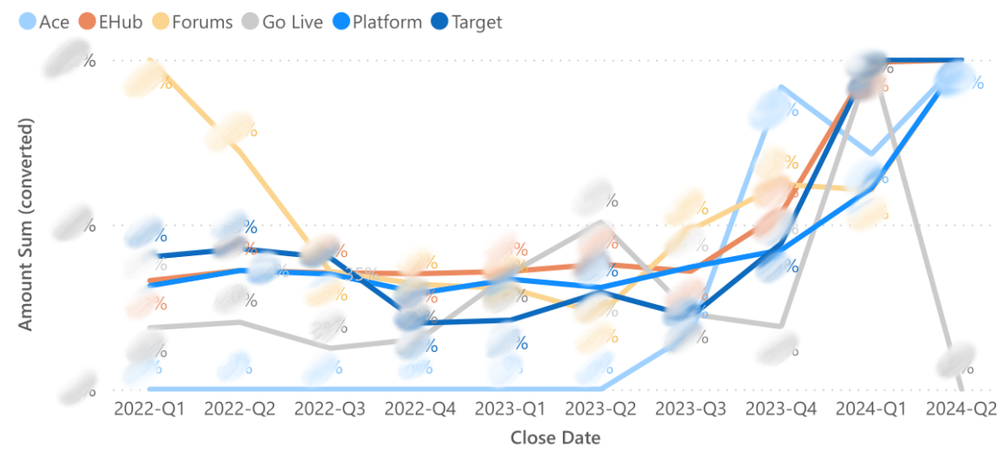
Closed Won Deals (#) as % of Product Type Over Time

Win Rate (#) per Product Type by Close Date; unaffected by "Closed Won/Loss" filter



Closed Won Deals ($) as % of Product Type Over Time

Win Rate ($) per Product Type by Close Date; unaffected by "Closed Won/Loss" filter



FILTERS

Close Date
All

BFT (Bucket)
All

Closed Won / Loss
All

Early / Late Stage
Late Stage

Opportunity Type
All

Product Type
All

Collab Tool or Other
Multiple selections

Marketing Sub Segment
All

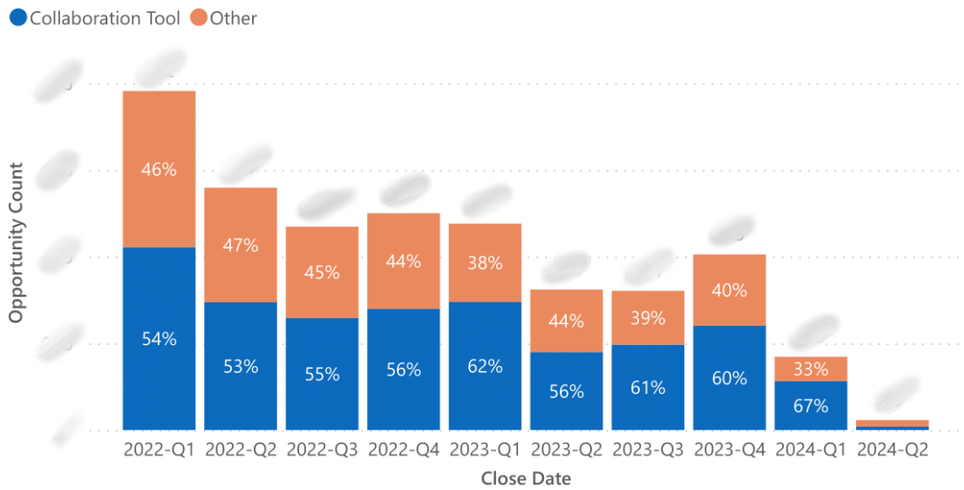
Company Segment
All

Reset Filters

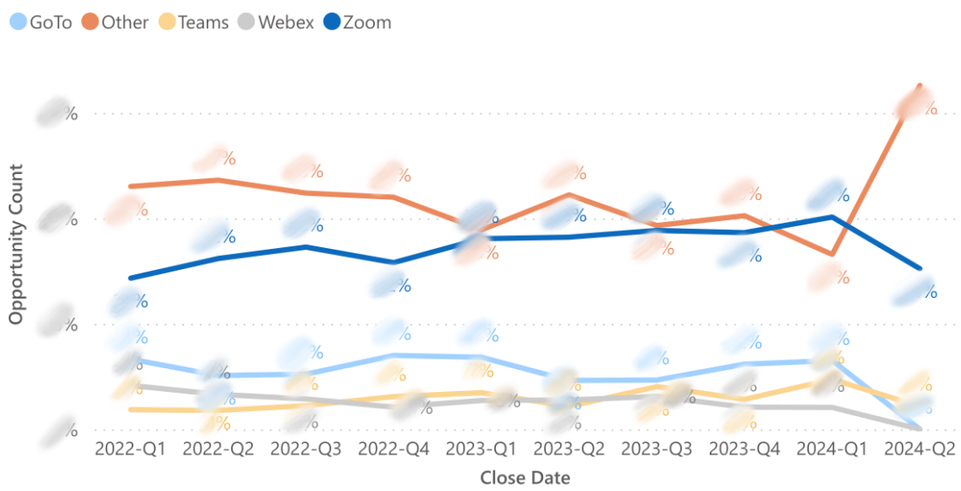
ALL DEALS (#) BY COMPETITOR

Collab Tool/Other (#) as % of Deals Over Time

Hover to view opportunity count

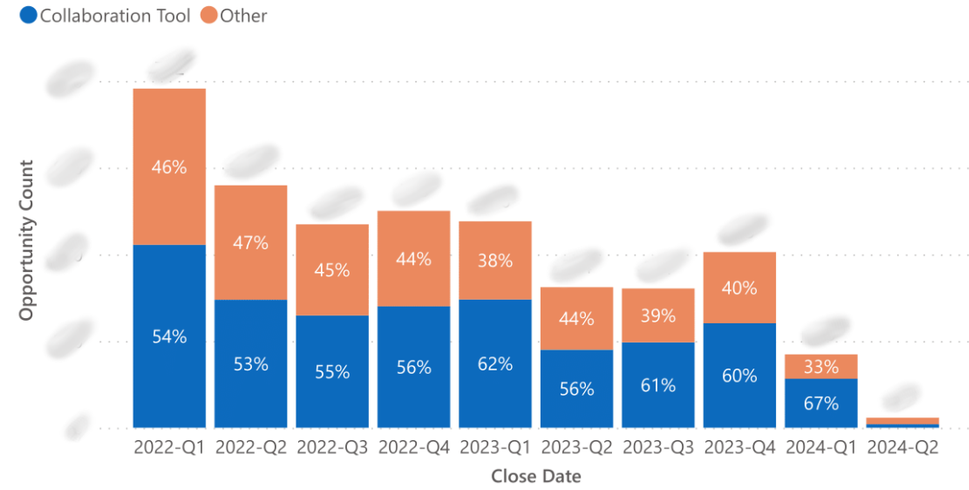


Filtered Competitor (#) as % of Deals Over Time

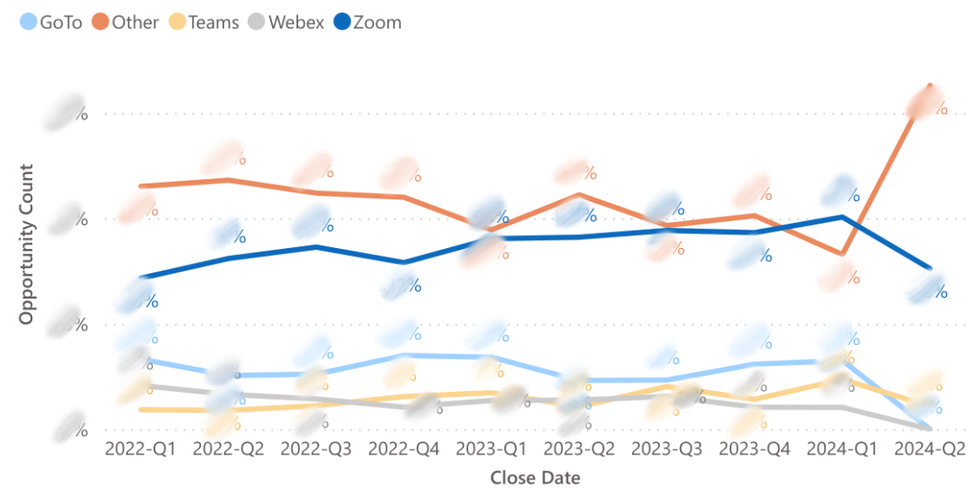


Collab Tool/Other (#) as % of Deals Over Time

Hover to view opportunity count



Filtered Competitor (#) as % of Deals Over Time



FILTERS

Close Date
All

BFT (Bucket) - Left
All

BFT (Bucket) - Right
All

Closed Won / Loss
All

Early / Late Stage
Late Stage

Opportunity Type
All

Product Type
All

Collab Tool or Other
Multiple selections

Marketing Sub Segment
All

Company Segment
All

Reset Filters

Opportunity ID 18 Digit	Opportunity Name	Close Date	Opportunity Type	Product Type	Product Type	Opportunity Amount	Ehub ($)	Forums ($)	Go Live ($)	Target ($)	Ace ($)	Won/Lost	Last Stage Before Close	Competitor	BFT (Bucket)	Closed Lost Reason	What Happened / Details
[illegible]	[illegible]	5/23/2024	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	5/31/2024	New	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	5/31/2024	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	5/17/2024	New	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	6/24/2024	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	6/28/2022	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	9/28/2022	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	12/1/2022	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	8/10/2022	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	1/19/2023	Conversion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	6/28/2022	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	2/17/2023	New	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	2/12/2024	New	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	2/17/2022	New	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	8/10/2022	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	1/12/2024	New	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	12/14/2022	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	12/28/2023	New	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	6/1/2023	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	4/24/2023	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	2/28/2023	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	12/21/2022	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	4/11/2022	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	3/15/2024	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	5/27/2022	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	6/30/2023	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	5/23/2023	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	2/28/2022	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	4/10/2022	New	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	12/6/2023	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	12/21/2023	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	6/30/2023	New	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	12/19/2023	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	2/1/2022	New	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	7/31/2023	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	9/20/2023	New	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	3/23/2023	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	12/28/2023	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	9/30/2022	New	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	5/12/2023	New	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	1/10/2024	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	6/16/2022	New	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	11/28/2023	New	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	7/29/2022	Expansion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Notable *Logic* Behind the Dashboard

Product Type Filter.

	Opportunity_ID_18_Digit__c	Opportunity.Platform Amount	Opportunity.Ace Amount	Opportunity.Engagement Hub Amou...	Opportunity.Go Live Amount	
1	[redacted]	0	0	0	0	
2	[redacted]	0	0	0	0	
3	[redacted]	[redacted]	0	0	0	
4	[redacted]	[redacted]	0	0	0	
5	[redacted]	[redacted]	0	0	0	
6	[redacted]	[redacted]	0	0	0	
7	[redacted]	[redacted]	0	0	0	
8	[redacted]	0	0	0	0	
9	[redacted]	[redacted]	0	0	0	
10	[redacted]	[redacted]	0	0	0	
11	[redacted]	[redacted]	0	0	0	
12	[redacted]	[redacted]	0	0	0	
13	[redacted]	[redacted]	0	0	0	
14	[redacted]	[redacted]	0	0	0	
15	[redacted]	0	0	0	0	
16	[redacted]	[redacted]	0	0	0	
17	[redacted]	0	0	0	0	
18	[redacted]	0	0	0	0	
19	[redacted]	[redacted]	0	0	0	
20	[redacted]	0	0	0	0	
21	[redacted]	0	0	0	0	
22	[redacted]	0	0	0	0	
23	[redacted]	[redacted]	0	0	0	
24	[redacted]	[redacted]	0	0	0	
25	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	
26	[redacted]	0	0	0	0	
27	[redacted]	[redacted]	0	0	0	
28						

PROPERTIES

Name

OppProductType

All Properties

APPLIED STEPS

- Source
- Navigation
- Choose columns
- Map Opportunity query
- Merge product type fields
- Unpivot other columns by Op...
- Add new Opportunity ID colu...
- Add Product Type column
- Add Amount column
- Remove original columns
- Delete blank rows (Amount = ...
- Rename Ehub row values
- Rename Target row values
- Rename Go Live row values
- Rename Forums row values
- Rename Ace row values
- Rename Platform row values
- Change Amount type to num...

Prior to transformation, an opportunity had a specific product if its amount in that product column was >0.

**Data is blurred or altered for confidentiality*

Product Type Filter.

	Opportunity_ID_18_Digit__c	Attribute	Value
1	[redacted]	Opportunity.Platform Amount	0
2	[redacted]	Opportunity.Ace Amount	0
3	[redacted]	Opportunity.Engagement Hub Amount	0
4	[redacted]	Opportunity.Go Live Amount	0
5	[redacted]	Opportunity.Forums Amount	0
6	[redacted]	Opportunity.Target Amount	0
7	[redacted]	Opportunity.Platform Amount	0
8	[redacted]	Opportunity.Ace Amount	0
9	[redacted]	Opportunity.Engagement Hub Amount	0
10	[redacted]	Opportunity.Go Live Amount	0
11	[redacted]	Opportunity.Forums Amount	0
12	[redacted]	Opportunity.Target Amount	0
13	[redacted]	Opportunity.Platform Amount	[redacted]
14	[redacted]	Opportunity.Ace Amount	0
15	[redacted]	Opportunity.Engagement Hub Amount	0
16	[redacted]	Opportunity.Go Live Amount	0
17	[redacted]	Opportunity.Forums Amount	0
18	[redacted]	Opportunity.Target Amount	0
19	[redacted]	Opportunity.Platform Amount	[redacted]
20	[redacted]	Opportunity.Ace Amount	0
21	[redacted]	Opportunity.Engagement Hub Amount	0
22	[redacted]	Opportunity.Go Live Amount	0
23	[redacted]	Opportunity.Forums Amount	0
24	[redacted]	Opportunity.Target Amount	0
25	[redacted]	Opportunity.Platform Amount	[redacted]
26	[redacted]	Opportunity.Ace Amount	0
27	[redacted]	Opportunity.Engagement Hub Amount	0
28	[redacted]	Opportunity.Go Live Amount	0

PROPERTIES

Name

OppProductType

All Properties

APPLIED STEPS

- Source
- Navigation
- Choose columns
- Map Opportunity query
- Merge product type fields
- Unpivot other columns by Op...
- Add new Opportunity ID colu...
- Add Product Type column
- Add Amount column
- Remove original columns
- Delete blank rows (Amount = ...
- Rename Ehub row values
- Rename Target row values
- Rename Go Live row values
- Rename Forums row values
- Rename Ace row values
- Rename Platform row values
- Change Amount type to num...

Unpivot columns by Opportunity ID so that each row represents a product.

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Product Type Filter.

	Opportunity ID 18 Digit	Product Type	Amount
1	[redacted]	Platform	[redacted]
2	[redacted]	Platform	[redacted]
3	[redacted]	Platform	[redacted]
4	[redacted]	Platform	[redacted]
5	[redacted]	Platform	[redacted]
6	[redacted]	Platform	[redacted]
7	[redacted]	Platform	[redacted]
8	[redacted]	Platform	[redacted]
9	[redacted]	Platform	[redacted]
10	[redacted]	Platform	[redacted]
11	[redacted]	Platform	[redacted]
12	[redacted]	Platform	[redacted]
13	[redacted]	Platform	[redacted]
14	[redacted]	Platform	[redacted]
15	[redacted]	Platform	[redacted]
16	[redacted]	Platform	[redacted]
17	[redacted]	Platform	[redacted]
18	[redacted]	Platform	[redacted]
19	[redacted]	Platform	[redacted]
20	[redacted]	Platform	[redacted]
21	[redacted]	Platform	[redacted]
22	[redacted]	Platform	[redacted]
23	[redacted]	Platform	[redacted]
24	[redacted]	Platform	[redacted]
25	[redacted]	Platform	[redacted]
26	[redacted]	Platform	[redacted]
27	[redacted]	Platform	[redacted]
28	[redacted]	Platform	[redacted]

PROPERTIES

Name

OppProductType

All Properties

APPLIED STEPS

- Source
- Navigation
- Choose columns
- Map Opportunity query
- Merge product type fields
- Unpivot other columns by Op...
- Add new Opportunity ID colu...
- Add Product Type column
- Add Amount column
- Remove original columns
- Delete blank rows (Amount = ...
- Rename Ehub row values
- Rename Target row values
- Rename Go Live row values
- Rename Forums row values
- Rename Ace row values
- Rename Platform row values
- Change Amount type to num...

Clean up data by removing amounts equal to 0 and renaming Product Type row values.

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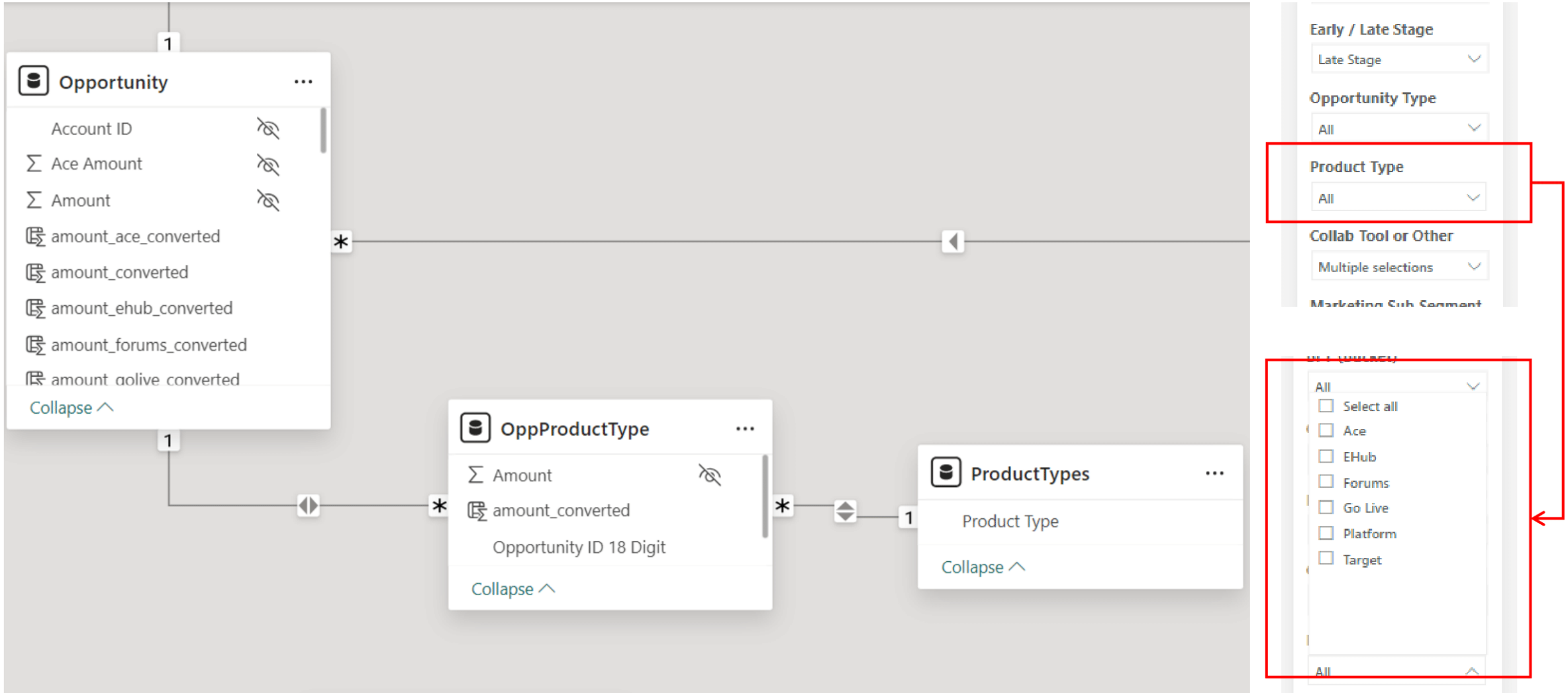
Product Type Filter.



Establish relationship between Opportunity table and Product Type table, then create Product Type filter.

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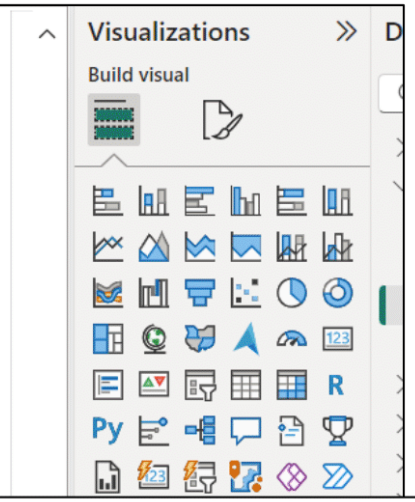
Conditional Formatting by Win & Loss

```
// values to use for conditional formatting QoQ # visual

--opportunity count
VAR opp_count = COUNT(Opportunity[Opportunity ID 18 Digit])

--opportunity count column total
VAR opp_count_total = CALCULATE(COUNT(Opportunity[Opportunity ID 18 Digit]), ALLSELECTED(Opportunity[Collaboration Tool or Other],
Opportunity[Filtered Competitor], Opportunity[Stage Mapping], Opportunity[BFT Mapping (Bucket)]))

--opportunity count % proportion of total in current quarter
VAR this_quarter = opp_count/opp_count_total

--opportunity count % proportion of total in previous quarter
VAR last_quarter =
    CALCULATE(COUNT(Opportunity[Opportunity ID 18 Digit]), DATEADD('CloseDateTable'[Date], -1, QUARTER))/
    CALCULATE(COUNT(Opportunity[Opportunity ID 18 Digit]),
        ALLSELECTED(Opportunity[Collaboration Tool or Other], Opportunity[Filtered Competitor],
        Opportunity[Stage Mapping], Opportunity[BFT Mapping (Bucket)]), DATEADD('CloseDateTable'[Date], -1, QUARTER))

--calculate quarter over quarter change
--return negative of closed lost for conditional formatting
--check last quarter stage mapping to solve miscoloring when closed lost = -100%
VAR last_quarter_stage = CALCULATE(FIRSTNONBLANK(Opportunity[Stage Mapping], 1), DATEADD('CloseDateTable'[Date], -1, QUART
VAR qoq = IF(IFERROR(this_quarter/last_quarter - 1, BLANK()),
            IF(AND(this_quarter=0, last_quarter=0), 0,
            IF(OR(FIRSTNONBLANK(Opportunity[Stage Mapping], 1)="Closed Lost", last_quarter_stage="Closed Lost"),
            -(this_quarter/last_quarter - 1),
            this_quarter/last_quarter - 1)))

RETURN qoq
```



of Collab Tool/Other (#) % of Deals Over Time

Tool or Other	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	202
ollaboration...	%	%	%	%	%	%	%	
GoTo	3%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	
Teams	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	
Webex	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	
Zoom	%	%	%	%	%	%	%	
Closed Lost	%	%	%	%	%	%	%	
Closed Won	%	%	%	%	%	%	%	

DAX code for conditional formatting related to the colors in the QoQ visual. Despite the closed won/loss metrics being in the same measure, this conditional formatting measure allows for the colors in the visual to differentiate between won and lost deals.

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