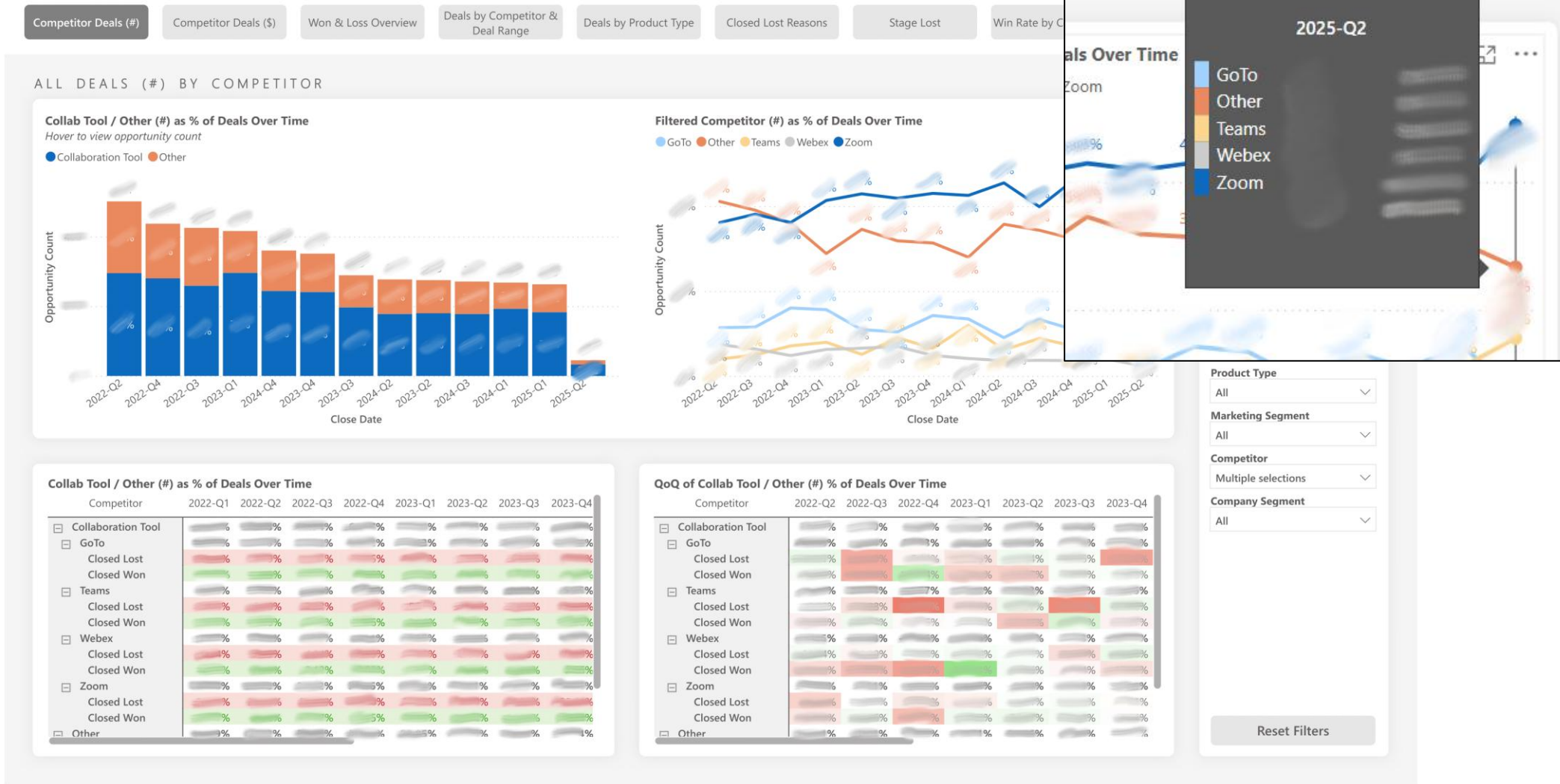# *Competitor & Closed Lost Deals Power BI Dashboard*
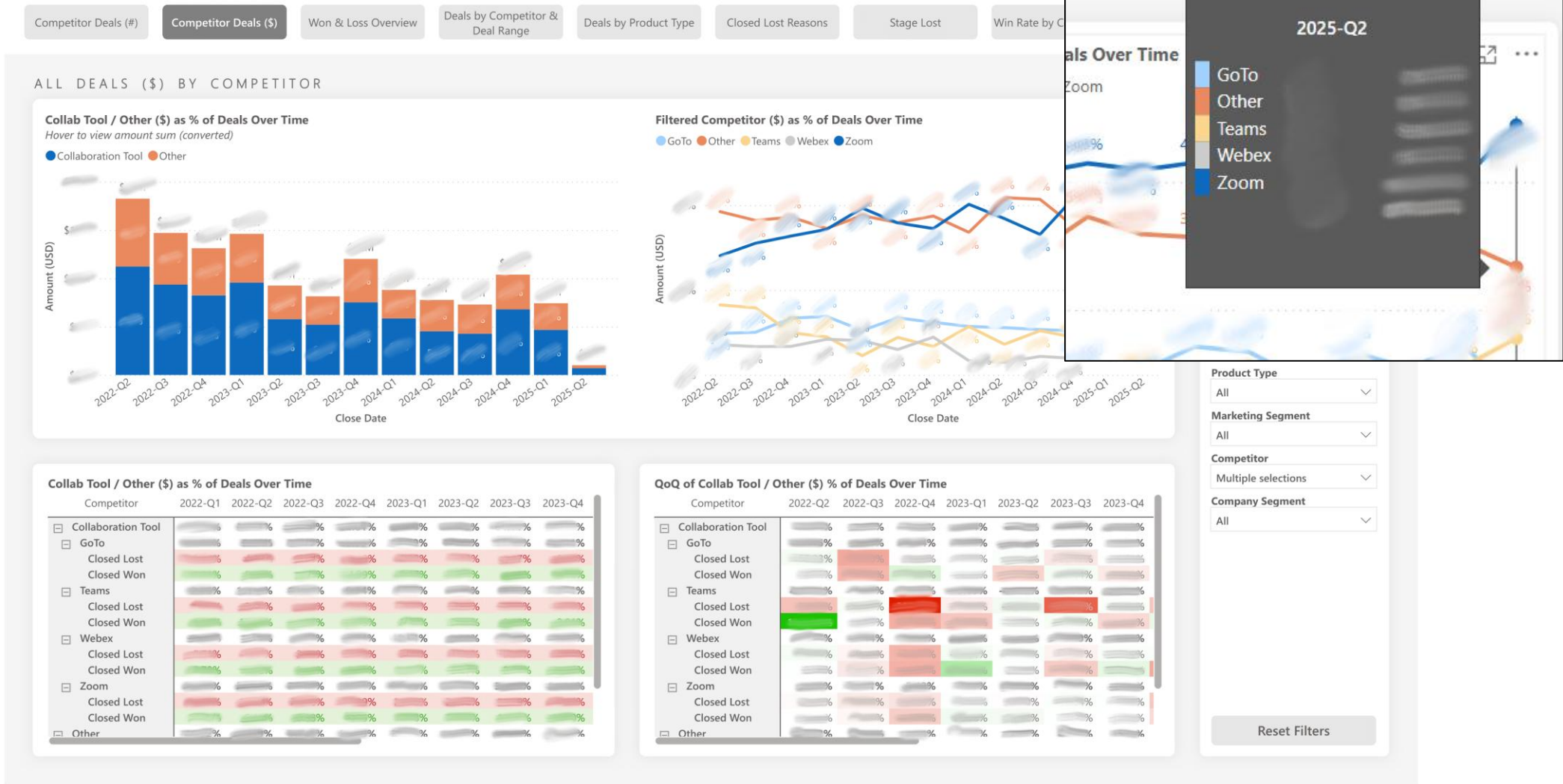
Page 1 – All Deals (#) By Competitor

Visual and tabular breakdown of opportunity counts by competitor per quarter.
Users can hover and view the percentage and counts via the tooltip feature.
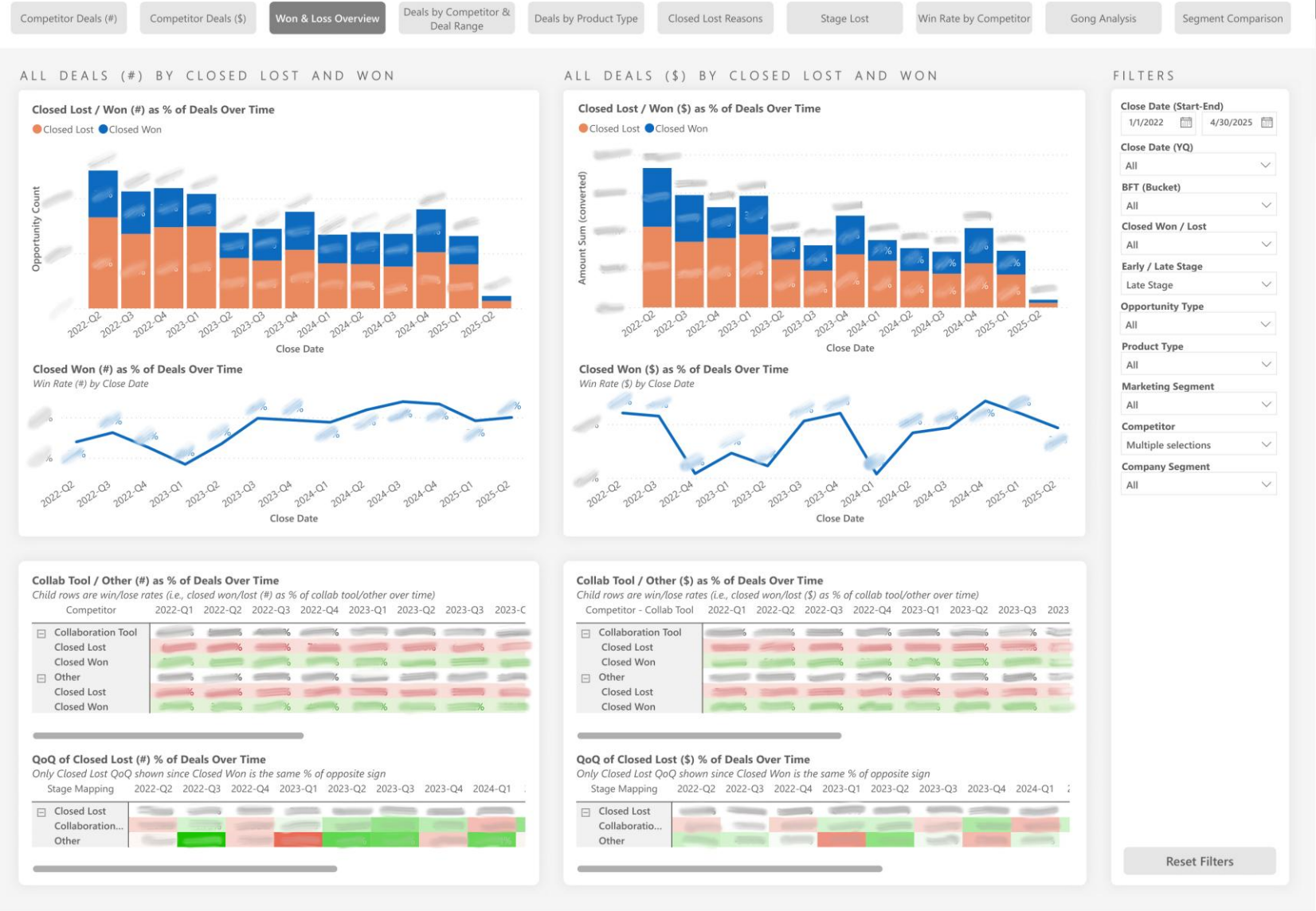
Data is blurred or altered for confidentiality

Page 2 – All Deals ($) By Competitor

Visual and tabular breakdown of opportunity amounts by competitor per quarter.
Users can hover and view the percentage and counts via the tooltip feature.

Data is blurred or altered for confidentiality

Page 3 – Win & Loss Overview

Visual and tabular breakdown of opportunities by closed won and loss per quarter.

Data is blurred or altered for confidentiality

Page 4 – Deals by Competitor & Deal Range

DEALS BY COMPETITOR

Primary Competitor	Total Deals Against (#)	Total Deals Against ($)	Deals Lost (#)	Deals Lost ($)	Deals Won (#)	Win Rate (#)	Deals Won ($)	Win Rate ($)

Total

DEALS BY DEAL RANGE & LOST 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
$0-25k						
Blank, No Reason						
Lost Sales Moment...						
No Budget, Too Exp...						
Other						
$25-50k						
Blank, No Reason						
Lost Sales Moment...						
No Budget, Too Exp...						
Other						
$50-100k						
Blank, No Reason						
Lost Sales Moment...						
No Budget, Too Exp...						
Other						

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
$0-25k						
Blank, No Reason						
Lost Sales Moment...						
No Budget, Too Ex...						
Other						
$25-50k						
Blank, No Reason						
Lost Sales Moment...						
No Budget, Too Ex...						
Other						
$50-100k						
Blank, No Reason						
Lost Sales Moment...						
No Budget, Too Ex...						
Other						

FILTERS

Close Date (Start-End)
1/1/2022 | 4/30/2025

Close Date (YQ)
All

BFT (Bucket)
All

Closed Won / Lost
All

Early / Late Stage
All

Opportunity Type
All

Product Type
All

Marketing Segment
All

Competitor
Multiple selections

Company Segment
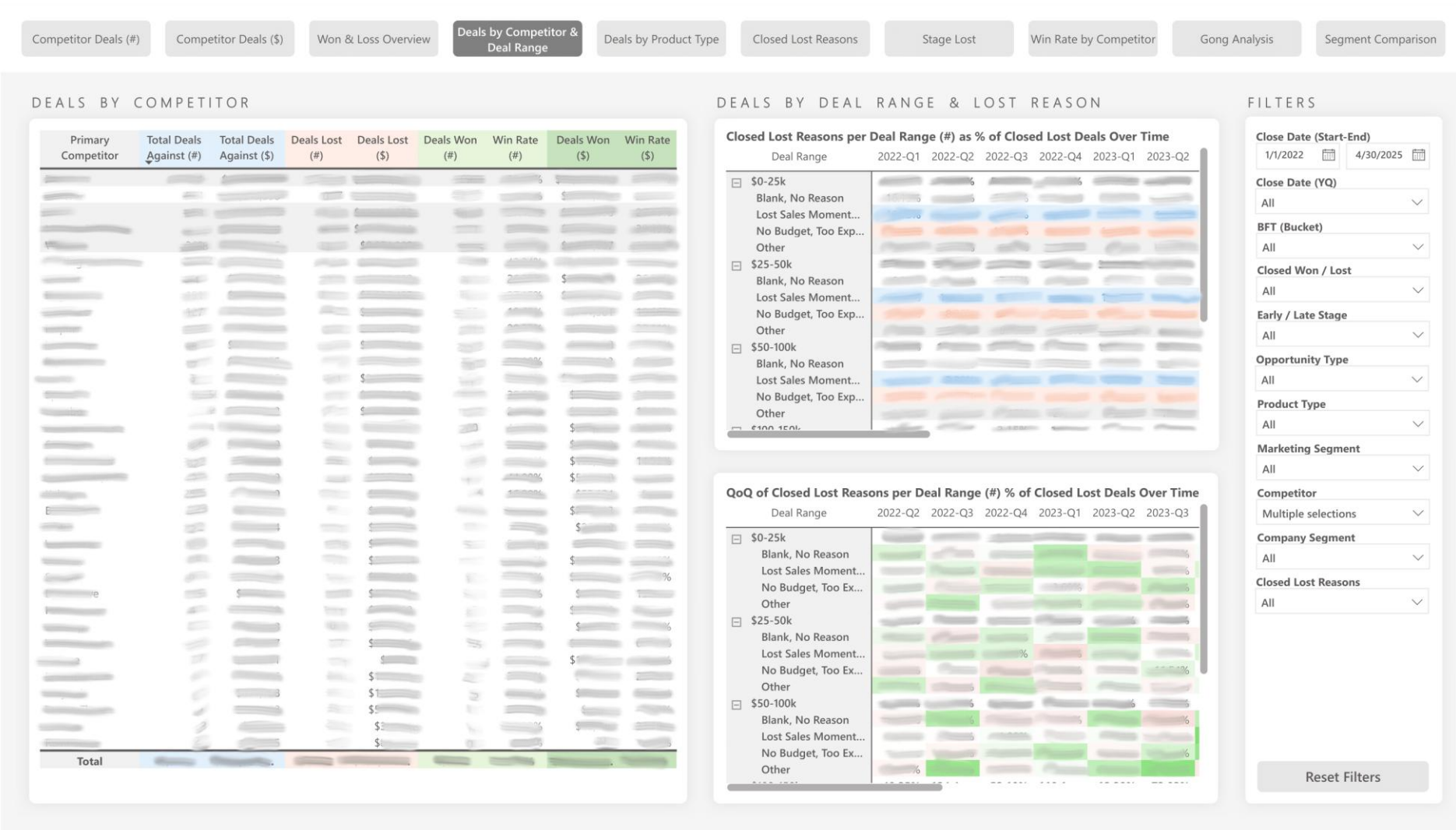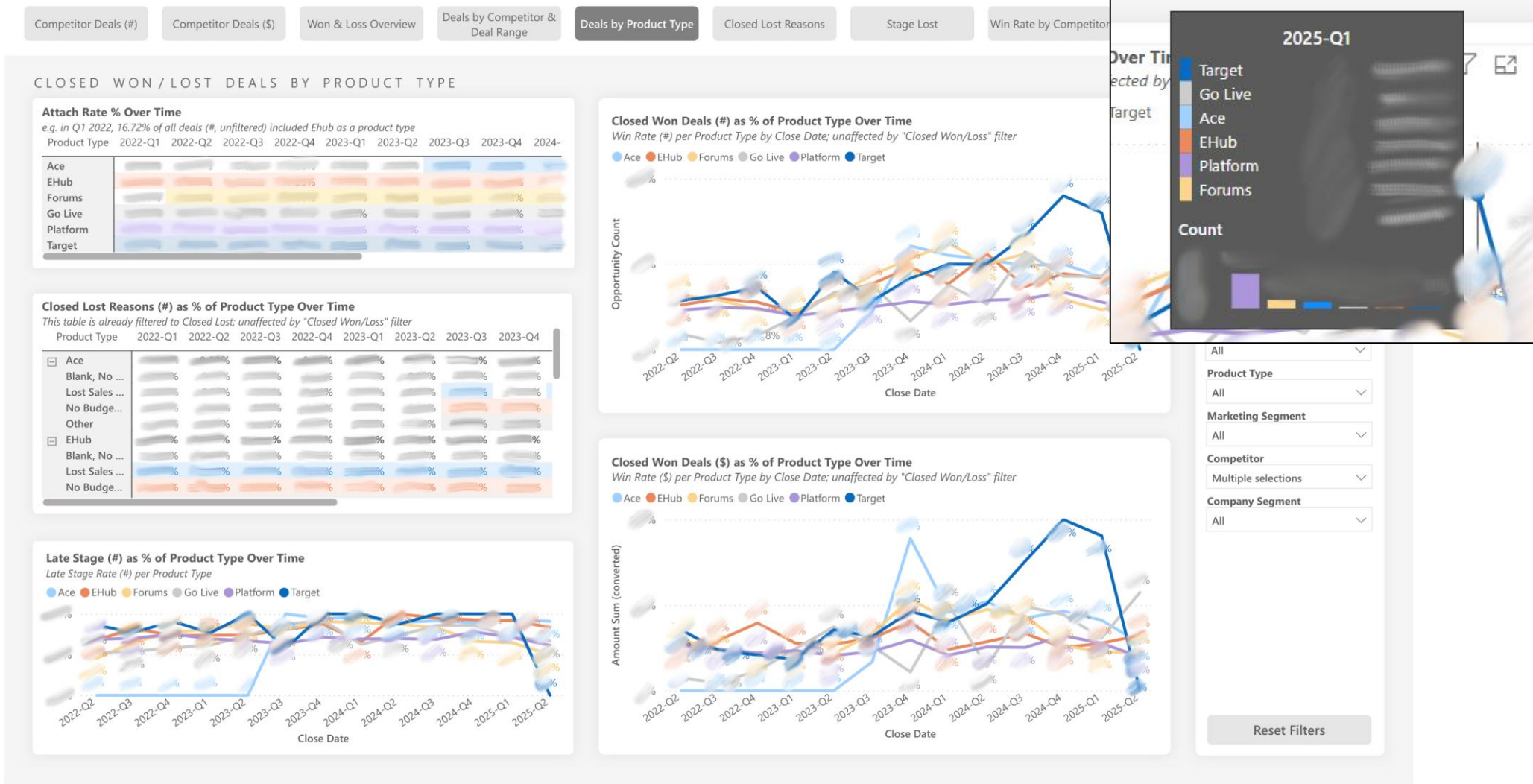All

Closed Lost Reasons
All

Reset Filters

Table summarizing counts and amounts against specific competitors, as requested by a C-level leader.
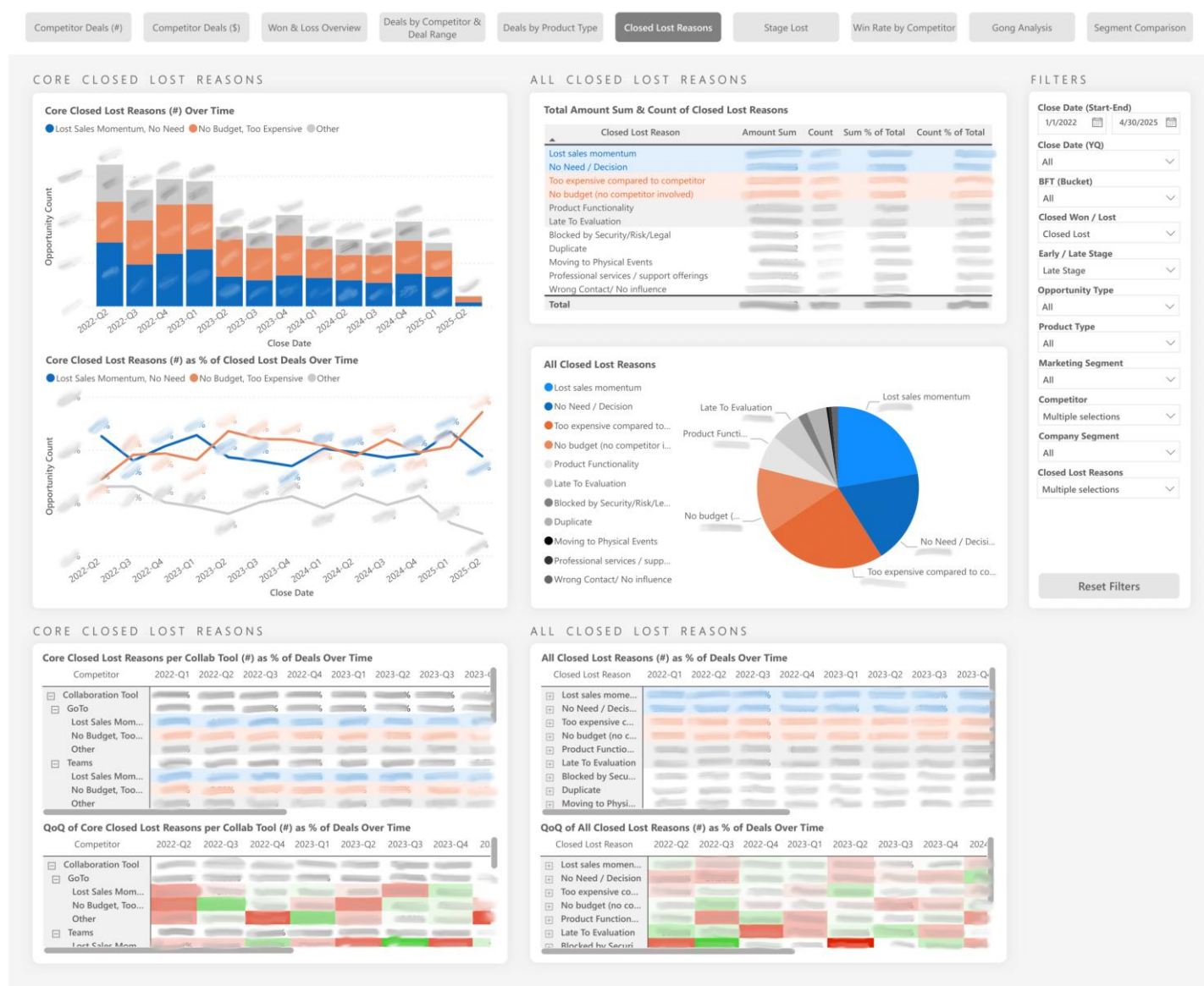
Data is blurred or altered for confidentiality

Page 5 – Deals by Product Type

Visual and tabular breakdown of opportunity counts by product per quarter.
Users can hover and view the percentage and counts via the tooltip feature.

Data is blurred or altered for confidentiality
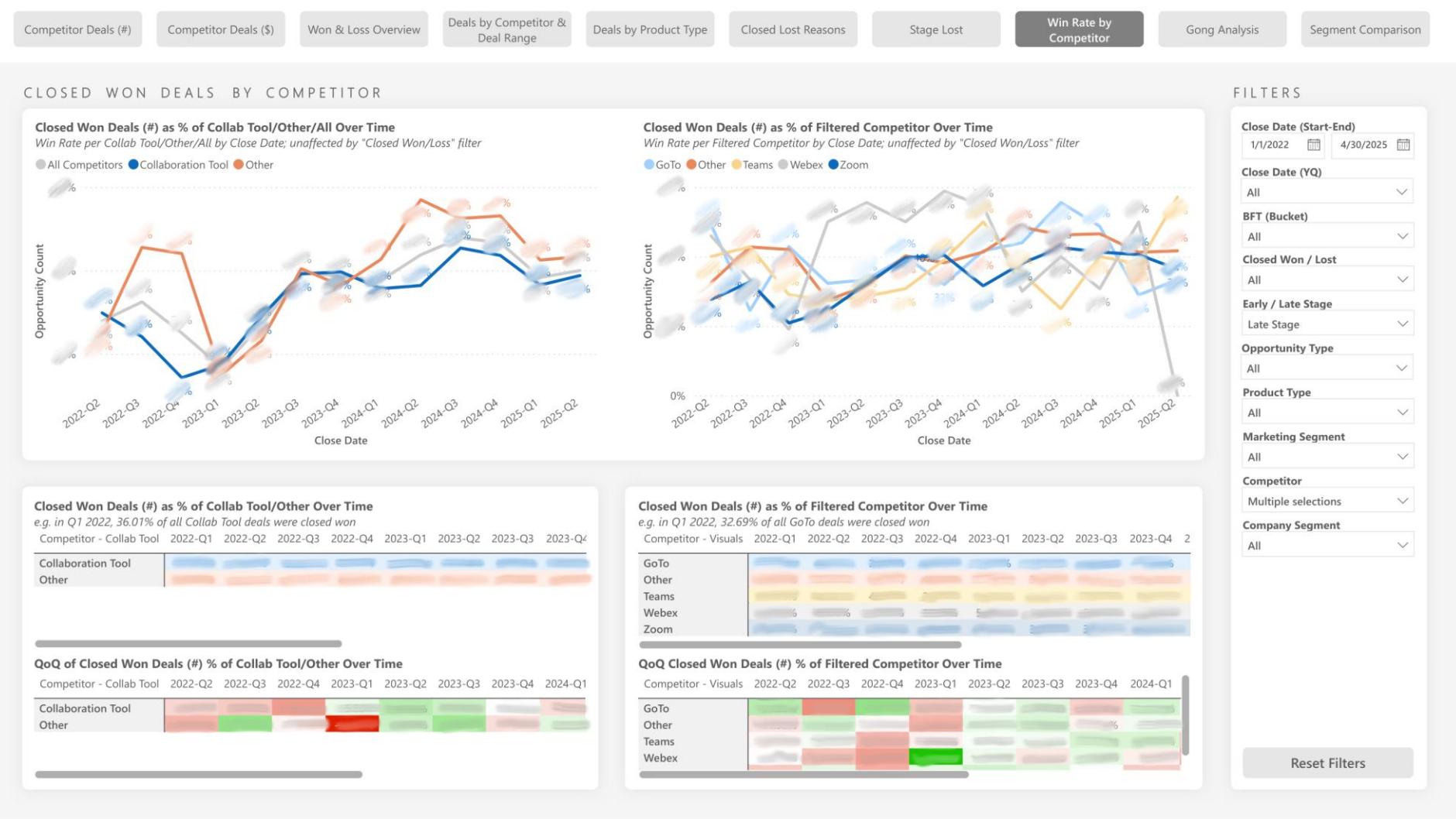
Page 6 – Closed Lost Reasons

Visual and tabular breakdown of closed lost opportunities by closed lost reasons per quarter.
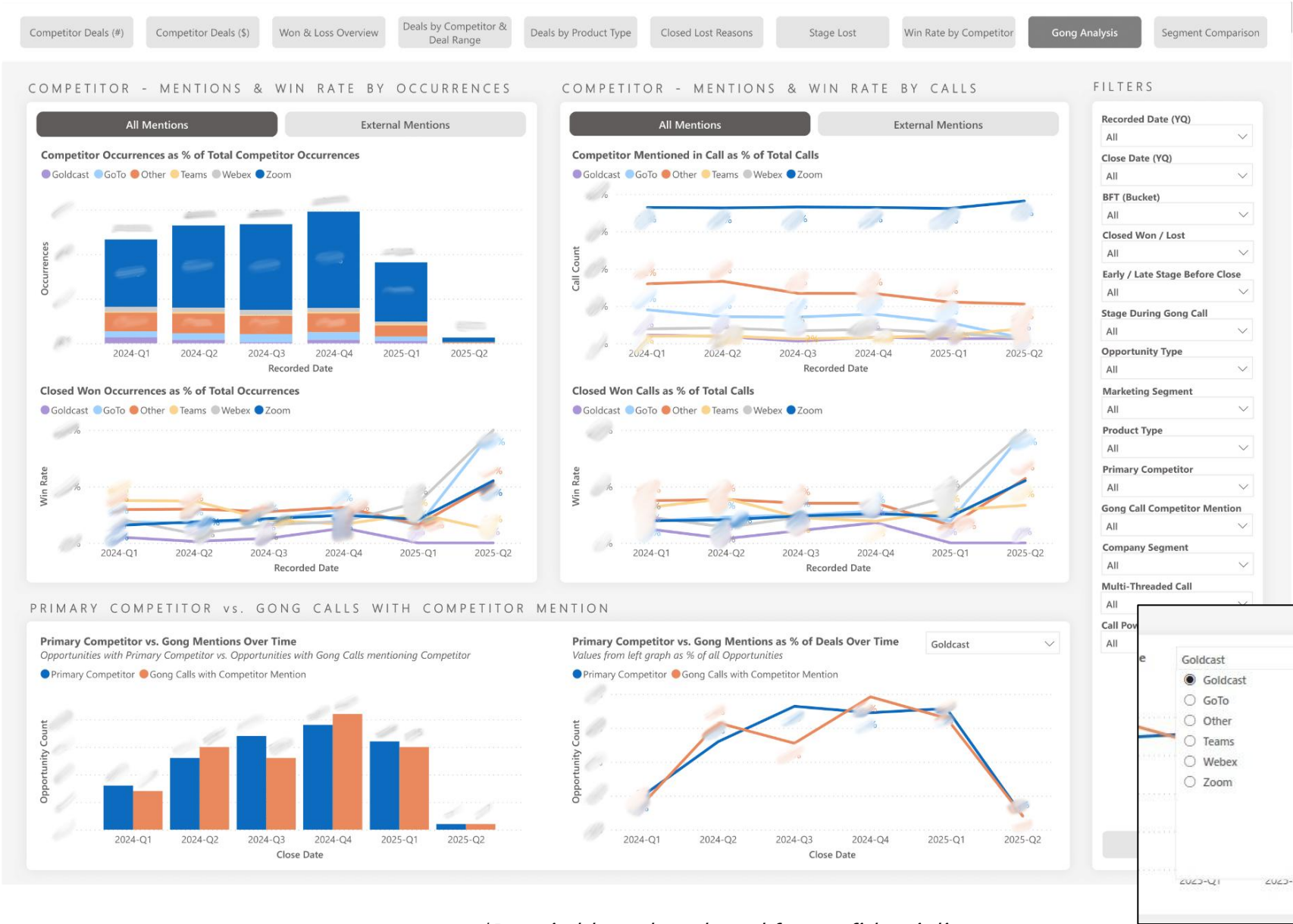
*Data is blurred or altered for confidentiality

Page 7 – Stage Lost

Visual and tabular breakdowns of closed lost opportunities by the stage in the pipeline during which they were lost.

Data is blurred or altered for confidentiality
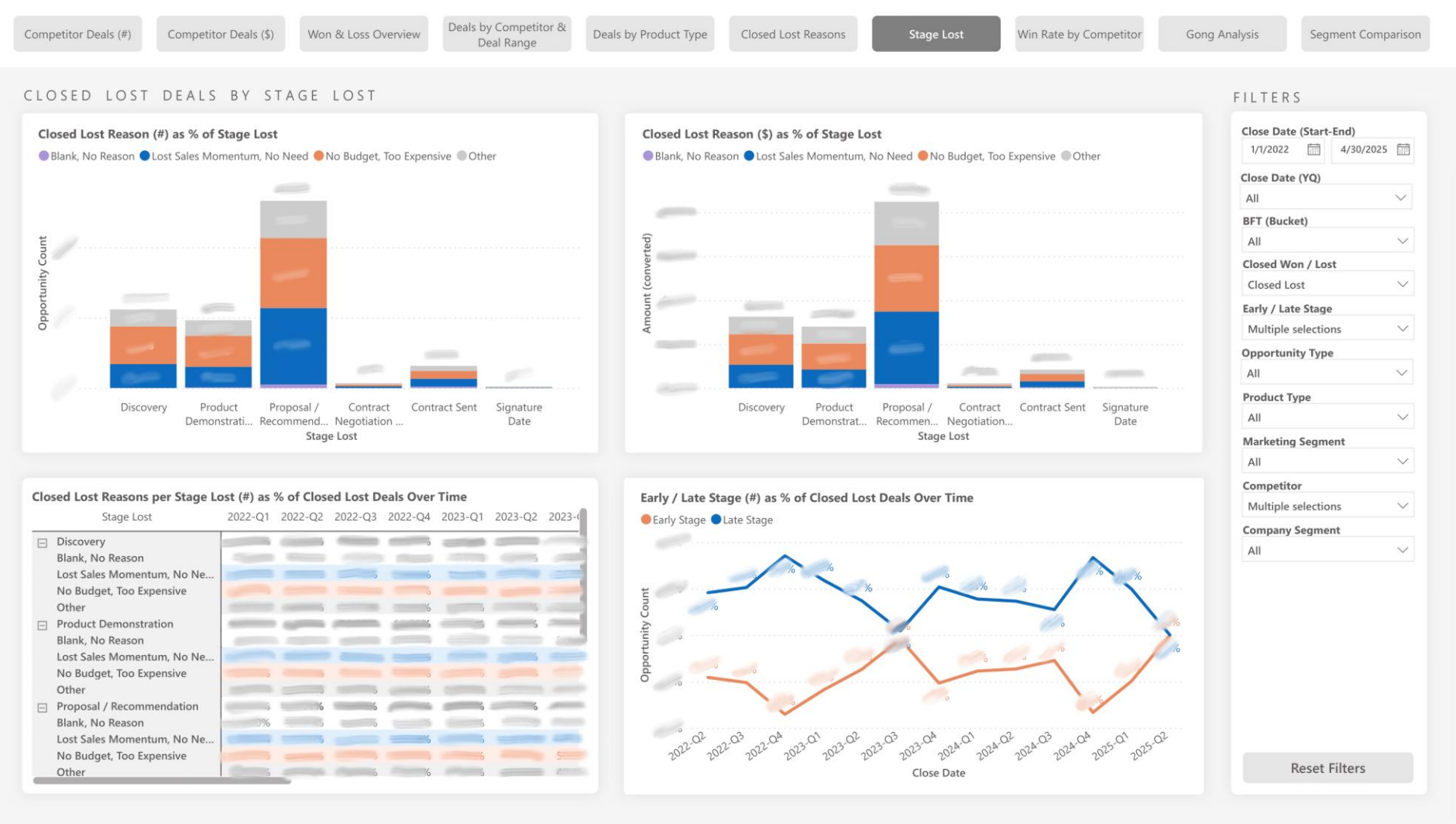
Page 8 – Win Rate by Competitor

Visual and tabular breakdowns of closed won deals by competitor per quarter.

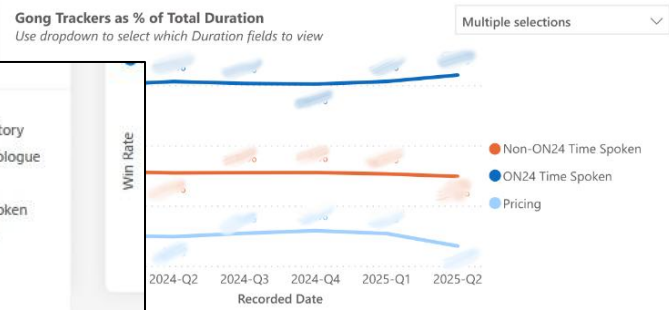*Data is blurred or altered for confidentiality*

Page 9 – Gong Analysis

Visual analysis of Gong call data, specifically calls where a competitor is mentioned.

Pivoting the data allows users to perform analyses on different competitors via a dropdown slicer.

Data is blurred or altered for confidentiality

Page 9 – Gong Analysis (continued)

"Power" calls refer to calls in which there is at least one Non-ON24 Attendee holding a variation of the following titles: Head, Director, VP, President, Chief, C-Level, CEO, CMO, CFO, CTO, COO, and CSO.

"Power"
?

2024-Q1   2024-Q2   2024-Q3   2024-Q4   2025-Q1   2025-Q2
Close Date

2024-Q1   2024-Q2   2024-Q3   2024-Q4   2025-Q1   2025-Q2
Close Date

MULTI-THREADED CALLS

POWER CALLS

Multi-Threaded Calls as % of Total Calls
● Multi-Threaded ● Single-Threaded

Power as % of Total Calls
% of Calls with High-Level Non-ON24 Participants
● Has Power ● No Power

"Power"
?

Call Count

2024-Q1   2024-Q2   2024-Q3   2024-Q4   2025-Q1   2025-Q2
Recorded Date

% of Total Calls

2024-Q1   2024-Q2   2024-Q3   2024-Q4   2025-Q1   2025-Q2
Recorded Date

Closed Won Calls as % of Total Multi-Threaded Calls
Multi-Threaded vs. Single-Threaded Calls Win Rate by Close Date
● Multi-Threaded ● Single-Threaded

Closed Won Calls as % of Total Power Calls
Has Power vs. No Power Win Rate by Close Date
● Has Power ● No Power

Win Rate

2024-Q1   2024-Q2   2024-Q3   2024-Q4   2025-Q1   2025-Q2
Close Date

Win Rate

2024-Q1   2024-Q2   2024-Q3   2024-Q4   2025-Q1   2025-Q2
Close Date

Visual analysis of Gong call data, specifically calls where a competitor is mentioned.

Pivoting the data allows users to perform analyses on different Gong trackers via a dropdown slicer.

MISC GONG TRACKERS

Gong Trackers as % of Total Duration
Use dropdown to select which Duration fields to view

Multiple selections ⌄

Other Gong Trackers by Occurrences (#)

Gong Trackers	2024-Q1	2024-Q2	2024-Q3	2024-Q4	2025-Q1
ON24 Question Count					
Expansion Focused					
Non-ON24 Question Count					
Methodology & Execution - Timeline					
Process					
Use Case & Verticals - Engagement					
Objections					
Use Case & Verticals - Demand Generation					
Strategic Alliances					
Product - ACE					
Next Steps					
Total					2

Win Rate

● Non-ON24 Time Spoken
● ON24 Time Spoken
● Pricing

2024-Q2   2024-Q3   2024-Q4   2025-Q1   2025-Q2
Recorded Date

☑ Select all
☐ Longest Customer Story
☐ Longest ON24 Monologue
☐ Next Steps
☑ Non-ON24 Time Spoken
☑ ON24 Time Spoken
☐ Presentation
☑ Pricing
☐ Small Talk
☐ Wrap-Up

Multiple selections   ⌃

*Data is blurred or altered for confidentiality

Page 10 – Segment Comparison
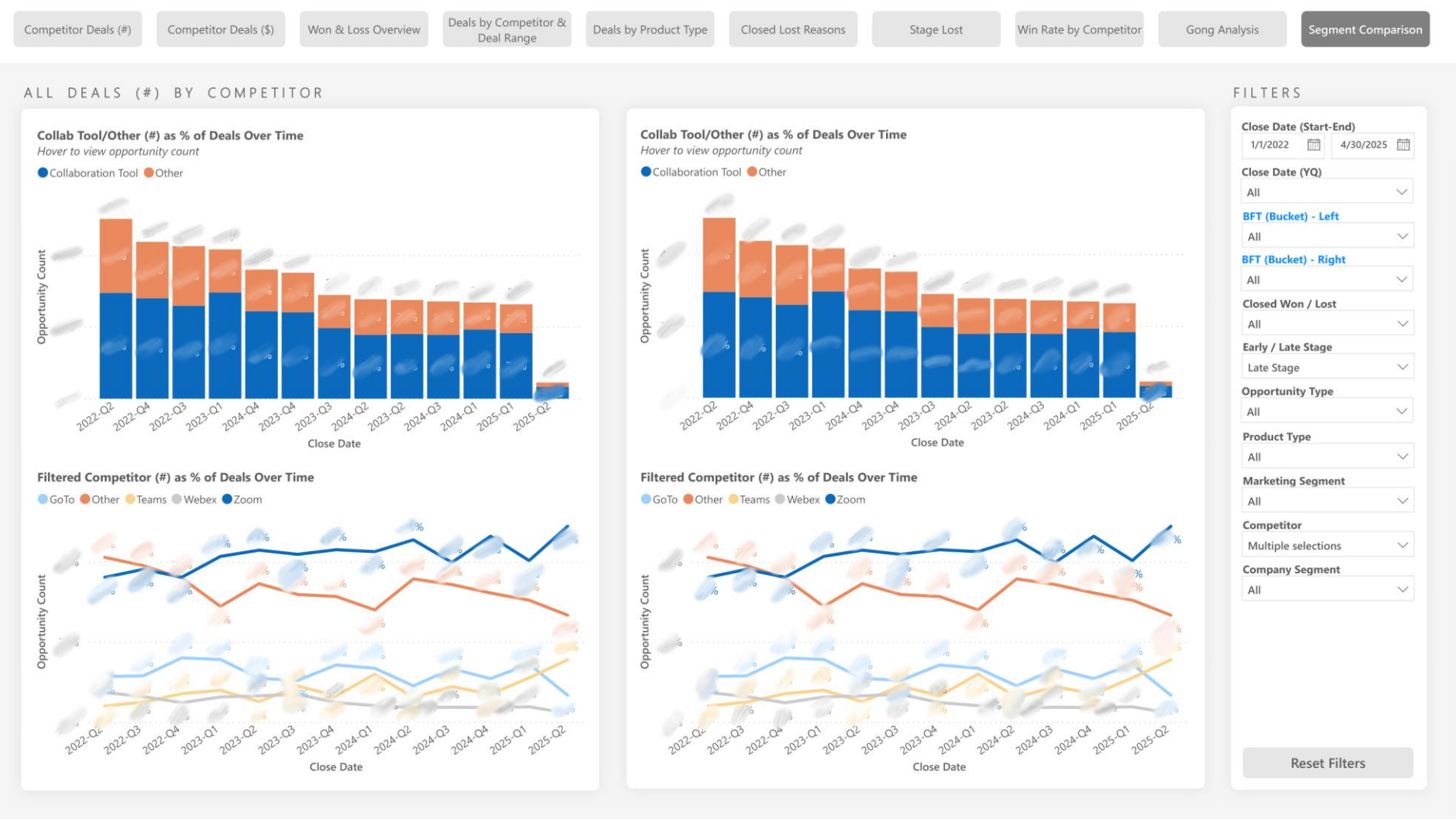
Allows users to compare the performance of 2 different teams using the filters on the right.

Data is blurred or altered for confidentiality

Page 11 – Opportunity Drill through Table

All visuals have a drill through feature that allows users to view the underlying Salesforce data via this table.

Data is blurred or altered for confidentiality

Page 12 – Gong Drill through Table

All visuals have a drill through feature that allows users to view the underlying Gong data via this table.

Data is blurred or altered for confidentiality

Notable Logic Behind the Dashboard

Product Type Filter

#	ABC Opportunity_ID_18_Digit__c	1.2 Opportunity.Platform Amount	1.2 Opportunity.Ace Amount	1.2 Opportunity.Engagement Hub Amou...	1.2 Opportunity.Go Live Amount	1.2
1	00600000004soegAAA	0	0	0	0	
2	00600000004v2XyAAI	0	0	0	0	
3	00600000007NQQ8AAO	36000	0	0	0	
4	00600000005AjVRAA0	50000	0	0	0	
5	00600000007byO8AAI	60000	0	0	0	
6	00600000005AlUDAA0	20000	0	0	0	
7	00600000008H4UYAA0	25000	0	0	0	
8	00600000005AlaQAAS	0	0	0	0	
9	00600000008XvsrAAC	278430	0	0	0	
10	00600000005AmDvAAK	60000	0	0	0	
11	0060P00000c1vvkQAA	8325	0	0	0	
12	00600000005AokgAAC	7500	0	0	0	
13	0060P00000faC8XQAU	20000	0	0	0	
14	00600000005CFGjAAO	10000	0	0	0	
15	0060P00000hbLLrQAM	0	0	0	0	
16	006000000708xxAAA	32146	0	0	0	
17	0060P00000hbLMGQA2	0	0	0	0	
18	006000000709Q8AAI	0	0	0	0	
19	0064U00000lZ3uTQAS	35500	0	0	0	
20	00600000070gX9AAI	0	0	0	0	
21	00600000070gXQAAY	0	0	0	0	
22	00600000070gXjAAI	0	0	0	0	
23	00600000070gXtAAI	89500	0	0	0	
24	00600000070uKVAAY	95000	0	0	0	
25	006000000071KCjAAM	null	null	null	null	
26	0060000000722ZOAA2	0	0	0	0	
27	0060000000722ZsAAM	30000	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.

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Product Type Filter

	ABC Opportunity_ID_18_Digit__c	ABC Attribute	1.2 Value
1	00600000004soegAAA	Opportunity.Platform Amount	0
2	00600000004soegAAA	Opportunity.Ace Amount	0
3	00600000004soegAAA	Opportunity.Engagement Hub Amount	0
4	00600000004soegAAA	Opportunity.Go Live Amount	0
5	00600000004soegAAA	Opportunity.Forums Amount	0
6	00600000004soegAAA	Opportunity.Target Amount	0
7	00600000004v2XyAAI	Opportunity.Platform Amount	0
8	00600000004v2XyAAI	Opportunity.Ace Amount	0
9	00600000004v2XyAAI	Opportunity.Engagement Hub Amount	0
10	00600000004v2XyAAI	Opportunity.Go Live Amount	0
11	00600000004v2XyAAI	Opportunity.Forums Amount	0
12	00600000004v2XyAAI	Opportunity.Target Amount	0
13	00600000007NQQ8AAO	Opportunity.Platform Amount	36000
14	00600000007NQQ8AAO	Opportunity.Ace Amount	0
15	00600000007NQQ8AAO	Opportunity.Engagement Hub Amount	0
16	00600000007NQQ8AAO	Opportunity.Go Live Amount	0
17	00600000007NQQ8AAO	Opportunity.Forums Amount	0
18	00600000007NQQ8AAO	Opportunity.Target Amount	0
19	00600000005AjVRAA0	Opportunity.Platform Amount	50000
20	00600000005AjVRAA0	Opportunity.Ace Amount	0
21	00600000005AjVRAA0	Opportunity.Engagement Hub Amount	0
22	00600000005AjVRAA0	Opportunity.Go Live Amount	0
23	00600000005AjVRAA0	Opportunity.Forums Amount	0
24	00600000005AjVRAA0	Opportunity.Target Amount	0
25	00600000007byO8AAI	Opportunity.Platform Amount	60000
26	00600000007byO8AAI	Opportunity.Ace Amount	0
27	00600000007byO8AAI	Opportunity.Engagement Hub Amount	0
28	00600000007byO8AAI	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

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

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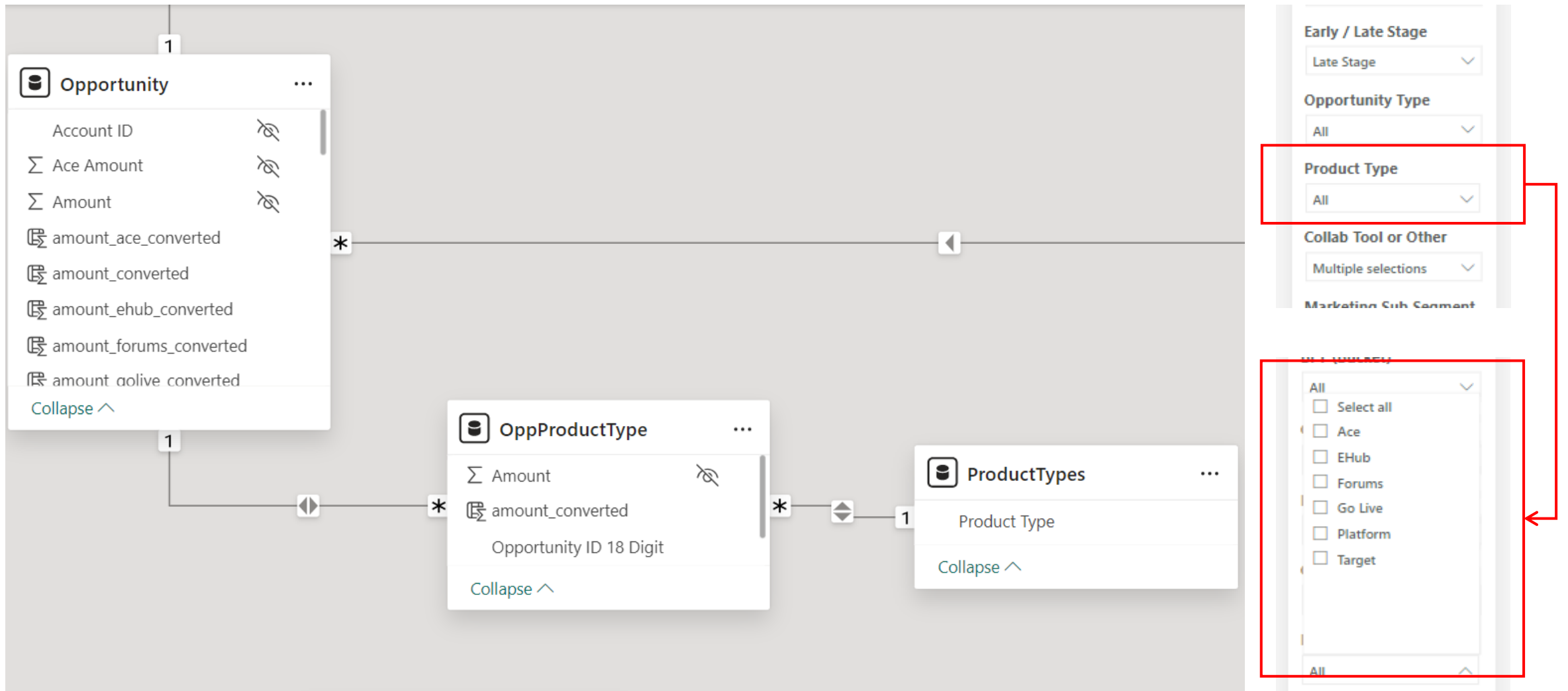
Establish relationship between Opportunity table and Product Type table, then create Product Type filter.

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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
```
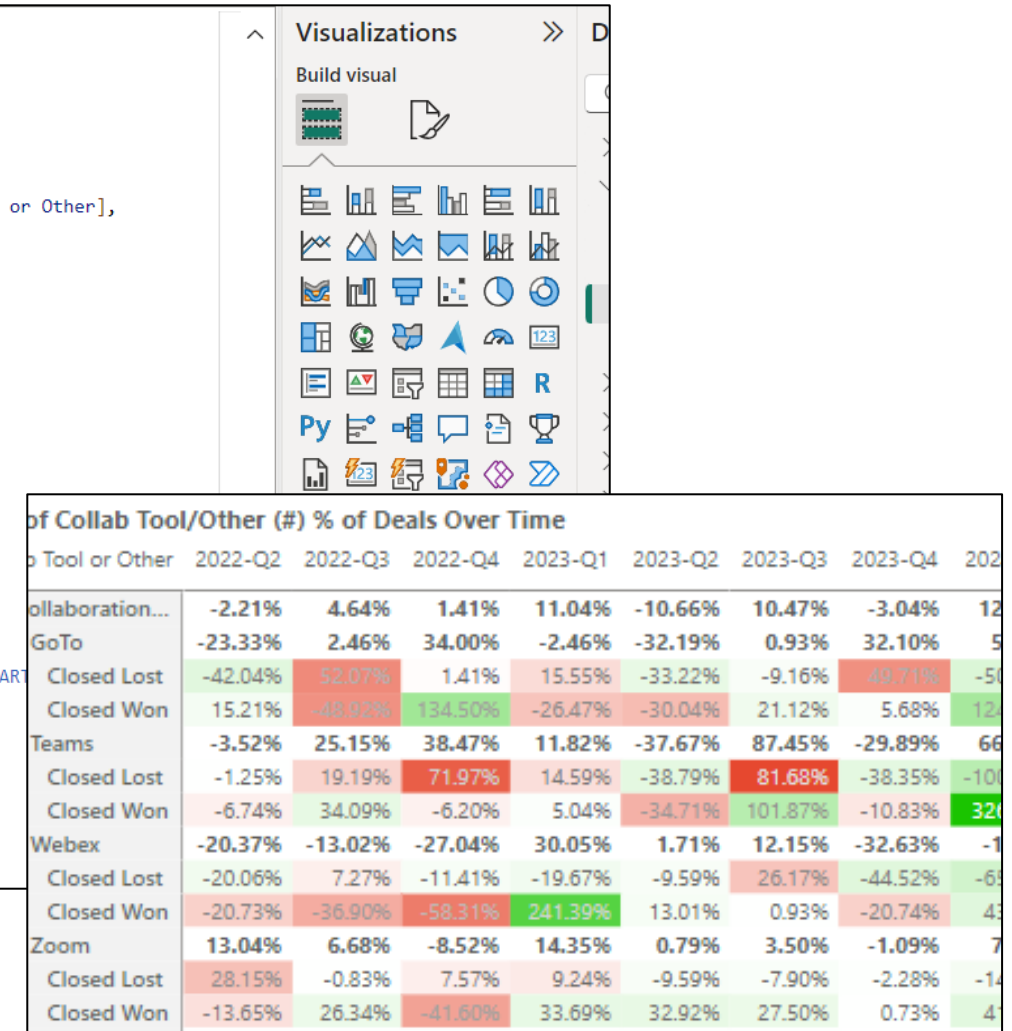
Tool or Other	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	202
ollaboration...	-2.21%	4.64%	1.41%	11.04%	-10.66%	10.47%	-3.04%	12
GoTo	-23.33%	2.46%	34.00%	-2.46%	-32.19%	0.93%	32.10%	5
Closed Lost	-42.04%	52.07%	1.41%	15.55%	-33.22%	-9.16%	49.71%	-50
Closed Won	15.21%	48.02%	134.50%	-26.47%	-30.04%	21.12%	5.68%	124
Teams	-3.52%	25.15%	38.47%	11.82%	-37.67%	87.45%	-29.89%	66
Closed Lost	-1.25%	19.19%	71.97%	14.59%	-38.79%	81.68%	-38.35%	-100
Closed Won	-6.74%	34.09%	-6.20%	5.04%	-34.71%	101.87%	-10.83%	320
Webex	-20.37%	-13.02%	-27.04%	30.05%	1.71%	12.15%	-32.63%	-1
Closed Lost	-20.06%	7.27%	-11.41%	-19.67%	-9.59%	26.17%	-44.52%	-6
Closed Won	-20.73%	-36.90%	-58.31%	241.39%	13.01%	0.93%	-20.74%	43
Zoom	13.04%	6.68%	-8.52%	14.35%	0.79%	3.50%	-1.09%	7
Closed Lost	28.15%	-0.83%	7.57%	9.24%	-9.59%	-7.90%	-2.28%	-1
Closed Won	-13.65%	26.34%	-41.60%	33.69%	32.92%	27.50%	0.73%	4

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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Close Date Visuals Default

```
1  Close Date Visuals Default =
2  // when date is not filtered, this caps the date to the latest 3 yrs for visuals
3  // the last date will be the date 3 years from the current qtr
4  // e.g., if it was Q1 2025, the reset visual will return the dates Q1 2022 - Q1 2025
5
6  VAR reset_mapping =
7      IF(AND(
8      SELECTEDVALUE(DateTableClose[Year]) >= YEAR(TODAY())-2,
9      SELECTEDVALUE(DateTableClose[Year]) < YEAR(TODAY())), 1,
10     IF(
11         SELECTEDVALUE(DateTableClose[Year]) = YEAR(TODAY()),
12         IF(SELECTEDVALUE(DateTableClose[Date]) <= TODAY(), 1, 0),
13     IF(
14         SELECTEDVALUE(DateTableClose[Year]) = YEAR(TODAY())-3,
15         IF(SELECTEDVALUE(DateTableClose[Quarter]) >= QUARTER(TODAY()), 1, 0), 0))
16  RETURN IF(ISFILTERED(DateTableClose[Year]), 1, reset_mapping)
```
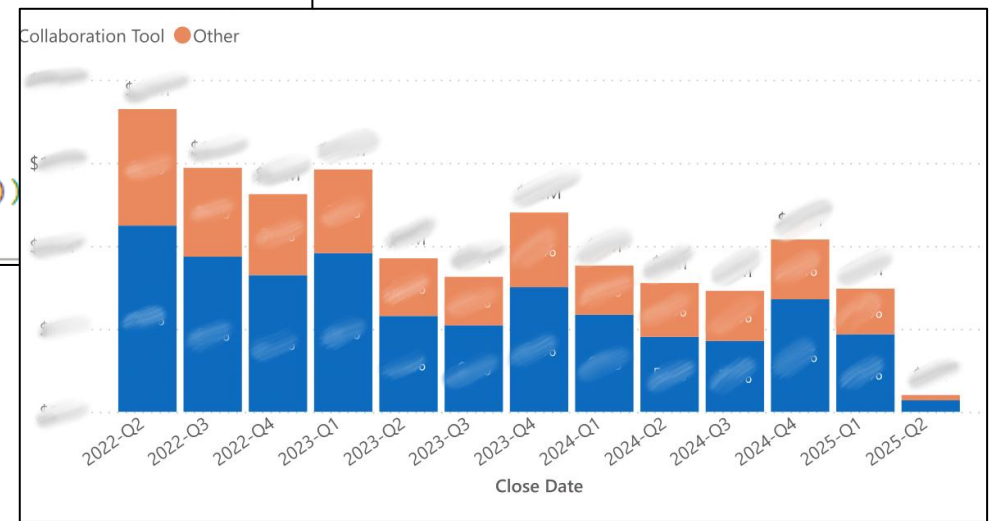
FILTERS

Close Date (Start-End)

1/1/2022   4/30/2025

Close Date (YQ)

All

DAX code for a filter that limits all visuals to the most recent quarters unless the close date is filtered by the user. This ensures all graphs visualize the most recent data and does not decrease the font size of the visual to fit more quarters into the graph, hence maximizing the readability of the visual.

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