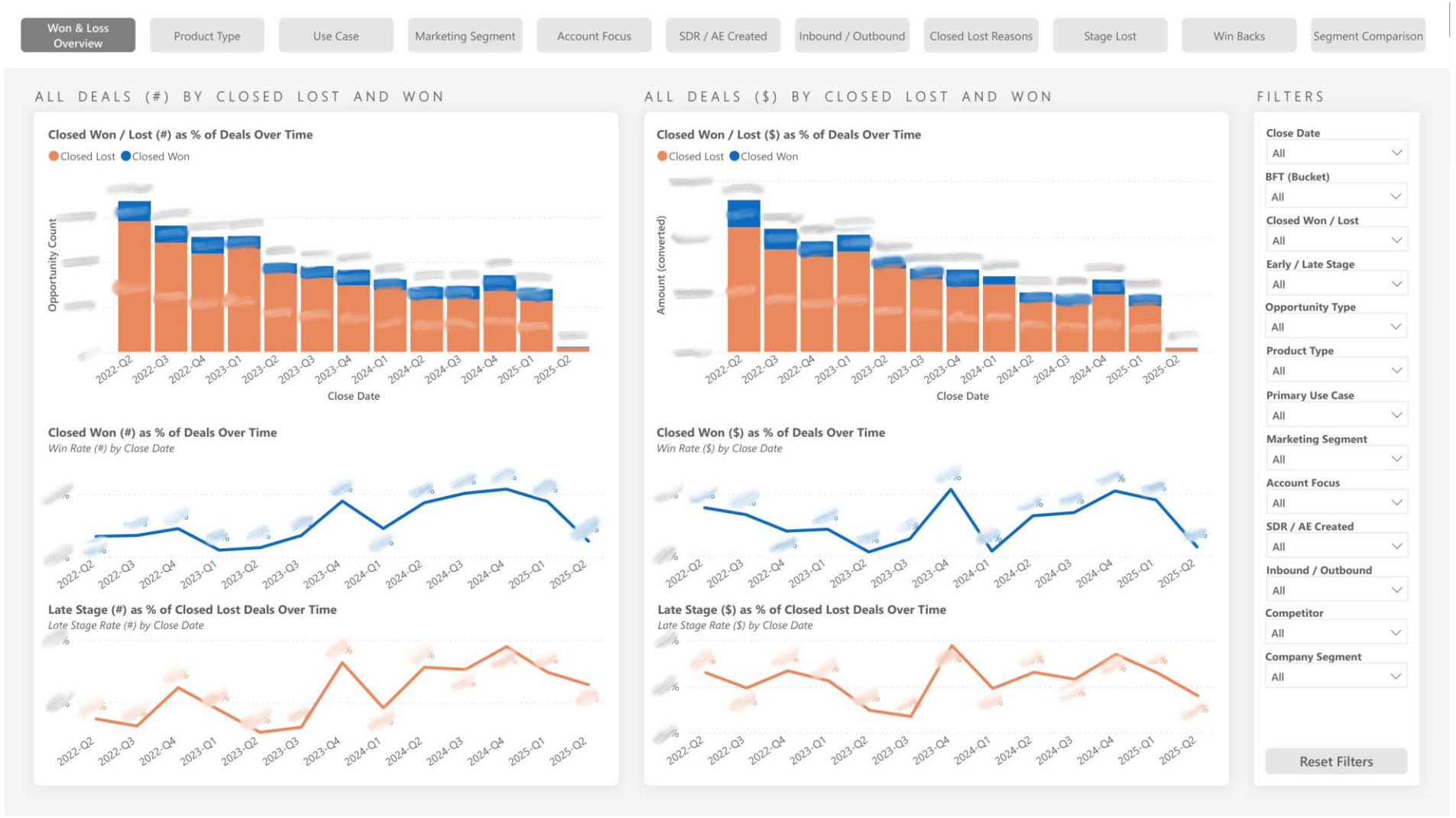
Pipeline Metrics
Power BI Dashboard

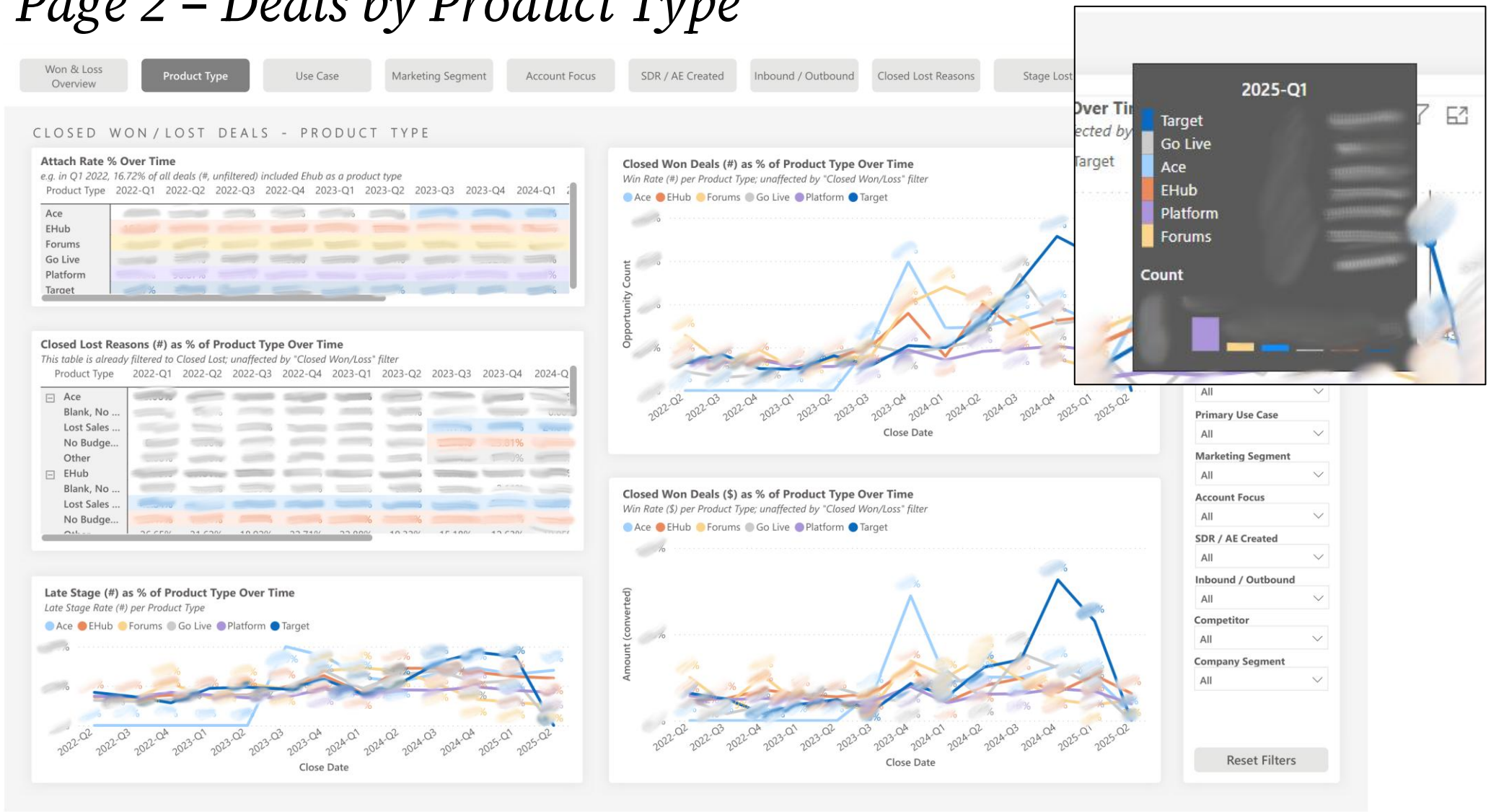
Page 1 – All Deals (#) By Closed Lost and Won



Visual breakdown of opportunities by won/loss per quarter.

**Data is blurred or altered for confidentiality*

Page 2 – 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.

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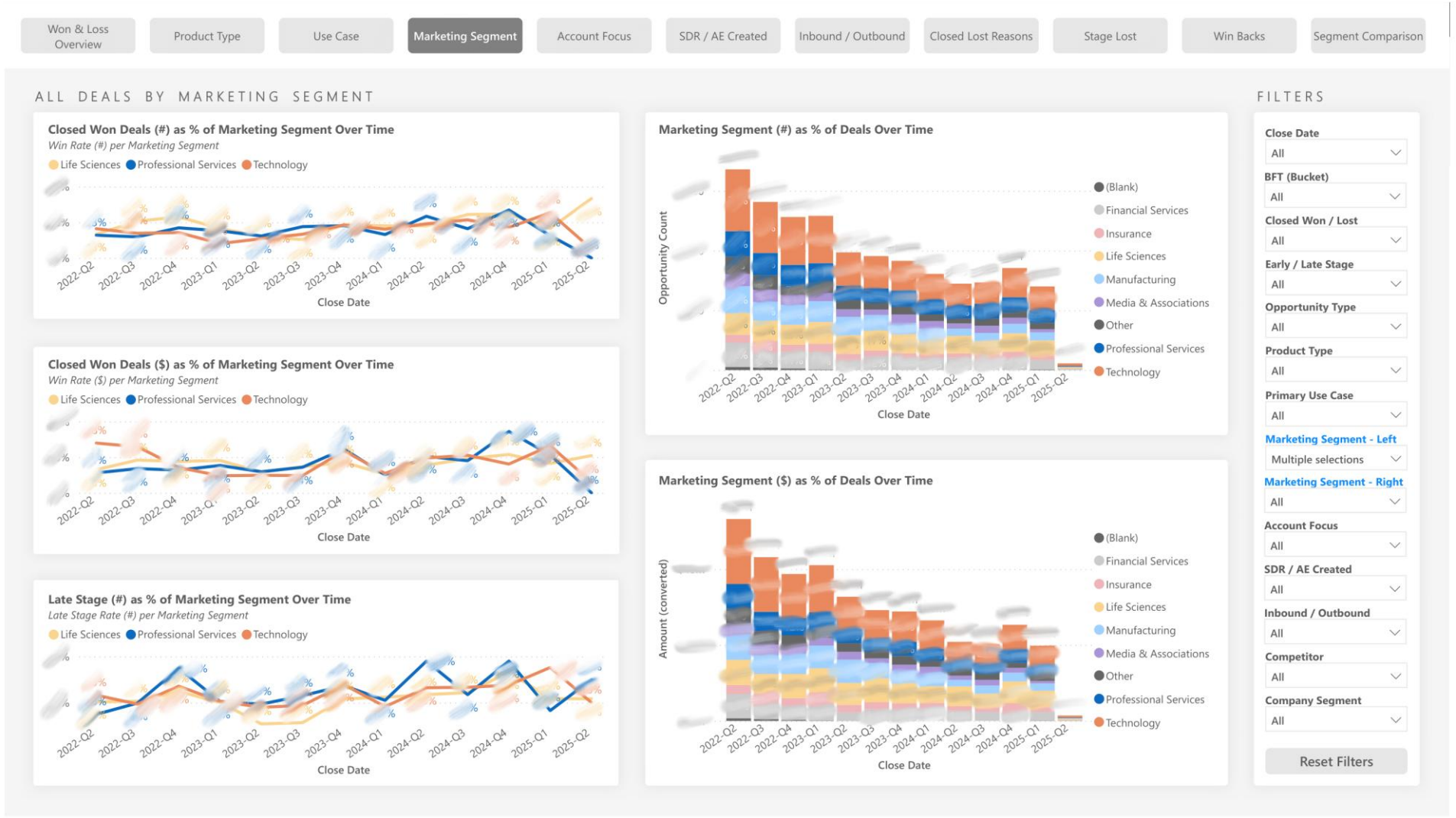
Pages 3-7 – Deals by Use Case, Marketing Segment, etc.



Visual breakdown of opportunities by various metrics per quarter.

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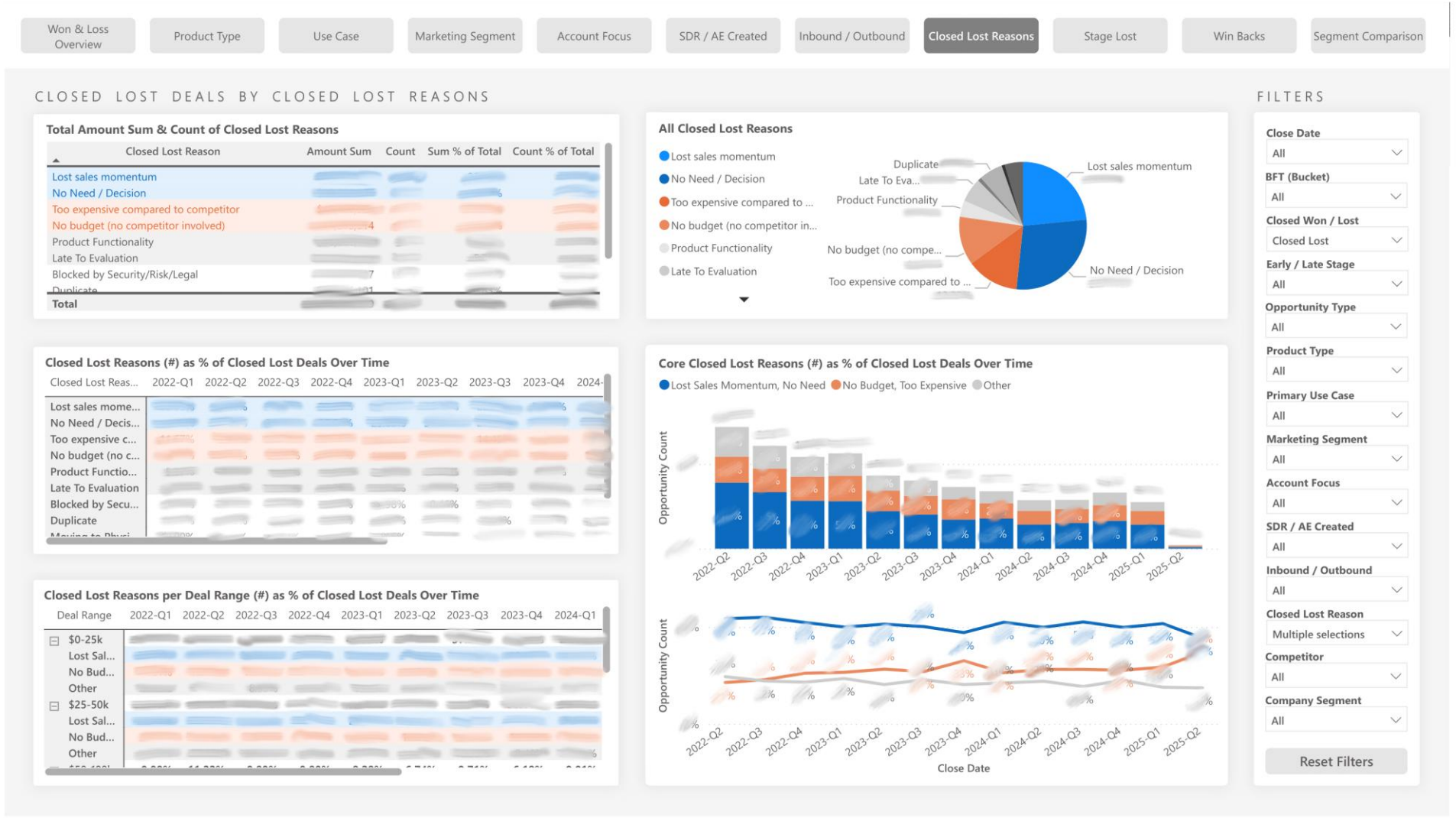
Page 8 – Closed Lost Reasons



Visual and tabular breakdown of closed lost opportunities by closed lost reasons per quarter.

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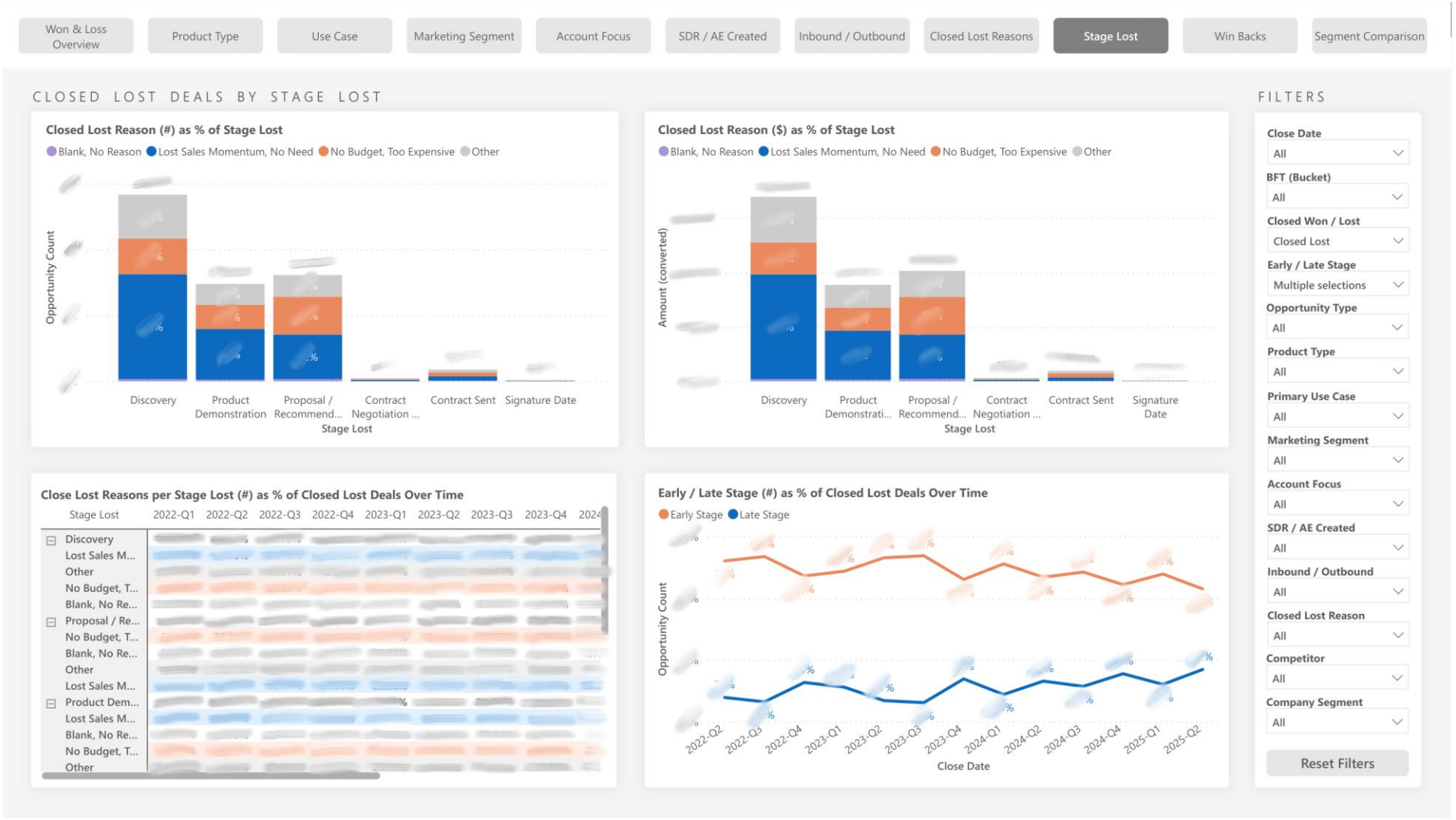
Page 9 – Stage Lost



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

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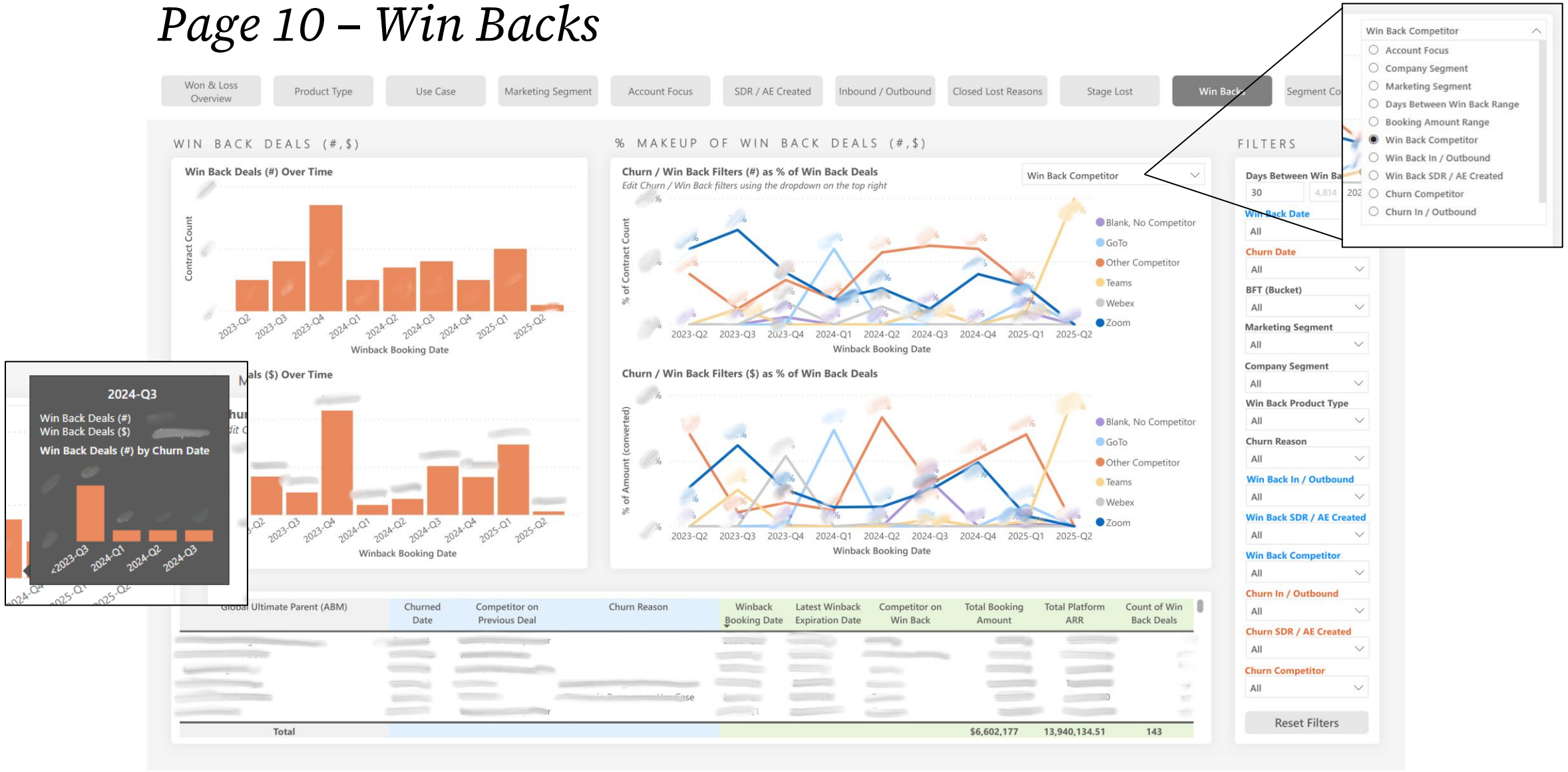
Page 10 – Win Backs



Visual and tabular breakdown of win backs (opportunities that churned and were won back later) per quarter. Users can hover and view win back deals by their churn date vs their win back date.

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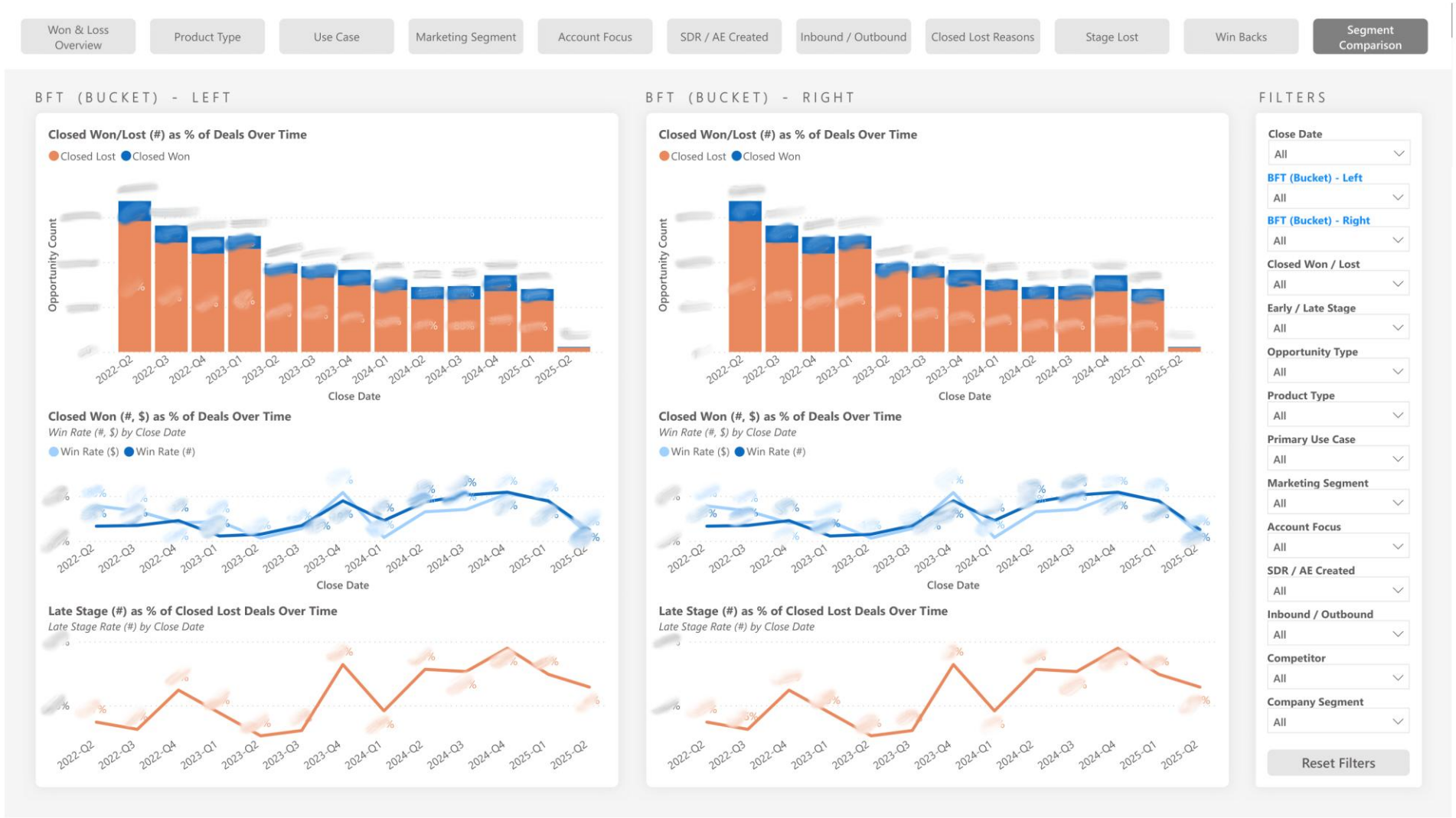
Page 11 – Segment Comparison



Allows users to compare the performance of 2 different teams using the filters on the right.

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Page 12 – Opportunity Drill through Table

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

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Page 13 – Win Back Drill through Table

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

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Notable Logic Behind the Dashboard

Win Back Deals

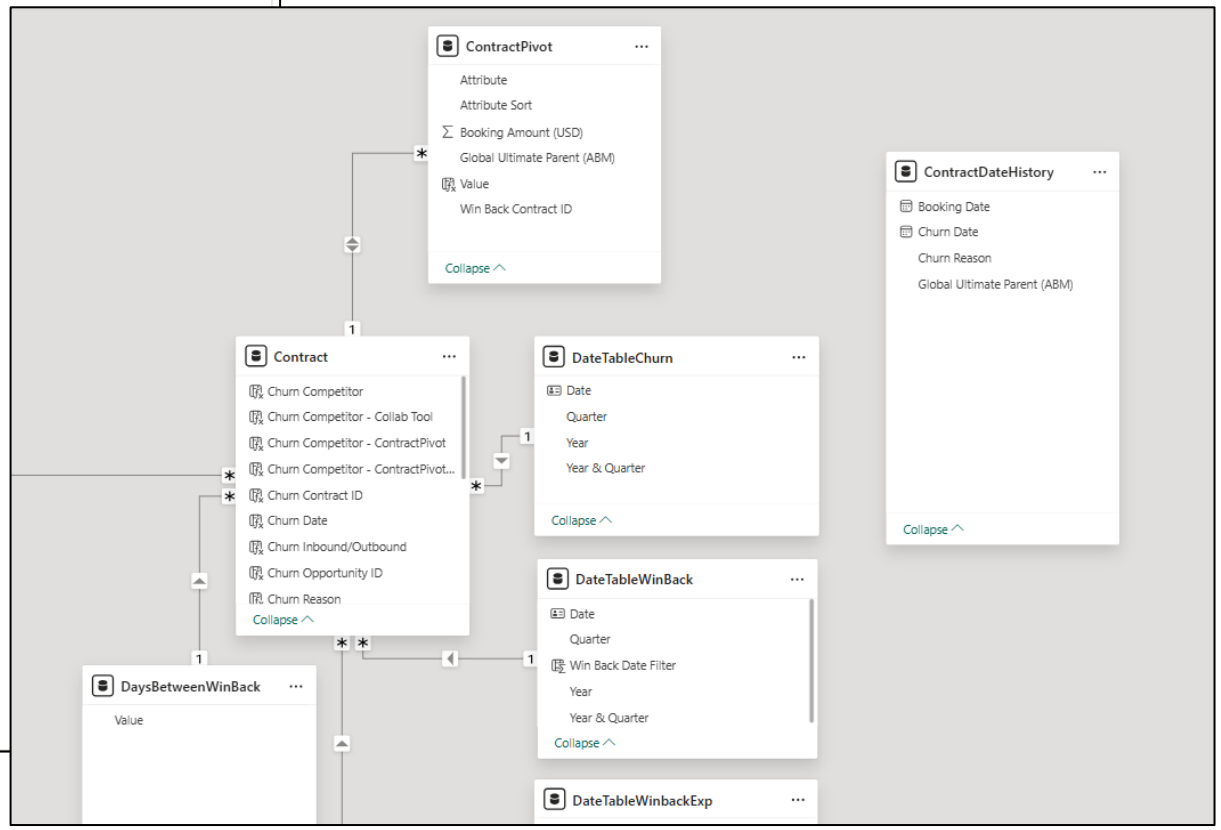
```
Churn Date =

VAR abm = Contract[Global Ultimate Parent (ABM)]
VAR bookingDate = Contract[Win Back Booking Date]

--check if contract booking date is within the booking and churn dates of another contract
VAR contractOverlap =
    CALCULATE(
        COUNT(ContractDateHistory[Global Ultimate Parent (ABM)]),
        ALLEXCEPT('ContractDateHistory', ContractDateHistory[Booking Date]),
        ContractDateHistory[Global Ultimate Parent (ABM)] = abm,
        ContractDateHistory[Booking Date] < bookingDate,
        ContractDateHistory[Churn Date] >= bookingDate) -
    --unless the booking dates are in the same year & month
    CALCULATE(
        COUNT(ContractDateHistory[Global Ultimate Parent (ABM)]),
        ALLEXCEPT('ContractDateHistory', ContractDateHistory[Booking Date]),
        ContractDateHistory[Global Ultimate Parent (ABM)] = abm,
        ContractDateHistory[Booking Date] < bookingDate,
        YEAR(ContractDateHistory[Booking Date]) = YEAR(bookingDate),
        MONTH(ContractDateHistory[Booking Date]) = MONTH(bookingDate))

--returns the closest churn date before booking date
VAR churnDate =
    CALCULATE(
        MAX(ContractDateHistory[Churn Date]),
        ContractDateHistory[Global Ultimate Parent (ABM)] = abm,
        ContractDateHistory[Churn Date] < bookingDate)

RETURN IF(contractOverlap < 1, churnDate, BLANK())
```



DAX code and model relationships behind identifying win back deals. After creating 3 contract queries via Power Query, the measure above marks win back contracts by first checking that the booking date of the contract is not within the booking and churn dates of another contract. Then for each booking date, it returns the earliest churn date before it. Contract tables are then filtered to only return contracts that have a churn date.

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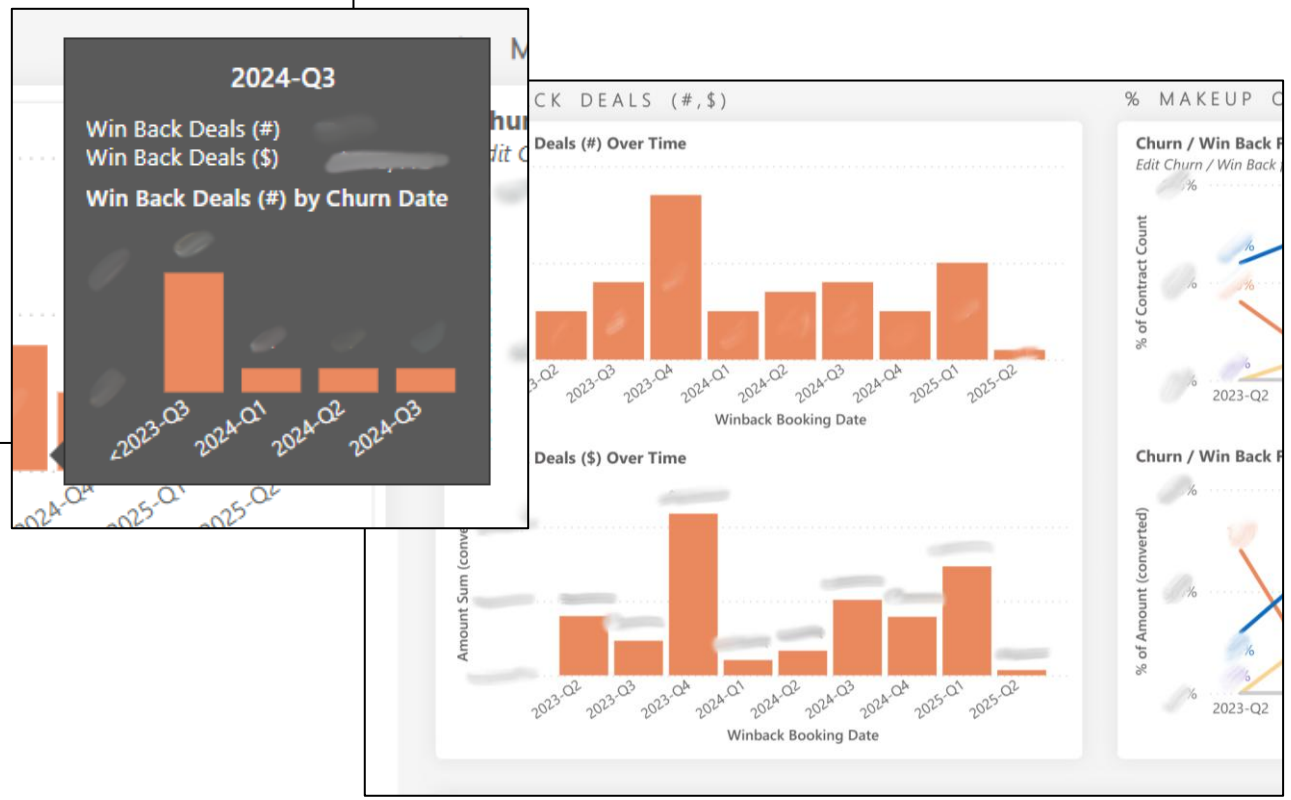
Win Back Deals Tooltip

```dax
Win Back Booking Date Tooltip =
// limits the churn tooltip bar graph to 6 bins

VAR churnYear = YEAR([Churn Date])
VAR churnQtr = QUARTER([Churn Date])
VAR winbackYear = Year([Win Back Booking Date])
VAR winbackQtr = QUARTER([Win Back Booking Date])

RETURN IF(
    churnYear = winbackYear ||
    AND(
        churnYear = winbackYear - 1,
        churnQtr >= winbackQtr),
    churnYear & "-Q" & churnQtr,
    "<"& winbackYear - 1 & "-Q" & winbackQtr)
```



DAX code for the win back deals tooltip, which visualizes win back deals based on their churn dates rather than their win back dates. Bar graph bins are automatically limited to a max of 6 quarters to ensure readability.

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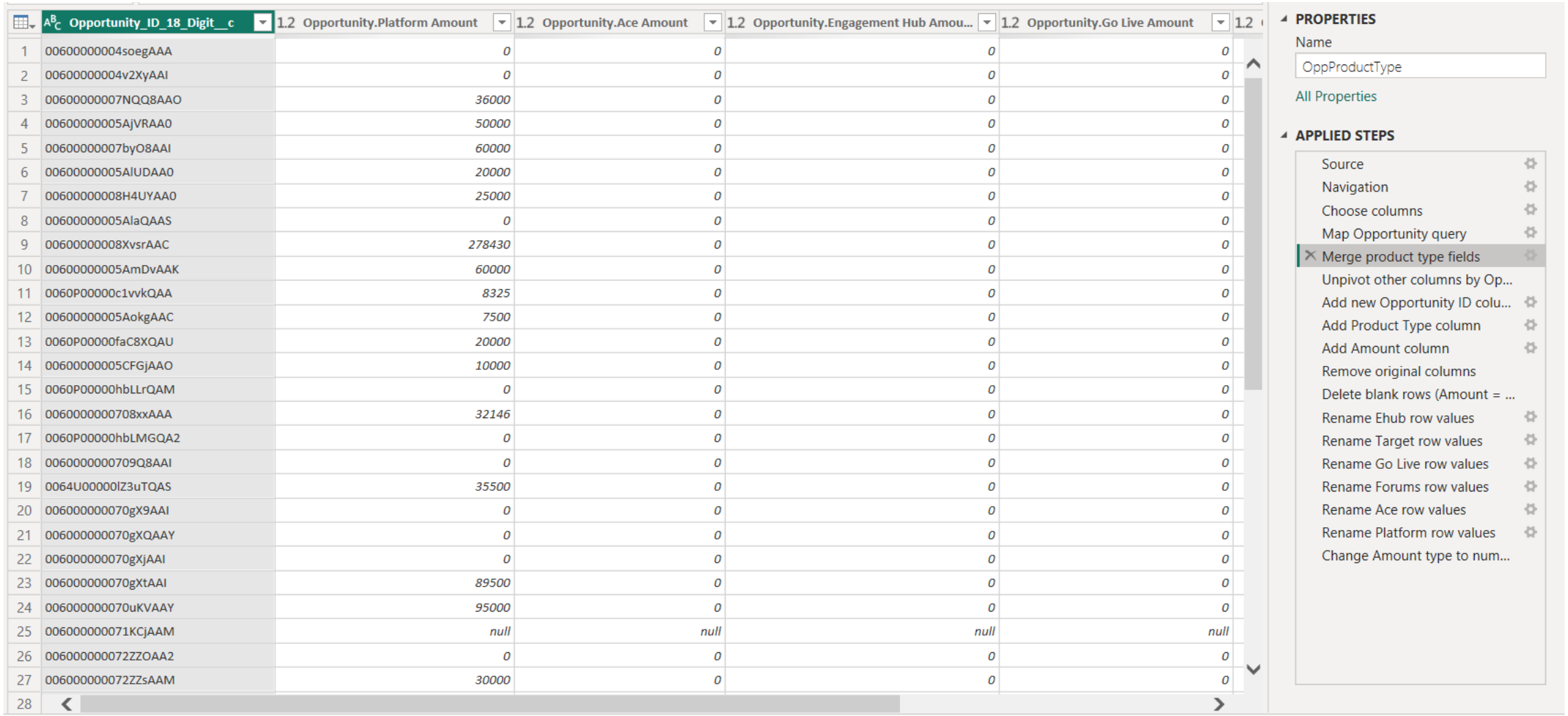
Product Type Filter



	Opportunity_ID_18_Digit__c	Opportunity.Platform Amount	Opportunity.Ace Amount	Opportunity.Engagement Hub Amou...	Opportunity.Go Live Amount	
1	006000000004soegAAA	0	0	0	0	
2	006000000004v2XyAAI	0	0	0	0	
3	006000000007NQQ8AAO	36000	0	0	0	
4	006000000005AjVRAA0	50000	0	0	0	
5	006000000007byO8AAI	60000	0	0	0	
6	006000000005AlUDAA0	20000	0	0	0	
7	006000000008H4UYAA0	25000	0	0	0	
8	006000000005AlaQAAS	0	0	0	0	
9	006000000008XvsrAAC	278430	0	0	0	
10	006000000005AmDvAAK	60000	0	0	0	
11	0060P00000c1vvkQAA	8325	0	0	0	
12	006000000005AokgAAC	7500	0	0	0	
13	0060P00000faC8XQAU	20000	0	0	0	
14	006000000005CFGjAAO	10000	0	0	0	
15	0060P00000hbLLrQAM	0	0	0	0	
16	0060000000708xxAAA	32146	0	0	0	
17	0060P00000hbLMGQA2	0	0	0	0	
18	0060000000709Q8AAI	0	0	0	0	
19	0064U00000lZ3uTQAS	35500	0	0	0	
20	006000000070gX9AAI	0	0	0	0	
21	006000000070gXQAAY	0	0	0	0	
22	006000000070gXjAAI	0	0	0	0	
23	006000000070gXtAAI	89500	0	0	0	
24	006000000070uKVAAY	95000	0	0	0	
25	006000000071KCjAAM	null	null	null	null	
26	006000000072ZZOAA2	0	0	0	0	
27	006000000072ZZsAAM	30000	0	0	0	
28						

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

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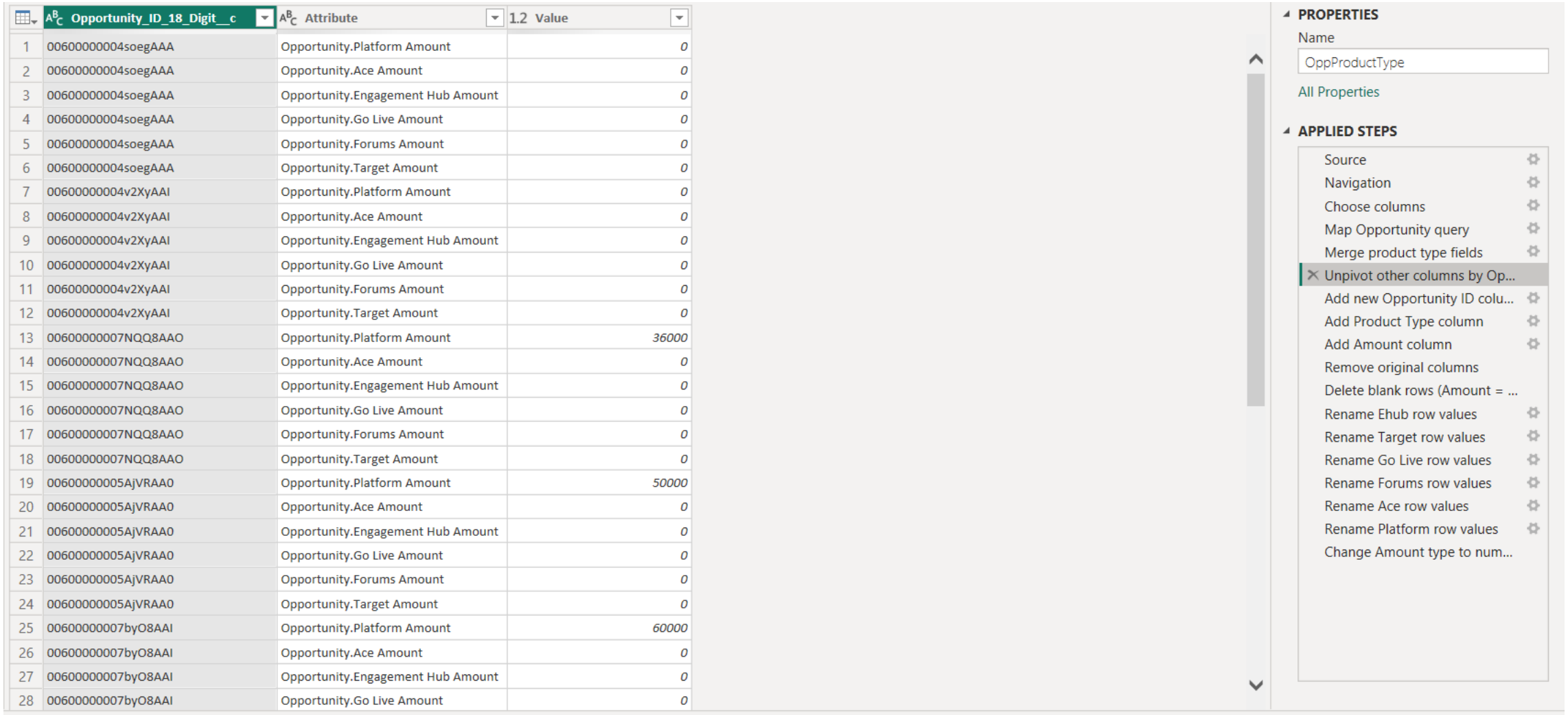
Product Type Filter



	Opportunity_ID_18_Digit__c	Attribute	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

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

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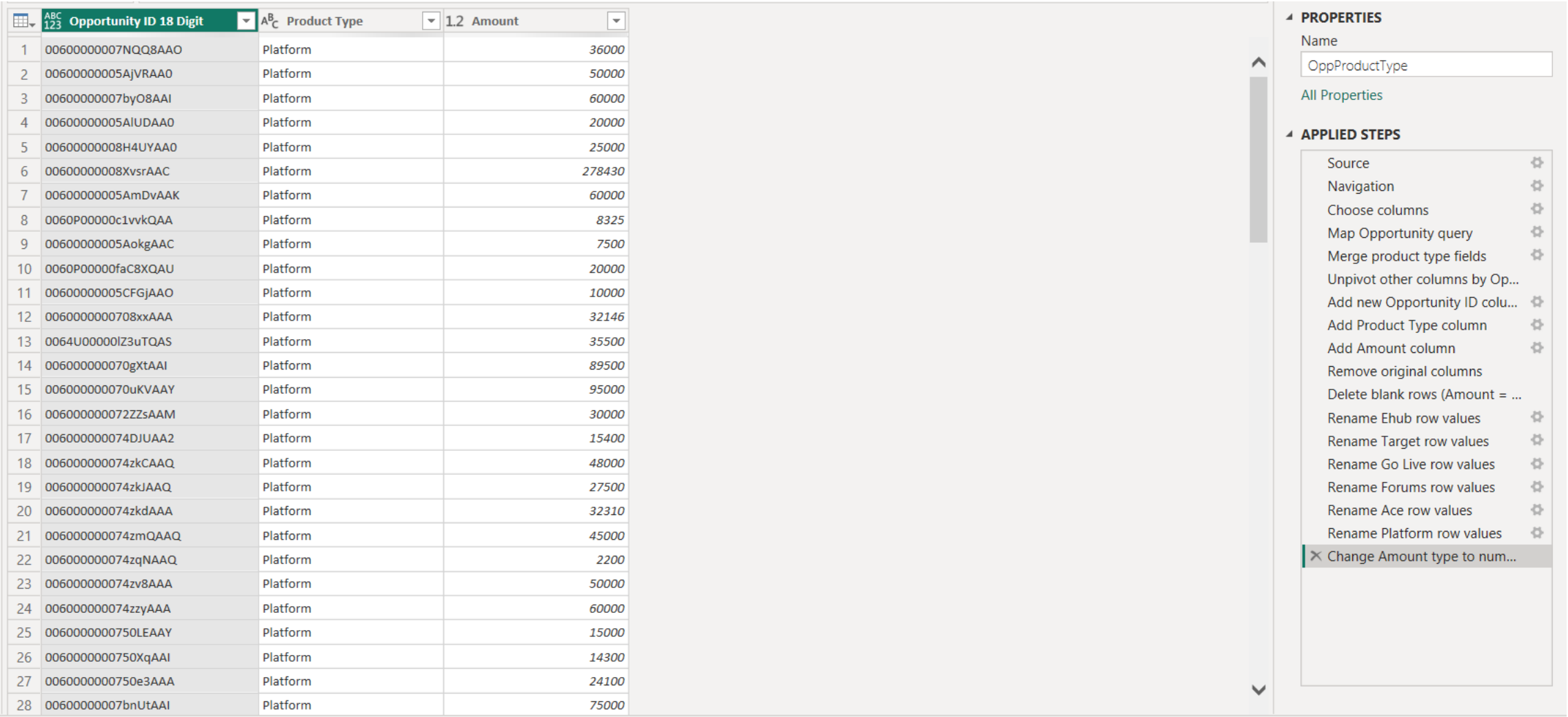
Product Type Filter



	Opportunity ID 18 Digit	Product Type	Amount
1	00600000007NQQ8AAO	Platform	36000
2	00600000005AjVRAA0	Platform	50000
3	00600000007byO8AAI	Platform	60000
4	00600000005AlUDAA0	Platform	20000
5	00600000008H4UYAA0	Platform	25000
6	00600000008XvsrAAC	Platform	278430
7	00600000005AmDvAAK	Platform	60000
8	0060P00000c1vvkQAA	Platform	8325
9	00600000005AokgAAC	Platform	7500
10	0060P00000faC8XQAU	Platform	20000
11	00600000005CFGjAAO	Platform	10000
12	0060000000708xxAAA	Platform	32146
13	0064U00000lZ3uTQAS	Platform	35500
14	006000000070gXtAAI	Platform	89500
15	006000000070uKVAAY	Platform	95000
16	006000000072ZZsAAM	Platform	30000
17	006000000074DJUAA2	Platform	15400
18	006000000074zkCAAQ	Platform	48000
19	006000000074zkJAAQ	Platform	27500
20	006000000074zkdAAA	Platform	32310
21	006000000074zmQAAQ	Platform	45000
22	006000000074zqNAAQ	Platform	2200
23	006000000074zv8AAA	Platform	50000
24	006000000074zzyAAA	Platform	60000
25	0060000000750LEAAY	Platform	15000
26	0060000000750XqAAI	Platform	14300
27	0060000000750e3AAA	Platform	24100
28	00600000007bnUtAAI	Platform	75000

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

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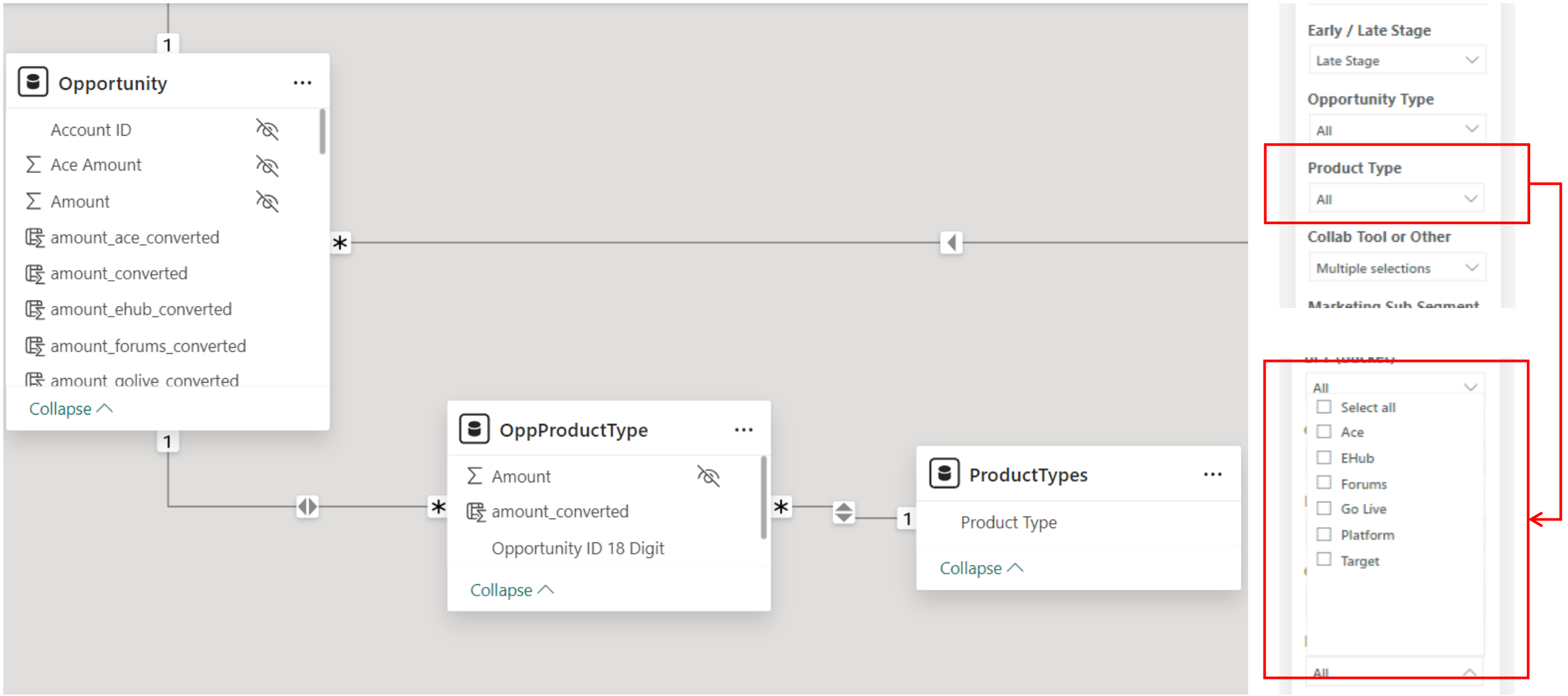
Product Type Filter



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

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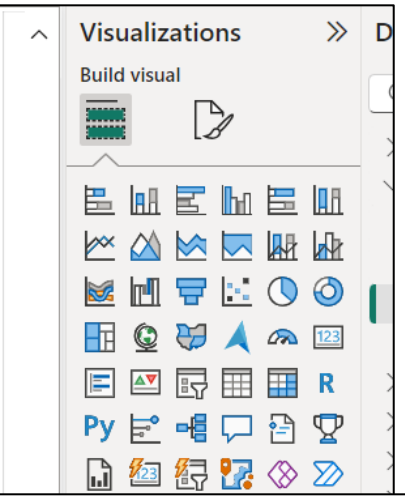
Conditional Formatting by Win & Loss

```
// 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...	-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%	-5
Closed Won	15.21%	-48.92%	134.50%	-26.47%	-30.04%	21.12%	5.68%	12
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%	-10
Closed Won	-6.74%	34.09%	-6.20%	5.04%	-34.71%	101.87%	-10.83%	32
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%	4
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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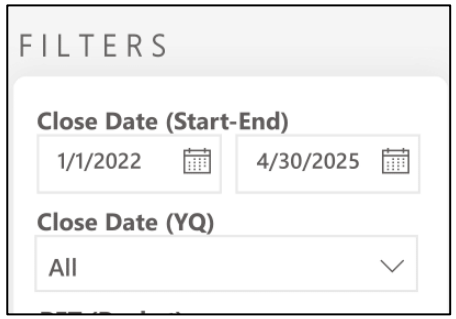
Close Date Visuals Default

```
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)
```



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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