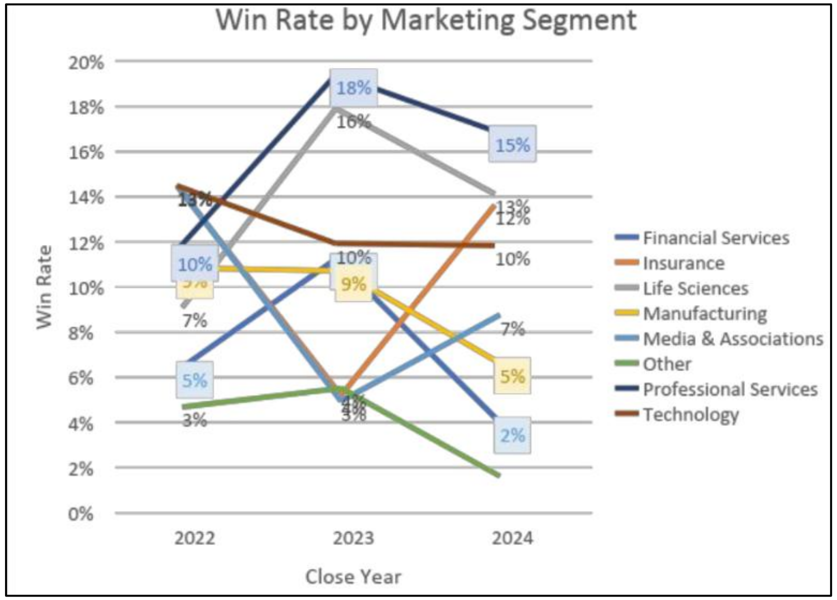
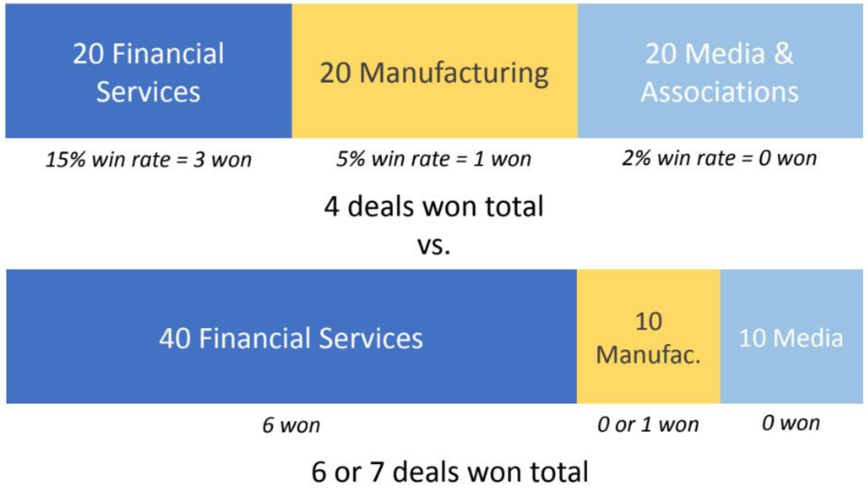
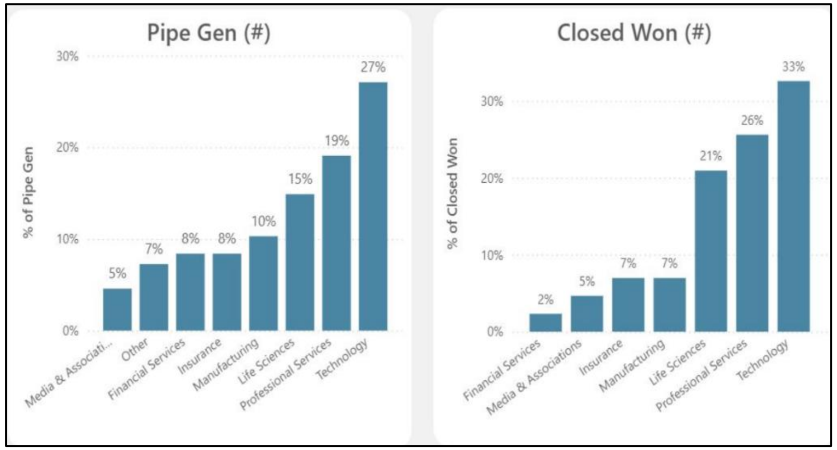
Account Scoring Power BI Dashboard

Motivation for an Account Scoring Model



Consider 60 accounts and 2024 win rates.





- Goal is to identify trends between the data we track (i.e., 6Sense data, marketing segment, etc.) and closed won deals. For example, Professional Services clearly has a higher win rate than Manufacturing.
- Accounts with higher probabilities of winning are prioritized over accounts with lower probabilities.
- We want to pursue accounts that we historically have a greater chance of winning. For example, % breakdown of pipe gen and closed won by marketing segment shows us that certain industries make up a greater % of pipe gen and closed won vs other industries.

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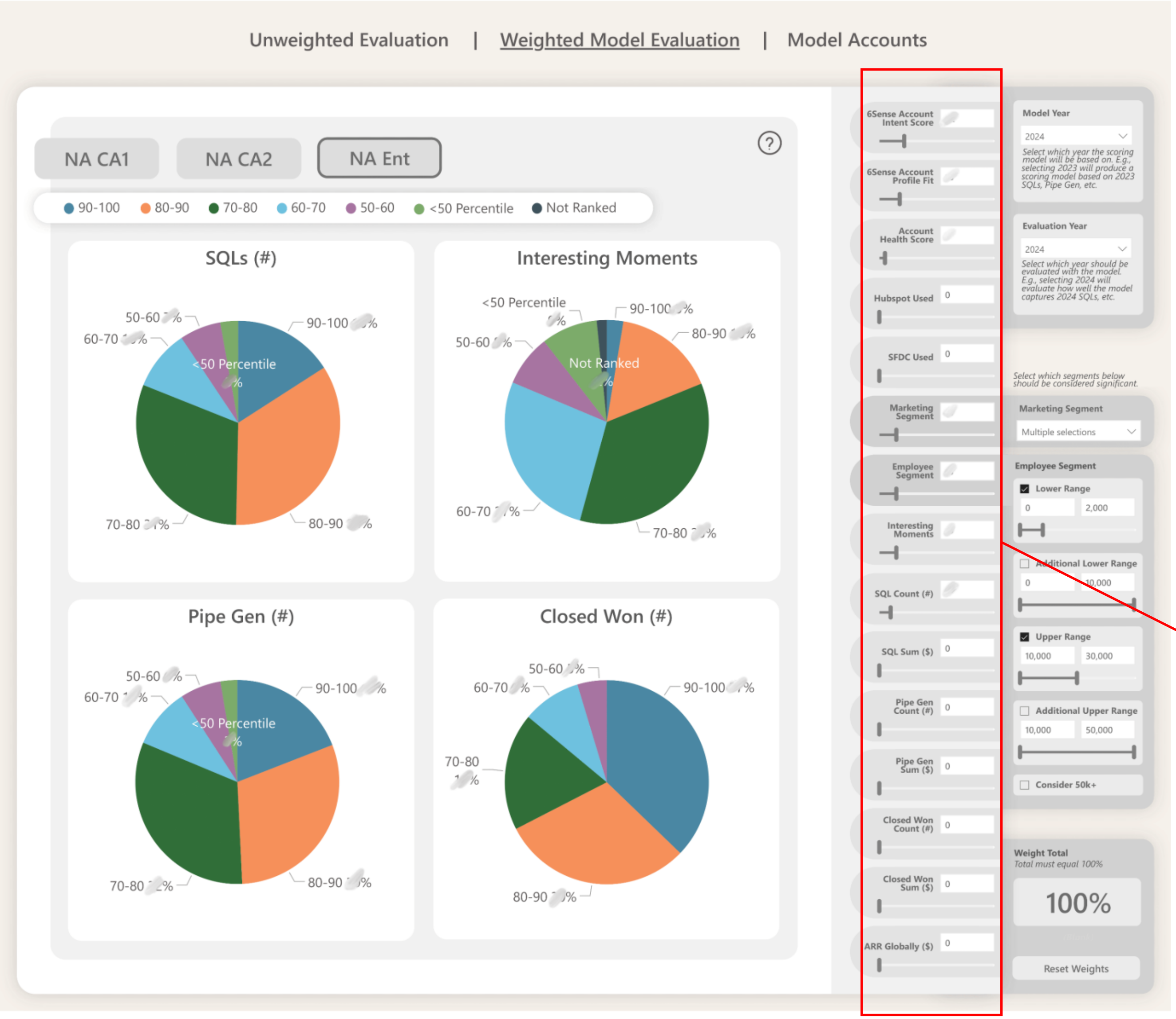
Weighted Model Evaluation



- Accounts are divided into Percentile ranges for ranking purposes. *Accounts scored in the 90th - 100th percentile are considered the 'best' accounts by our model. These accounts should be prioritized by the team as they most closely align with future opportunity activity.*
- The model ranks accounts according to weights assigned to each category (user-adjustable via sliders on the right of the dashboard)
- The weights are collaborative and completely adjustable, which allows us to prioritize trends across various industries or other forward-looking themes.

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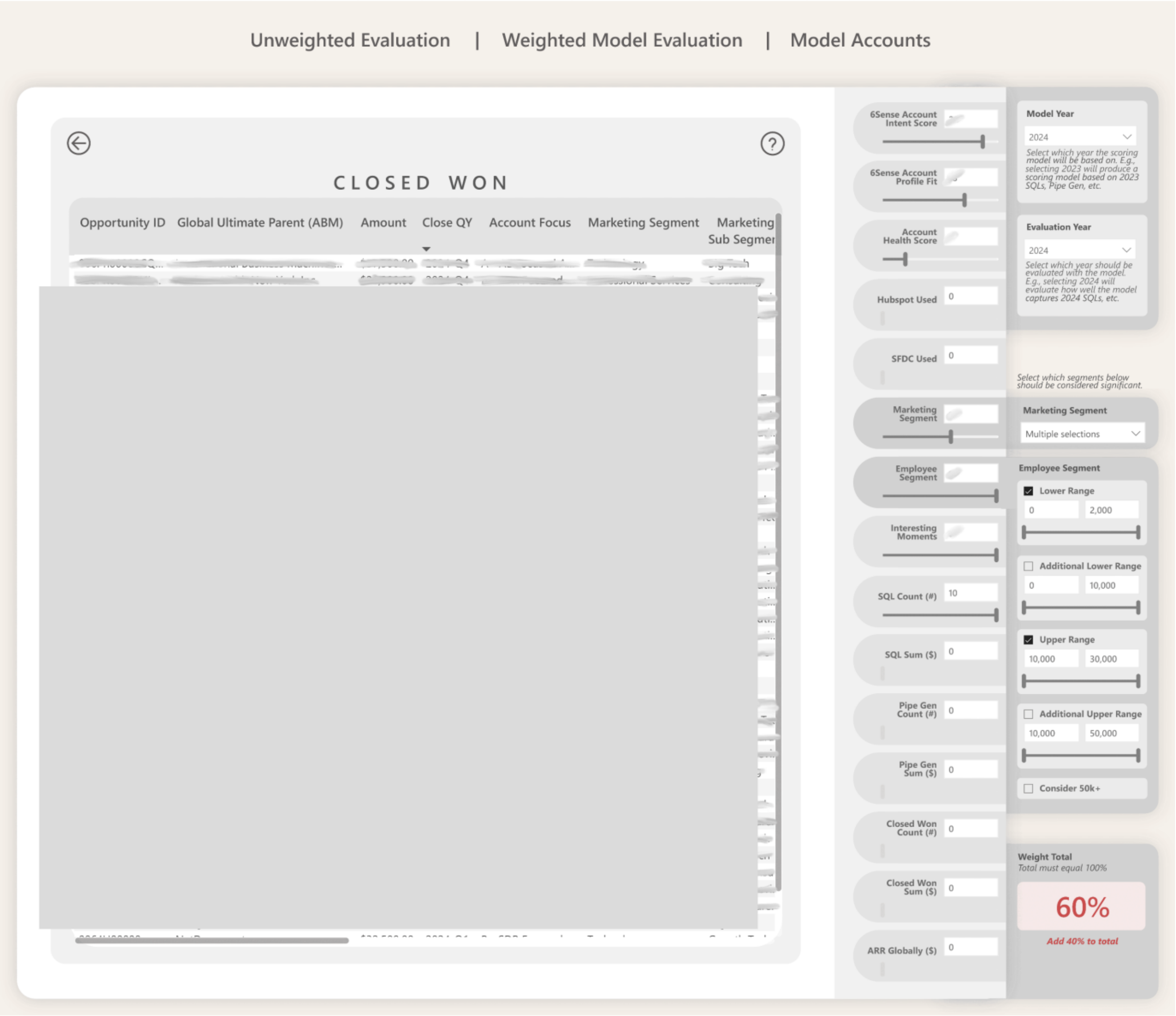
Drill Through Table



- Because the graphs in the previous slide represent the % breakdown of each score percentile across SQLs, Closed Won, etc., we can drill through each graph and see the underlying Salesforce data driving each evaluation.
- This is an example of the table we see when we drill through the ‘Closed Won’ graph.

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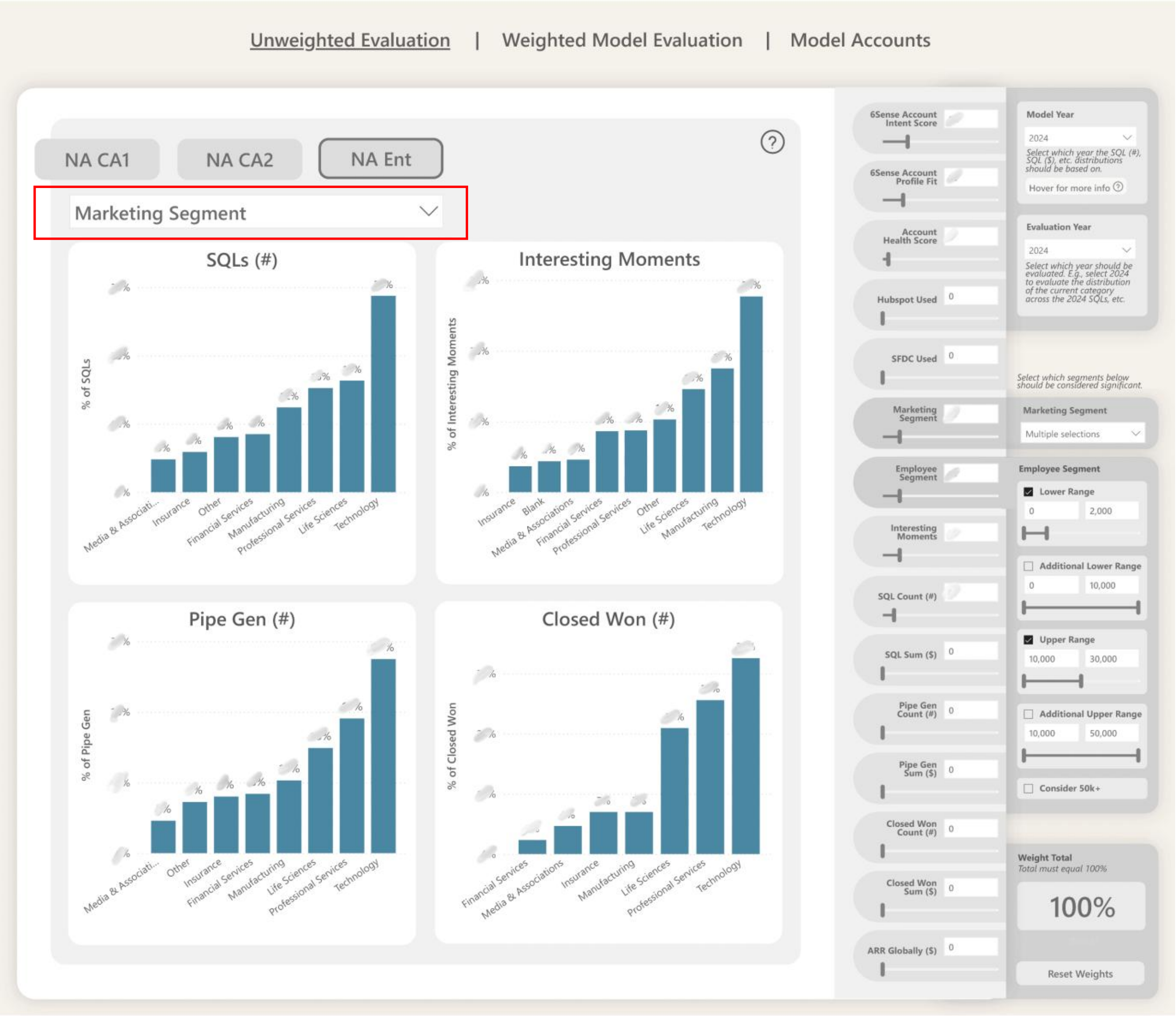
Unweighted Evaluation



- To better inform how weights are determined, navigate to the 'Unweighted Evaluation' tab.
- All factors are available here in the dropdown. We can see the distribution of a factor across SQLs, Pipe Gen, etc.
- In this example we can see Tech is the primary segment for SQLs, thereby suggesting we should lean into tech accounts more possibly and thus increase its weight via the slider.

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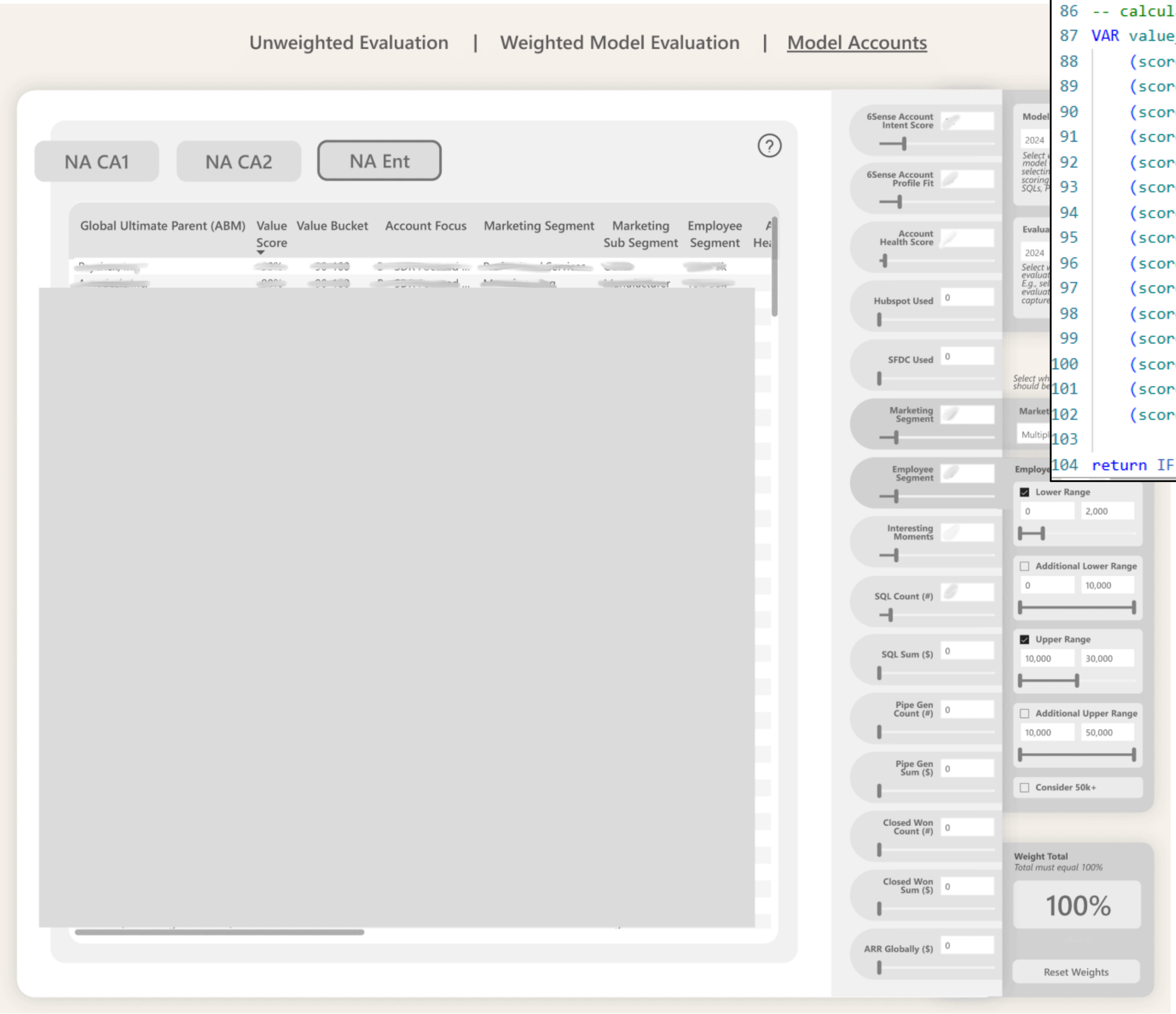
Model Accounts & DAX




```
///////////////////////////// FINAL VALUE SCORE /////////////////////////////

-- calculate value score by multiplying each score to their weights
VAR value_score =
    (score_accIntScore     * (MAX('_weight_6sense account intent score'[Value]))/100) +
    (score_accProfileFit   * (MAX('_weight_6sense account profile fit'[Value]))/100) +
    (score_accHealth       * (MAX('_weight_account health score'[Value]))/100) +
    (score_empSeg          * (MAX('_weight_employee segment'[Value]))/100) +
    (score_hubspot         * (MAX('_weight_hubspot used'[Value]))/100) +
    (score_sfdc            * (MAX('_weight_sfdc used'[Value]))/100) +
    (score_marSeg          * (MAX('_weight_marketing segment'[Value]))/100) +
    (score_intMom          * (MAX('_weight_interesting moments'[Value]))/100) +
    (score_sqlCount        * (MAX('_weight_sqls #'[Value]))/100) +
    (score_sqlSum          * (MAX('_weight_sqls $'[Value]))/100) +
    (score_pipeCount       * (MAX('_weight_pipe gen #'[Value]))/100) +
    (score_pipeSum         * (MAX('_weight_pipe gen $'[Value]))/100) +
    (score_wonCount        * (MAX('_weight_closed won #'[Value]))/100) +
    (score_wonSum          * (MAX('_weight_closed won $'[Value]))/100) +
    (score_arrSum          * (MAX('_weight_arr globally'[Value]))/100)

return IF(ISBLANK(SELECTEDVALUE('na ca1_model'[Global Ultimate Parent (ABM)])), "Blank", value_score)
```

Glimpse of DAX code behind calculating value scores.

- Once we're comfortable with the weights, navigate to the 'Model Accounts' tab, which lists all accounts and their respective score based on the weights assigned.
- We can easily export this data for the team to review in excel/csv.

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How were accounts scored prior to this dashboard?

Obtain Weights for Model via Logistic Regression in R

```r

    # perform logistic regression
    full_model <- glm(pipe_gen ~ ., data=dataset, family=binomial)
    model_probs <- full_model %>% predict(dataset, type="response")
    process_probs <- preProcess(as.data.frame(model_probs), method=c("range"))
    norm_probs <- predict(process_probs, as.data.frame(model_probs))
    summary1[[i]] = summary(full_model)
}

# RESULTS
coeffs <- (full_model$coefficients)[-1]
process <- preProcess(as.data.frame(coeffs), method=c("range"))
norm_coeffs <- predict(process, as.data.frame(coeffs))
weights <- (norm_coeffs/sum(norm_coeffs))*100
weights <- format(round(weights,2), nsmall=2)
df <- data.frame(coeffs, norm_coeffs, weights)
df <- df %>% rename("original coeffs"=coeffs,
                    "normalized"=coeffs.1,
                    "weights (%)"=coeffs.2)
df
```

61:47 (Top Level)

	Original Coeffs	Normalized		Weights
Account Health Score	0.51640369	0.3738399	0.37/2.21 =	16.94%
6Sense Account Intent Score	0.80258252	0.5972739	0.6/2.21 =	27.06%
6Sense Account Profile Fit	1.31840252	1.0000000	1/2.21 =	45.30%
Global Ultimate Parent Employee Count	0.03758173	0.0000000	0/2.21 =	0.00%
Interesting Moments	0.34022550	0.2362889	0.24/2.21 =	10.70%
Sum		**2.2074027**		**100%**

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Input Weights into Excel Model & Identify Target Accounts

A	B	C	D	E	F	G	H	I	J	K	
		Marketing Segment		Employee Segment		Health Score	6sense	6sense	#Interesting Moments	Has SQLs ?	
2024	Weight in Scoring	15%		15%		5%	22%	18%	15%	10%	
l Ultimate Parent Comp	Account Owner	Segment	Sub Segment	Employee Segment	Focus Rating	Health Score	6sense intent Score	6sense profile score	Interesting Moments This Year	SQLs Created this year	C
utodesk, Inc.	Peter Finn	Manufacturing	Manufacturer	10K-15K	B - SDR Focused	5	95	Strong	59	$ 268,900.00	$
SL LIMITED	Julie Glazer	Life Sciences	Pharmaceuticals	20K-30K	A - AE Focused	5	93	Strong	35	$ 330,651.28	$

		Percentile Normalization Ranking						
Value Score	Percentile of Score	Marketing Segment	Employee Segment	Health Score	6sense intent Score	6sense profile score	#Interesting Moments	SQLs
0.99	100%	1	1	1	0.95	1.00	0.998	0.997
0.98	100%	1	1	1	0.93	1.00	0.993	0.998
0.98	100%	1	1	1	0.94	1.00	0.995	0.955
0.98	100%	1	1	1	0.92	1.00	0.997	0.996

Weights were further adjusted based on conversations with Sales Managers and regional VPs. Above are screenshots of columns that are weighted and their normalized counterparts. After normalization, each account is assigned a Value Score intended to help identify target accounts.

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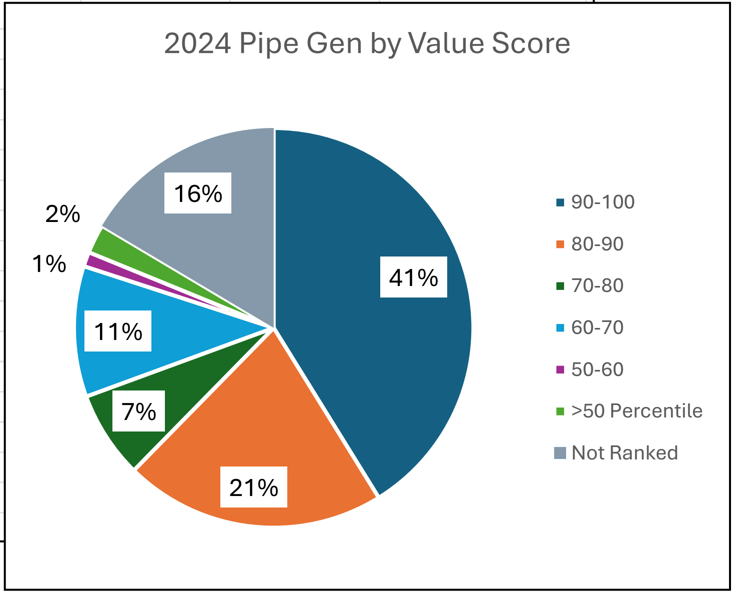
Check if model is properly capturing accounts

F	G	H	I	J	K	L	M	N	O	P	Q
		2023				2024					
Value Score	Percentile of Sco	nteresting Mome	SQLs	Elite Pipe G	Closed Wo	Interesting Moments	SQLs	SQLs (#)	Elite Pipe G	lite Pipe Ge	Closed Won
0.1	0%	0	$ -	$ -	$ -	0	$ -	-	$ -	-	$ -
0.1	0%	0	$ -	$ -	$ -	0	$ -	-	$ -	-	$ -
0.1	0%	0	$ -	$ -	$ -	0	$ -	-	$ -	-	$ -
0.1	0%	0	$ -	$ -	$ -	0	$ -	-	$ -	-	$ -
0.1	0%	0	$ -	$ -	$ -	0	$ -				
0.1	0%	0	$ -	$ -	$ -	0	$ -				
0.1	0%	0	$ -	$ -	$ -	0	$ -				
0.1	0%	0	$ -	$ -	$ -	0	$ -				
0.1	0%	0	$ -	$ -	$ -	0	$ -				
0.1	0%	0	$ -	$ -	$ -	0	$ -				
0.1	0%	0	$ -	$ -	$ -	0	$ -				
0.1	0%	0	$ -	$ -	$ -	0	$ -				
0.1	0%	0	$ -	$ -	$ -	0	$ -				
0.1	0%	0	$ -	$ -	$ -	0	$ -				
0.1	0%	0	$ -	$ -	$ -	0	$ -				
0.1	0%	0	$ -	$ -	$ -	0	$ -				
0.1	0%	0	$ -	$ -	$ -	0	$ -				
0.1	0%	0	$ -	$ -	$ -	0	$ -				
0.1	0%	0	$ -	$ -	$ -	0	$ -				
0.1	0%	0	$ -	$ -	$ -	0	$ -				
0.1	0%	0	$ -	$ -	$ -	0	$ -				
0.1	0%	0	$ -	$ -	$ -	0	$ -				



Since the model was based on 2023 data, we check 3 months into 2024 to see if the model is properly capturing the intended accounts (i.e., we want to see if the higher value scores are reflected in the pipeline generated). The high percentage makeup of '90-100' scored accounts indicates a good model but will be improved upon based on the current data collected.

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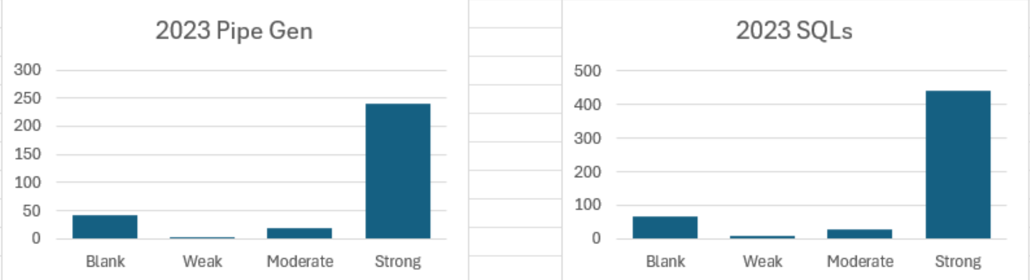
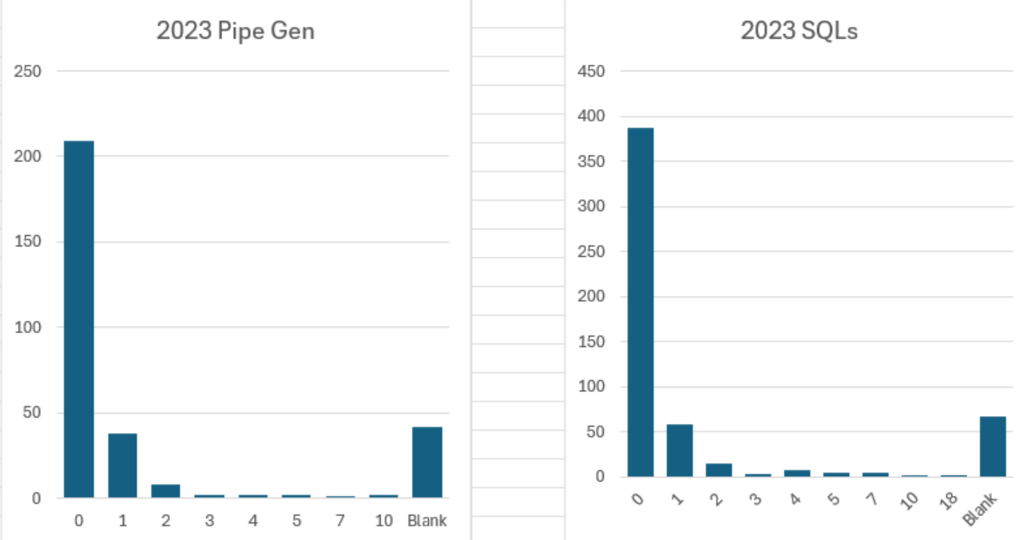
Check if model is properly capturing accounts (cont.)

6SENSE PROFILE FIT



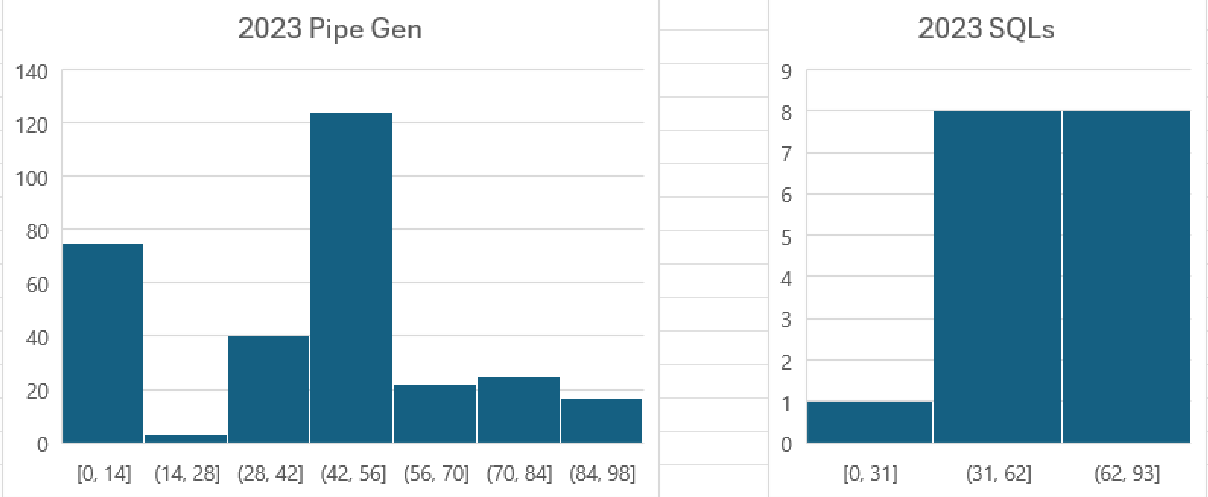
Clearly the majority of pipe gen and sqls have a Strong 6Sense Profile Fit
Increase weight from 20% to 30%

INTERESTING MOMENTS

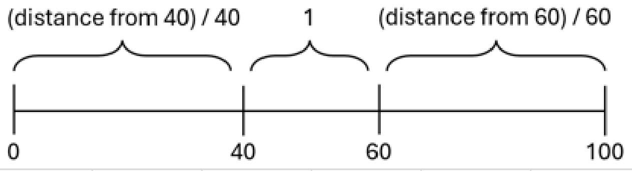


# of interesting moments doesn't seem to have an impact on the # of pipe gen or sqls
Decrease weight from 25% to 10%

6SENSE INTENT SCORE



Majority of pipe gen and sqls are concentrated between a 6Sense Intent Score of 40 and 60
Change 6Sense Intent Score formula in model



In the case that the model is inaccurate for a particular team, we look at each factor individually and adjust accordingly.

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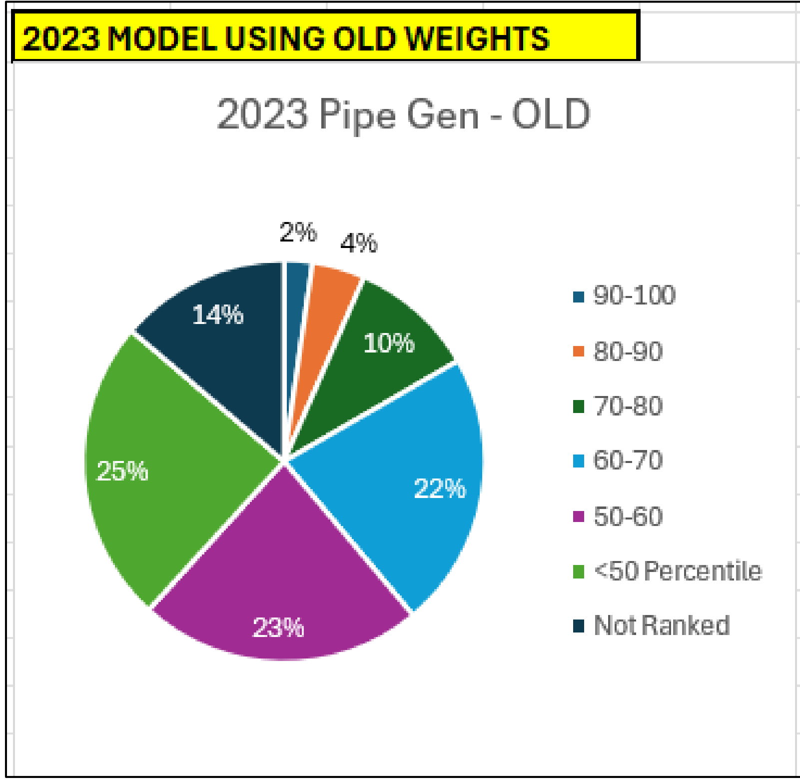
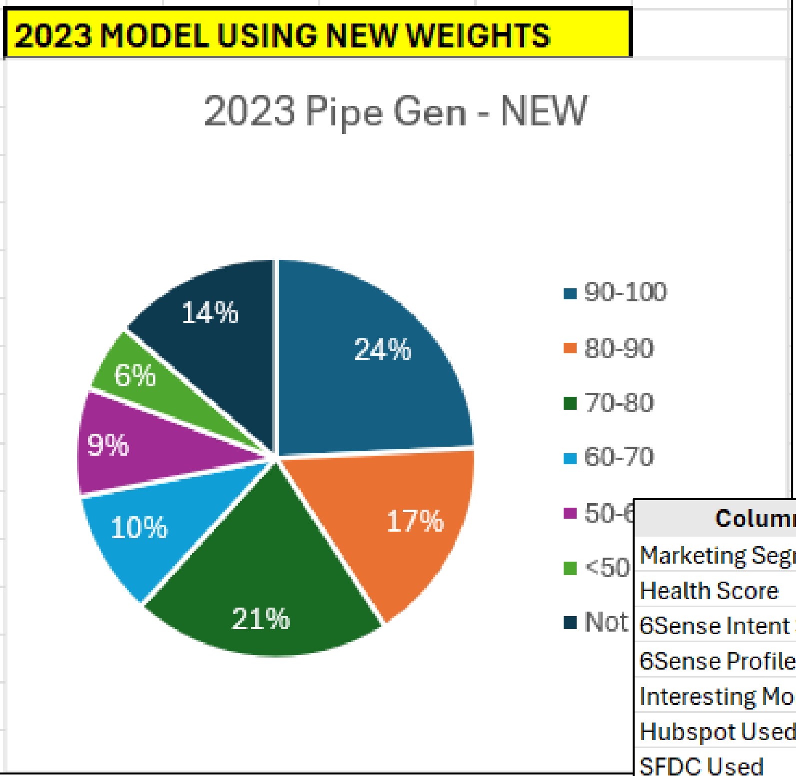
Check if model is properly capturing accounts (cont.)





Column	Old Weights	New Weights
Marketing Segment	10%	15%
Health Score	5%	10%
6Sense Intent Score	20%	20%
6Sense Profile Fit	20%	30%
Interesting Moments	25%	10%
Hubspot Used	10%	0%
SFDC Used	10%	15%
Total	**100%**	**100%**

Notice how the new weights better capture '90-100' value scored accounts.

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