Case Interview Prompt

At the end of 3 hours, email your Excel and PPT to your interviewer. Please ensure you email before the 3 hour cut-off.

It's the beginning of the fiscal year and the **CEO of PortCo X**, a transaction processing company, has asked you to **help her assess the health of the company's sales pipeline for 2019** ahead of an upcoming board meeting. The CEO wants to know if the **pipeline of deals looks healthy and if they will hit their 2019 revenue target**. Attached is a raw data extract from Salesforce representing the 2019 pipeline.

Information about the data:

- Each row represents a unique opportunity and the potential revenue associated with it.
- The revenue data does NOT account for the fact that the merchants need to be onboarded and ramp onto using the platform in full. Meaning, after the merchant goes live, they will only spend 50% of the expected revenue in the first quarter in which they go live, followed by 100% in the quarters thereafter.
  - *Example*: A go live date of 2Q2019 means PortCo X will receive 50% of the total Q2 expected revenue in that quarter. Followed by 100% of the Q3 revenue and 100% of the Q4 revenue. This yields that PortCo X would only actually receive 62.5% of the full year 2019 expected revenue from the Merchant.

Some key questions that you may want to consider answering for the CEO (not an exhaustive list):

- The **target for 2019 is $9M**.
- What is the pipeline vs. the target? What are the implications?
- How does the pipeline look from a deal stage standpoint? What are the implications?
- Are there any risks from a deal concentration standpoint?
- How does the pipeline look from quarter to quarter?
- What actionable advice can you give to the CEO?
- What other information would you want to make your analysis more impactful?

Take the next 3 hours to:

1. Analyze the data
2. Draw conclusions and create slides that summarize your findings (please limit yourself to ~5 slides)

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