

HR Company Case Study Presentation

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Key Targets

► **Provenance:** 1° Inbound vs Outbound & Paid

► **Sectors:** industrial, other, information technology, communication, HealthCare.
¾ sum & n°

► **Profile size:** avg 30 employees.
Industrial avg 40

95% Companies < 100 employees & 88.5%
“sum” - Corr. 0.92

► **Timing:** Q1 vs Q3/Q4

► **To whom?** CEOs, HR Directos. Via LinkedIn and Demo.

► **Why us?** 78%. Time-related matters.

12% coming from Personio

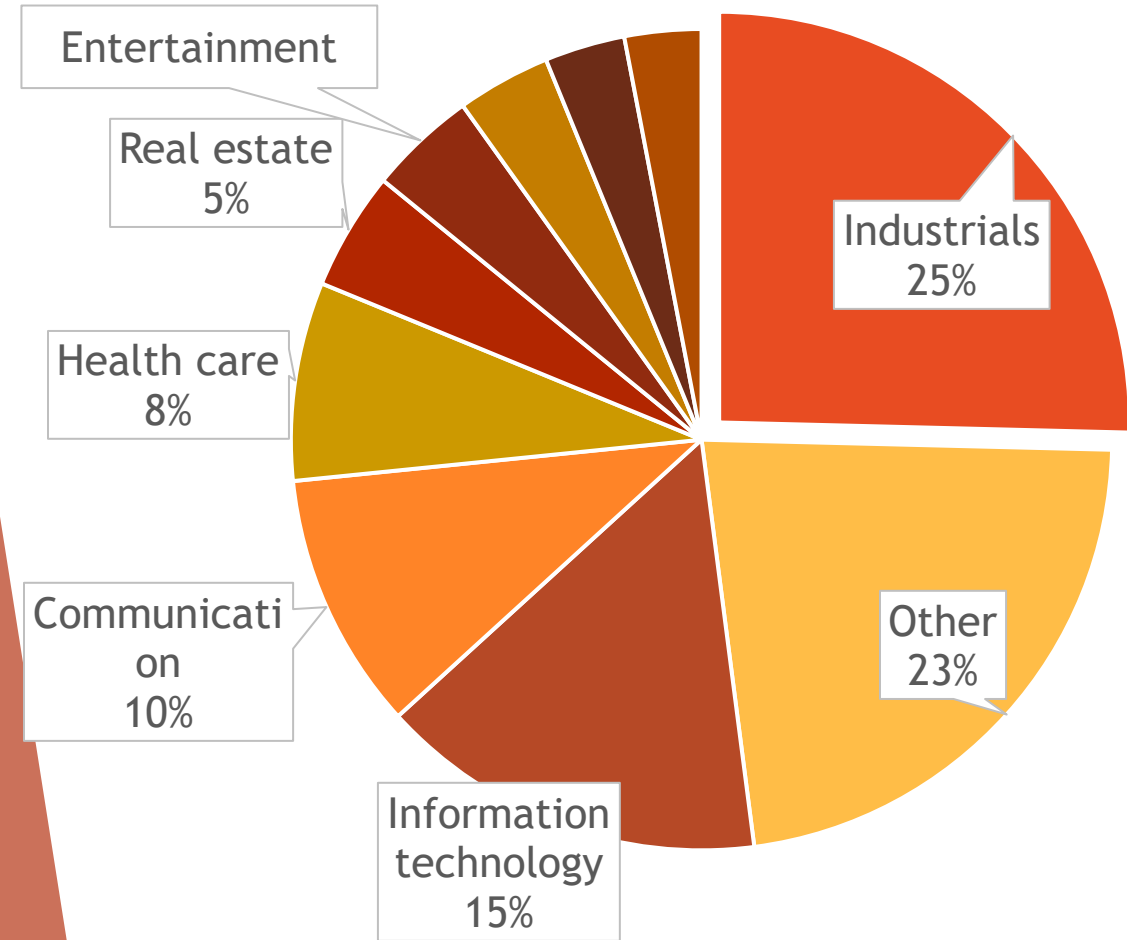
% Grant total Sum

Ranking Industry/Provinance				
Position	Global	Inbound	Outbound	Paid
1	Industrials 31,27%	other 11,69%	Industrials 10,68%	Industrials 13,76%
2	other 27,77%	Communication 8,87%	other 4,98%	other 8,85%
3	Information technology 18,83%	Information 7,42%	Information technology 3,79%	Information 7,62%
4	Communication 12,50%	Health 7,15%	Communication 1,82%	Communication 1,82%
5	Health care	Industrials 6,82%	Health 0,92%	Health 1,31%

N° Accounts

Other: 66
Industrial: 43
Information: 42
Health: 22
Communication: 19

Top 10 Sum Vs Number



Company age?
N° workers/ age?

Row Labels	Total Count
Other	66
Industrials	43
Information technology	42
Health care	22
Communication	19
Real estate	13
Finance	8
Legal services	8
Energy	7
Entertainment	7
Grand Total	235

Performance

Row Labels	Sum of Amount in Euro	Count %
Inbound	43,38%	44,66%
Outbound	21,41%	13,74%
Paid	33,03%	35,50%
Partners	2,18%	6,11%
(blank)	0,00%	0,00%
Grand Total	100,00%	100,00%

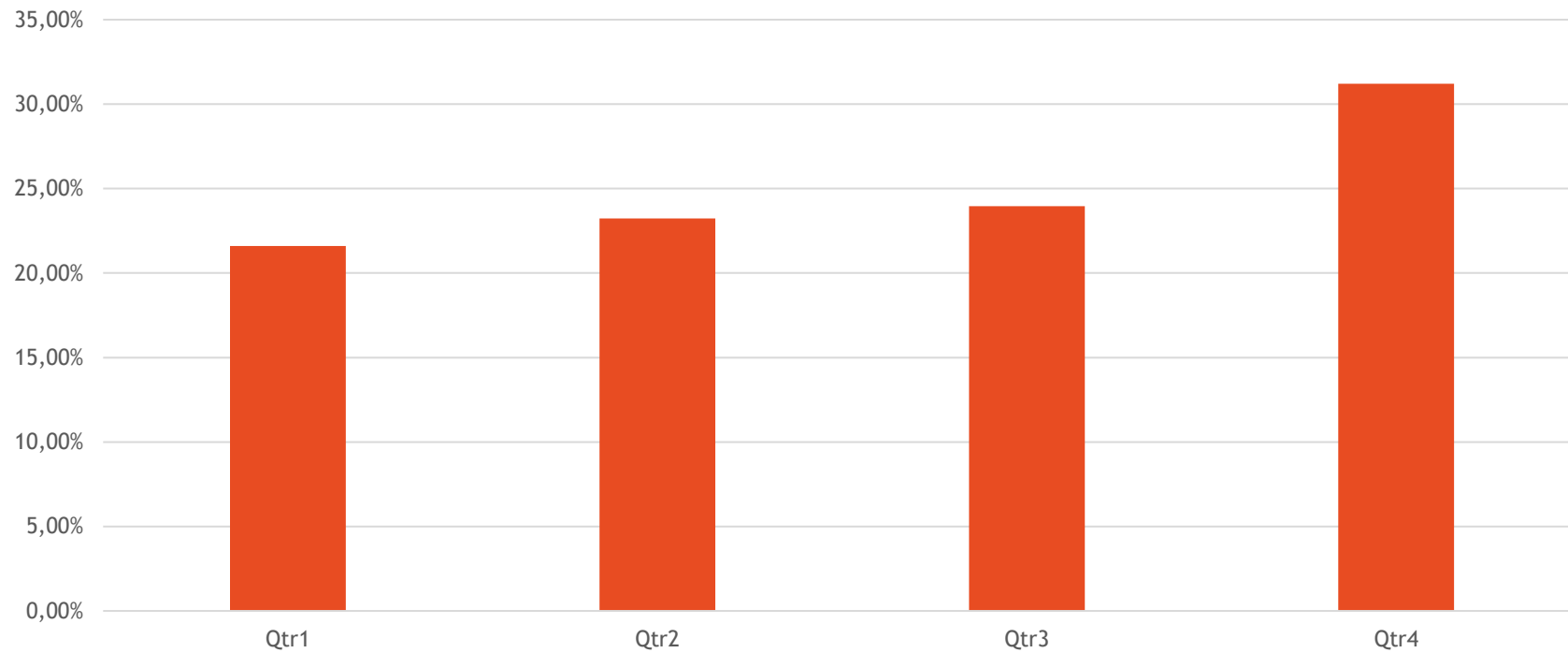
Row Labels	Average of Amount in Euro
Entertainment	414,7142857
Tourism	412,5
Industrials	403,8139535
Communication	365,4589474
Energy	360,8571429
Consumer discretionary	344,075
Agriculture	337,5
Finance	270,5
Information technology	248,952381
Real estate	245,5230769
Grand Total	329,0572297

Row Labels	Average of Amount in Euro
Outbound	442,69
Inbound	276,02
Paid	264,42
Partners (blank)	101,30
Grand Total	284,13

Average of Amount in Euro	Column Labels	Inbound	Outbound	Paid	Partners (blank)	Grand Total
Agriculture			540,00	135,00		337,50
Communication		410,34	336,73	252,35		365,46
Consumer discretionary		149,00		539,15		344,08
Energy		555,58	249,00	187,00	236,25	360,86
Entertainment		187,00	724,50	360,00		414,71
Finance		359,60		122,00		270,50
Health care		283,79	254,50	145,80	135,00	243,00
Hospitality		302,67	180,00	96,83		213,61
Industrials		344,45	847,29	305,76		403,81
Information technology		171,75	420,60	325,46		248,95
Legal services		325,60		95,00		239,13
Other		259,78	345,75	258,65	89,25	233,70
Real estate		275,25	228,20	235,60		245,52
Tourism		412,50				412,50
Transportation			194,00	167,00		173,75
Grand Total		282,48	452,69	266,57	101,30	288,82

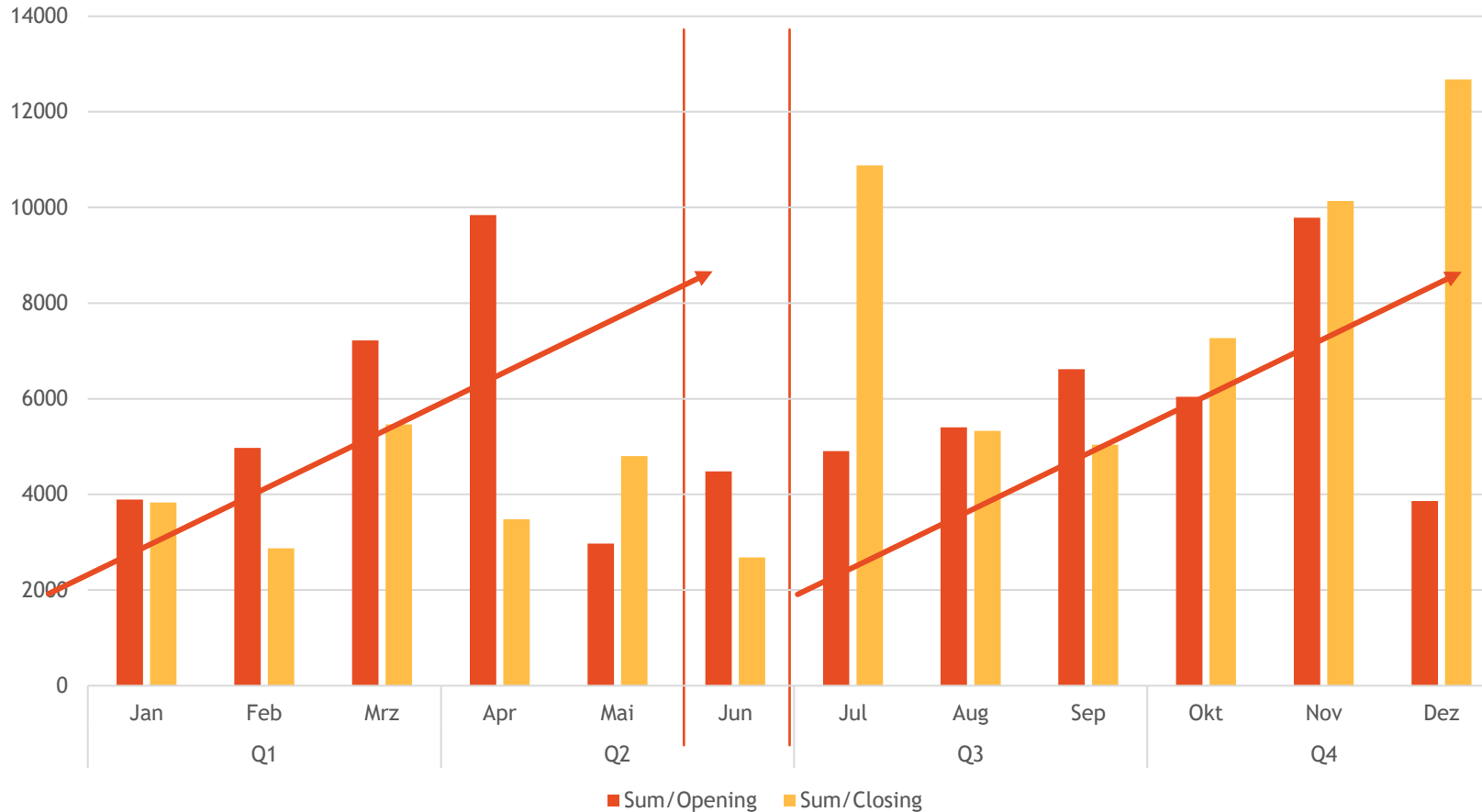
All	%	Inbound	%	Outbound	%
Inbound Demo	33,95%	Signup Completed	37,53%	LinkedIn	41,43%
Signup Completed	24,80%	Inbound Demo	30,35%	Gartner	22,65%
LinkedIn	9,76%	Inbound Freebie	8,25%	Outbound Linkedin	14,56%
Signup Uncompleted	4,26%	Inbound Contact Sales	7,44%	Sales extension	9,93%
Outbound Linkedin	3,12%	Signup Uncompleted	6,64%		88,58%
	75,88%		90,22%		

First Quarters impresion / % Sum



Attention
to the
month
split

Monthly Opening/Closing Amount



Quarters	Opening		April	N°
	% Amount	% N°Accounts		
Q1	21,60%	19,85%	13,22%	9,54%
Q3/4	55,16%	57,25%		

Ticket time resolution

Total avg: 29 days - from 12 to 49.
June: record avg 49 days

Q1&Q2

Fewer companies but higher avg value due to company size. Mrz. avg 49 - Outlayers?

Q3&Q4: biggest n° and value

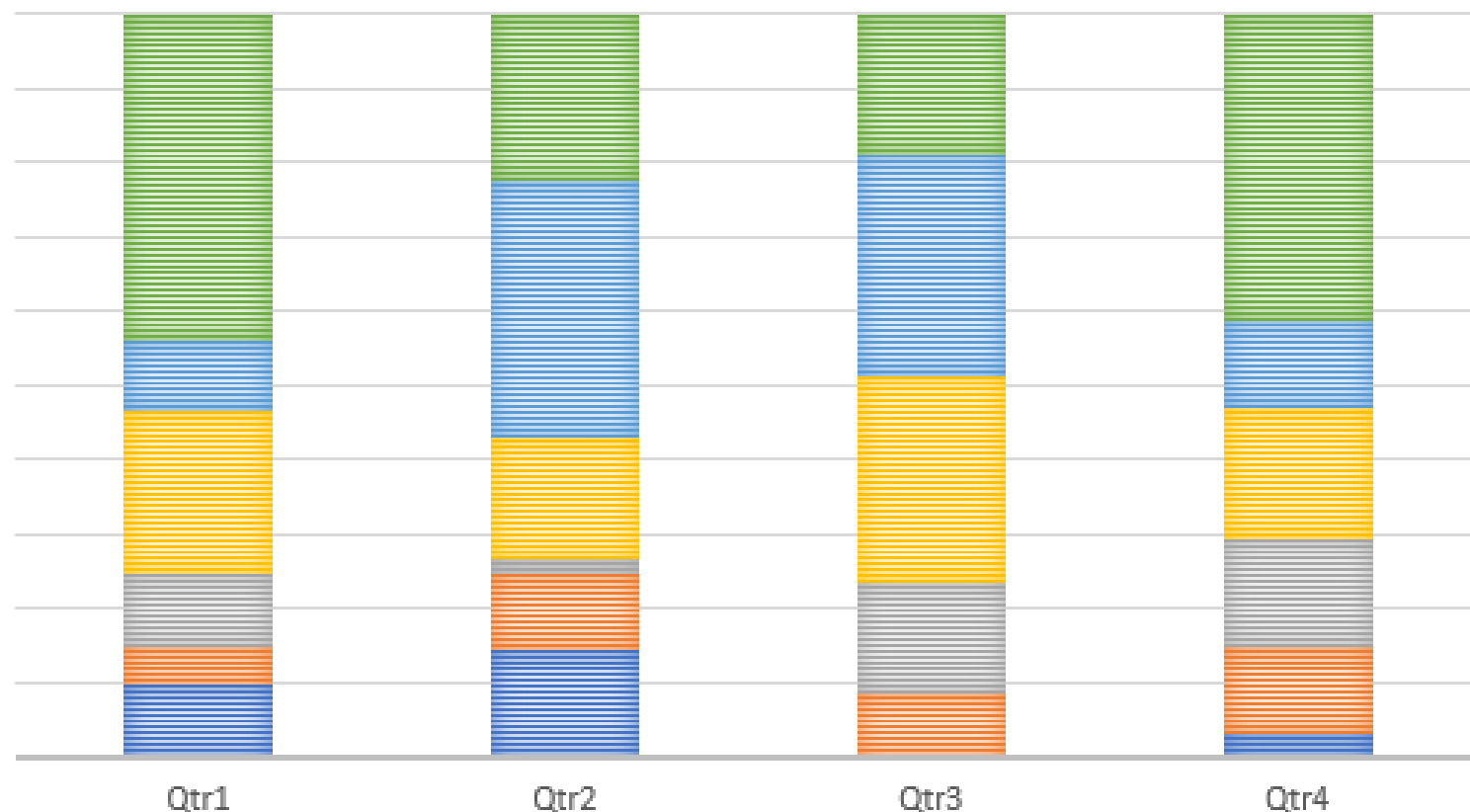
More value, more companies, but smaller.

Conclusión - balanced but...

Q1 and Q3/4 are key. Start targeting companies before next year.

Quarter/Industry

Count of Champion



Crr(global): -0,11
Crr (month): -0,09

Industry

- Other
- Industrials
- Information technology
- Health care
- Communication
- Real estate

Target all industries regardless of Q

Quarters (Create Date) Months (Create Date)

+ -

Industrial has more activity in Q2&3 vs Global trend.
However **lineal correlation** (industry/time) not that ensured.

Month vs Industry

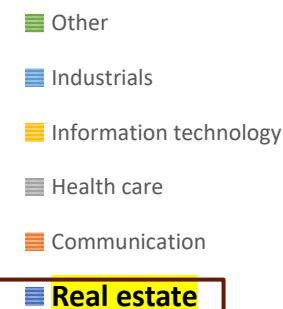
(n° acco. not
value, group by
industry)

Crr(global): -0,11
Crr (month): -0,09

“Other”
follows the
global trend,
in June less
activity vs
Real State.

23% Real State
accounts are in June

	Industry	month	number_of_accounts
Industry	1.000000	-0.091183	0.246298
month	-0.091183	1.000000	0.087044
number_of_accounts	0.246298	0.087044	1.000000



Note: Real State top
month in June (opposite
than global tendency), but
only 13 accounts within 1
year.

Not enough data (year) and patterns to ensure a 100% industry/time prediction.

Champion vs Decision Maker

- To maximize results, it's advisable to target **CEOs**, **HR Directors**, and HR teams in **Q1** and during **Q3/Q4**, since basically **4/5** of earnings and accounts are generated during this time period.
- Furthermore, **56% of earnings** in the outbound category originate from **LinkedIn**.
- Inbound demos** also prove extremely successful, contributing to **22.9% of overall earnings**, making it the highest-performing method within the **paid** category.
- No correlation size / Decision maker.** CrrGl: 0,13
Smaller size = Champion -> +% CEO CrrGl: 0.32

Person	Champion	Decision
CEO	55%	87%
HR Director	23%	9%

	Champion	Mode_employees	Median_of_employees	Avg_employees
0	Administration	20	24.5	26.000000
1	CEO	15	15.0	22.791667
2	CFO	15	15.0	15.000000
3	HR Director	15	26.0	37.393443
4	HR team	15	26.0	39.081081
5	IT	15	16.0	25.000000
6	Office Manager	23	23.0	23.000000
7	Project Manager	15	35.0	83.750000

	Champion	Mode_employees	Median_of_employees	Avg_employees
Champion	1.000000	0.046823	0.487654	0.590015
Mode_employees	0.046823	1.000000	0.086846	-0.271958
Median_of_employees	0.487654	0.086846	1.000000	0.868889
Avg_employees	0.590015	-0.271958	0.868889	1.000000

Note, this 9% is a combination of both outbound and inbound decisions.

Why us?

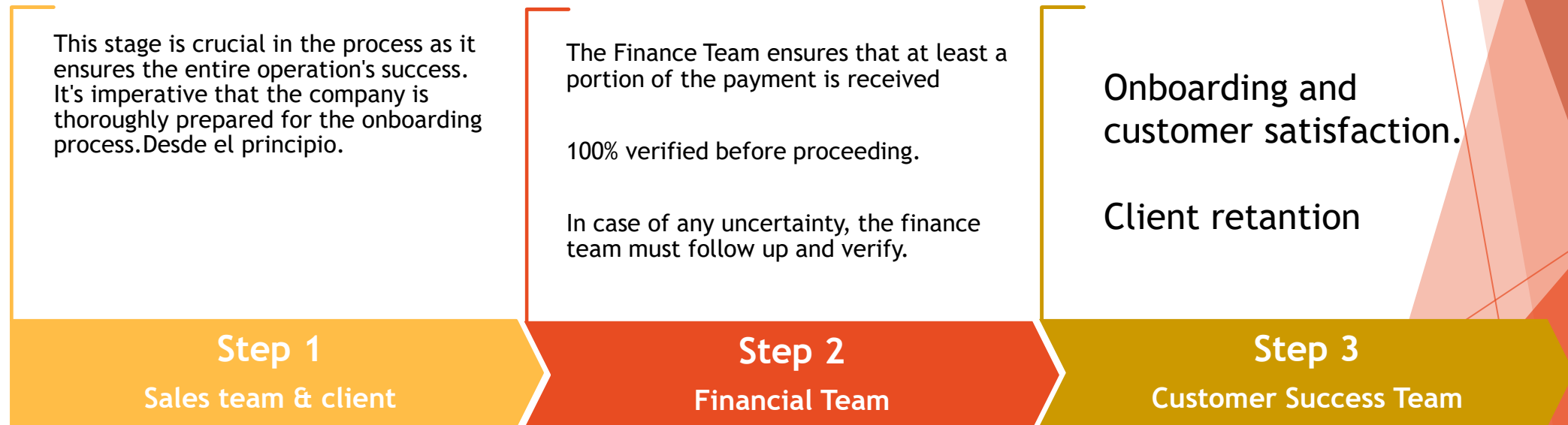
- Time-related issues are the main point of hiring this software/service 78%. Good point regarding to easiness of use and ATS. Interesting Apps...
- 12% of all accounts come from competitors (almost all from Personio). Why? the manual work.

I suggest keeping an eye on this competitor and developing a friendlier product for user management, as this seems to be the key decision for customer acquisition along with the previously mentioned ones...

Customer process

Stakeholders

- Client
- Sales Team
- Finance team /Bank
- Customer Success Team (Account Manager 1° for 0-100 employees & Account Manager 2° from 100.
- France, Spain, Brazil



Step 1

Sales team & client

- ▶ **Title:** Contractual Agreement and Onboarding Preparation

Key Points:

- ▶ Importance of Preparation for Onboarding
- ▶ Elements of the Contract (Onboarding timeline, data protection and policy, software usage, payment terms)
- ▶ Considerations for Transactions in Brazil
- ▶ Checklist for Sales Team (Payment methods, timelines, devices, data protection, onboarding after payment etc.)
- ▶ Importance of Accurate Contracts for Customer Satisfaction- Win-Win relationship

Step 2

Financial Team

- ▶ **Title:** Finance Team's Role in Payment Processing

Key Points:

- ▶ Transition from Sales to Finance
- ▶ Essential Information in Tickets for Invoicing
- ▶ Importance of Bank and Payment Verifications - Payment within 30 days, discount in rapid payments.
- ▶ Ensuring Payment in Bank Account Before Onboarding. All or part according to the business.
- ▶ Ticket Closure and Sales Team Notification - 30 days.

Step 3

Customer Success Team

- ▶ **Title:** Tailoring Customer Experience and Handling Post-Onboarding

Key Points:

- ▶ Account Tiers based on Company Details
- ▶ Linking Tickets to Maintain Client Interaction Record
- ▶ Requests for Service Upgrades or Cancellations alongside Sales Pipeline
- ▶ Tech tickets and timezone Brazil vs European Team.
- ▶ Incorporating Reasons for Cancellation in Ticketing System -
- ▶ Win-Win relationship

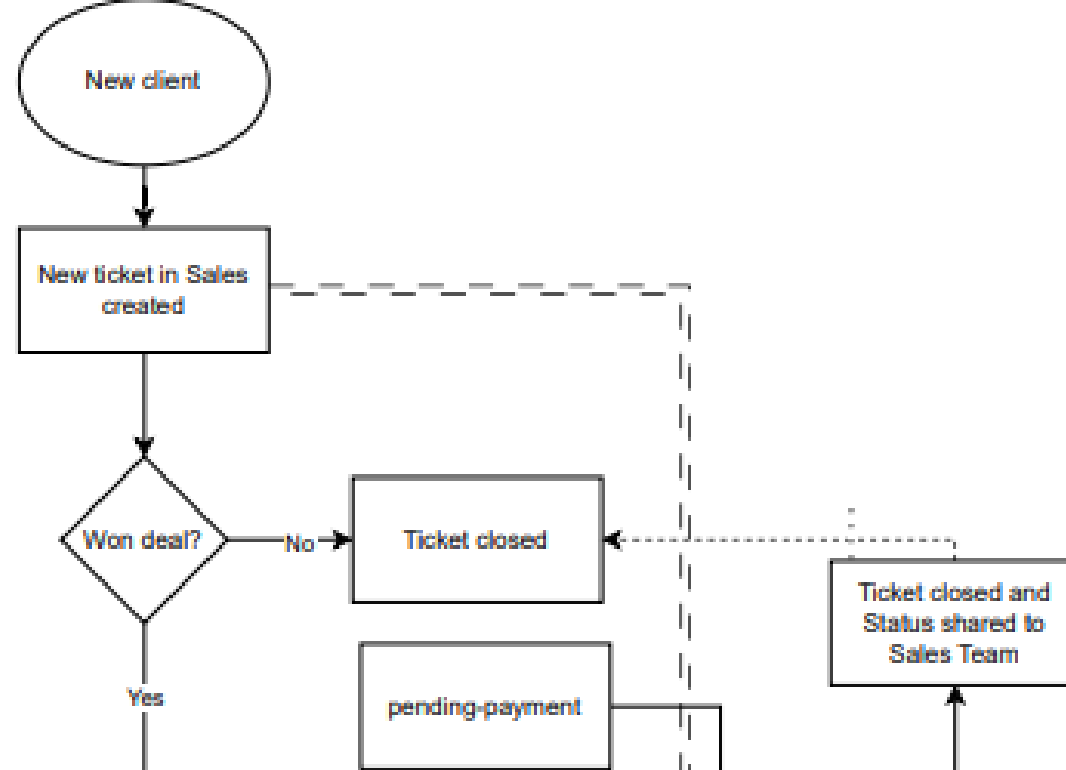
Ticket System Summary

- ▶ **Title:** Structuring and Managing Tickets

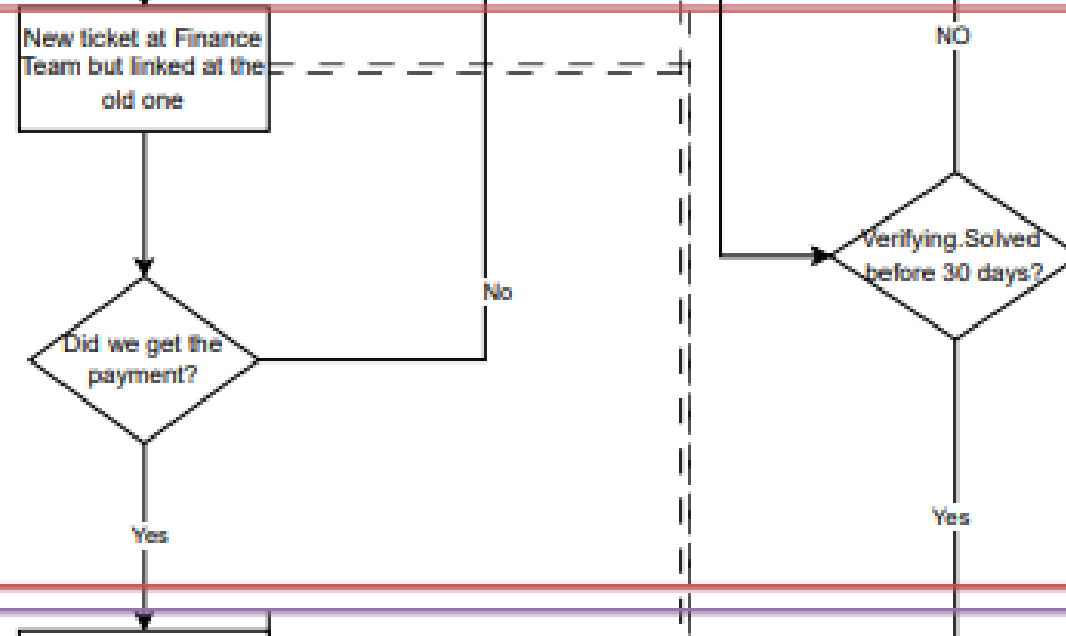
Key Points:

- ▶ Categorization based on Company Details and Contract Agreements
- ▶ Features: Attachments, Internal Chat, and Documentation - Documentation by ticket team and not all attached together.
- ▶ Ticket Workflow Stages - key words
- ▶ Periodic Follow-ups for Client Awareness and Satisfaction

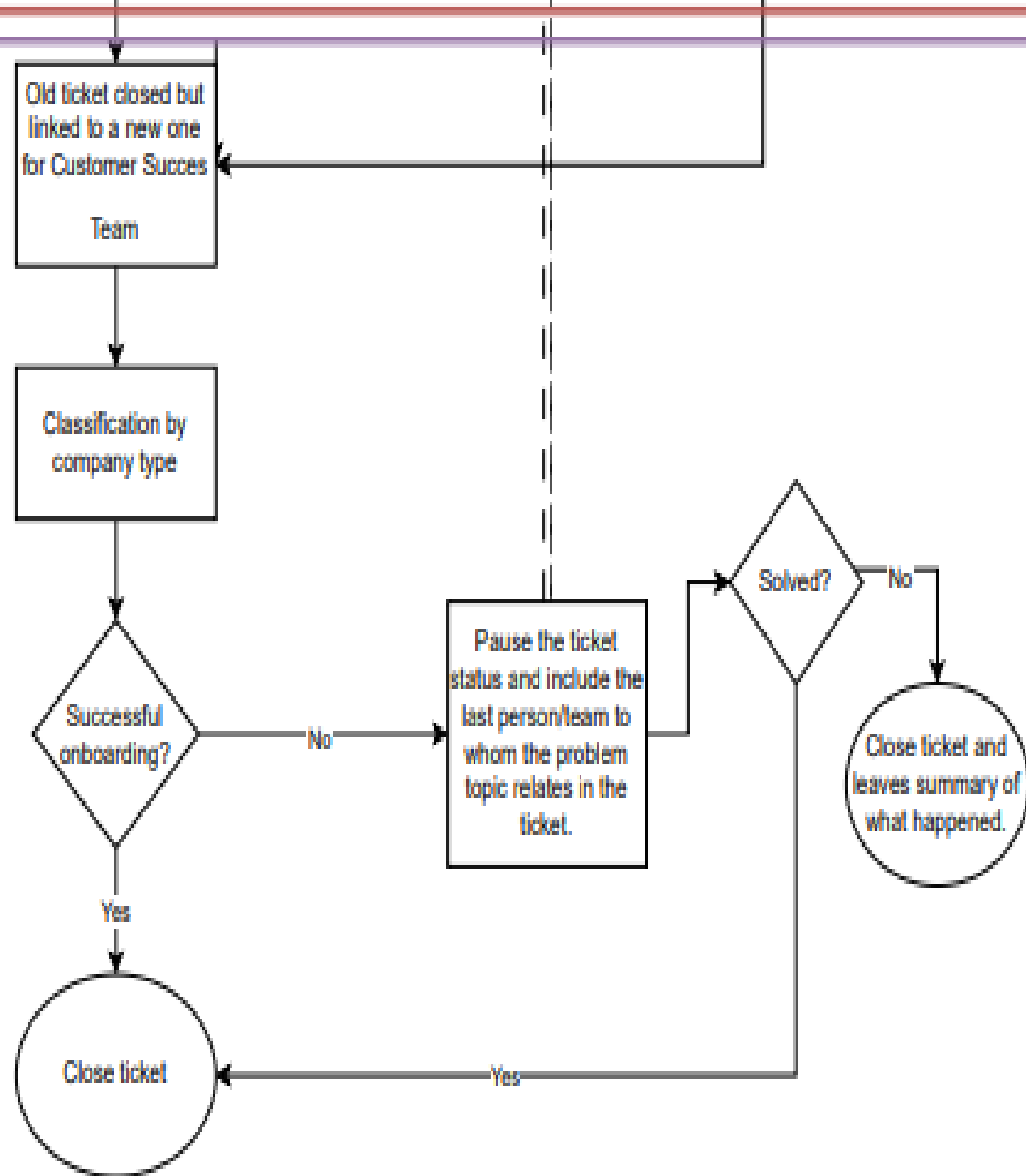
SALES TEAM



FINANCE TEAM



CUSTOMER SUCCESS TEAM



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THANK YOU

