

Houston, we have a problem..



A quick look at reps' basic KPI:

Deal_owner_anonym	Closed won		Closed lost		Grand Total	
	N	Rate %	N	Rate %	N	Rate %
Rep 12	23	32%	50	68%	73	100%
Rep 13	14	88%	2	13%	16	100%
Rep 23	5	45%	6	55%	11	100%
Rep 29	5	56%	4	44%	9	100%
Rep 30	9	50%	9	50%	18	100%
Grand Total	56	44%	71	56%	127	100%

All time to July 22

Diving into the lead source of the closed deals:

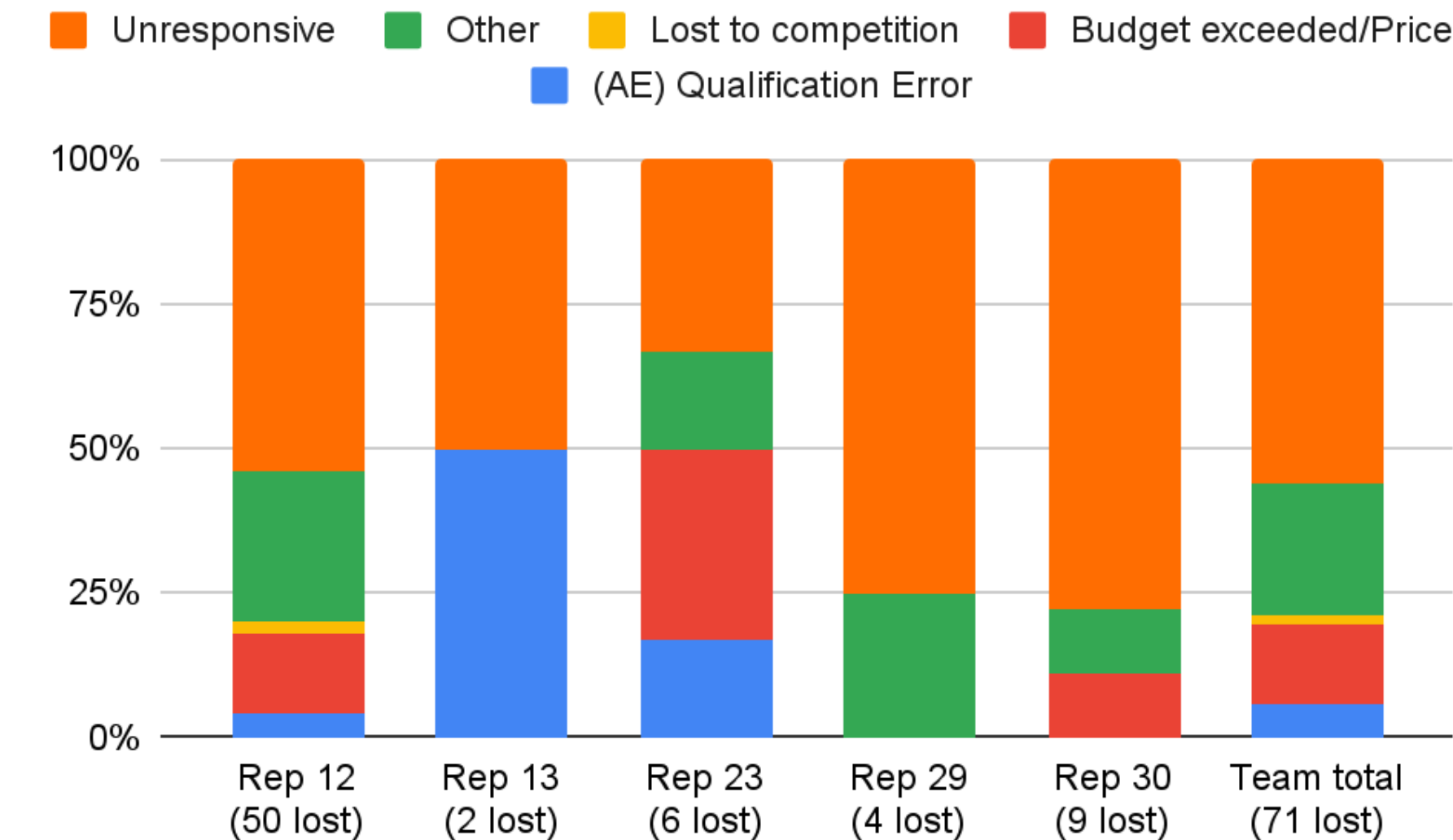
Deal_owner_anonym	MRG Lead Values									
	Inbound		Outbound (Email + L Upwork (bidding)		Partner sale		Returned (after churr		Grand Total	
	N closed	WR	N closed	WR	N closed	WR	N closed	WR	N closed	WR
Rep 12	32	44%	32	22%	6	0%	1	0%	2	100%
Rep 13	12	83%	3	100%			1	100%	16	88%
Rep 23	8	63%	3	0%					11	45%
Rep 29	6	67%	1	0%	1	0%	1	100%	9	56%
Rep 30	18	50%							18	50%
Grand Total	76	55%	39	26%	7	0%	3	67%	127	44%

Pasted as an image to preserve heatmap; here is [the original table](#)

Takeaways:

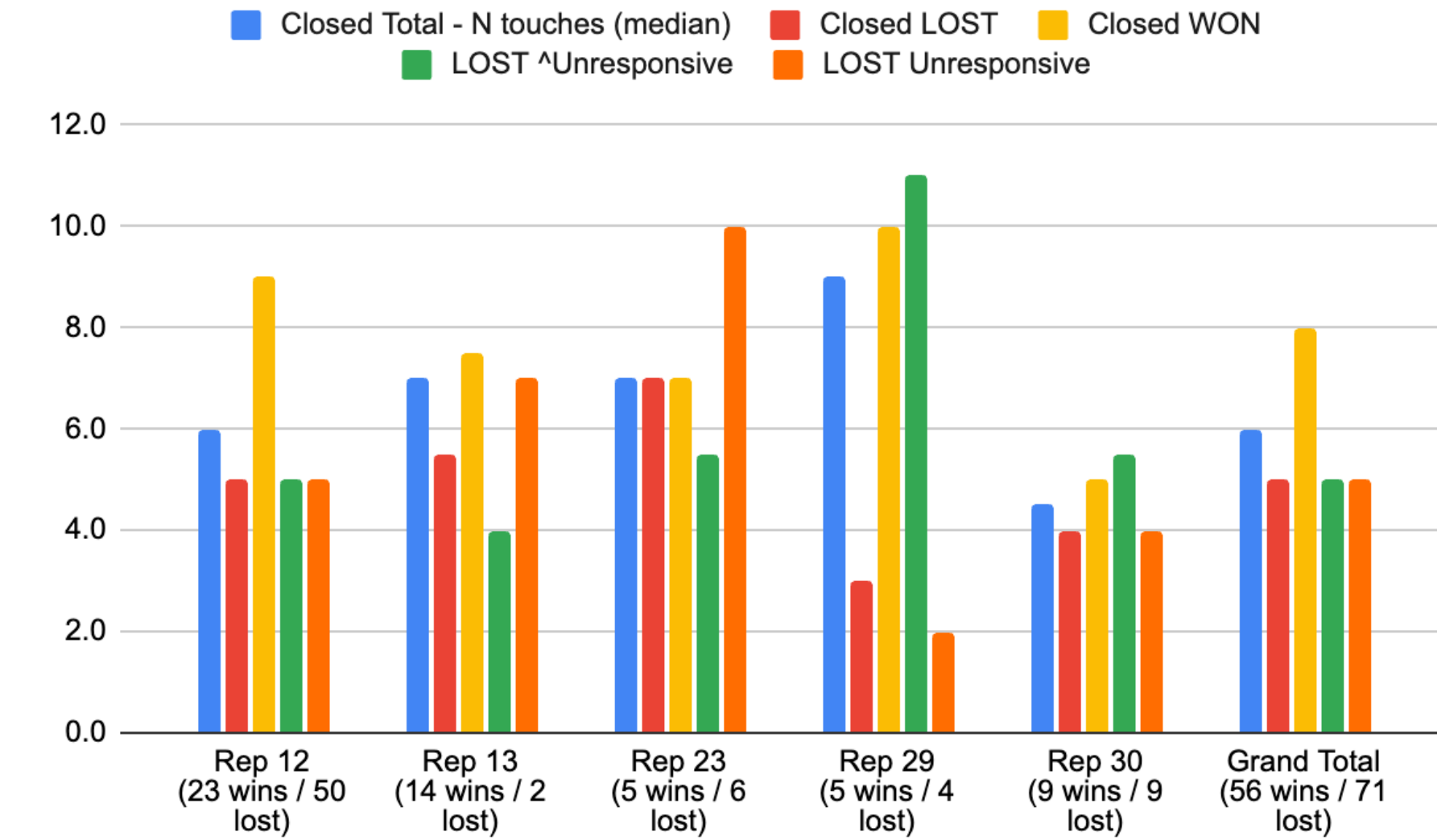
- Rep 12 has low WR for the Outbound compared to ~40% seen in the past for Earth team
- Rep 13 is absolute champion with 100% the winrate for outbound (3 deals only) and 88% for Inbound (NB this AE deals is a subset of her work)
- Rep 23 lost all of his 3 Outbound deals
- Zero (0) deals won from Upwork

Who's least / most ghosted:



- Rep 23 - the least losses due to Unresponsive
- Rep 13 has lost 2 deals only, too little data
- Rep 29 & Rep 30 both have the most Unresponsive lost

How many *touches* to close (median):

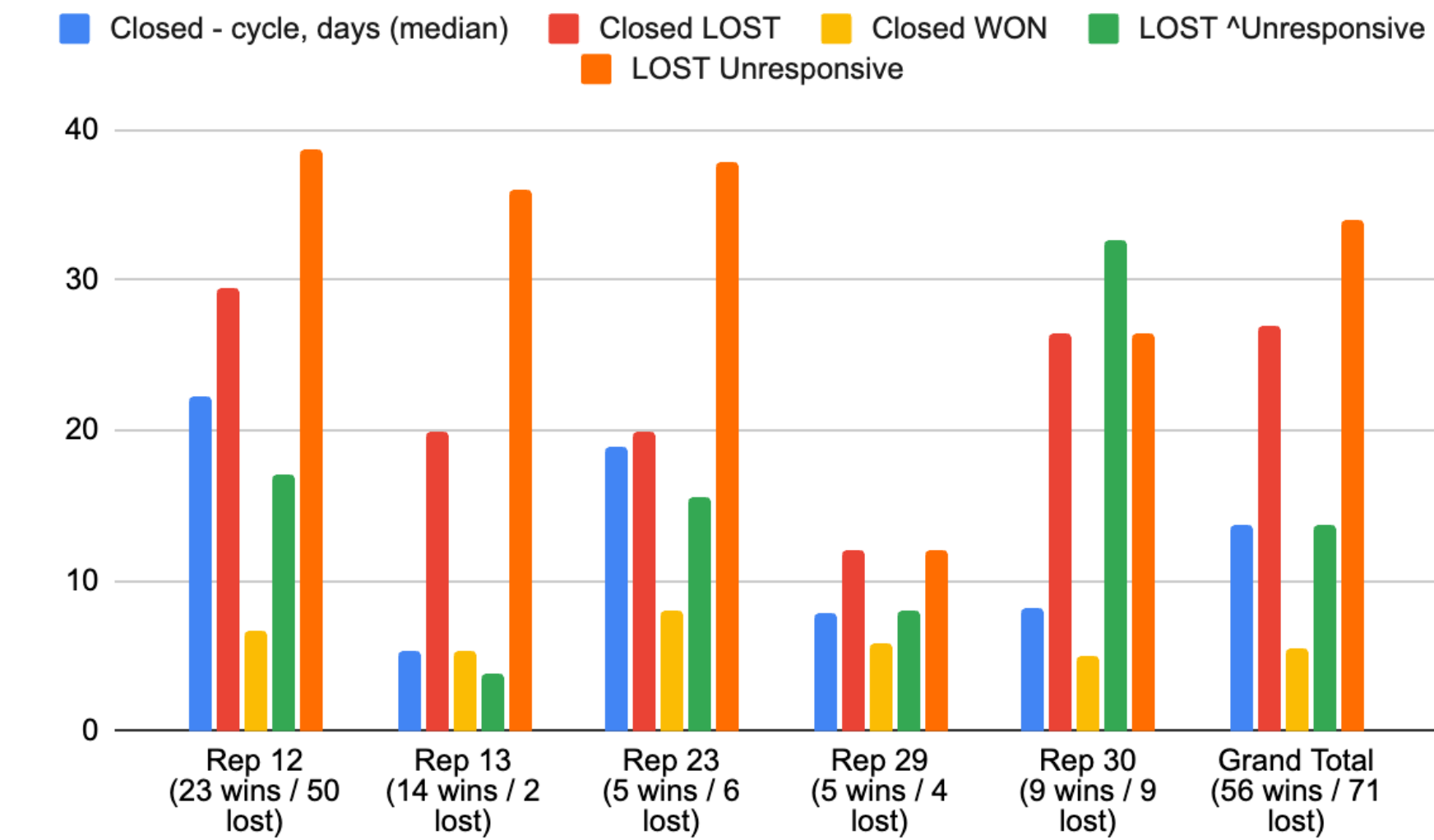


[Here](#) is how Hubspot defines a touch (look up *Number of times contacted*)

- Rep 23 sets the pattern to follow (esp for Lost ^Unresponsive & Unresponsive)
- Rep 29 onboarded recently seems unbalanced & just ramping up
- Rep 30 seems not taking much care of the deals that do not close fast

Why would the Wons receive more touches than the Lost? Onboarding hassle may be an answer, needs a deeper dive into the touches.

Days to close (median):



Won deals cycle distribution:

At a glance, checking the difference between median and average, while looking at stdev as well:

Deal_owner_anonym	N won	MEDIAN of Duration	AVERAGE of Duration	STDEV of Duration
Rep 12	23	6.7	9.6	9.8
Rep 13	14	5.4	7.3	8.3
Rep 23	5	8.0	68.5	131.9
Rep 29	5	5.8	5.2	2.2
Rep 30	9	5.0	4.4	2.8
Grand Total	56	5.5	13.1	40.4

Need to check outliers manually esp for Rep 23

Glance at Other reasons:

There 16 deals closed lost with Other as the main reason and free text under the additional AE Close Lost Reason detail field. Here is [the list of these deals](#). After categorised and grouped:

Category	count	Category
Not using Upwork	6	
Lead ownership error	3	
Other	3	
Not ready to buy now	2	
Not using automation	2	

Takeaway: *Not using Upwork*, *Not ready to buy now* and *Not using automation* be added as preset reasons for top-level AE Closed Lost Reason property.