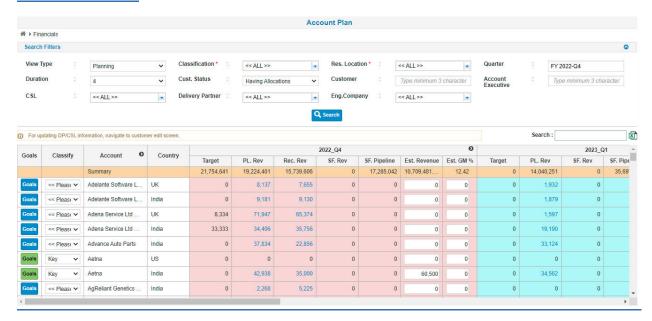# Account Plan:

View Type:

Planning: In Planning Est. Revenue and Est. GM % that planned for the Customer for quarter by stake holders that we are showing.

Resource Location: Resources tagged to customer and based on resource location data will show.

Quarter: Data will show for the current and feature quarters.

Duration: we can select the duration of Quarters, based on that data will show.

Customer status:

- Having Allocations: Resources who are under the customer, if there are having allocations that will show.
- No Allocations: Resources who are under the customer, if there are not having allocations that will show.
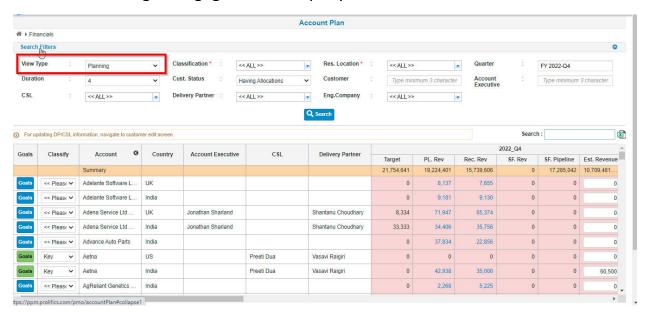
Customer: Customers which is active that we are showing.

Account Executive: Account Executives who are tagged to the customers.

CSL: Customer Successful Leaders (CSL) who are tagged to Customer.

Delivery Partner: Delivery Partner (DP) who are tagged to Customer.

Engagement Company: For Every customer we are creating Engagement and customers will tag to Engagement Company.

Goals: Goals (Service Offering, Practices and Customer Units) provided for Customer

Account: showing Customer other than Prospects.

Country: Showing Customer Location.

Account Executive: showing assigned Account Executive for customer.

CSL: showing assigned Customer Successful lead for customer.

Delivery Partner: Showing assigned Delivery Partner for Customer.

Target: Targets provide for Account Executive based on Customer and customer location.

PL. Revenue: Planned Revenue based on the Planning Hrs of Project in capacity plan. (Allocation Hrs * Billing rate)

Once clicking on planned revenue value then below table is showing projects and project st date and end date and country, pl. revenue for current Quarter and months will show.

Planned Revenue For **2022_Q4**

Project	Start Date	End Date	Account	Country	Jan-2022	Feb-2022	Mar-2022
(P) Adelante: Managed Manual Regression Test	07-Feb-2022	18-Mar-2022	Adelante Software Limited	UK	$ 0	$ 4,836	$ 0
(P) Adelante: Managed Manual Regression Te…	14-Mar-2022	29-Mar-2022	Adelante Software Limited	UK	$ 0	$ 0	$ 403
(P) Adelante: Managed Manual Regression Te…	14-Mar-2022	11-Apr-2022	Adelante Software Limited	UK	$ 0	$ 0	$ 2,898

Rec. Revenue: Customer based on the location, we are showing Recognized Revenue of Customer for Quarter and Month (Approved Hrs * billing Rate).

Once clicking on Recognized revenue value then below table is showing projects and project st date and end date and country. Rec. revenue for current Quarter and months will show.

Recognized Revenue For **2022_Q4**

Project	Start Date	End Date	Account	Country	Jan-2022	Feb-2022	Mar-2022
(P) Monsoon-MERCATUS Inception-MON-008	02-Sep-2021	04-Mar-2022	Adena Service Ltd Mon…	UK	$ 1,489	$ 0	$ 0
(P) Monsoon-IP Inception-MON-009	01-Nov-2021	11-Feb-2022	Adena Service Ltd Mon…	UK	$ 6,933	$ 10,647	$ 0
(P) Adena Services - SoW-MON-010	07-Feb-2022	29-Apr-2022	Adena Service Ltd Mon…	UK	$ 0	$ 17,573	$ 28,732

SF. Revenue: If ADD to Call flag is checked for Opportunity then Revenue is considered in SF Revenue column.

SF. Pipeline: Opportunities amount which we are considering the stages (Conditional Agreement, Draft proposal delivered, Sow proposal delivered, Qualified, Validated,Closing) that we are showing in SF Pipeline.

- Once clicking on SF Pipeline amount value then below table is showing Opportunities and Opportunities created date and closed date and country there probability and Amount for current Quarter.

SF Pipline For **2022_Q4**

Opportunity	Created Date	Closed Date	Account	Country	Probability	Amount
Bluechip - CPA Global Custom App Migration	22-Jan-2021	25-Mar-2022	Bluechip	UK	50 %	$ 200,000
Bluechip - SIS MQ assistance	04-Oct-2021	25-Mar-2022	Bluechip	UK	50 %	$ 10,000

Est. Revenue: Est. Planned Revenue is provided for customer by Stake Holders.

Est. GM %: Est. GM% is provided for each customer by Stake Holders.

Total Est.GM% = sum of (customer Est. Revenue * customer Est.GM%) / Total Est.Revenue.

View Type:

Actuals: Recognized revenue how much we get based on customer and location.

Resource Location: Resources tagged to customer and based on resource location data will show.

Quarter: Data will show for the current and feature quarters.

Duration: we can select the duration of Quarters, based on that data will show.

Customer status:

- **Having Allocations:** Resources who are under the customer, if there are having allocations that will show.
- **No Allocations:** Resources who are under the customer, if there are not having allocations that will show.

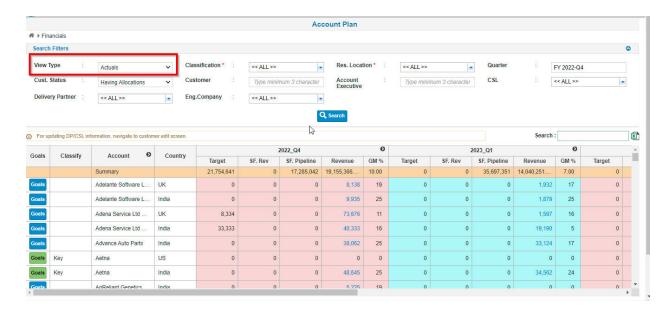**Customer:** Customers which is active that we are showing.

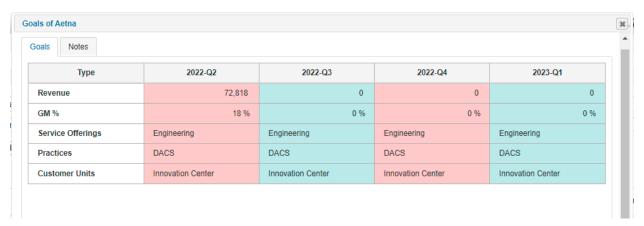**Account Executive:** Account Executives who are tagged to the customers.

CSL: Customer Successful Leaders (CSL) who are tagged to Customer.

Delivery Partner: Delivery Partner (DP) who are tagged to Customer.

Engagement Company: For Every customer we are creating Engagement and customers will tag to Engagement Company.

Account Plan

⌂ ▸ Financials

Search Filters

View Type	:	Actuals	Classification *	:	<< ALL >>	Res. Location *	:	<< ALL >>	Quarter	:	FY 2022-Q4
Cust. Status	:	Having Allocations	Customer	:	Type minimum 3 character	Account Executive	:	Type minimum 3 character	CSL	:	<< ALL >>
Delivery Partner	:	<< ALL >>	Eng.Company	:	<< ALL >>						

🔍 Search

ⓘ For updating DP/CSL information, navigate to customer edit screen.

Search : _____

Goals	Classify	Account	Country	2022_Q4					2023_Q1					
				Target	SF. Rev	SF. Pipeline	Revenue	GM %	Target	SF. Rev	SF. Pipeline	Revenue	GM %	Target
		Summary		21,754,641	0	17,285,042	19,155,366...	10.00	0	0	35,697,351	14,040,251...	7.00	0
Goals		Adelante Software L...	UK	0	0	0	8,138	19	0	0	0	1,932	17	0
Goals		Adelante Software L...	India	0	0	0	9,935	25	0	0	0	1,879	25	0
Goals		Adena Service Ltd ...	UK	8,334	0	0	73,676	11	0	0	0	1,597	16	0
Goals		Adena Service Ltd ...	India	33,333	0	0	40,333	16	0	0	0	19,190	5	0
Goals		Advance Auto Parts	India	0	0	0	38,062	25	0	0	0	33,124	17	0
Goals	Key	Aetna	US	0	0	0	0	0	0	0	0	0	0	0
Goals	Key	Aetna	India	0	0	0	48,645	25	0	0	0	34,562	24	0
Goals		AgReliant Genetics	India	0	0	0	5,225	19	0	0	0	0	0	0

Goals: Goals (Revenue, GM%, Service Offering, Practices and Customer Units) provided for Customer

Goals of Aetna

Goals | Notes

Type	2022-Q2	2022-Q3	2022-Q4	2023-Q1
Revenue	72,818	0	0	0
GM %	18 %	0 %	0 %	0 %
Service Offerings	Engineering	Engineering	Engineering	Engineering
Practices	DACS	DACS	DACS	DACS
Customer Units	Innovation Center	Innovation Center	Innovation Center	Innovation Center

Account: showing Customer other than Prospects.

Country: Showing Customer Location.

Account Executive: showing assigned Account Executive for customer.

CSL: showing assigned Customer Successful lead for customer.

Delivery Partner: Showing assigned Delivery Partner for Customer.

Target: Targets provide for Account Executive based on Customer and customer location.

SF. Revenue: If ADD to Call flag is checked for Opportunity then Revenue is considered in SF Revenue column.

SF. Pipeline: Opportunities amount which we are considering the stages (Conditional Agreement, Draft proposal delivered, Sow proposal delivered, Qualified, Validated) that we are showing in SF Pipeline.

- Once clicking on SF Pipeline amount value then below table is showing Opportunities and Opportunities created date and closed date and country there probability and Amount for current Quarter.

SF Pipline For 2022_Q4

Opportunity	Created Date	Closed Date	Account	Country	Probability	Amount
Auto-Owners Process Mining Jump Start	10-Sep-2020	31-Mar-2022	Auto-Owners Insurance	US	25 %	$ 14,000

Revenue: Recognized revenue of customer that we considering the cutoff date (Ex: For current month until 15th it will take only planned revenue after 15th it will take   Recognized revenue.) this we are taking from GMA (Gross Margin Analysis)

GM %: Gross Margin % of customer for the quarter that we are taking from GMA.

- Formula:
  For Current and Feature month **GM% = Planned revenue – (RDC+ODC) / Planned Revenue.**
  For Past months **GM% = Recognized revenue – (RDC+ODC) / Recognized Revenue.**

View Type:

Compare: In Compare we are showing comparison of Est. Pl Revenue and how much Recognized revenue reached for customer.

Resource Location: Resources tagged to customer and based on resource location data will show.

Quarter: Data will show for the current and feature quarters.

Duration: we can select the duration of Quarters, based on that data will show.

Customer status:

- Having Allocations: Resources who are under the customer, if there are having allocations that will show.
- No Allocations: Resources who are under the customer, if there are not having allocations that will show.
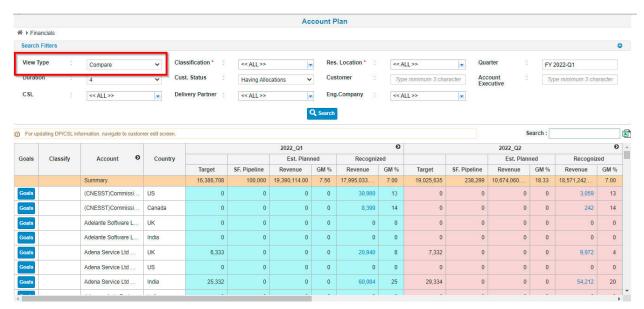
Customer: Customers which is active that we are showing.

Account Executive: Account Executives who are tagged to the customers.
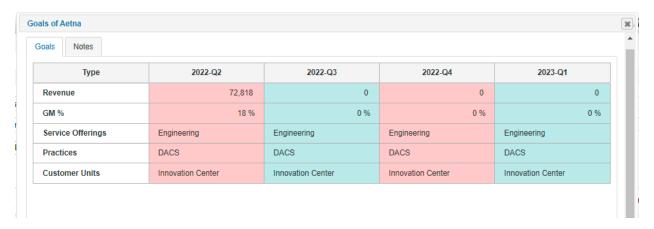
CSL: Customer Successful Leaders (CSL) who are tagged to Customer.

Delivery Partner: Delivery Partner (DP) who are tagged to Customer.

Engagement Company: For Every customer we are creating Engagement and customers will tag to Engagement Company.

Goals:

Account: showing Customer other than Prospects.

Country: Showing Customer Location.

Account Executive: showing assigned Account Executive for customer.

CSL: showing assigned Customer Successful lead for customer.

Delivery Partner: Showing assigned Delivery Partner for Customer.

Target: Targets provide for Account Executive based on Customer and customer location.

SF. Pipeline: Opportunities amount which we are considering the stages (Conditional Agreement, Draft proposal delivered, Sow proposal delivered, Qualified, Validated) that we are showing in SF Pipeline.

- Once clicking on SF Pipeline amount value then below table is showing Opportunities and Opportunities created date and closed date and country there probability and Amount for current Quarter.

SF Pipline For **2022_Q1**

Opportunity	Created Date	Closed Date	Account	Country	Probability	Amount
DataGov-CCPA	15-May-2020	15-Apr-2021	Navy Federal Credit Uni...	NM	10 %	$ 50,000
Senzing-Entity Resolution	07-Aug-2020	18-Jun-2021	Navy Federal Credit Uni...	NM	10 %	$ 50,000

Est. Planned:

- **Revenue:** Est. Planned Revenue is provided for customer by Stake Holders.
- **GM %:** Est. GM% is provided for each customer by Stake Holders.
  Total Est.GM% = each customer Est. Revenue * each customer Est.GM% / Total Est.Revenue.

Recognized:

- **Revenue:** Recognized revenue that customer reached for quarter based on location (Approved Hrs * billing rate)
- **GM %: Formula**
  For Current and Feature month **GM% = Planned revenue – (RDC+ODC) / Planned Revenue.**
  For Past months **GM% = Recognized revenue – (RDC+ODC) / Recognized Revenue.**

View Type:

View: In View we are showing Targets, SF Pipeline, SF Revenue, Est. Pl Revenue, Est.GM%, Recognized revenue, GM % and Attain% for CSL Level (customer successful lead).

Resource Location: Resources tagged to customer and based on resource location data will show.

Month: Data will show for the current and feature Months.

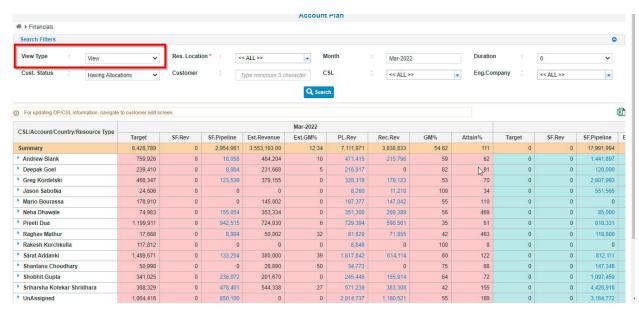**Duration:** we can select the duration of Months, based on that data will show.

Customer status:

- **Having Allocations:** Resources who are under the customer, if there are having allocations that will show.
- **No Allocations:** Resources who are under the customer, if there are not having allocations that will show.

Customer: Customers which is active that we are showing.

CSL: Customer Successful Leaders (CSL) who are tagged to Customer.

Engagement Company: For Every customer we are creating Engagement and customers will tag to Engagement Company.

CSL/Account/Country/Resource Type	Mar-2022											
	Target	SF.Rev	SF.Pipeline	Est.Revenue	Est.GM%	PL.Rev	Rec.Rev	GM%	Attain%	Target	SF.Rev	SF.Pipeline
Summary	6,428,789	0	2,954,961	3,553,193.00	12.34	7,111,971	3,838,833	54.62	111	0	0	17,991,994
Andrew Blank	759,926	0	18,058	484,204	10	471,415	215,796	59	62	0	0	1,441,897
Deepak Goel	239,410	0	8,984	231,668	5	216,917	0	82	91	0	0	120,000
Greg Kordelski	468,347	0	123,539	379,155	0	328,319	179,123	53	70	0	0	2,807,993
Jason Sabotka	24,606	0	0	0	0	8,260	11,210	100	34	0	0	551,565
Mario Bourassa	178,910	0	0	145,002	0	197,377	147,042	55	110	0	0	0
Neha Dhawale	74,983	0	155,054	353,334	0	351,300	289,389	56	469	0	0	85,000
Preeti Dua	1,199,911	0	942,515	724,930	6	729,394	590,561	35	61	0	0	818,331
Raghav Mathur	17,668	0	8,984	50,002	32	81,829	71,855	42	463	0	0	118,600
Rakesh Kurchkulla	117,812	0	0	0	0	8,848	0	100	8	0	0	0
Sarat Addanki	1,489,671	0	133,254	380,000	39	1,817,842	614,114	60	122	0	0	812,111
Shantanu Choudhary	50,998	0	0	28,890	50	34,773	0	75	68	0	0	147,348
Shobhit Gupta	341,025	0	236,072	201,670	0	245,446	155,914	64	72	0	0	1,097,459
Sriharsha Kotekar Shridhara	368,329	0	478,401	544,338	27	571,239	383,308	42	155	0	0	4,426,918
UnAssigned	1,064,416	0	850,100	0	0	2,014,737	1,180,521	55	189	0	0	3,164,772

CSL: showing Accounts, location and Resources assigned for Customer under CSL (Customer Successful lead).

Target: Targets provide for Account Executive based on Customer and customer location.

SF. Revenue: If ADD to Call flag is checked for Opportunity then Revenue is considered in SF Revenue column.

SF. Pipeline: Opportunities amount which we are considering the stages (Conditional Agreement, Draft proposal delivered, Sow proposal delivered, Qualified, Validated) that we are showing in SF Pipeline.

- Once clicking on SF Pipeline amount value then below table is showing Opportunities and Opportunities created date and closed date and country there probability and Amount for current Quarter.

SF Pipline For **2022_Q1**

Opportunity	Created Date	Closed Date	Account	Country	Probability	Amount
DataGov-CCPA	15-May-2020	15-Apr-2021	Navy Federal Credit Uni…	NM	10 %	$ 50,000
Senzing-Entity Resolution	07-Aug-2020	18-Jun-2021	Navy Federal Credit Uni…	NM	10 %	$ 50,000

Est. Revenue: Est. Revenue is provided for customer by Stake Holders.

Est. GM %: Est. GM% is provided for each customer by Stake Holders.

Total Est.GM% = sum(customer Est. Revenue * customer Est.GM%)/ Total Est.Revenue.

PL. Revenue: Customer tagged to CSL, Planned Revenue of CSL showing for Month.

Once clicking on planned revenue value then below table is showing projects and project st date and end date and country, pl. revenue for current Quarter and months will show.

Planned Revenue For **Mar-2022**

Project	Start Date	End Date	CSL	Account	Country	Revenue
(P) Fedway: Commerce Service Agreement 20…	15-Jan-2022	13-Jan-2023	Andrew Blank	Fedway Associates Inc.	US	$ 16,605
(P) Ralph Lauren: Managed Support Services …	29-Jun-2019	01-Apr-2022	Andrew Blank	Ralph Lauren Corporation	India	$ 33,300
(P) Ralph Lauren: Integration for Digitizing the …	01-Apr-2021	16-Sep-2022	Andrew Blank	Ralph Lauren Corporation	India	$ 14,720
(P) Ralph Lauren: OMS Digital Home Develop…	17-Apr-2021	27-May-2022	Andrew Blank	Ralph Lauren Corporation	India	$ 10,080
(P) Ralph Lauren: Digital Integration for APAC	14-Aug-2021	30-Nov-2022	Andrew Blank	Ralph Lauren Corporation	India	$ 24,800
(P) Ralph Lauren - DVCTestManagementFoun…	09-Aug-2021	06-May-2022	Andrew Blank	Ralph Lauren Corporation	India	$ 3,380
(P) Ralph Lauren - UFT Environment Assessm…	09-Oct-2021	02-Dec-2022	Andrew Blank	Ralph Lauren Corporation	India	$ 1,17 3,380
(P) Raph Lauren: Creative Asset Management…	01-Nov-2021	11-Mar-2022	Andrew Blank	Ralph Lauren Corporation	India	$ 3,440
(P) Inter-Metro FreightInc:Application moderni…	21-Mar-2022	13-May-2022	Andrew Blank	Inter-Metro Freight Inc	India	$ 760
(P) Smithfield Foods: Integration Managed Ser…	01-Jan-2022	30-Dec-2022	Andrew Blank	Smithfield Foods	US	$ 8,280
(P) Smithfield Foods: Smithfield Development …	01-Jan-2022	30-Dec-2022	Andrew Blank	Smithfield Foods	US	$ 20,125
(P) Smithfield Foods: Integration Managed Ser…	01-Jan-2022	30-Dec-2022	Andrew Blank	Smithfield Foods	India	$ 19,569
(P) Smithfield Foods: Smithfield Development …	01-Jan-2022	30-Dec-2022	Andrew Blank	Smithfield Foods	India	$ 36,008
(P) Henry Schein: EDI Test Support	24-Jul-2021	30-Dec-2022	Andrew Blank	Henry Schein, Inc.	India	$ 3,168
(P) Henry Schein: General Testing Support	02-Sep-2021	06-May-2022	Andrew Blank	Henry Schein, Inc	India	$ 23,781

Rec. Revenue: Customer tagged to CSL, Recognized Revenue of CSL showing for Month(Approved hrs * billing rate).

Once clicking on Recognized revenue value then below table is showing projects and project st date and end date, CSL, Customer, country and Rec. revenue for current month.

Recognized Revenue For Mar-2022

Project	Start Date	End Date	CSL	Account	Country	Revenue
(P) Ralph Lauren: Integration for Digitizing the …	01-Apr-2021	16-Sep-2022	Andrew Blank	Ralph Lauren Corporation	India	$ 13,440
(P) Ralph Lauren: OMS Digital Home Develop…	17-Apr-2021	27-May-2022	Andrew Blank	Ralph Lauren Corporation	India	$ 9,840
(P) Ralph Lauren: Digital Integration for APAC	14-Aug-2021	30-Nov-2022	Andrew Blank	Ralph Lauren Corporation	India	$ 23,760
(P) Ralph Lauren - DVCTestManagementFoun…	09-Aug-2021	06-May-2022	Andrew Blank	Ralph Lauren Corporation	India	$ 2,754
(P) Raph Lauren: Creative Asset Management…	01-Nov-2021	11-Mar-2022	Andrew Blank	Ralph Lauren Corporation	India	$ 3,600
(P) Henry Schein: EDI Test Support	24-Jul-2021	30-Dec-2022	Andrew Blank	Henry Schein, Inc.	India	$ 2,816
(P) Henry Schein: General Testing Support	02-Sep-2021	06-May-2022	Andrew Blank	Henry Schein, Inc.	India	$ 15,648
(P) Henry Schein: EDI Development Support 2…	01-Jan-2022	30-Dec-2022	Andrew Blank	Henry Schein, Inc.	India	$ 3,996
(P) Equitable Life Insurance Company: DataP…	28-Feb-2022	30-Nov-2022	Andrew Blank	Equitable Life Insurance…	India	$ 4,752
(P) New York eHeatlh Collaborative: IBM MQ f…	07-Feb-2022	04-Mar-2022	Andrew Blank	New York eHealth Colla…	US	$ 3,060
(P) Mizuho Corporate Bank - Mizuho IIB Infras…	03-Aug-2019	30-Jun-2022	Andrew Blank	Mizuho Corporate Bank…	US	$ 25,080
(P) Mizuho Corporate Bank - Mizuho IIB Cons…	28-Sep-2021	30-Sep-2022	Andrew Blank	Mizuho Corporate Bank…	US	$ 17,280
(P) State of TN - Strategic Technology Solution…	03-Nov-2016	30-Jun-2022	Andrew Blank	State Of Tennessee	US	$ 46,650
(P) State of TN-SOTN-F&A: Edison Peoplesoft…	11-Sep-2021	31-Mar-2022	Andrew Blank	State Of Tennessee	US	$ 200
(P) State of TN - STS (ECD) - CRM Support E…	11-Jan-2022	30-Dec-2022	Andrew Blank	State Of Tennessee	US	$ 42,920

GM%: Gross Margin % of CSL that customers which are tagged for CSL that GM% is showing.

> For Current and Feature month **GM% = Planned revenue – (RDC+ODC) / Planned Revenue.**
> For Past months **GM% = Recognized revenue – (RDC+ODC) / Recognized Revenue.**

Attain%:

For Past Month **Attain % = Recognized Revenue /Target * 100**

For Current and feature months **Attain % = (SF. Rev + SF. Pipeline) / Target**