Success Plan - Metrics Review

Target release	Summer 2013
Theme	
Document status	DRAFT
Document owner	Ed McAdoo
Designer	
Developers	Andrey Bosak
QA	

Goals

Background and strategic fit

Assumptions

Requirements

#	User Story Title	User Story Description	Priority	Notes	JIRA Issues
1	Evaluate ADCL for the Seller	**For Sales Rep:** Average Deal Close length (ADCL, also known as Sales Cycle) will be evaluated as follows: 1. Get the Closed/Won Opportunities with Close date >= Today - 12 Months (i.e Closed in the last 12 months) 2. Evaluate Deal Close Length for each of these Opportunities. 'Deal Close Length' = Close Date - Created Date 3. ADCL = Sum of the "Deal Close Lengths" for all the Opportunities from#1/ Number of Opportunities from#1 **For Sales Manager (Or Manager Of Managers):** Average of the ADCL for all the Sellers reporting to the Current coach	1		**COAC-40** - Metrics Review page: Evaluate ADCL for Seller **COMPLETE**
2	Evaluate the Current Values for the Seller for the current period	Metrics Review (Current Period): 2 Charts & 4 gauges should be evaluated based on the formulas/ logic defined in the Table below for the Current period.	1	Andrey Bosak Please look into the implementing the solution for the Charts for New Opportunities and New proposals based on SFDC reports.	**COAC-41** - Metrics Review page: Evaluate the Current Values for the Seller for the current period **COMPLETE**

Filter Results

☐ Type task here and @mention a user to assign them the task

Create a New Issue

1. **New Opportunities:** This should be a **chart** with two graphs plotted for **each day** of the Current period for the following metrics:
   a. Number of New Opportunities prorated for each day based on the Number of New Opportunities per period from the Plan (Ex: If the plan says 30 per period, then chart should show 1 Opportunity increase per day, so a slant line starting with 1 to 30 in 30 days)
   b. Actual number of new Opportunities as of current day for each day of the period. (Ex: If there are 0 oppts on 1 day, 3 new ones **as of** 2nd day and 5 new ones as as of 3rd day, then chart should be drawn connecting 0, 3 and 5)
   c. This chart should be built based on 'Total New Opportunities Current Period' for the current Seller from Actual Metrics.
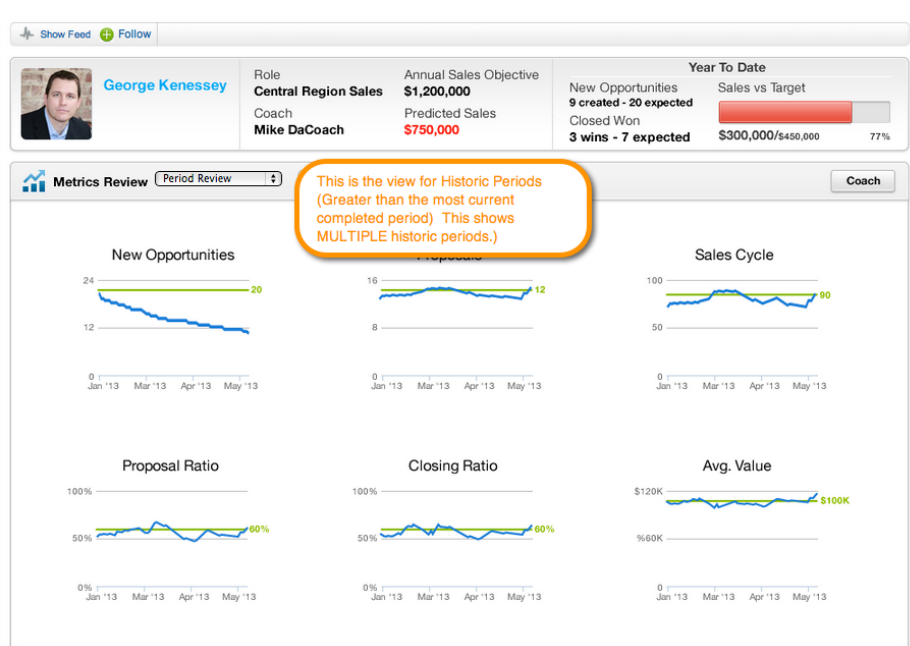
2. **New Proposals:** This should be a **chart** with two graphs plotted for **each day** of the Current period for the following metrics:
   a. Number of New Proposals prorated for each day based on the Number of New Proposals per period from the Plan (Ex: If the plan says 30 proposals per period, then chart should show 1 proposal increase per day, so a slant line starting with 1 to 30 in 30 days)
   b. Actual number of new Proposals as of current day for each day of the period. (Ex: If there are 0 Proposals on 1st day, 3 new ones **as of** 2nd day and 5 new ones as as of 3rd day, then chart should be drawn connecting 0, 3 and 5)
   c. This chart should be built based on 'Total New Proposals Current Period' for the current Seller from Actual Metrics.
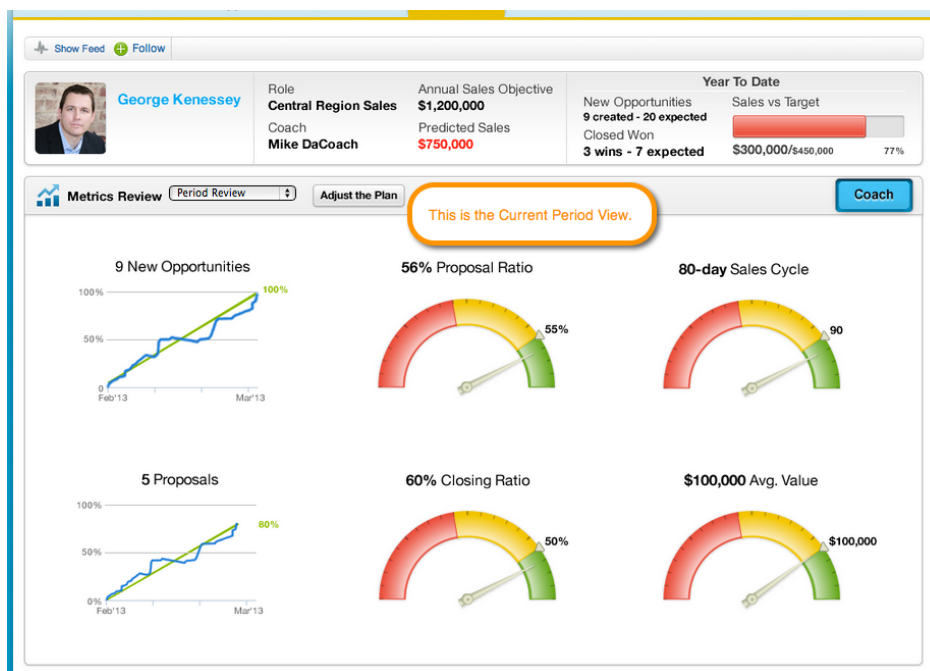
3. Gauges: Rest of the 4 metrics are gauges to show the most recent metrics from "Actual Metrics" for the current Seller.
Proposal Ratio
Closing Ratio
Sales Cycle
Average Value

For guages:
Line that devides the Yellow and Green = Metric value from the Primary Success plan.
Guage Arrow should point to the current value from the Actual metrics
Line that devides the Red and Yellow = X% of the Metric Value from the Primary Successplan (Where X = "Threshold For Red" in the "Org Settings" custom Setting.

In the attached Screen shot, 55% is the proposal ratio from the success plan, 56% is the current value from the Actual Metrics.

| 3 | Store the Current Values of Seller (**Sales Rep**) for Historic Trend Charts | Create Analytic snapshot to store the Current metrics on a Daily basis in "Actual Metrics" Object to plot the Trend Charts. The 6 different metrics need to be evaluated for each Seller as per the Rules defined in the table below.

Ex: There will be one row per day for each Seller, with "Metric Date" populated with the current date. So there will be 365 rows per Year for each seller. | 1 | **Pavel Lobach**

• Need to know any technical challenges with Analytic Snapshot solution ASAP.
• Alternative Solution: Create Batch Job to populate the individual sales rep data

Ed McAdoo

• There is a 100 000 records limit for the number of rows returned by the report (which will be data source for the analytic snapshot). This means that for 2000 sales reps we will have a problem in case of >50 opportunities per sales rep
• Also some of the calculations will require additional Formula fields to be created on Opportunity level for the calculation
• Analytic snapshot will require more significant manual configuration after package installation, which is another point against this option
• Additional batch job will be required to calculate each sales-rep level in Role hierarchy and the other batch to aggregate data starting from the lowest level to the highest. Analytic snapshot execution has to be synced with these 2 batches execution. The sync itself might be additional technical problem because of the unpredictable time for analytic snapshot to complete
In general current recommendation is to use custom batch job for calculations instead of Analytic Snapshot | **COAC-43** - Metrics Review page: Store the Current Values of Seller (Sales Rep) for Historic Trend Charts **COMPLETE** |
| 4 | Store the current values of Seller (**Coach and Above**) for Historic Trend Chart | 1. Create batch job to rollup the Seller Metrics from "Actual Metrics" object to the immediate Coach level.
2. Multiple Jobs need to be executed to evaluate the rollup metrics for every level in the Sales Hierarchy in **SEQUENCE** from bottom level to the very top (i.e CSO). | | | **COAC-44** - Metrics Review page: Store the current values of Seller (Coach and Above) for Historic Trend Chart **COMPLETE** |

| 5 | Plot the Trend charts (Actual Metrics) for the selected number of Periods | Metrics Review (View Last <Selected Value> Periods:

 1. 6 Different charts (Blue Color in the Screenshots) need to be drawn based on the actuals data from "**Actual Metrics**" for each day for the current seller, for the Last "selected" number of periods.
 2. Period Type for this historic Charts will be decided by "Period Type" in the Current Active Success plan.
 3. Display Periods 1, 4, 8, 12 and 24 for all period Types for Weekly and Monthly.
 4. Display periods 1, 4 and 8 for Quarterly period Type. | | | **COAC-45** - Metrics Review page: Plot the Trend charts (Actual Metrics) for the selected number of Periods. **COMPLETE** |
| 6 | Plot the Trend charts (Plan Metrics) for the selected number of Periods | Metrics Review (View Last <Selected Value> Periods:

 1. 6 Different charts (Green Color in the Screen shots) need to be drawn based on "Plan Metrics Object)
 2. Period Type for this historic Charts will be decided by "Period Type" in the Current Active Success plan.
 3. Display Periods 1, 4, 8, 12 and 24 for all period Types for Weekly and Monthly.
 4. Display periods 1, 4 and 8 for Quarterly period Type. | | Ed McAdoo

 I am proposing to do this using field History (rather than another Analytic Snapshot solution). In this case, if we go with Snapshot approach i.e creating a snapshot record for every successplan every day for each seller in another custom object, there will be large number of records to be stored for an Organization with thousands of sales reps).

 Pavel Lobach

 Do you see any technical issues (SFDC governor limits etc) with the Field History approach?

 Ed McAdoo

 There are following issues:

 1) field history approach will require some manual post-installation steps to enable field history

 2) Date selection performance in field-history approach will be less efficient than using additional fields in precalculated Metric Date object for other KPIs

 3) Charts rendering will be more complex, because we will need to display data from 2 different data sources (field history and Metric object). Data interpolation for small number of dates from field history to display the charts on the same time-line will require additional calculations to be performed via JavaScript which will reduce performance of charts.

 If we assume that each metric will require 16 bytes for each day. | **COAC-46** - Metrics Review page: Plot the Trend charts (Plan Metrics) for the selected number of Periods **COMPLETE**

 COAC-113 - Green lines on Charts should reflect the Plan Metrics object (Highcharts) **COMPLETE** |

			2000 reps * 365 days * 2 years * 6 metric * 16 bytes/ 1 Mbyte = 133 Mbyte for all the metric in data storage per 2 years. This is pretty small storage amount for large organization (each user receives 500Mb storage for Enterprise edition) so we could neglect storage issue in this case. The recommendation is to store all data required to display graphics in uniform format in custom Metric object Andrey Bosak You can go ahead and create "Plan Metrics" object similar to the "Actual Metrics" object to store the snapshot of the "Success plan" object. Andrey Bosak Valery Dvornichenko This is the storyline with details of how 'Plan Metrics' object need to populated and how the green lines in the chart are drawn. Please read through the details in the Notes column, we didn't for field history and used batch job to populate the current plan details into 'Plan Metrics' object. Marina Kryuchko	
7	Metrics for "Manager of Mangers" should be rolled up with Period Type as "Monthly"	In a Sales Organization, Manager and Sales Reps reporting to him will have same Period Type, so Metrics for manager will be rolled up based on the Period Type of 'Manager'. But in case of Manager of Managers and above, immediate reports may have different "Period Types". Ex: When you are rolling to CSO levels, VP of west may have period type as Monthly and VP of East may have period type as Quarterly. So to avoid confusion and misrepresentation of data, data should be rolled up with Period Type = 'Monthly' all the time. In the above example, for rolling up data for CSO, VP of east data should be adjusted to 'Monthly' (original period type = Quarterly) before aggregation of data for both VP of West and VP of East.		**COAC-194** - Metrics Review Page: Metrics for "Manager of Managers" should be rolled up with Period Type as "Monthly" **COMPLETE**
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User interaction and design

George Kenessey

Role	Annual Sales Objective	Year To Date	
Central Region Sales	**$1,200,000**	New Opportunities	Sales vs Target
Coach	Predicted Sales	9 created - 20 expected	
Mike DaCoach	**$750,000**	Closed Won	$300,000/$450,000 77%
		3 wins - 7 expected	

📊 Metrics Review [Period Review ⇅] [Adjust the Plan]   [Coach]

This is the Current Period View.

9 New Opportunities

100%
50%
0
Feb'13   Mar'13
100%

56% Proposal Ratio

55%

80-day Sales Cycle

90

5 Proposals

100%
50%
0%
Feb'13   Mar'13
60%

60% Closing Ratio

50%

$100,000 Avg. Value

$100,000

George Kenessey

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Mike DaCoach	**$750,000**	Closed Won	$300,000/$450,000 77%
		3 wins - 7 expected	

📊 Metrics Review [Period Review ⇅]   [Coach]

This is the view for Historic Periods (Greater than the most current completed period) This shows MULTIPLE historic periods.)

New Opportunities

24
20
12
0
Jan '13   Mar '13   Apr '13   May '13

Proposals

16
12
8
0
Jan '13   Mar '13   Apr '13   May '13

Sales Cycle

100
90
50
0
Jan '13   Mar '13   Apr '13   May '13

Proposal Ratio

100%
60%
50%
0%
Jan '13   Mar '13   Apr '13   May '13

Closing Ratio

100%
60%
50%
0%
Jan '13   Mar '13   Apr '13   May '13

Avg. Value

$120K
$100K
%60K
0
Jan '13   Mar '13   Apr '13   May '13

The table below presents the data sources and formulas to be used to calculate the current "Actual" Values for ANNUAL Plans.

Seq	Item	Actual
a	Period TO Date Sales	Sum Oppty value where IsClosed = TRUE and IsWon = True and close date >= Period Start Date and <= today
b	~~# Periods~~	~~Today - start of FY period / period type days~~
c	~~Sales ($) per Period~~	~~Formula = a/b~~

d	Avg. Sale Value (Closed/Won)	AVERAGE Oppty value where IsClosed = TRUE and IsWon = TRUE and Created date >= (Today - 2*ADCL) and <= today and Closed date >= (Today - 2*ADCL) and <= today
e	~~Sales (#) per Period~~	~~COUNT Oppty where status = Closed/Won and close date >= SFDC Org Fiscal Year start date and <= today / b~~
f	Closing Ratio*	1. Get the Count of Prposals where Created date >= (Today - 2*ADCL) and <= today (**This is same as the Numerator used in the Proposal Ratio calculation**) 2. Out of those Opportunities get the count of Opportunities where IsClosed = TRUE and IsWon = TRUE and close date <= today Closing Ratio = Count from #2/ Count from #1 Ex: If ADCL is 90 Days, say there are 3 Opportunities with Proposal Date in the last 180 Days (i.e 2*90 = 180). Out of those 3 Opportunities, 2 of them have Status = Closed/Won and Closed within the last 180 days. Then the Closing Ratio = 0.66 (=2/3)
g	New Proposals per Period	Count Oppty where proposal date* >= Period Start Date and <= today

h	Proposal Ratio*	1. Get the Count of Opportunities where Create date >= (Today - 2*ADCL) & <= today 2. Out of those Opportunities get the count of Opportunities with proposal date <= today Proposal Ratio = Count from #2/ Count from #1 Ex: If ADCL is 90 Days, say there are 5 Opportunities with Create Date in the last 180 Days (i.e 2*90 = 180). Out of those 5 Opportunities, 3 of them have Proposal date within the last 180 days. Then the Proposal Ratio = 0.60 (=3/5)
i	New Opptys per Period	COUNT Oppty where create date >= Period Start Date and <= today
j	ADCL	**For Sales Rep:** Average Deal Close length (ADCL, also known as Sales Cycle) will be evaluated as follows: 1. Get the Opportunities with Close date >= Today - 12 Months (i.e Closed in the last 12 months) and Close Date <= Today and IsClosed = TRUE and IsWon = TRUE. 2. ADCL = Sum of the "Deal Close Lengths" for all the Opportunities from#1/ Number of Opportunities from#1 **For Sales Manager (Or Manager Of Managers):** Average of the ADCL for all the Sellers reporting to the Current coach

ADCL: Average Deal Close Length

*Closing Ratio and Proposal Ratio are evaluated based on date in a period "Twice the Average Deal Close Length".

Sales Objective IS Pegged (If there is ONLY one metric is pegged, then there will be multiple outcomes. So we should have ALL but one metric pegged for one Unique outcome. So Need more discussion around this with Ed McAdoo):

1	Average Value	Inversely Proportional To	Proposals

2	Closing Ratio	Inversely Proportional To	Proposals
3	Proposal Ratio	Inversely Proportional To	New Oportunities
4	New Opportunities	Inversely Proportional To	Proposal ratio

Sales Objective Is NOT Pegged:

1	Average Value	Proportional To	Sales Objective
2	Closing Ratio	Proportional To	Sales Objective
3	Proposal Ratio	Proportional To	Proposals Sales Objective
4	New Opportunities	Proportional To	Proposals Sales Objective

Questions

Below is a list of questions to be addressed as a result of this requirements document:

Question	Outcome
How to evaluate the Average Deal Close Length for individual Sales Rep and for the SAles Manager and Manager of managers? Ed McAdoo Please review and confirm the StoryLine#1	Story#1 covers this.
Period Type for this historic Charts will be decided by "Period Type" in the Current Active Success plan. Ed McAdoo We are NOT storing Period Type anywhere other than the Success Plan. So proposing to get this from the Current Active Success Plan. How to decide Period Type for CSO, who may NOT have any Successplan himself.	
In the following screenshot, please provide exact logic on which data is displayed in every section: **- Representative** **- Target** **- Year To Date** **- Closed** **- New Opportunities** **- Feb 15 - Mar 15 2013** **- View Last 4 8 12 24 Periods** **- People** **- Assignments**	

| What will happen after clicking on the following buttons:

- Adjust
- View Current Period
- View Last 4 8 12 24 Periods | |

Not Doing