
Report to Showcase My Abilities

Creating Revenue and Opportunities Dashboards to Generate Insights

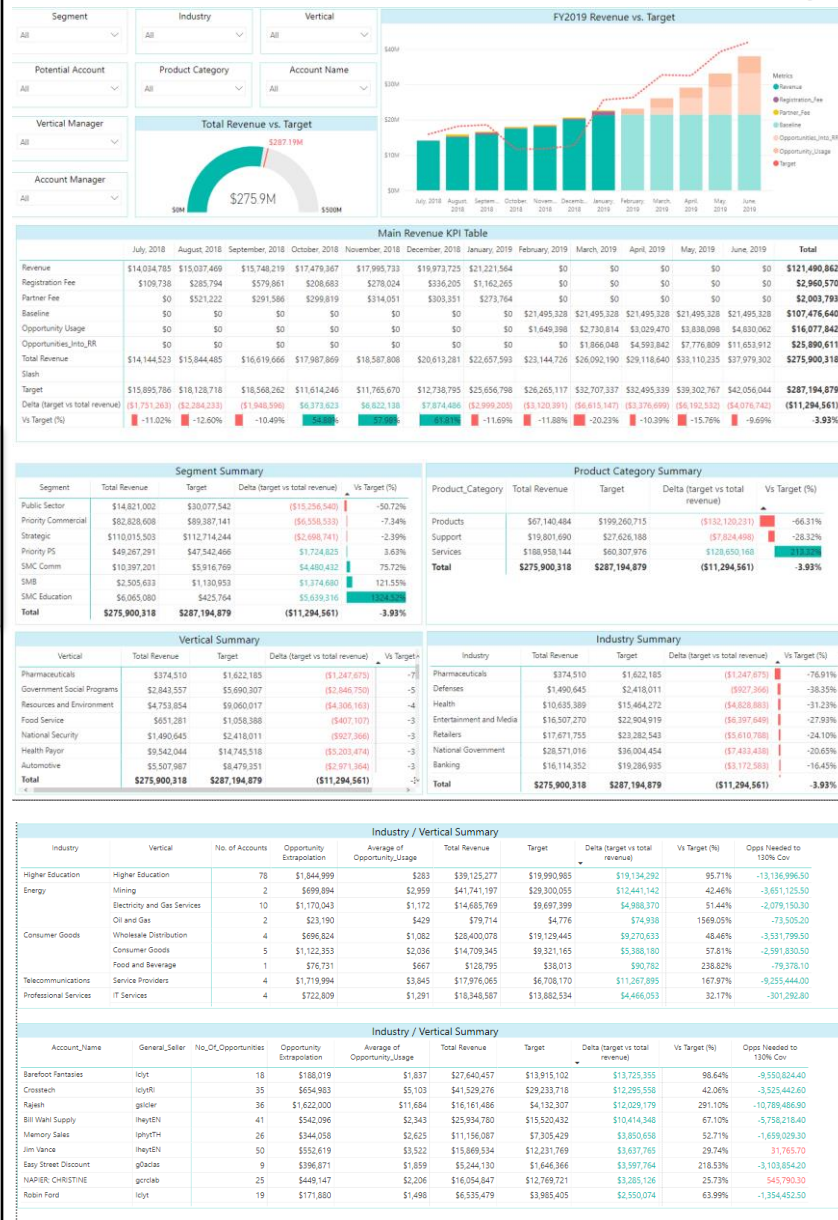
Valentin DE BALTHASAR

Various excel files

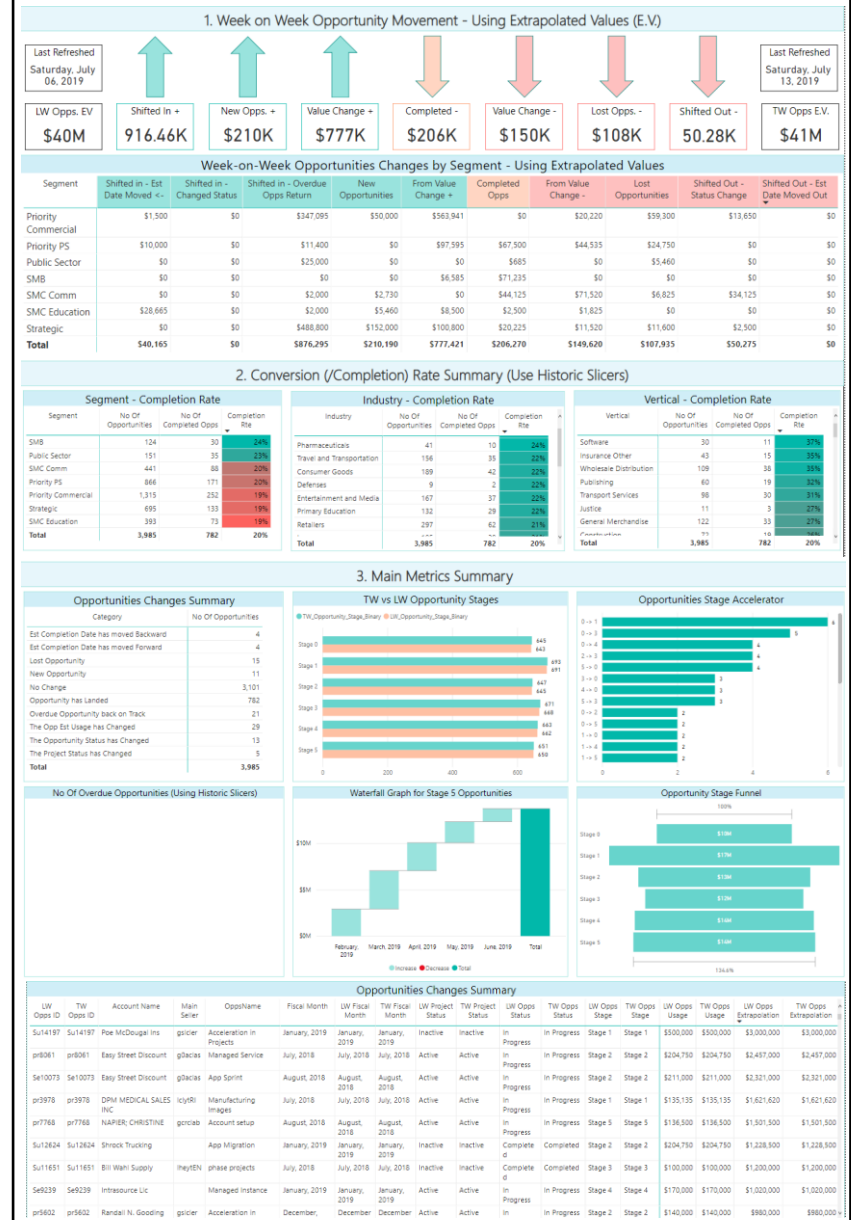


Cleaning & Engineering

Overall Revenue Performance Summary



Opportunities Change Tracker Summary



1. Fiscal Year Performance: expected to finish with **-4% Revenue vs Target:**

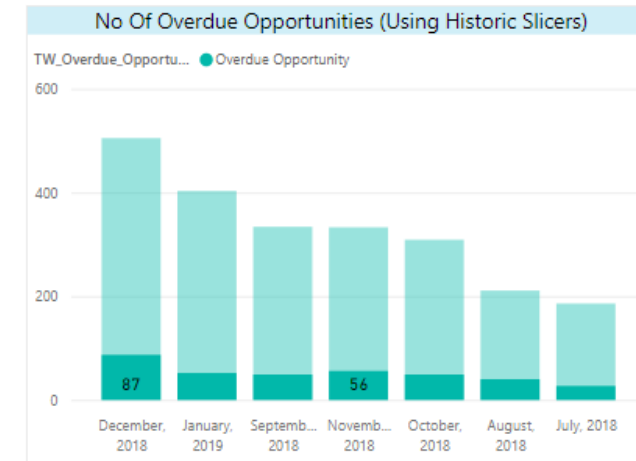
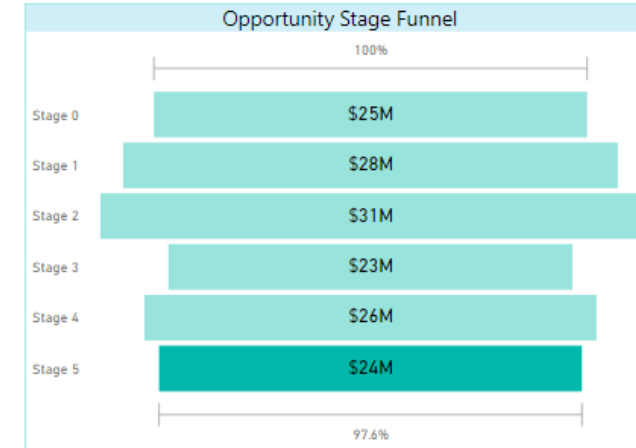
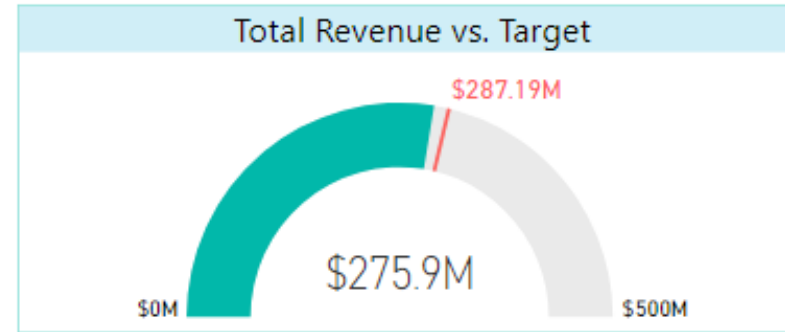
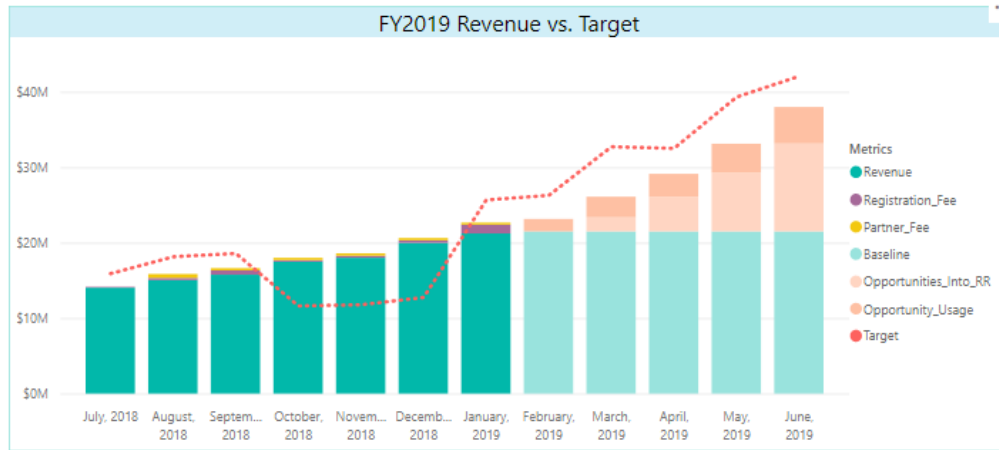
- Not enough opportunities are present in the pipeline
- About **\$50 million** worth of overdue opportunities are sitting in Stage 4 and 5

Stage 5 overdue opportunities should be brought back into the pipeline and pushed towards completion to achieve the FY target (+4.4%).

2. Current Month Performance: January missed it's target by **-12% (3 million):**

- The "products" from Product Category is **-76%** and Priority Commercial Segments is **-20%** because of it's completion rate (14%).
- **7 million** worth of overdue opportunities in January.

The seller for the 2 biggest overdue opportunities is Andy. So this seller should be contacted to get an update.



Main Revenue KPI Table

	July, 2018	August, 2018	September, 2018	October, 2018	November, 2018	December, 2018	January, 2019	February, 2019	March, 2019	April, 2019	May, 2019	June, 2019	Total
Revenue	\$14,034,785	\$15,037,469	\$15,748,219	\$17,479,367	\$17,995,733	\$19,973,725	\$21,221,564	\$0	\$0	\$0	\$0	\$0	\$121,490,862
Registration Fee	\$109,738	\$285,794	\$579,861	\$208,683	\$278,024	\$336,205	\$1,162,265	\$0	\$0	\$0	\$0	\$0	\$2,960,570
Partner Fee	\$0	\$521,222	\$291,586	\$299,819	\$314,051	\$303,351	\$273,764	\$0	\$0	\$0	\$0	\$0	\$2,003,793
Baseline	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$21,495,328	\$21,495,328	\$21,495,328	\$21,495,328	\$21,495,328	\$107,476,640
Opportunity Usage	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,649,398	\$2,730,814	\$3,029,470	\$3,838,098	\$4,830,062	\$16,077,842
Opportunities_Into_RR	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,866,048	\$4,593,842	\$7,776,809	\$11,653,912	\$25,890,611
Total Revenue	\$14,144,523	\$15,844,485	\$16,619,666	\$17,987,869	\$18,587,808	\$20,613,281	\$22,657,593	\$23,144,726	\$26,092,190	\$29,118,640	\$33,110,235	\$37,979,302	\$275,900,318
Slash													
Target	\$15,895,786	\$18,128,718	\$18,568,262	\$11,614,246	\$11,765,670	\$12,738,795	\$25,656,798	\$26,265,117	\$32,707,337	\$32,495,339	\$39,302,767	\$42,056,044	\$287,194,879
Delta (target vs total revenue)	(\$1,751,263)	(\$2,284,233)	(\$1,948,596)	\$6,373,623	\$6,822,138	\$7,874,486	(\$2,999,205)	(\$3,120,391)	(\$6,615,147)	(\$3,376,699)	(\$6,192,532)	(\$4,076,742)	(\$11,294,561)
Vs Target (%)	-11.02%	-12.60%	-10.49%	54.88%	57.98%	61.81%	-11.69%	-11.88%	-20.23%	-10.39%	-15.76%	-9.69%	-3.93%

1. Public Sector is estimated to finish the year **-51%** vs target.

- Public Sector is not pushing their opportunities down the funnel to completion.

We should have a meeting with the segment lead to identify the cause.

2. “Products” from the product category are estimated to finish the year **-66%** below target.

- Something went wrong back in December, we had **250 overdue opportunities worth of \$7 million** extrapolated value.
- Even if we land all the overdue opportunities, we will still miss the Fiscal target.
- There is not enough opportunities in the pipeline to meet the fiscal target. *Maybe we should investigate if the target is too high.*

Segment Summary

Segment	Total Revenue	Target	Delta (target vs total revenue)	Vs Target (%)
Public Sector	\$14,821,002	\$30,077,542	(\$15,256,540)	-50.72%
Priority Commercial	\$82,828,608	\$89,387,141	(\$6,558,533)	-7.34%
Strategic	\$110,015,503	\$112,714,244	(\$2,698,741)	-2.39%
Priority PS	\$49,267,291	\$47,542,466	\$1,724,825	3.63%
SMC Comm	\$10,397,201	\$5,916,769	\$4,480,432	75.72%
SMB	\$2,505,633	\$1,130,953	\$1,374,680	121.55%
SMC Education	\$6,065,080	\$425,764	\$5,639,316	1324.52%
Total	\$275,900,318	\$287,194,879	(\$11,294,561)	-3.93%

Product Category Summary

Product_Category	Total Revenue	Target	Delta (target vs total revenue)	Vs Target (%)
Products	\$67,140,484	\$199,260,715	(\$132,120,231)	-66.31%
Support	\$19,801,690	\$27,626,188	(\$7,824,498)	-28.32%
Services	\$188,958,144	\$60,307,976	\$128,650,168	213.32%
Total	\$275,900,318	\$287,194,879	(\$11,294,561)	-3.93%

2. Generate Insights to Add Value

- Opportunities have increased **\$1M** Week on Week (40M to 41M), mostly driven by overdue opportunities returning back on track. Specifically, from 14 overdue opportunities from Strategic and Priority Comm Segments (see report for full list).
- Also, Priority Commercial drove the biggest value charge WoW (**+\$560k**)

