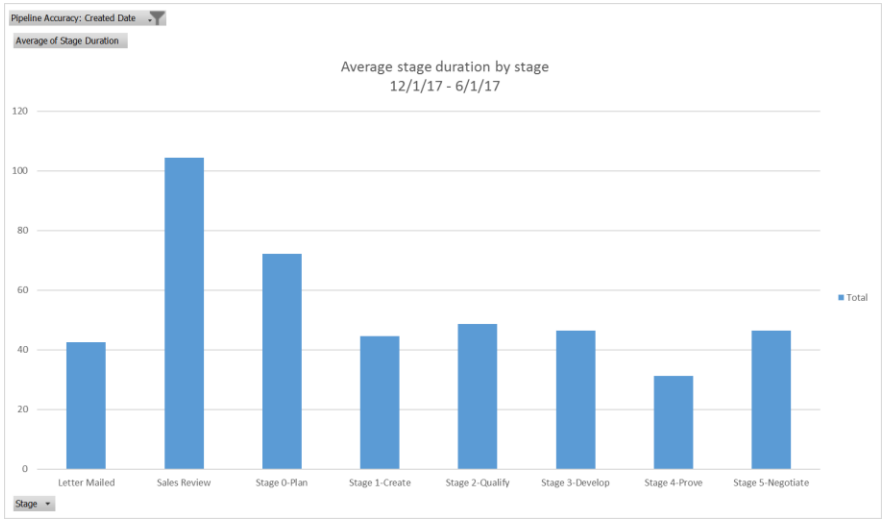
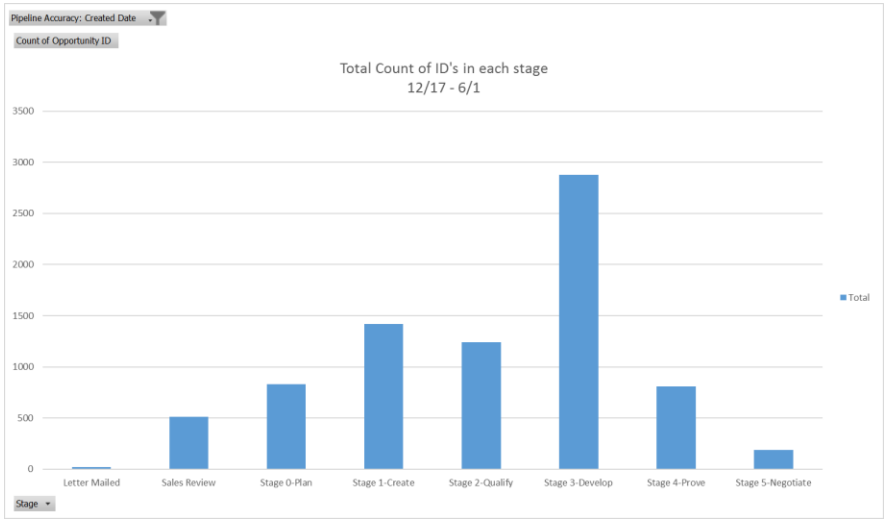
Pipeline Forecasting

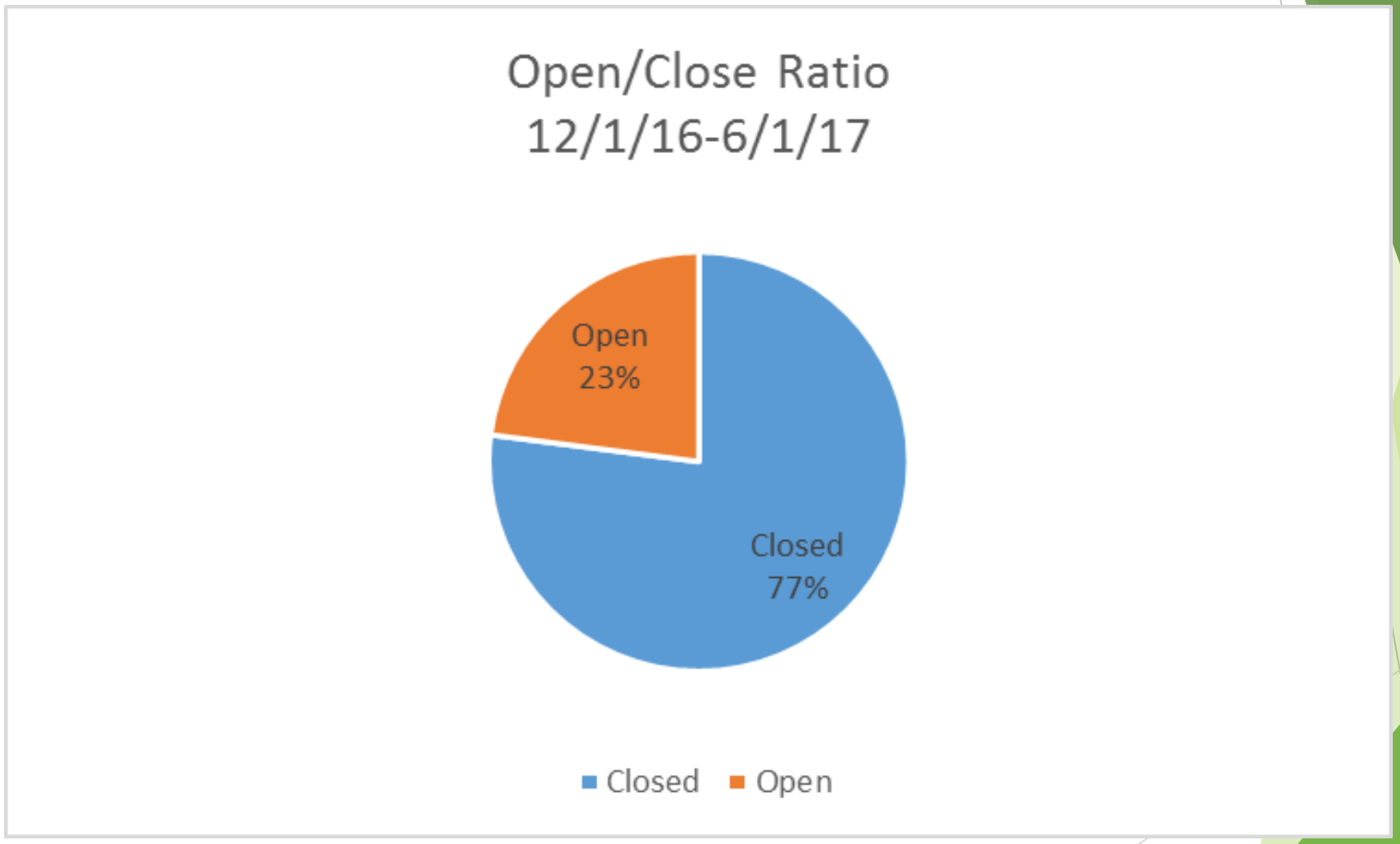
What is our Project?

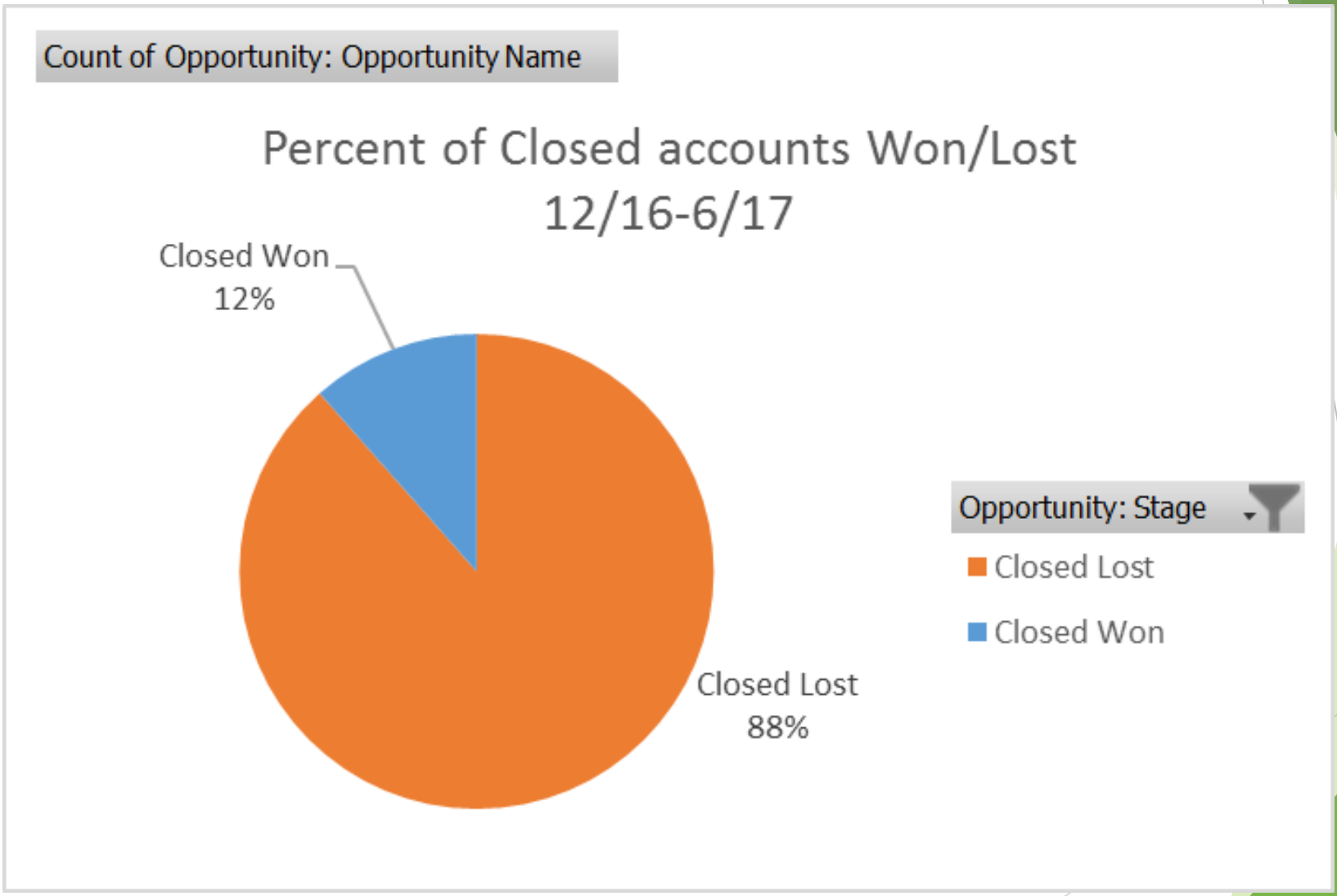
In the current system, sales reps report to their region managers the number of accounts they'll be able to close from their pipeline based on "feelings". This system yields a 10-15% accuracy rate. To improve this accuracy, Kelly Springer created an algorithm to help regional managers better gauge these pipeline forecasts. The objective of our project is to assess this algorithm and improve it where needed. We'll accomplish this by first assessing the accuracy of the current algorithm. Then we'll adjust the weights of the current algorithm criteria. We'll conclude by identifying new criteria relevant to pipeline forecasting.

Stage Duration

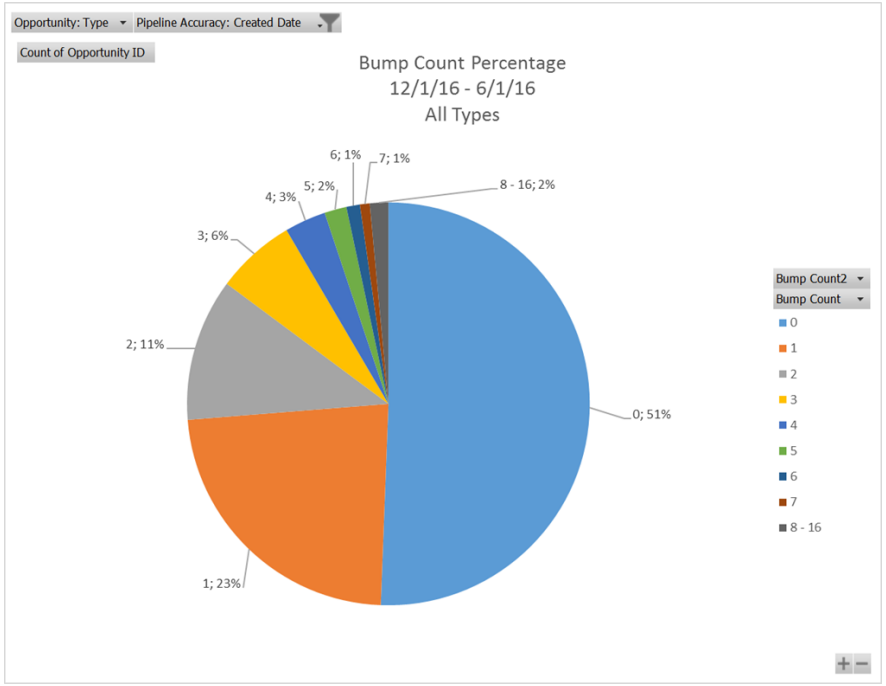


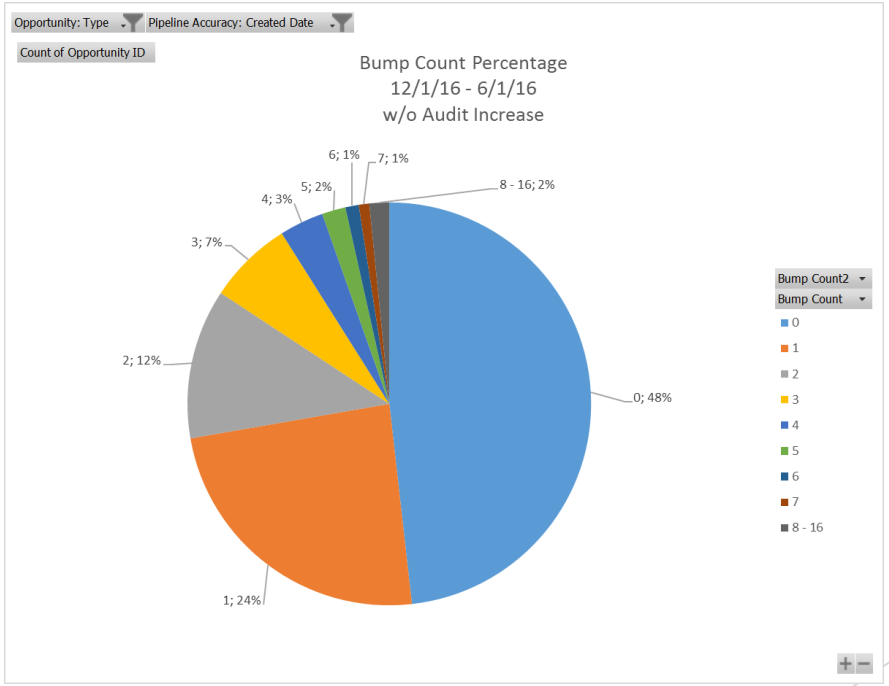



Open/Close Ratio
12/1/16-6/1/17
Open
23%
Closed
77%
Closed
Open

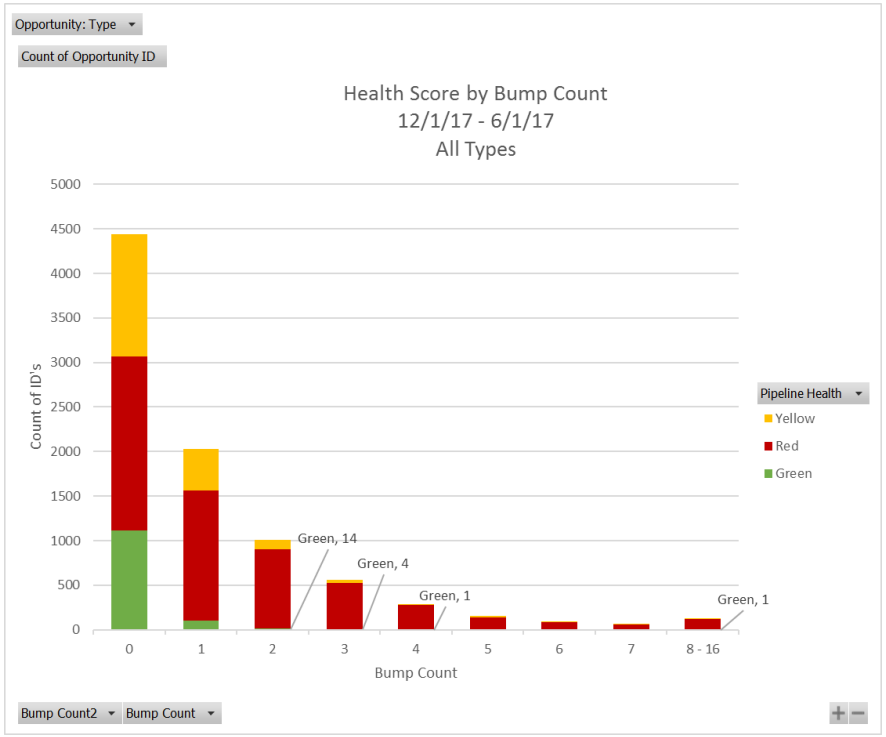

Count of Opportunity: Opportunity Name
Percent of Closed accounts Won/Lost
12/16-6/17
Closed Won
12%
Closed Lost
88%
Opportunity: Stage
Closed Lost
Closed Won

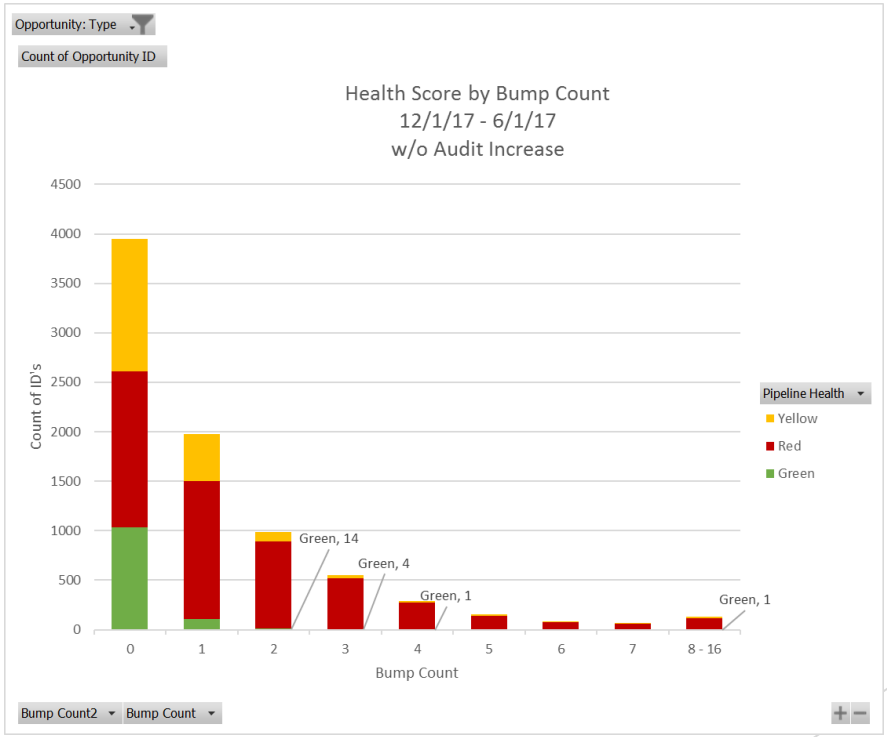
Bump Count Percentages



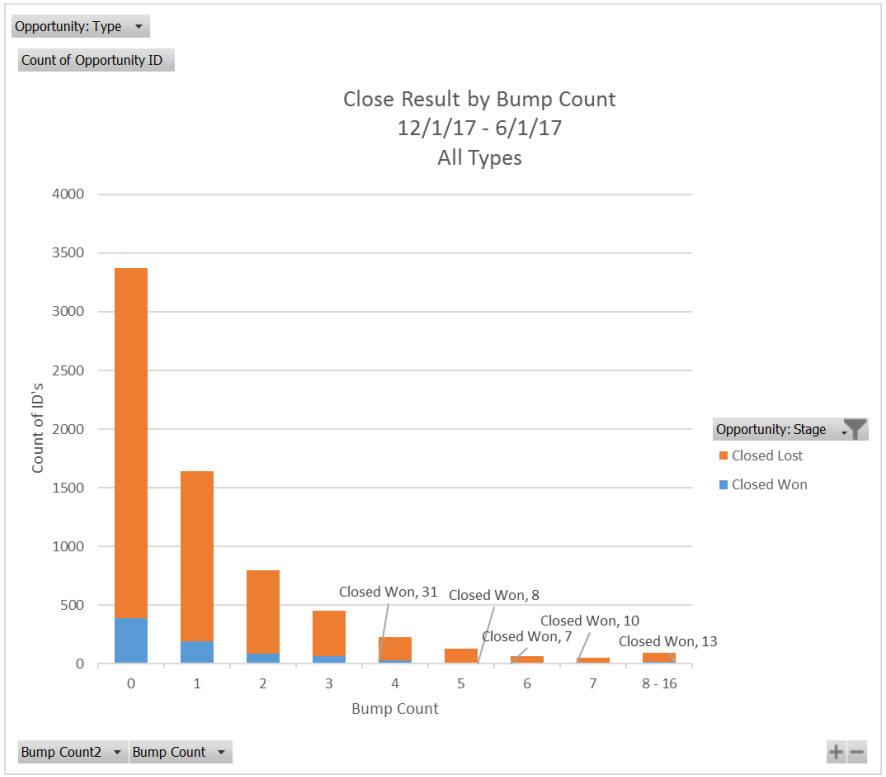


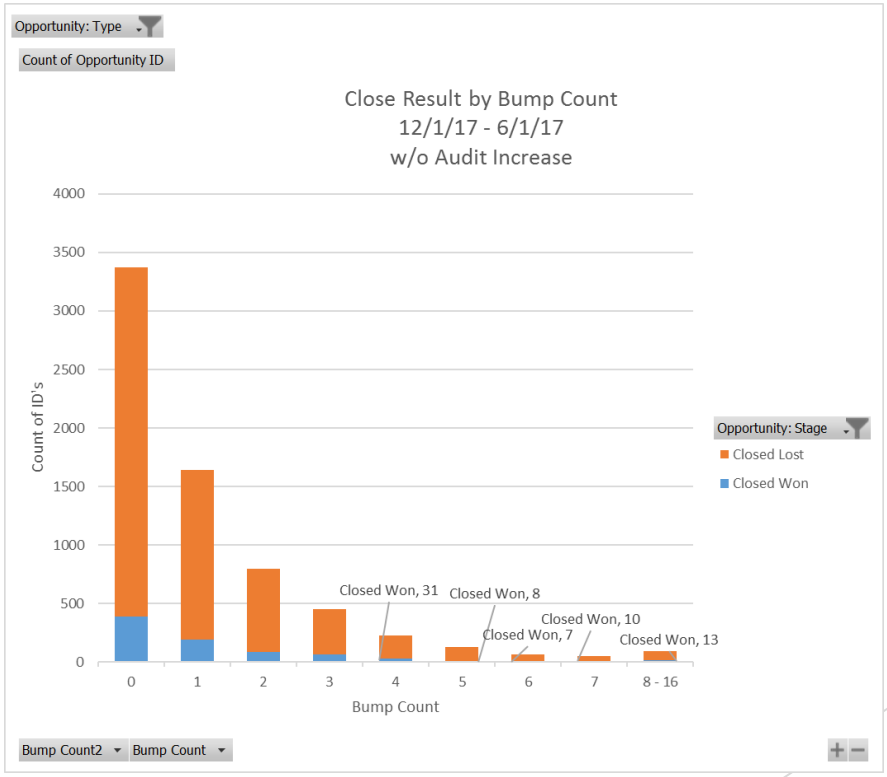
Y/R/G by Bump Counts



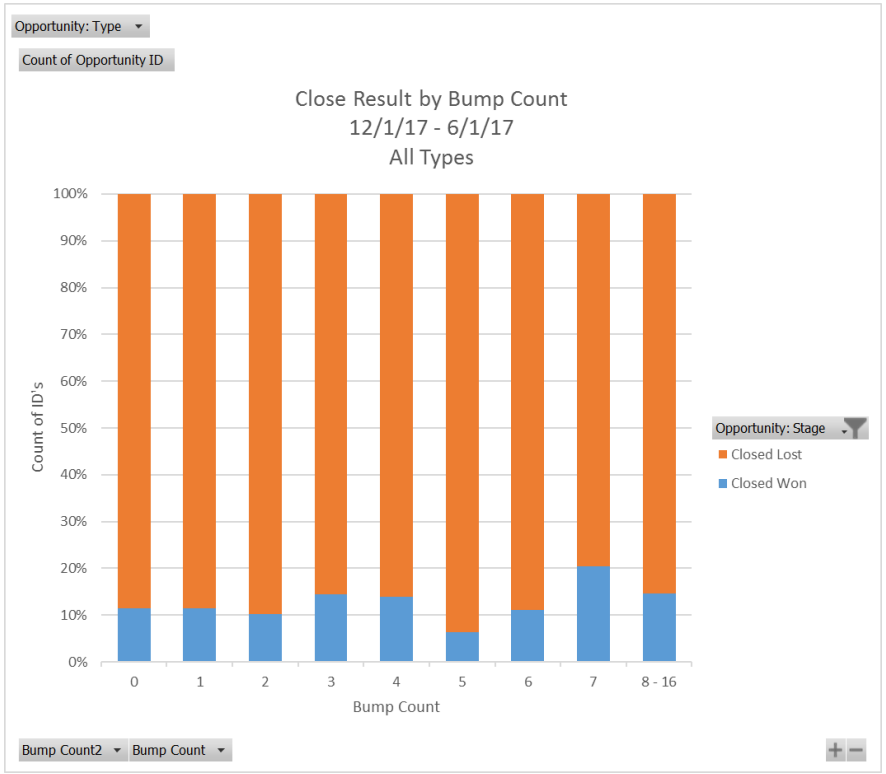


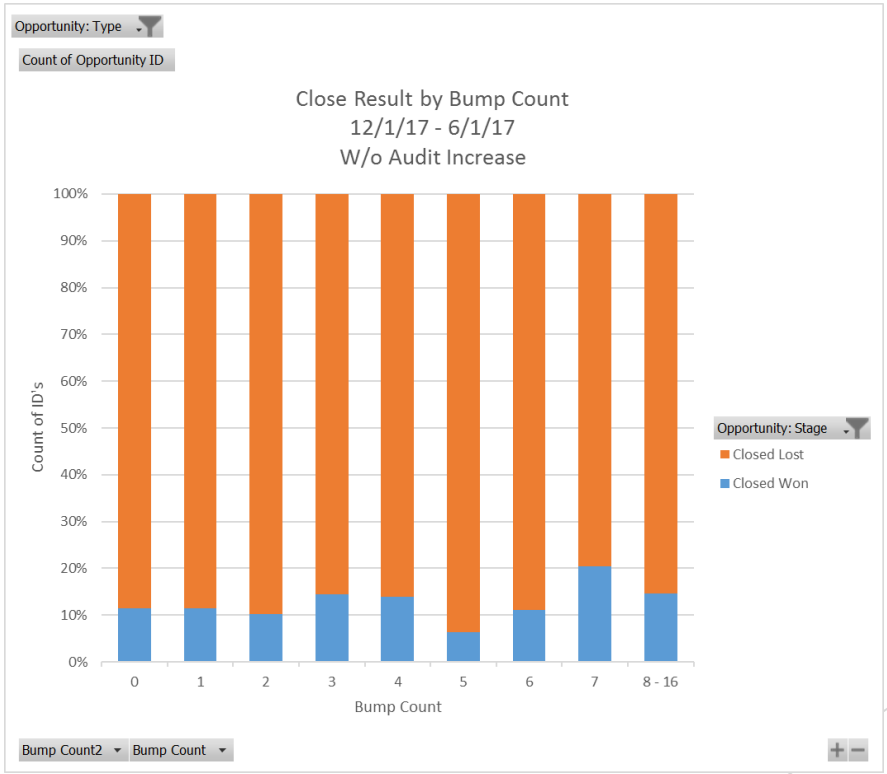
Won/Lost value by Bump Count



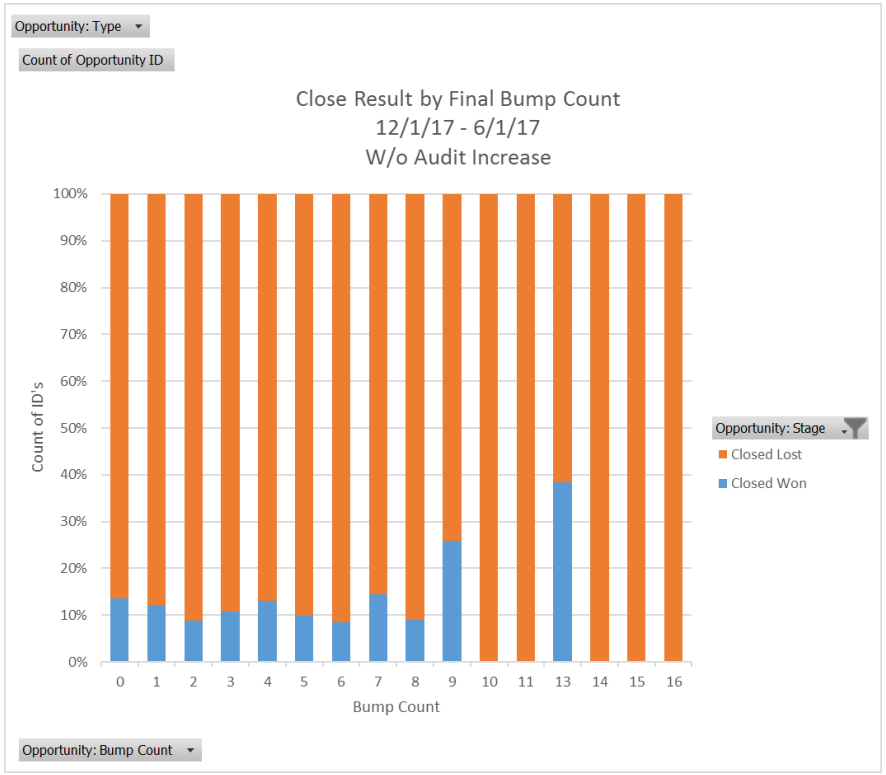


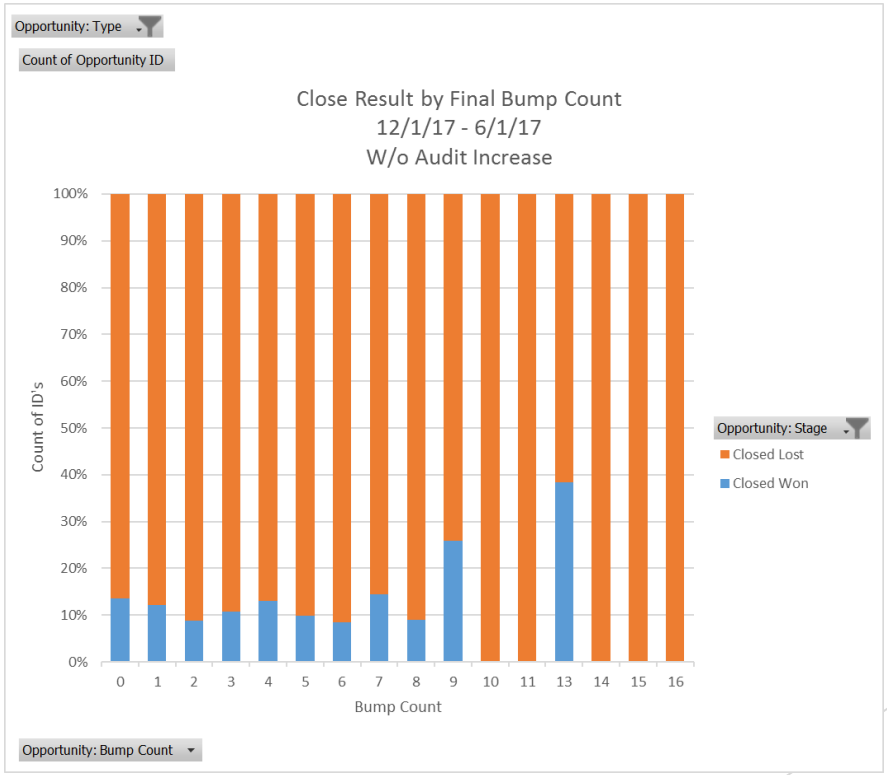
Percent W/L by Bump Count



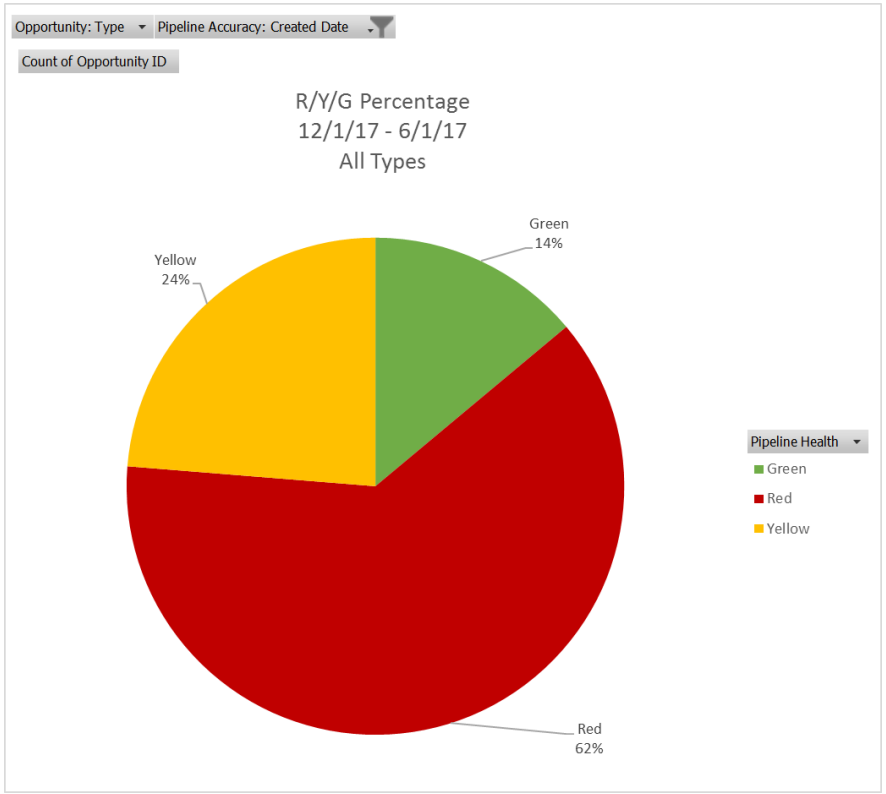


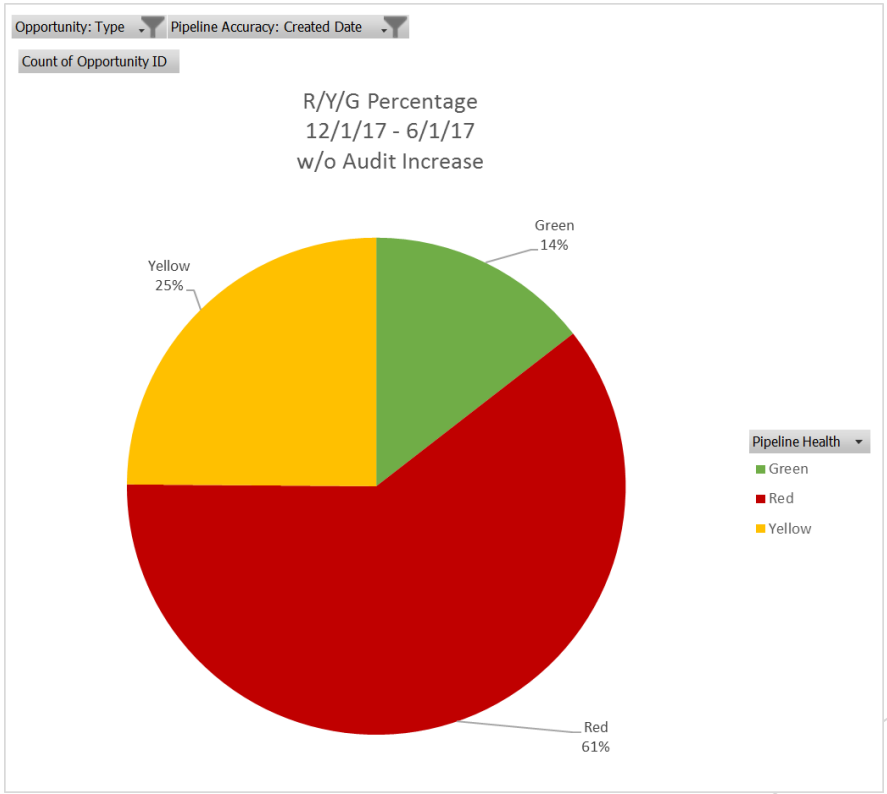
% W/L by Final Bump Count



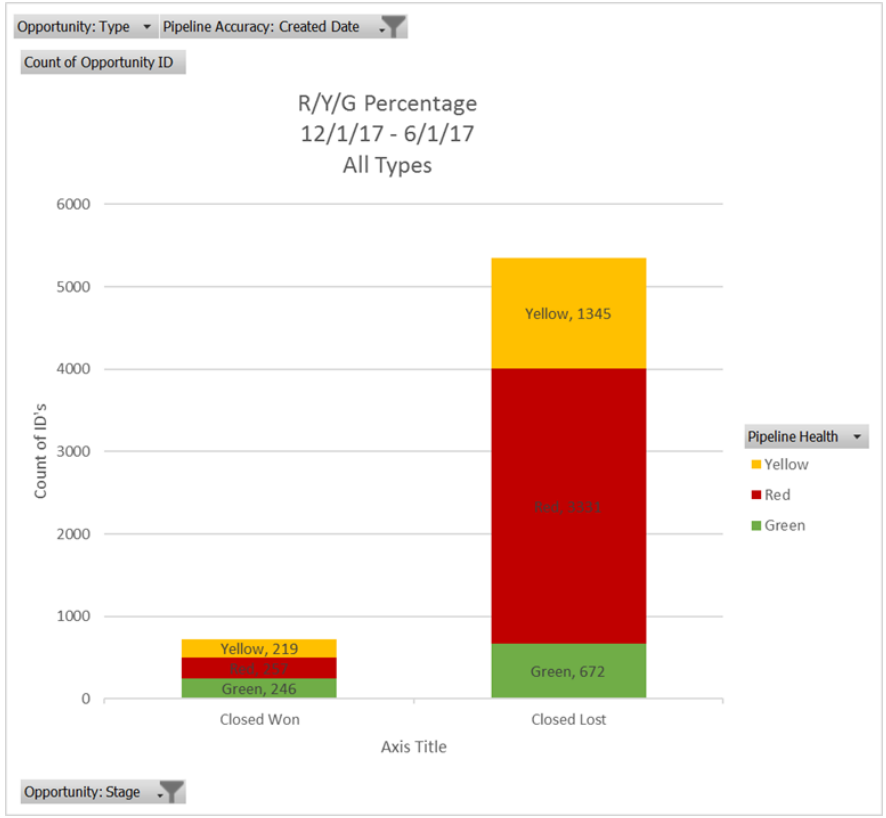


Percent of Snapshots rated R/Y/G

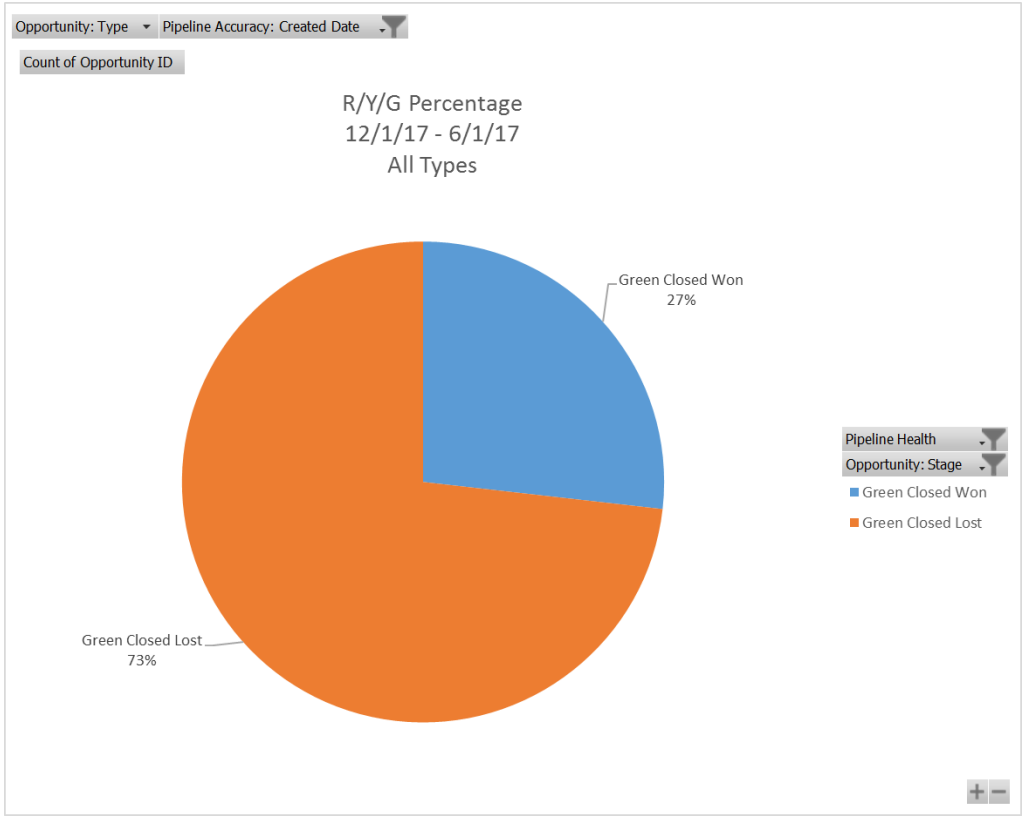




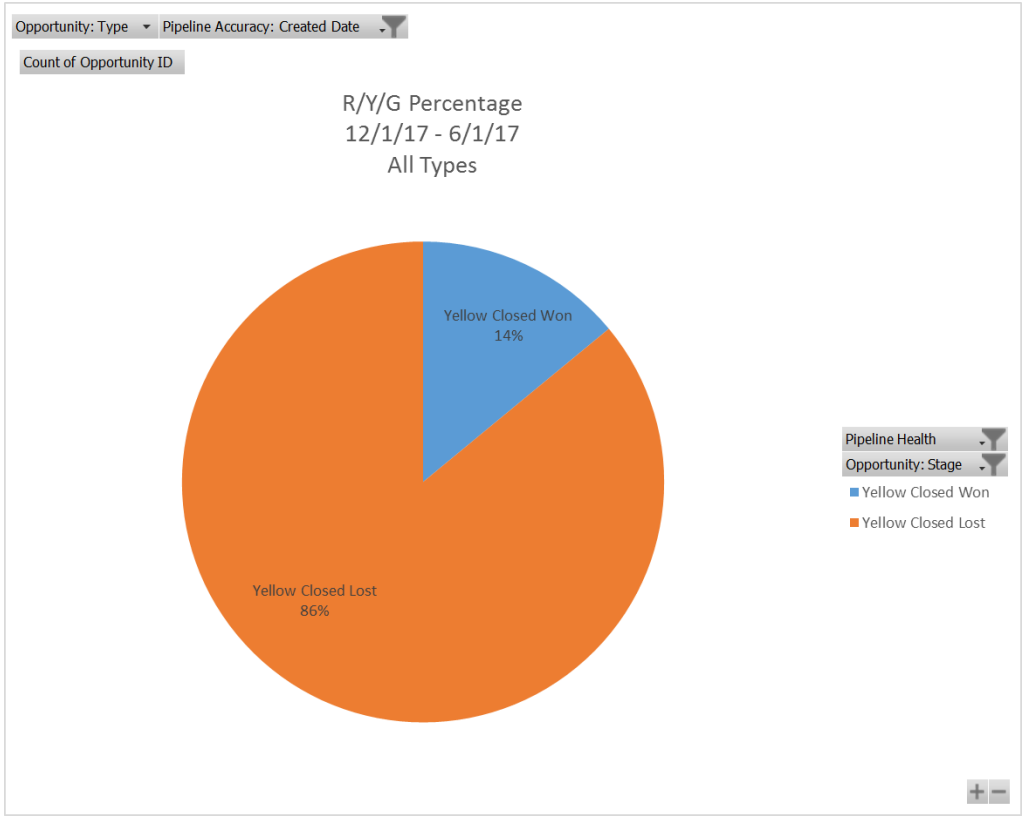
Value of R/Y/G by Won/Lost



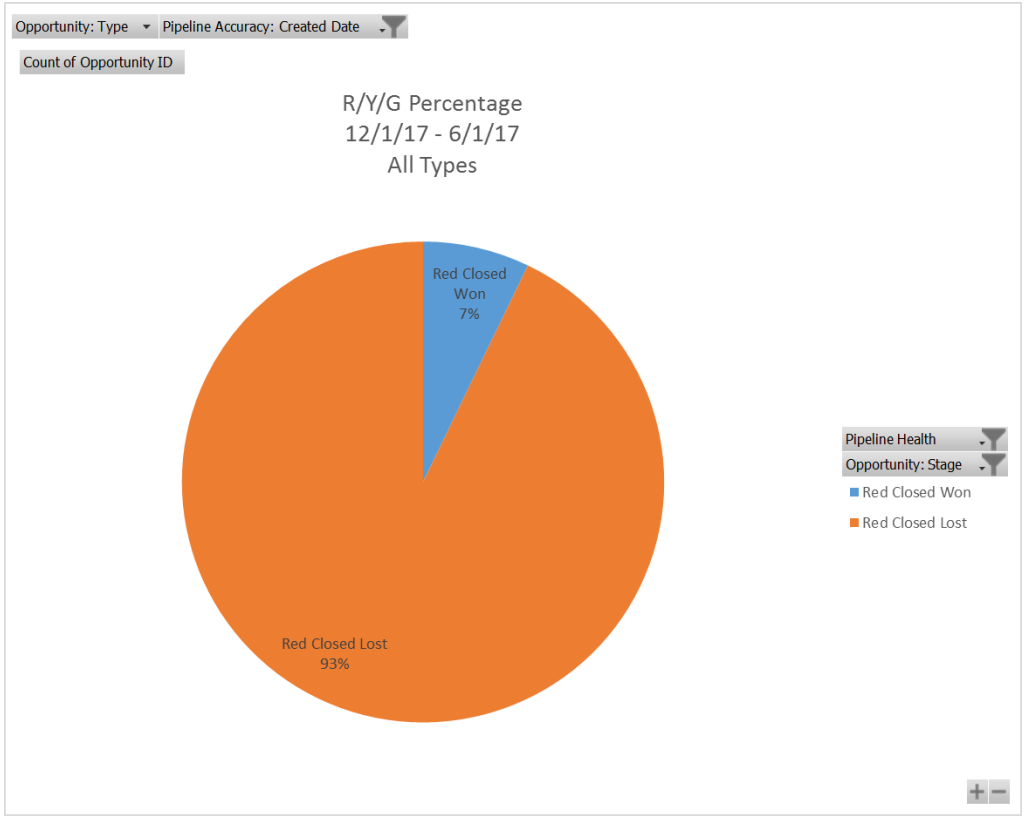
Percent of Greens Won/Lost



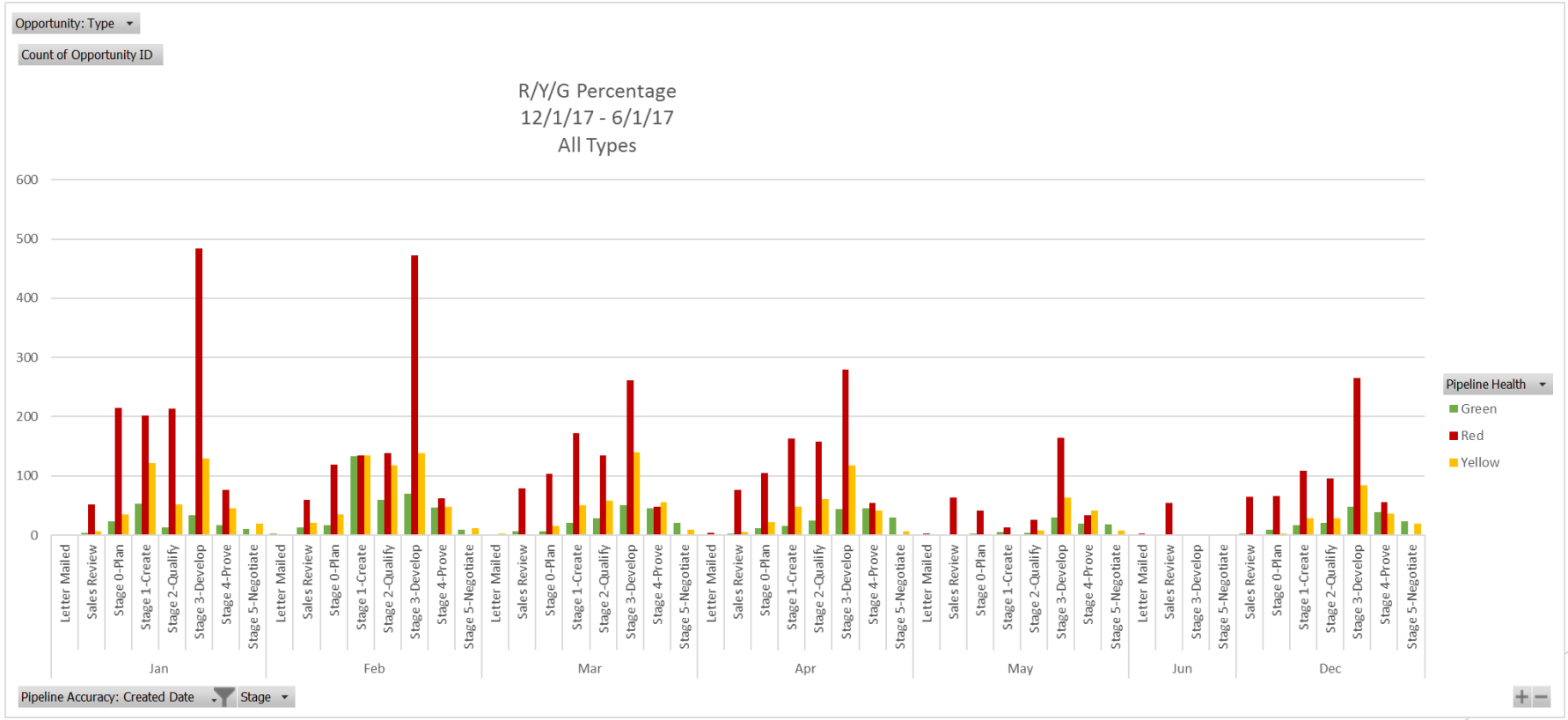
Percent of Yellows Won/Lost



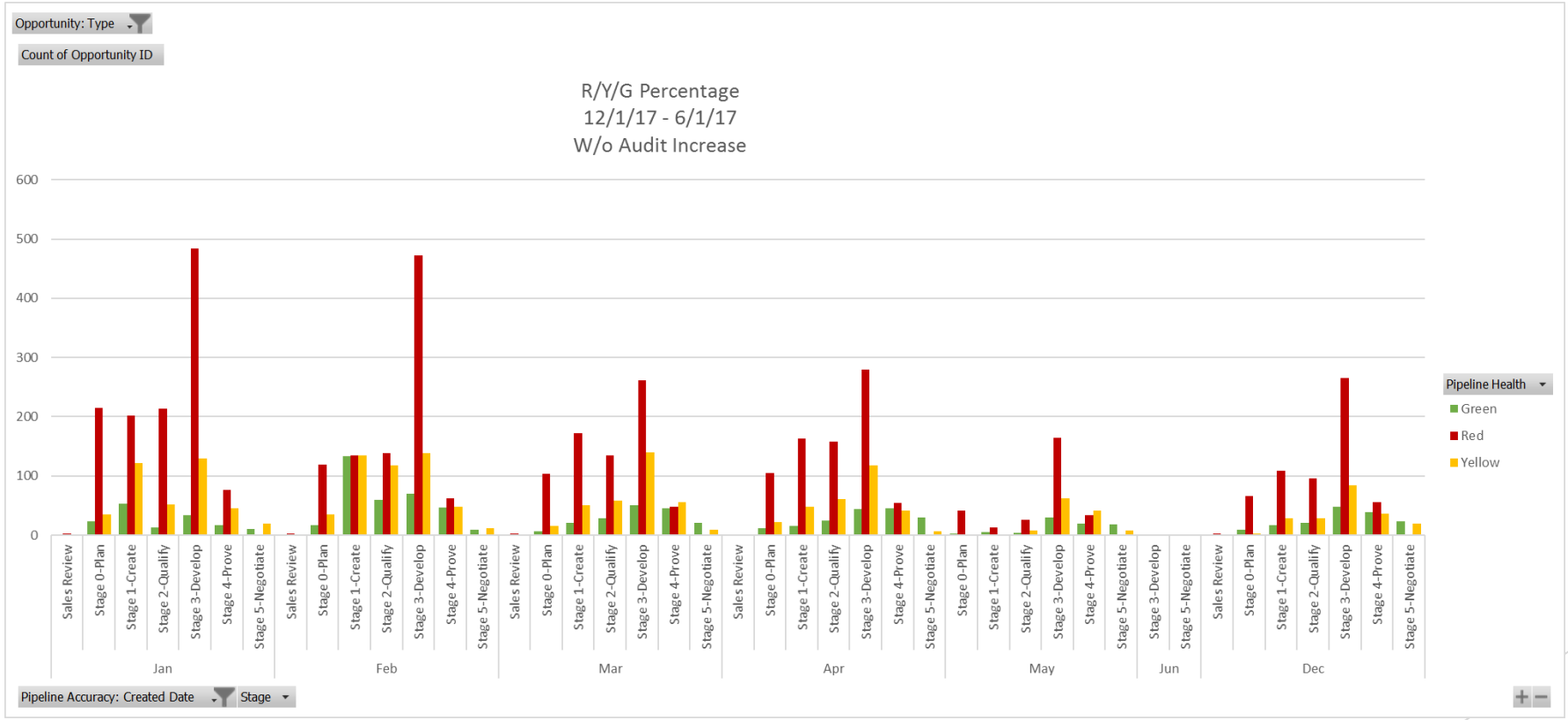
Percent of Reds Won/Lost

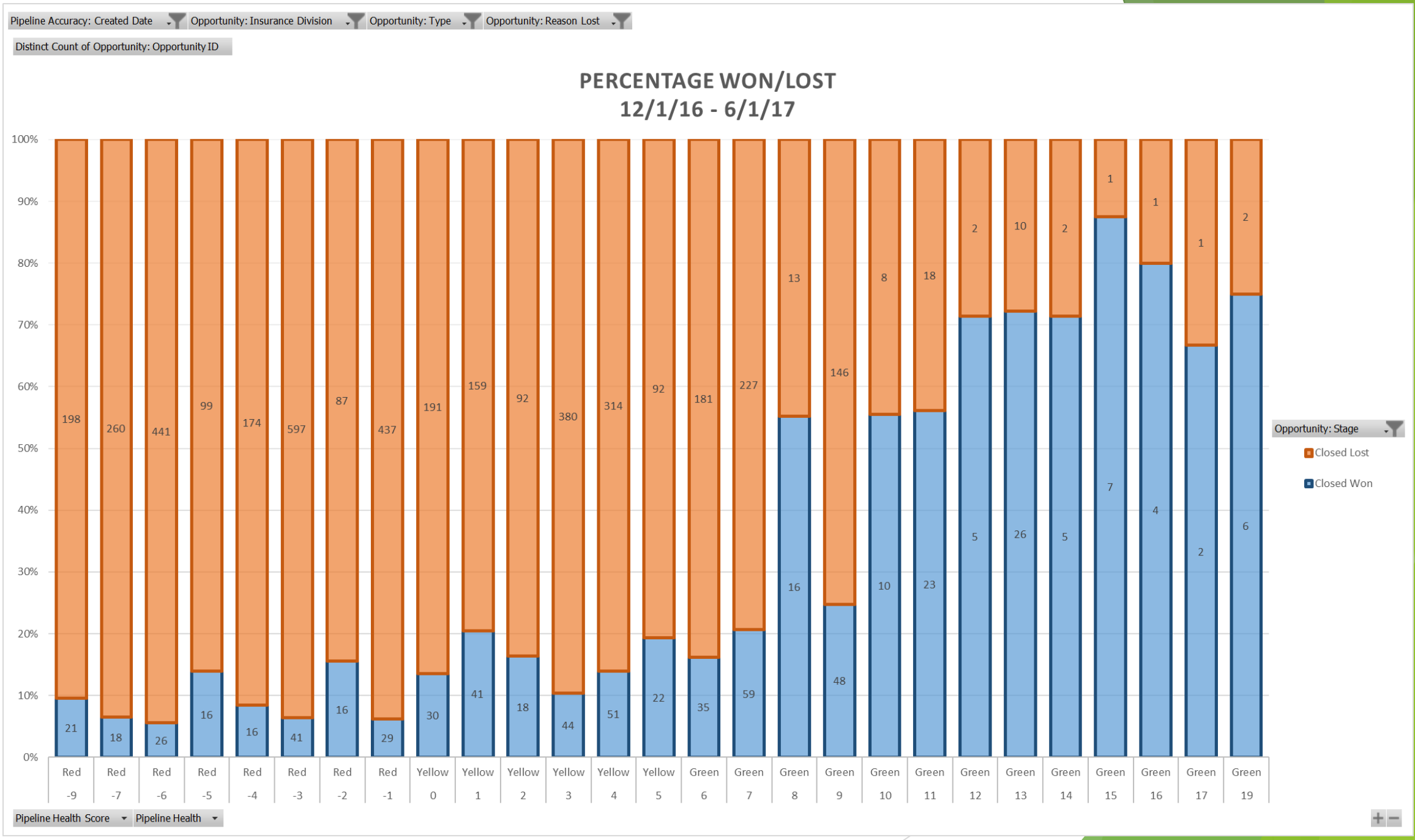


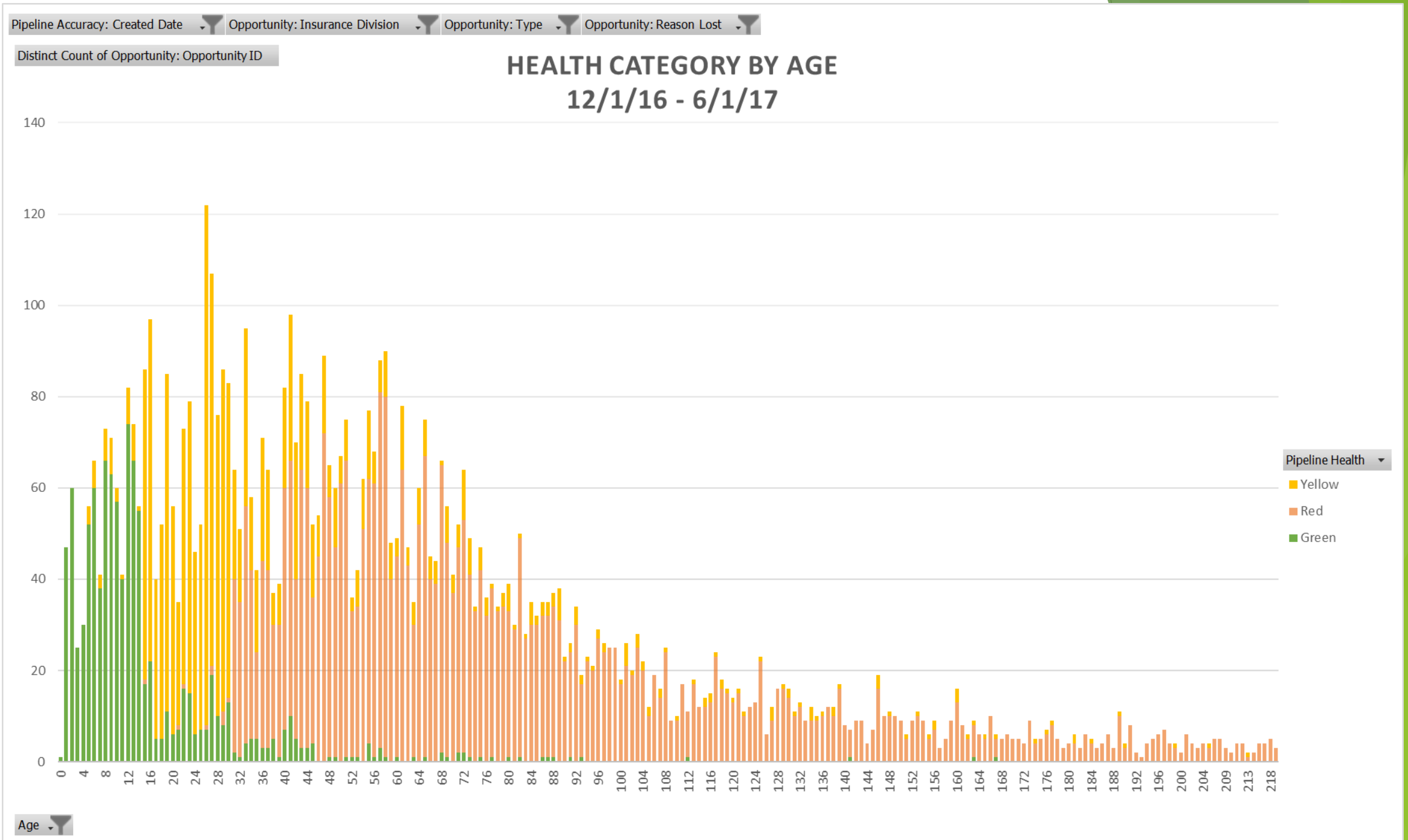
R/Y/G by Month and Stage

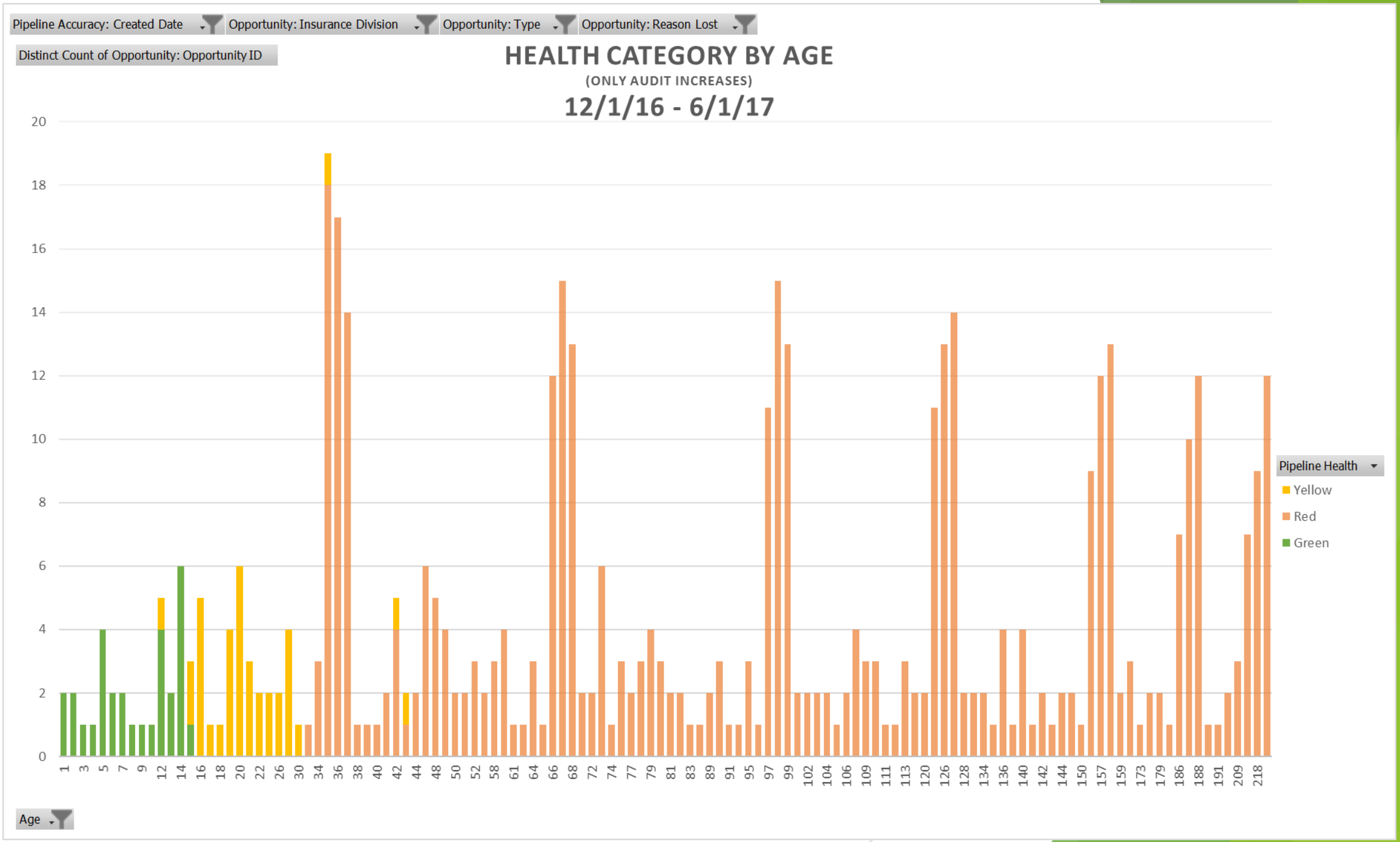


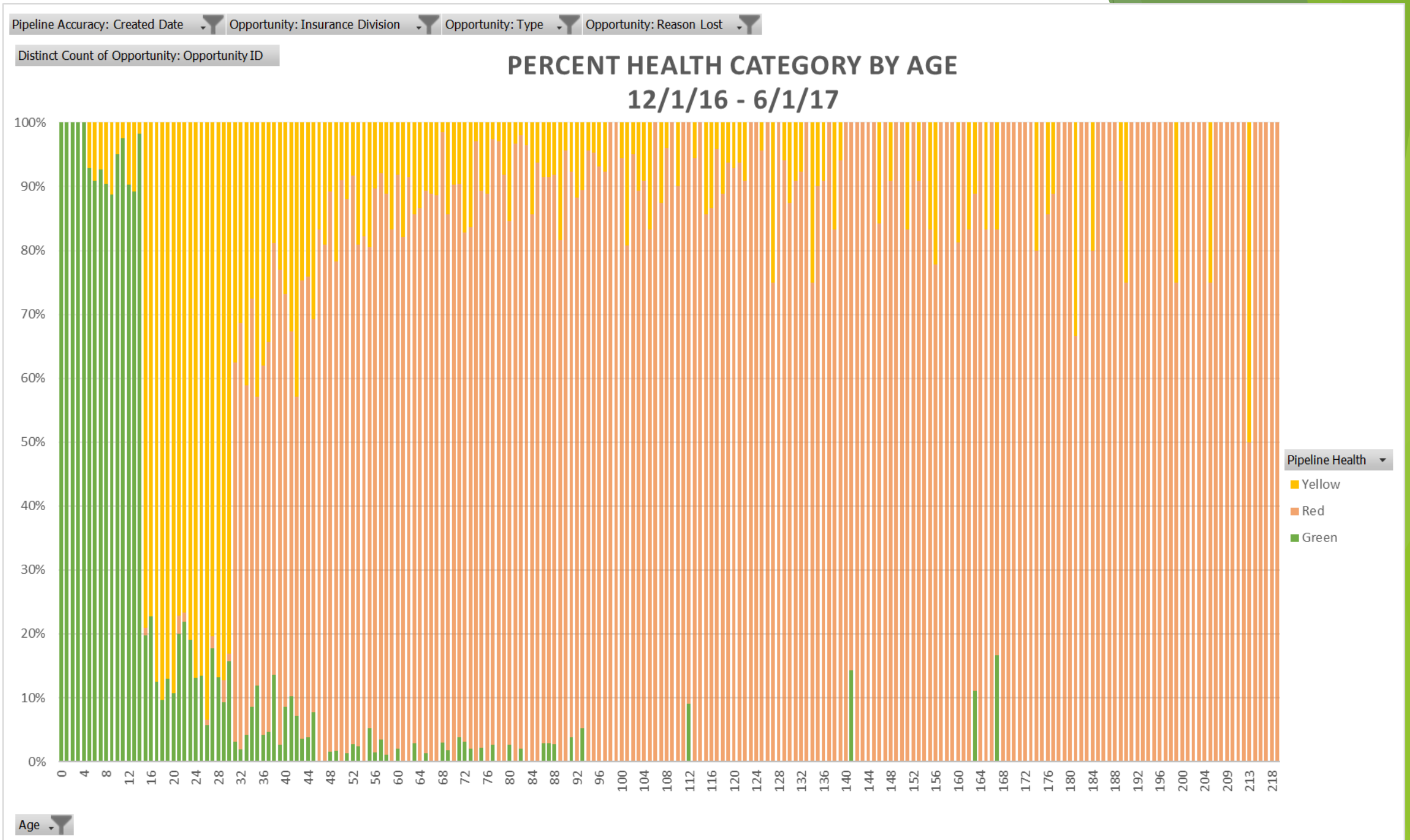
R/Y/G by Month and Stage

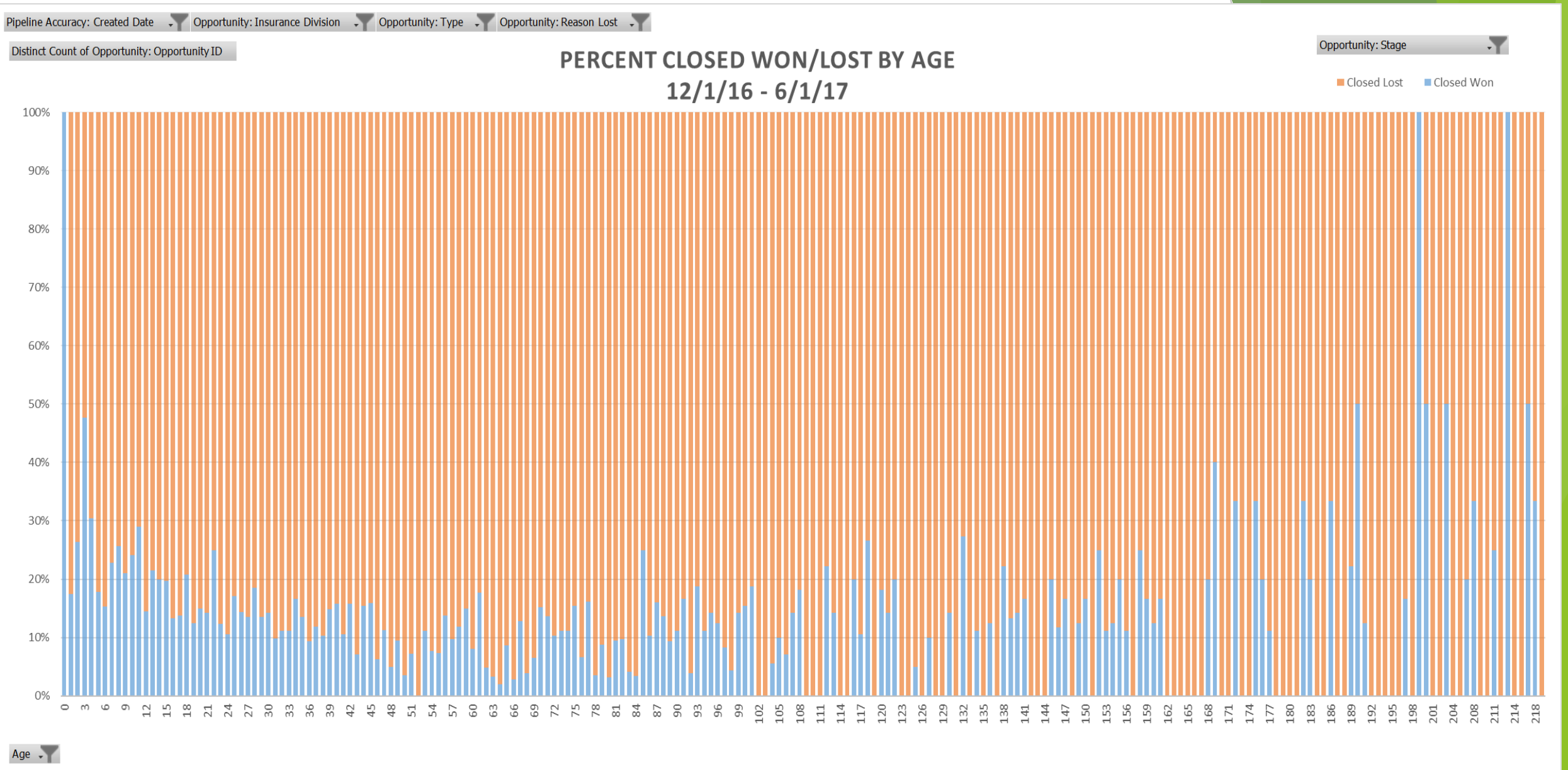


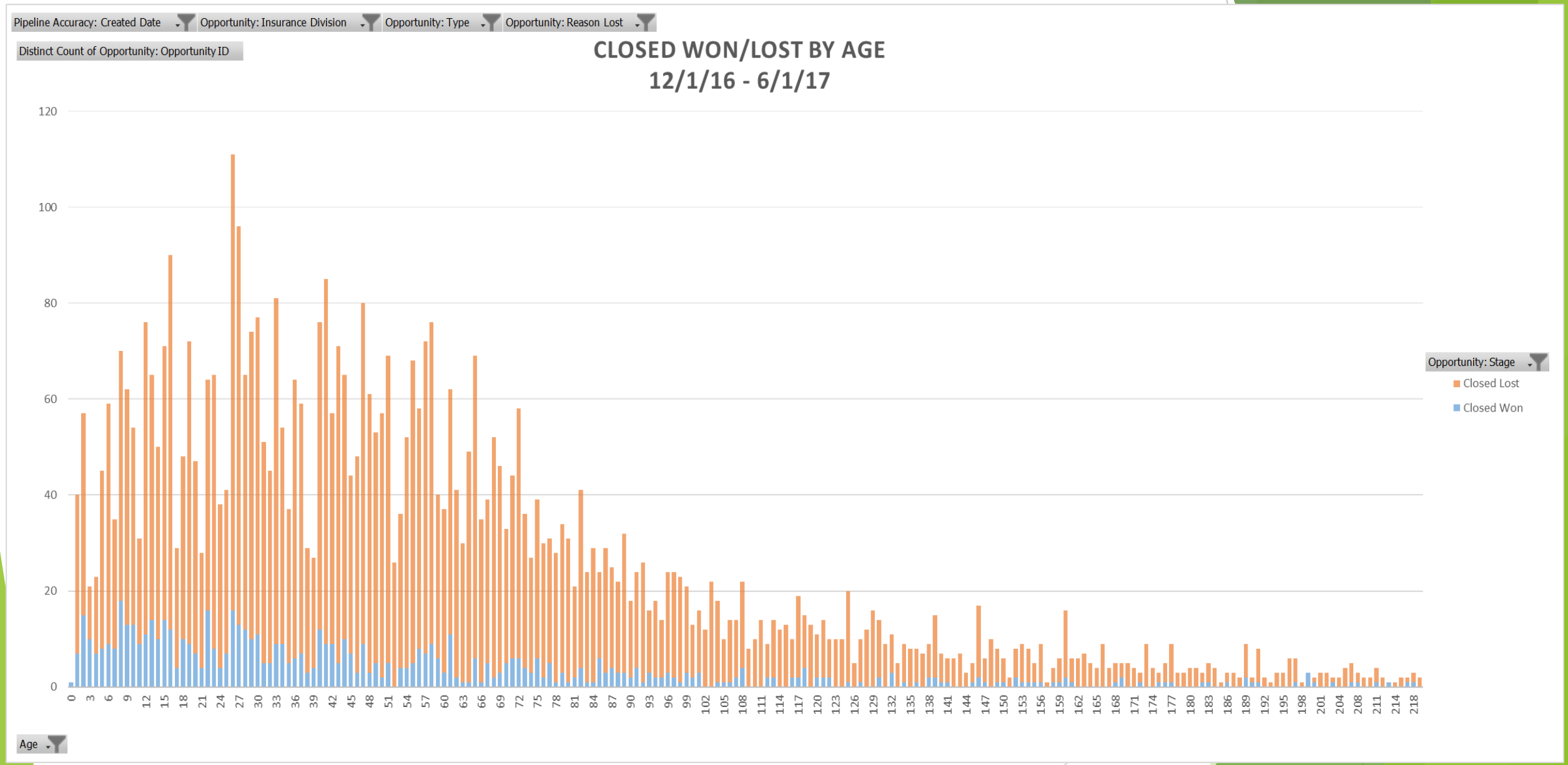

Pipeline Accuracy: Created Date
Opportunity: Insurance Division
Opportunity: Type
Opportunity: Reason Lost
Distinct Count of Opportunity: Opportunity ID
PERCENTAGE WON/LOST
12/1/16 - 6/1/17
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
198
260
441
99
174
597
87
437
191
159
92
380
314
92
181
227
13
146
8
18
2
10
2
1
1
2
21
18
26
16
16
41
16
29
30
41
18
44
51
22
35
59
16
48
10
23
5
26
5
7
4
2
6
Red -9
Red -7
Red -6
Red -5
Red -4
Red -3
Red -2
Red -1
Yellow 0
Yellow 1
Yellow 2
Yellow 3
Yellow 4
Yellow 5
Green 6
Green 7
Green 8
Green 9
Green 10
Green 11
Green 12
Green 13
Green 14
Green 15
Green 16
Green 17
Green 19
Opportunity: Stage
Closed Lost
Closed Won
Pipeline Health Score
Pipeline Health

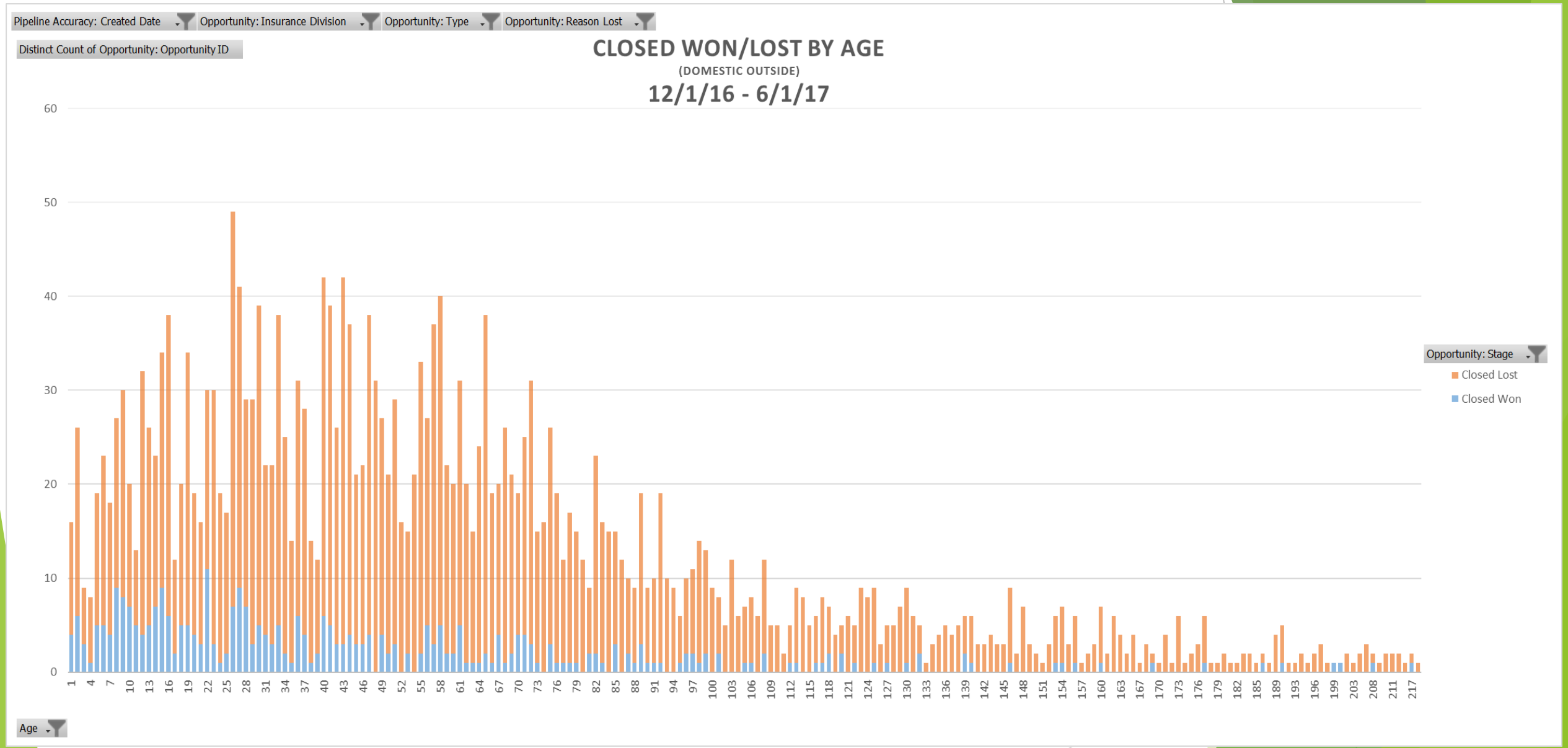

Pipeline Accuracy: Created Date
Opportunity: Insurance Division
Opportunity: Type
Opportunity: Reason Lost
Distinct Count of Opportunity: Opportunity ID
HEALTH CATEGORY BY AGE
12/1/16 - 6/1/17
140
120
100
80
60
40
20
0
0 4 8 12 16 20 24 28 32 36 40 44 48 52 56 60 64 68 72 76 80 84 88 92 96 100 104 108 112 116 120 124 128 132 136 140 144 148 152 156 160 164 168 172 176 180 184 188 192 196 200 204 209 213 218
Pipeline Health
Yellow
Red
Green
Age

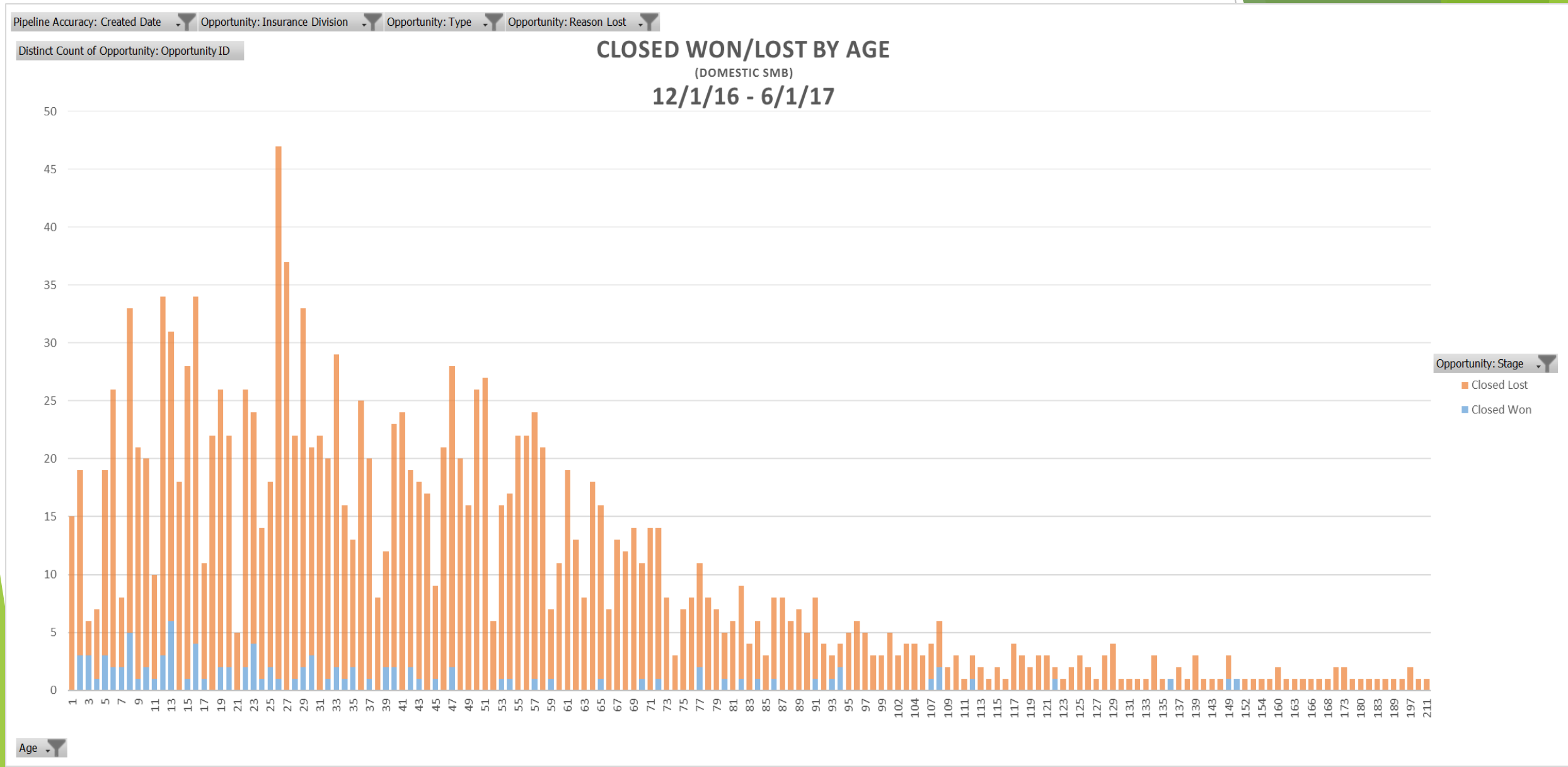

Pipeline Accuracy: Created Date
Opportunity: Insurance Division
Opportunity: Type
Opportunity: Reason Lost
Distinct Count of Opportunity: Opportunity ID
HEALTH CATEGORY BY AGE
(ONLY AUDIT INCREASES)
12/1/16 - 6/1/17
20
18
16
14
12
10
8
6
4
2
0
1 3 5 7 9 12 14 16 18 20 22 26 30 34 36 38 40 42 44 48 50 52 58 61 64 66 68 72 74 77 79 81 83 89 91 95 97 99 102 104 106 109 111 113 120 126 128 134 136 140 142 144 150 157 159 173 179 186 188 191 209 218
Pipeline Health
Yellow
Red
Green
Age

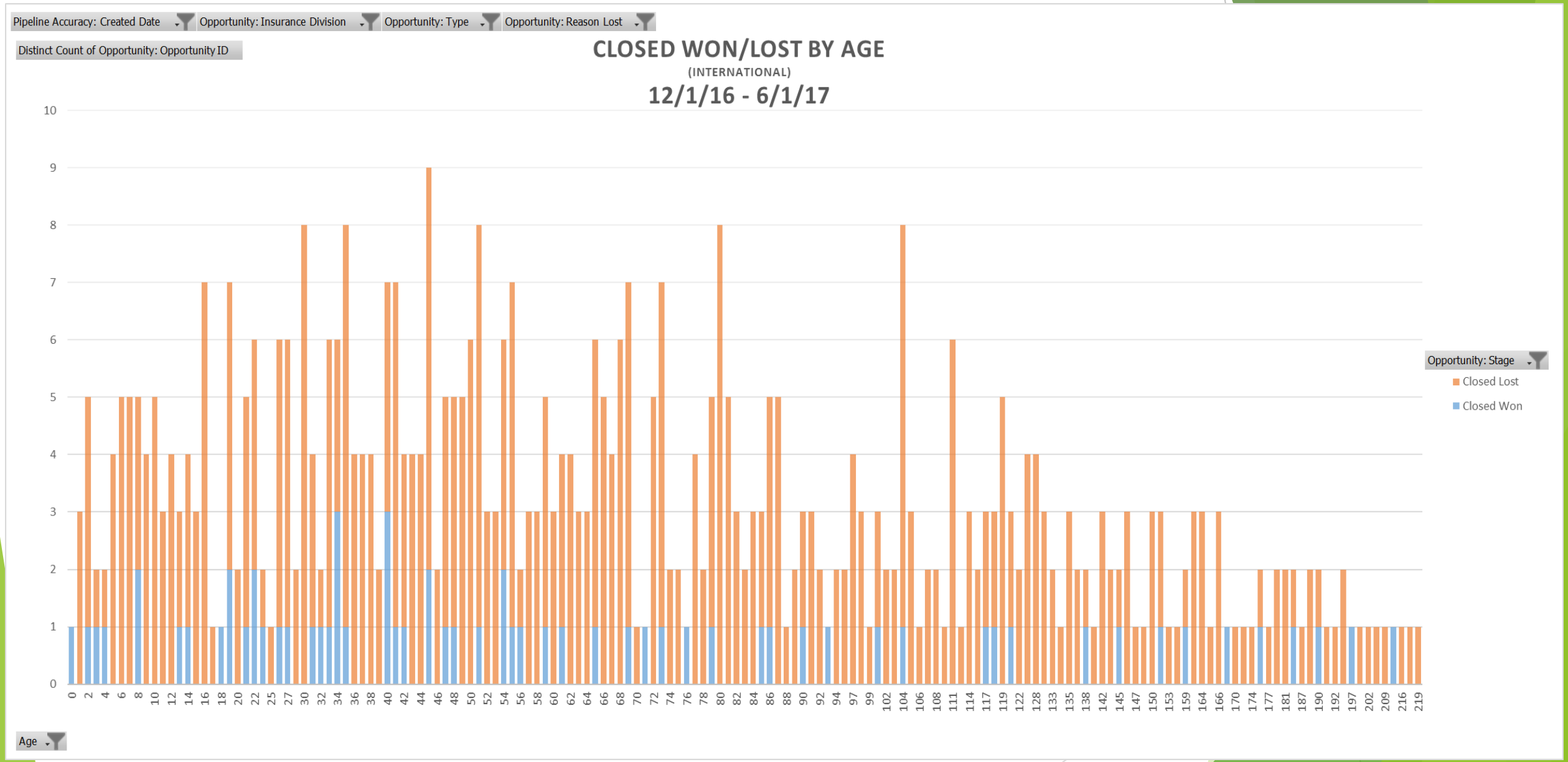

Pipeline Accuracy: Created Date
Opportunity: Insurance Division
Opportunity: Type
Opportunity: Reason Lost
Distinct Count of Opportunity: Opportunity ID
PERCENT HEALTH CATEGORY BY AGE
12/1/16 - 6/1/17
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
0 4 8 12 16 20 24 28 32 36 40 44 48 52 56 60 64 68 72 76 80 84 88 92 96 100 104 108 112 116 120 124 128 132 136 140 144 148 152 156 160 164 168 172 176 180 184 188 192 196 200 204 209 213 218
Age
Pipeline Health
Yellow
Red
Green

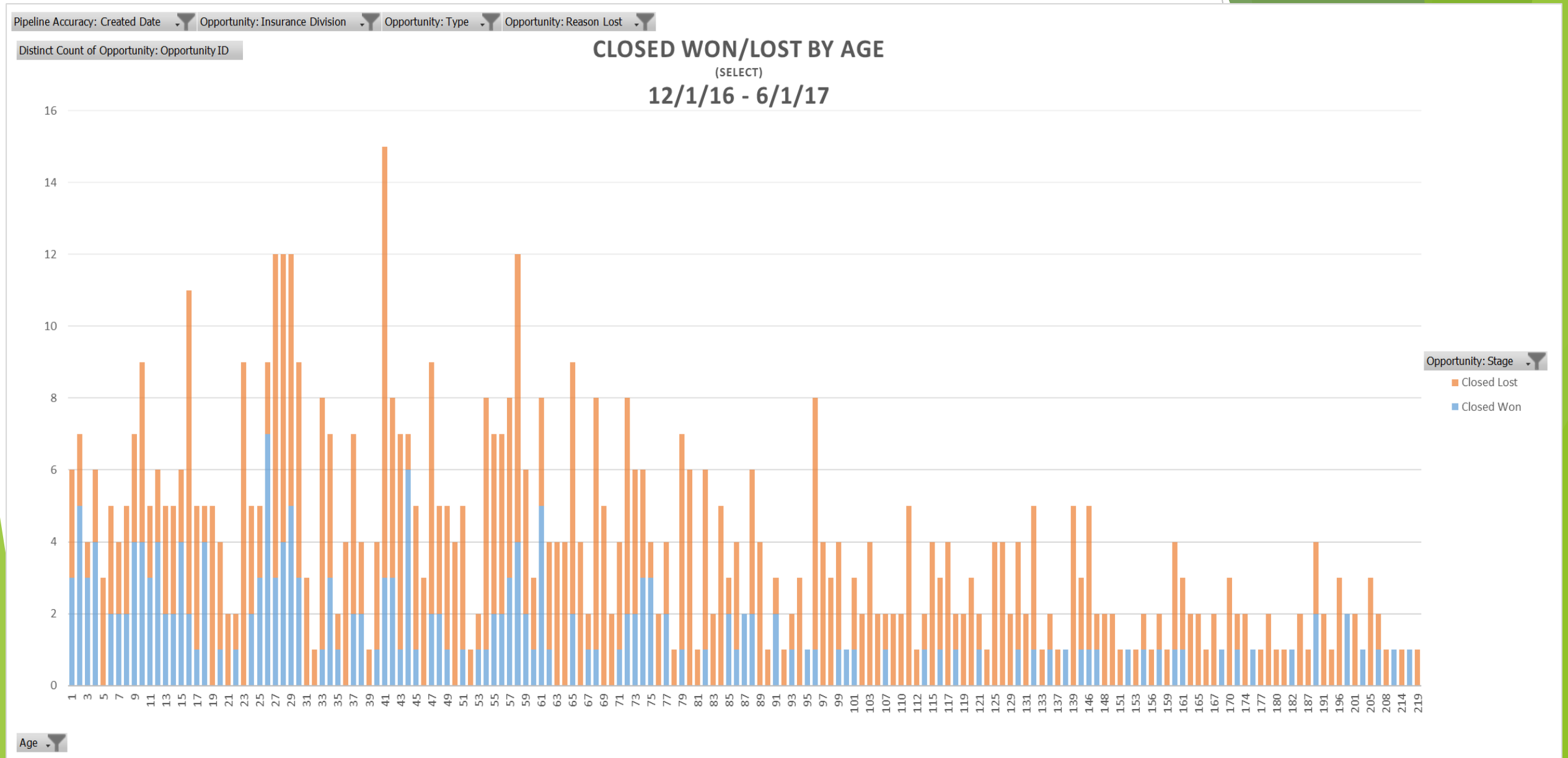

Pipeline Accuracy: Created Date
Opportunity: Insurance Division
Opportunity: Type
Opportunity: Reason Lost
Distinct Count of Opportunity: Opportunity ID
PERCENT CLOSED WON/LOST BY AGE
12/1/16 - 6/1/17
Opportunity: Stage
Closed Lost
Closed Won
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
0 3 6 9 12 15 18 21 24 27 30 33 36 39 42 45 48 51 54 57 60 63 66 69 72 75 78 81 84 87 90 93 96 99 102 105 108 111 114 117 120 123 126 129 132 135 138 141 144 147 150 153 156 159 162 165 168 171 174 177 180 183 186 189 192 195 198 201 204 208 211 214 218
Age


Pipeline Accuracy: Created Date
Opportunity: Insurance Division
Opportunity: Type
Opportunity: Reason Lost
Distinct Count of Opportunity: Opportunity ID
CLOSED WON/LOST BY AGE
12/1/16 - 6/1/17
120
100
80
60
40
20
0
0 3 6 9 12 15 18 21 24 27 30 33 36 39 42 45 48 51 54 57 60 63 66 69 72 75 78 81 84 87 90 93 96 99 102 105 108 111 114 117 120 123 126 129 132 135 138 141 144 147 150 153 156 159 162 165 168 171 174 177 180 183 186 189 192 195 198 201 204 208 211 214 218
Opportunity: Stage
Closed Lost
Closed Won
Age


Pipeline Accuracy: Created Date
Opportunity: Insurance Division
Opportunity: Type
Opportunity: Reason Lost
Distinct Count of Opportunity: Opportunity ID
CLOSED WON/LOST BY AGE
(DOMESTIC OUTSIDE)
12/1/16 - 6/1/17
60
50
40
30
20
10
0
1 4 7 10 13 16 19 22 25 28 31 34 37 40 43 46 49 52 55 58 61 64 67 70 73 76 79 82 85 88 91 94 97 100 103 106 109 112 115 118 121 124 127 130 133 136 139 142 145 148 151 154 157 160 163 167 170 173 176 179 182 185 189 193 196 199 203 208 211 217
Opportunity: Stage
Closed Lost
Closed Won
Age


Pipeline Accuracy: Created Date
Opportunity: Insurance Division
Opportunity: Type
Opportunity: Reason Lost
Distinct Count of Opportunity: Opportunity ID
CLOSED WON/LOST BY AGE
(DOMESTIC SMB)
12/1/16 - 6/1/17
50
45
40
35
30
25
20
15
10
5
0
1 3 5 7 9 11 13 15 17 19 21 23 25 27 29 31 33 35 37 39 41 43 45 47 49 51 53 55 57 59 61 63 65 67 69 71 73 75 77 79 81 83 85 87 89 91 93 95 97 99 102 104 107 109 111 113 115 117 119 121 123 125 127 129 131 133 135 137 139 143 149 152 154 160 163 166 168 173 180 183 189 197 211
Opportunity: Stage
Closed Lost
Closed Won
Age


Pipeline Accuracy: Created Date
Opportunity: Insurance Division
Opportunity: Type
Opportunity: Reason Lost
Distinct Count of Opportunity: Opportunity ID
CLOSED WON/LOST BY AGE
(INTERNATIONAL)
12/1/16 - 6/1/17
10
9
8
7
6
5
4
3
2
1
0
0 2 4 6 8 10 12 14 16 18 20 22 25 27 30 32 34 36 38 40 42 44 46 48 50 52 54 56 58 60 62 64 66 68 70 72 74 76 78 80 82 84 86 88 90 92 94 97 99 102 104 106 108 111 114 117 119 122 128 133 135 138 142 145 147 150 153 159 164 166 170 174 177 181 187 190 192 197 202 209 216 219
Opportunity: Stage
Closed Lost
Closed Won
Age


Pipeline Accuracy: Created Date
Opportunity: Insurance Division
Opportunity: Type
Opportunity: Reason Lost
Distinct Count of Opportunity: Opportunity ID
CLOSED WON/LOST BY AGE
(SELECT)
12/1/16 - 6/1/17
16
14
12
10
8
6
4
2
0
1 3 5 7 9 11 13 15 17 19 21 23 25 27 29 31 33 35 37 39 41 43 45 47 49 51 53 55 57 59 61 63 65 67 69 71 73 75 77 79 81 83 85 87 89 91 93 95 97 99 101 103 107 110 112 115 117 119 121 125 129 131 133 137 139 146 148 151 153 156 159 161 165 167 170 174 177 180 182 187 191 196 201 205 208 214 219
Opportunity: Stage
Closed Lost
Closed Won
Age

Average Age of Closed Accounts

Month	Closed Won	Closed Lost	Grand Total
Jan	126.33	116.47	117.18
Feb	101.11	96.19	96.70
Mar	107.77	90.02	92.22
Apr	82.34	83.10	82.99
May	58.86	84.87	78.16
Dec	99.62	128.46	123.73
Grand Total	**99.59**	**103.35**	**102.90**

Average Age of Closed Accounts (By Division)

Domestic Outside			
Dec	87	125	119
Jan	108	113	112
Feb	79	101	99
Mar	75	88	86
Apr	58	83	80
May	57	79	74
Grand Total	**80**	**102**	**99**

Domestic SMB			
Dec	65	90	86
Jan	73	75	75
Feb	44	68	67
Mar	42	71	69
Apr	52	66	66
May	40	57	53
Grand Total	**55**	**72**	**71**

International			
Dec	232	171	175
Jan	230	176	179
Feb	185	151	156
Mar	223	123	137
Apr	255	111	127
May	38	118	107
Grand Total	**211**	**154**	**160**

Select			
Dec	117	154	144
Jan	144	148	148
Feb	140	132	134
Mar	142	123	128
Apr	77	106	93
May	71	121	95
Grand Total	**113**	**137**	**130**