Equation 1

# Equation Components

## Stage

=IF(OR('Full Set'!STAGE COLUMN="Stage 4-Prove",'Full Set'!STAGE COLUMN="Stage 5-Negotiate"),(IF('Full Set'!BUMP COLUMN<=4,1,(IF('Full Set'!BUMP COLUMN>4,-1,0)))),(IF(OR('Full Set'!STAGE COLUMN="Stage 0-Develop",'Full Set'!STAGE COLUMN="Stage 1-Create",'Full Set'!STAGE COLUMN="Stage 2-Qualify"),(IF('Full Set'!BUMP COLUMN<=0,1,(IF('Full Set'!BUMP COLUMN>=1,-2,0)))),(IF('Full Set'!BUMP COLUMN<=3,1,-1)))))

### Three Separate equations dependent on Stage

### Stage 0 – 1

### <= 0 – 1 Point

### >=1 – -2 Point

### Stage 3

### <=3 – 1 Point

### >3 – -1 Point

### Stage 4 and 5

### <=4 – 1 Point

### >4 – -1 Point

## Stage Duration

=IF(OR('Full Set'!STAGE COLUMN="Stage 4-Prove",'Full Set'!STAGE COLUMN="Stage 5-Negotiate"),IF('Full Set'!STAGE DURATION COLUMN<5,6,(IF('Full Set'!STAGE DURATION COLUMN<=10,4,0))),IF('Full Set'!STAGE DURATION COLUMN<5,8,(IF('Full Set'!STAGE DURATION COLUMN<=10,4,(IF('Full Set'!STAGE DURATION COLUMN<=20,0,(IF('Full Set'!STAGE DURATION COLUMN<=30,-4,(IF('Full Set'!STAGE DURATION COLUMN>30,-8))))))))))

### Two Separate equations for Stage Duration in days –

### Stage 4 and 5 equation

### If Stage Duration < 5 - 6 points

### If Stage Duration <= 10 - 4 points

### Else

### < 5 – 8 Points

### <= 10 – 4 Points

### <= 20 – 0 Points

### <= 30 – -4 Points

### 30 – -8 Points

## Total Age

=IF(OR('Full Set'!STAGE COLUMN="Stage 0-Plan",'Full Set'!STAGE COLUMN="Stage 1-Create",'Full Set'!STAGE COLUMN="Stage 2- Qualify"),IF('Full Set'!AGE COLUMN<=30,1,(IF('Full Set'!AGE COLUMN<=60,0,(IF('Full Set'!AGE COLUMN>60,-1,0))))),IF(OR('Full Set'!STAGE COLUMN="Stage 4-Prove",'Full Set'!STAGE COLUMN="Stage 5-Negotiate"),IF('Full Set'!AGE COLUMN<=22,5,(IF('Full Set'!AGE COLUMN<=36,0,(IF('Full Set'!AGE COLUMN<=70,0,(IF('Full Set'!AGE COLUMN>70,0))))))),(IF('Full Set'!AGE COLUMN<=20,3,(IF('Full Set'!AGE COLUMN<=60,0,(IF('Full Set'!AGE COLUMN<=100,0,-3))))))))

### Three equations for the Opportunity’s age at time of snapshot in days

### Stage 0-2

### <=30 – 1 point

### <= 60 – 0 points

### >60 – -1 points

### Stage 3

### <=20 – 3 points

### <= 60 – 0 points

### >100 – -3 points

### Stage 4 and 5

### <=22 – 5 points

### >22 – 0 points

## Stage Bonus

=IF('Full Set'!STAGE COLUMN="Stage 5-Negotiate",3,(IF('Full Set'!STAGE COLUMN="Stage 4-Prove",0,(IF('Full Set'!STAGE COLUMN="Stage 3-Develop",0,0)))))

### Single equation for Stage Bonus

### Stage 5 – Negotiate = 3 points

## Opportunity Type

=IF(OR('Full Set'!TYPE COLUMN = "Additional Product", 'Full Set'!TYPE COLUMN = "New Customer"),-1, (IF(OR('Full Set'!TYPE COLUMN = "Manual Renewal",'Full Set'!TYPE COLUMN = "Professional Services (SOW)"), 1,0)))

### Single equation for Opportunity Type

### -1 points for Additional Products and New Customers

### 1 point for Manual Renewal and Professional Services

## Adjusted Score

Bump Count + Stage Duration + Total Age + Stage Bonus + Opportunity Type

# Adjusted Category

IF(O:O>=14,"Green",IF(O:O>=8,"Yellow",(IF(O:O>=-4,"Orange","Red"))))

## Green >= 14 points

## Yellow >= 8 points

## Orange >= -2 points

## Red < -2 points

# Intended Category meaning

## Green – 80% win rate (Currently 91%)

## Yellow – 30 % win rate (Currently 71%)

## Orange – 15% win rate (Currently 16%)

## Red – 5% win rate (Currently 6%)

Equation 2

# Equation Components

## Stage

=IF('Full Set'!STAGE COLUMN="Stage 0-Plan",IF('Full Set'!BUMP COLUMN<4,0,-1),IF('Full Set'!STAGE COLUMN="Stage 1-Create",IF('Full Set'!BUMP COLUMN<2,1,IF('Full Set'!BUMP COLUMN<6,0,-1)),IF(OR('Full Set'!STAGE COLUMN="Stage 2-Qualify",'Full Set'!STAGE COLUMN="Stage 3-Develop"),IF('Full Set'!BUMP COLUMN<3,1,IF('Full Set'!BUMP COLUMN<9,0,-1)),IF('Full Set'!STAGE COLUMN="Stage 4-Prove",IF('Full Set'!BUMP COLUMN<3,2,IF('Full Set'!BUMP COLUMN<9,1,IF('Full Set'!BUMP COLUMN<16,0,-1))),IF('Full Set'!STAGE COLUMN="Stage 5-Negotiate",IF('Full Set'!BUMP COLUMN<6,1,0))))))

### 5 Separate equations dependent on Stage

### Stage 0

### <4 – 0 Point

### >=4 – -1 Point

### Stage 1

### <2 – 2 point

### <6 – 1 point

### >=6 – 0 point

### Stage 2 and 3

### <3 – 2 points

### <9 – 1 points

### >=9 – 0 points

### Stage 4

### <3 – 3 points

### <10 – 2 points

### <16 – 1 point

### >=16 – 0 points

### Stage 5

### <6 – 2 points

### <13 – 1 point

### >=13 – 0 points

### 

## Stage Duration

=IF(OR('Full Set'!STAGE COLUMN="Stage 0-Plan",'Full Set'!STAGE COLUMN="Stage 2-Qualify"),IF('Full Set'!STAGE DURATION COLUMN<11,6,IF('Full Set'!STAGE DURATION COLUMN<21,4,0)),IF('Full Set'!STAGE COLUMN="Stage 1-Create",IF('Full Set'!STAGE DURATION COLUMN<4,6,IF('Full Set'!STAGE DURATION COLUMN<12,4,0)),IF(OR('Full Set'!STAGE COLUMN="Stage 3-Develop",'Full Set'!STAGE COLUMN="Stage 4-Prove"),IF('Full Set'!STAGE DURATION COLUMN<7,6,IF('Full Set'!STAGE DURATION COLUMN<14,4,IF('Full Set'!STAGE DURATION COLUMN<21,0,0))),-1)))

### Three equations for Stage Duration in days –

### Stage 0 and 2

### < 5 - 5 points

### <21 – 3 points

### >= 22 - 0 points

### Stage 1

### < 4 – 5 Points

### < 12 – 3 Points

### >= 12 – 0 Points

### Stage 3-5

### <7 – 5 points

### <13 – 3 points

### <21 – 0 points

### >=21 – -1 Points

## Total Age

=IF(OR('Full Set'!STAGE COLUMN="Stage 0-Plan",'Full Set'!STAGE COLUMN="Stage 1-Create",'Full Set'!STAGE COLUMN="Stage 2- Qualify"),IF('Full Set'!AGE COLUMN<=15,2,(IF('Full Set'!AGE COLUMN<=60,1,(IF('Full Set'!AGE COLUMN>60,0,0))))),IF(OR('Full Set'!STAGE COLUMN="Stage 4-Prove"),IF('Full Set'!AGE COLUMN<=15,2,(IF('Full Set'!AGE COLUMN<=36,1,(IF('Full Set'!AGE COLUMN<=70,0,(IF('Full Set'!AGE COLUMN>70,0))))))),(IF('Full Set'!AGE COLUMN<=15,2,(IF('Full Set'!AGE COLUMN<=60,0,(IF('Full Set'!AGE COLUMN<=100,0,0))))))))

### Three equations for the Opportunity’s age at time of snapshot in days

### Stage 0-2

### <=15 – 2 point

### <= 60 – 1 points

### >60 – 0 points

### Stage 4

### <=15 – 2 points

### <= 36 – 1 points

### >36 – 0 points

### Else

### <=15 – 2 points

### <=36 – 1 point

### >36 – 0 points

## Stage Bonus

=IF('Full Set'!STAGE COLUMN="Stage 5-Negotiate",12,(IF('Full Set'!STAGE COLUMN="Stage 4-Prove",2,(IF('Full Set'!STAGE COLUMN="Stage 3-Develop",1,0)))))

### Single equation for Stage Bonus

### Stage 3 – 1

### Stage 4 – 2

### Stage 5 – 12 points

## Opportunity Type

=IF('Full Set'!TYPE COLUMN="Additional Product",-2,IF(OR('Full Set'!TYPE COLUMN="New Customer",'Full Set'!TYPE COLUMN="Renewal with New Product"),-1,(IF(OR('Full Set'!TYPE COLUMN="Manual Renewal",'Full Set'!TYPE COLUMN="Professional Services (SOW)"),3,0)))))

### Single equation for Opportunity Type

### Additional Products – -2 points

### New Customers – -1 points

### Manual Renewal and Professional Services – 3 points

## Adjusted Score

Bump Count + Stage Duration + Total Age + Stage Bonus + Opportunity Type

# Adjusted Category

=IF(O:O>=15,"Green",IF(O:O>=11,"Blue",IF(O:O>=2,"Orange","Red")))

## Green >= 14 points

## Yellow >= 8 points

## Orange >= -2 points

## Red < -2 points

# Intended Category meaning

## Green – 80% win rate (Currently 91%)

## Blue – 60 % win rate (Currently 71%)

## Orange – 15% win rate (Currently 16%)

## Red – 5% win rate (Currently 6%)

Equation 3

# Equation Components

## Stage

=IF(OR('Full Set'!STAGE COLUMN="Stage 0-Plan", 'Full Set'!STAGE COLUMN = "Stage 1-Create"), IF('Full Set'!BUMP COLUMN <=3, 1, 0), IF('Full Set'!STAGE COLUMN = "Stage 2-Qualify", IF('Full Set'!BUMP COLUMN<=2,2, IF('Full Set'!BUMP COLUMN <=5, 1, 0)),IF('Full Set'!STAGE COLUMN= "Stage 3-Develop", IF('Full Set'!BUMP COLUMN <=1,2,IF('Full Set'!BUMP COLUMN <=3,1,IF('Full Set'!BUMP COLUMN <= 6,0,"-1"))), IF(OR('Full Set'!STAGE COLUMN="Stage 4-Prove", 'Full Set'!STAGE COLUMN="Stage 5-Negotiate"),IF('Full Set'!BUMP COLUMN<=2,2,IF('Full Set'!BUMP COLUMN<=4,1,IF('Full Set'!BUMP COLUMN<=8,0,-1))),-2))))5 Separate equations dependent on Stage

### Stage 0

### ~~<4 – 0 Point~~

### Stage 1

### ~~<2 – 2 point~~

### ~~<6 – 1 point~~

### ~~>=6 – 0 point~~

### Stage 2 and 3

### ~~<3 – 2 points~~

### ~~<9 – 1 points~~

### ~~>=9 – 0 points~~

### Stage 4

### ~~<3 – 3 points~~

### ~~<10 – 2 points~~

### ~~<16 – 1 point~~

### ~~>=16 – 0 points~~

### Stage 5

### ~~<6 – 2 points~~

### ~~<13 – 1 point~~

### ~~>=13 – 0 points~~

### 

## Stage Duration

=IF(OR('Full Set'!STAGE COLUMN="Stage 5-Negotiate",'Full Set'!STAGE COLUMN="Stage 4-Prove"),IF('Full Set'!STAGE DURATION COLUMN<=6,3,IF('Full Set'!STAGE DURATION COLUMN<=14,1,IF('Full Set'!STAGE DURATION COLUMN<=25,0,-1))),IF(OR('Full Set'!STAGE COLUMN="Stage 3-Develop",'Full Set'!STAGE COLUMN="Stage 2-Qualify"),IF('Full Set'!STAGE DURATION COLUMN<=10,3,IF('Full Set'!STAGE DURATION COLUMN<=25,1,IF('Full Set'!STAGE DURATION COLUMN<=40,0,-1))),IF(OR('Full Set'!STAGE COLUMN="Stage 1-Create",'Full Set'!STAGE COLUMN="Stage 0-Plan"),IF('Full Set'!STAGE DURATION COLUMN<=10,3,IF('Full Set'!STAGE DURATION COLUMN<=20,1,0)),-3)))

### Three equations for Stage Duration in days –

### ~~Stage 0 and 2~~

### ~~< 5 - 5 points~~

### ~~<21 – 3 points~~

### ~~>= 22 - 0 points~~

### ~~Stage 1~~

### ~~< 4 – 5 Points~~

### ~~< 12 – 3 Points~~

### ~~>= 12 – 0 Points~~

### ~~Stage 3-5~~

### ~~<7 – 5 points~~

### ~~<13 – 3 points~~

### ~~<21 – 0 points~~

### ~~>=21 – -1 Points~~

## Total Age

=IF('Full Set'!STAGE COLUMN="Stage 3-Develop",IF('Full Set'!AGE COLUMN<=7,4,IF('Full Set'!AGE COLUMN<=20,2,IF('Full Set'!AGE COLUMN<=30,0,-2))),IF(OR('Full Set'!STAGE COLUMN="Stage 4-Prove",'Full Set'!STAGE COLUMN="Stage 5-Negotiate"),IF('Full Set'!AGE COLUMN<=10,4,IF('Full Set'!AGE COLUMN<=40,2,IF('Full Set'!AGE COLUMN<=70,0,-2))),-5))

### ~~Three equations for the Opportunity’s age at time of snapshot in days~~

### ~~Stage 0-2~~

### ~~<=15 – 2 point~~

### ~~<= 60 – 1 points~~

### ~~>60 – 0 points~~

### ~~Stage 4~~

### ~~<=15 – 2 points~~

### ~~<= 36 – 1 points~~

### ~~>36 – 0 points~~

### ~~Else~~

### ~~<=15 – 2 points~~

### ~~<=36 – 1 point~~

### ~~>36 – 0 points~~

## Stage Bonus

=IF('Full Set'!STAGE COLUMN="Stage 5-Negotiate",15,(IF('Full Set'!STAGE COLUMN="Stage 4-Prove",4,(IF('Full Set'!STAGE COLUMN="Stage 3-Develop",2,-1)))))

### ~~Single equation for Stage Bonus~~

### ~~Stage 3 – 1~~

### ~~Stage 4 – 2~~

### ~~Stage 5 – 12 points~~

## Opportunity Type

=IF(OR('Full Set'!TYPE COLUMN="New Customer",'Full Set'!TYPE COLUMN="Additional Product"),-2,IF(OR('Full Set'!TYPE COLUMN="Renewal with New Product",'Full Set'!TYPE COLUMN="Product Swap"),1,(IF(OR('Full Set'!TYPE COLUMN="Manual Renewal",'Full Set'!TYPE COLUMN="Professional Services (SOW)"),2,0))))~~Single equation for Opportunity Type~~

### ~~Additional Products – -2 points~~

### ~~New Customers – -1 points~~

### ~~Manual Renewal and Professional Services – 3 points~~

## Adjusted Score

Bump Count + Stage Duration + Total Age + Stage Bonus + Opportunity Type

# Adjusted Category

= IF(O:O>=23,"Green",IF(O:O>=7,"Blue",IF(O:O>=-2,"Yellow",IF(O:O>=-6,"Orange","Red"))))

## ~~Green >= 14 points~~

## ~~Yellow >= 8 points~~

## ~~Orange >= -2 points~~

## ~~Red < -2 points~~

# Intended Category meaning

## ~~Green – 80% win rate (Currently 91%)~~

## ~~Blue – 60 % win rate (Currently 71%)~~

## ~~Orange – 15% win rate (Currently 16%)~~

## ~~Red – 5% win rate (Currently 6%)~~