Agenda

- ☑ Introduction
- ☑ Top-down vs. Bottom-up planning
- ☑ Key KPIs for a good plan
- ☑ Modern trends and approaches
- ☑ Conclusion

REVOS

Founder and CEO of RevOS.ai

Entrepreneur, Sales and Revenue Leader

- before RevOS.ai I was a Founder & CEO of elastic.io, exited to mVISE AG in 2021
- Building & leading successful teams (50+ FTEs) in Germany, Europe and United States
- Complex selling, customer success and expansion of 7-digit B2B into medium and large companies in DE, EU and USA
- Strategic product and portfolio management aligned with Go-to-Market strategy

Forecasting is complicated

"~~Writing~~ Forecasting is like driving at night in the fog. You can only see as far as your headlights, but you can make the whole trip that way""

E.L. Doctorow

Forecasting is complicated

93% of sales organizations are unable to forecast end of the quarter revenue within 5 percent, even in the two weeks prior to the end of the quarter.

source, study with n=300

Pitch

Forecasting is crucial

- **Marketing:** Wrong targets → Lower performance → Higher CAC
- **Sales:** Missing revenue forecast → Missing Quotas → Lower motivation & higher fluctuation.
- **Success:** Reactive and not Proactive → Lower customer satisfaction → Higher customer churn
- **Human Resources:** Over-hiring or missed growth opportunities → Lower team performance → Higher fluctuation
- **Finance:** Slower and less profitable growth → missed funding opportunities

Top-Down vs. Bottom Up

- **Top-Down** – start planning from high level goal like revenue growth, profitability, market-share objectives. They are gradually moved to the lower levels of the organisational hierarchy.

- **Bottom-Up –** start with the goal-setting at the lower level of the organisational hierarchy and aggregate it up to the global goals and strategy at higher levels.
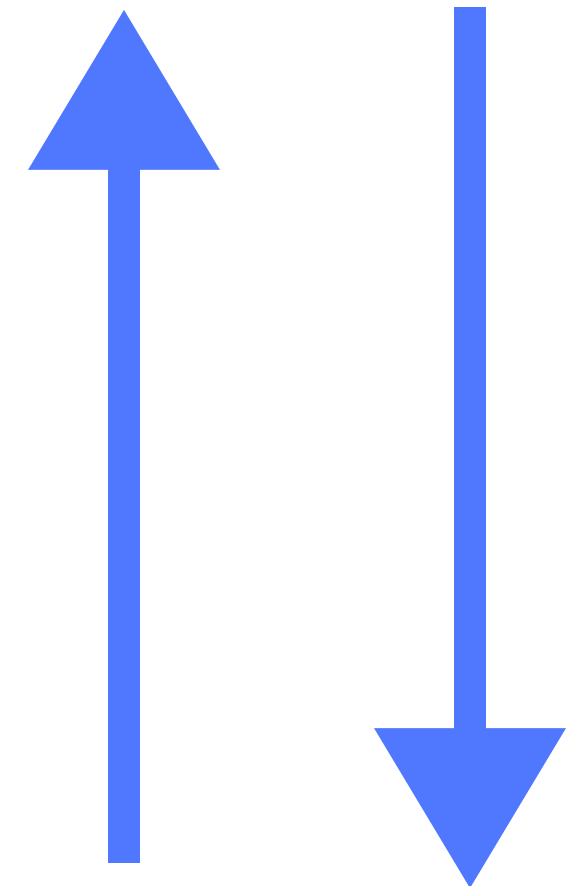
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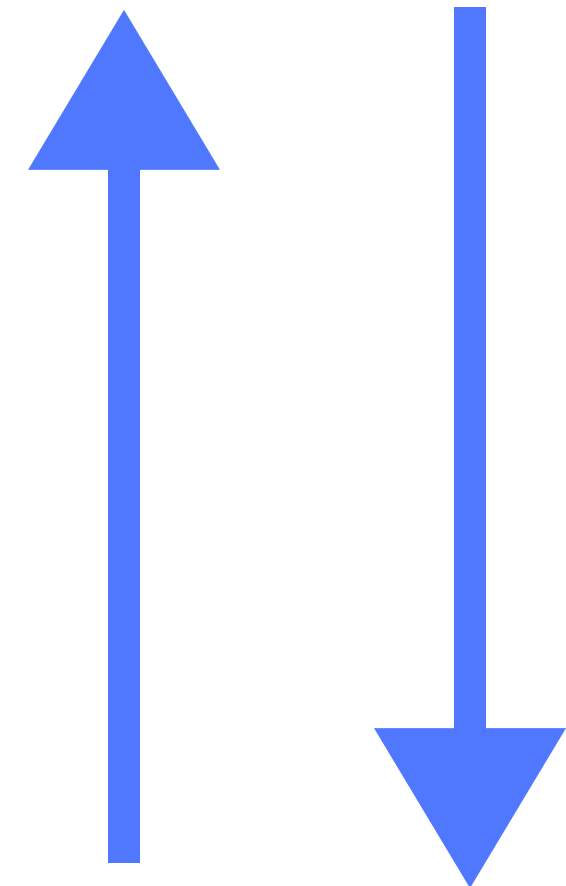
Sales & Customer Success KPIs for bottom–up planning

Basic

- Quota
- Pipeline
- Churn

Pro

- Conversion(s)
- Pipeline Health
- Customer Health

Advanced

- Velocity
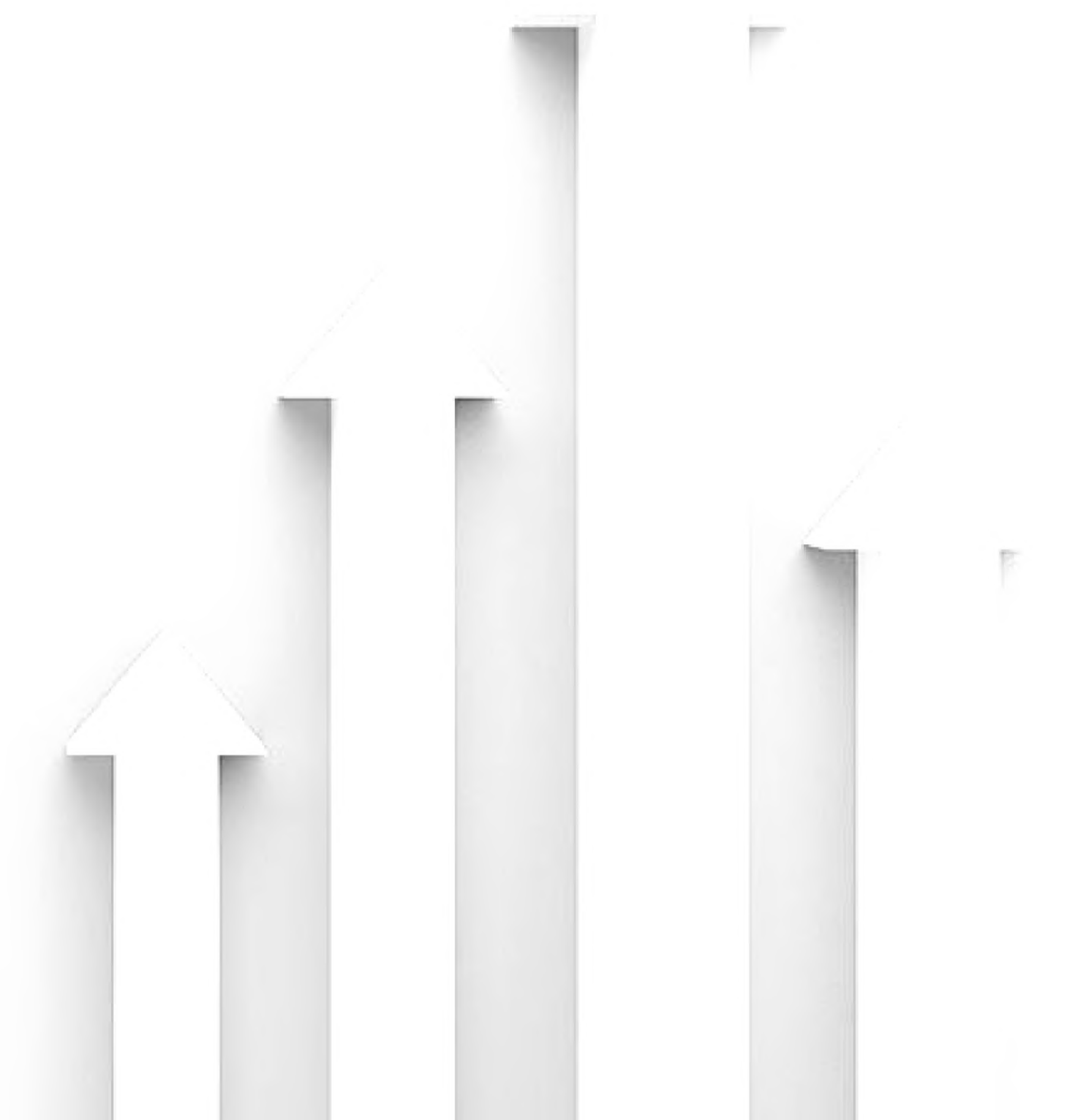- Slippage
- [Everything] realtime

Pitch

Basic KPIs

Basic KPIs

1. Quota
   a. Sales Quota
   b. Success aka. ARR per CSM Ratio

2. Pipeline
   a. Quarterly
   b. Coverage

3. Churn
   a. Logo
   b. Revenue
   c. Expansion

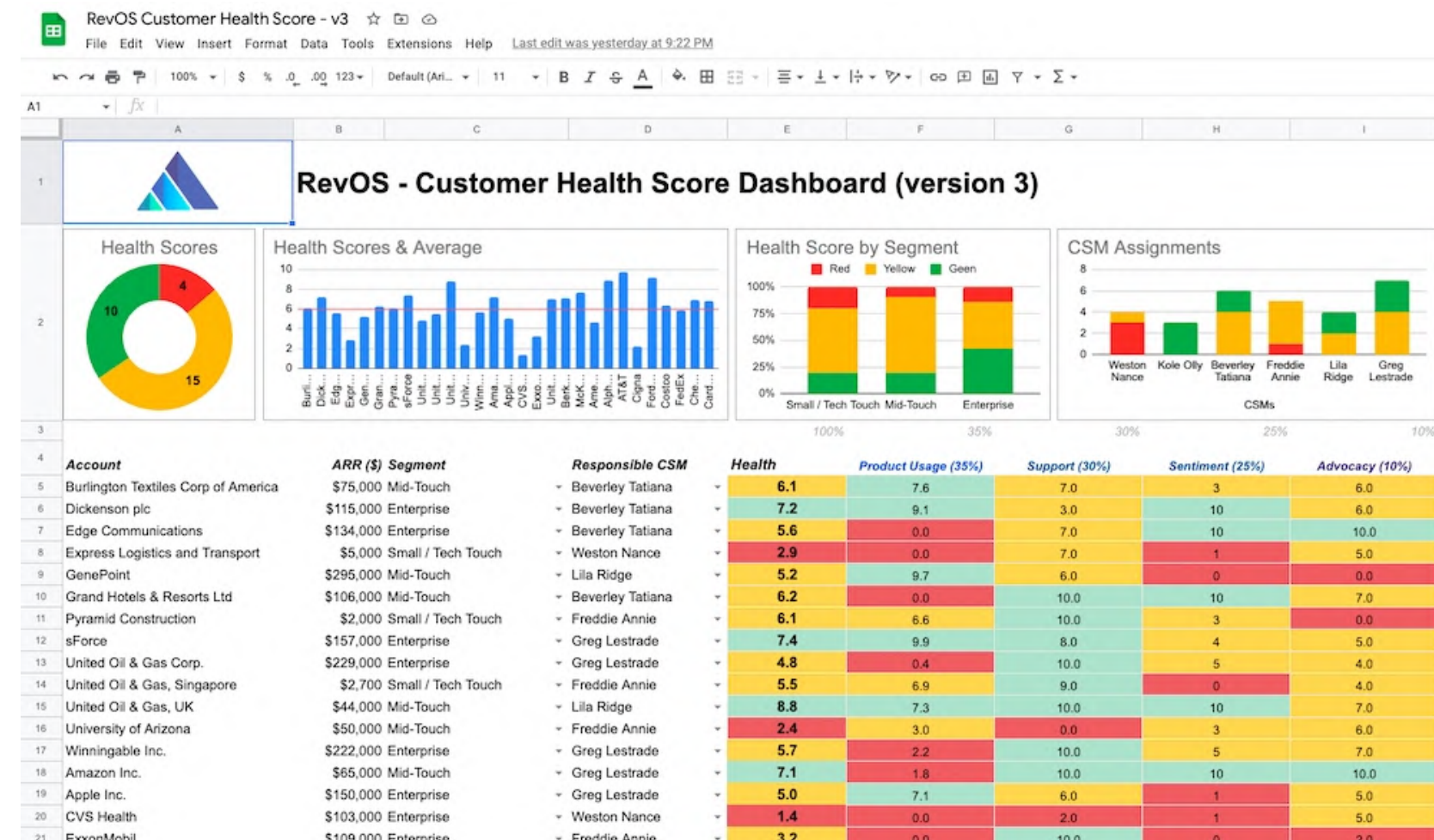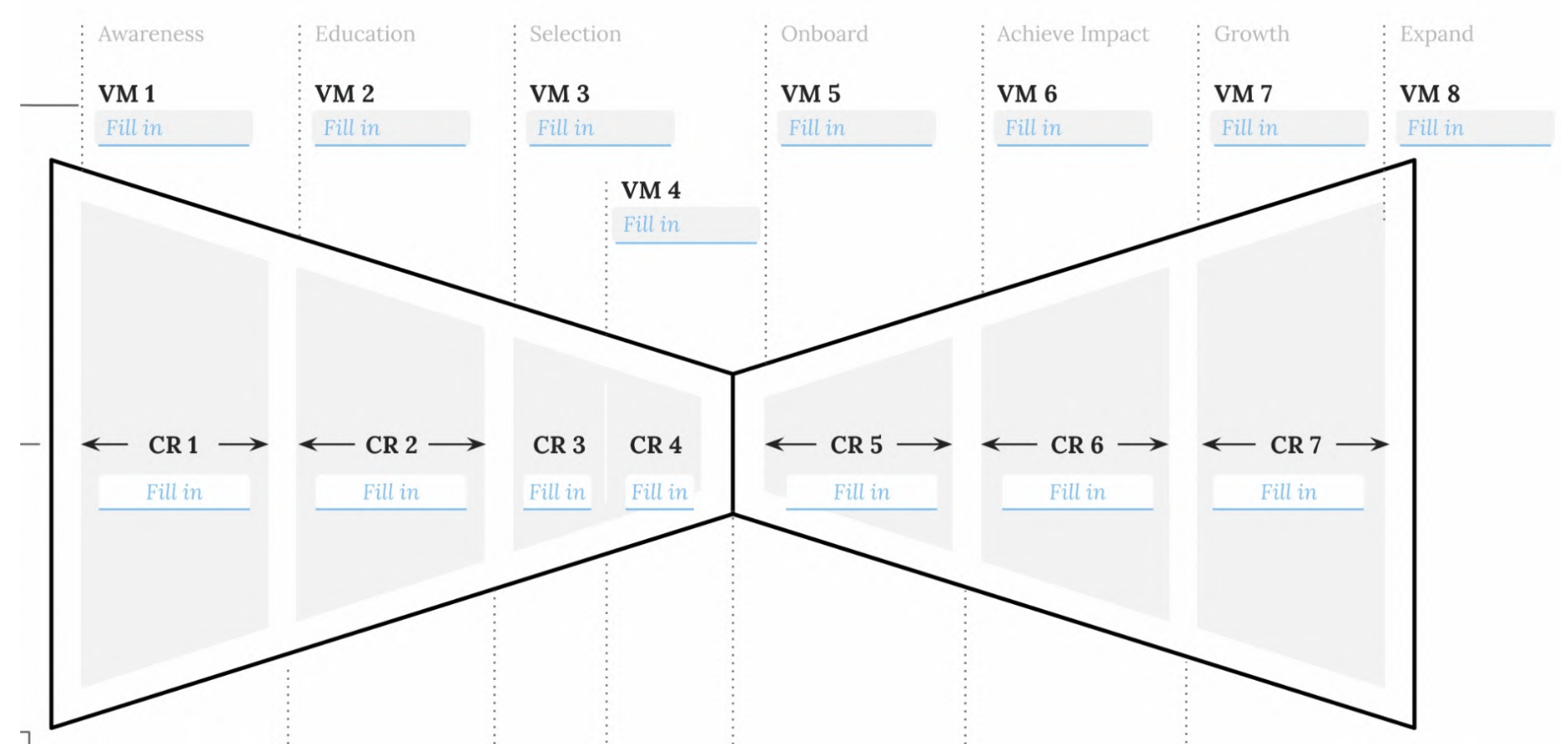# Pro KPIs

Pro KPIs

1. **Conversions**

2. **Pipeline Health**

3. **Customer Health**

    a. **+NPS / CSAT**

VM 1   Fill in
VM 2   Fill in
VM 3   Fill in
VM 5   Fill in
VM 6   Fill in
VM 7   Fill in
VM 8   Fill in

VM 4   Fill in

CR 1   Fill in
CR 2   Fill in
CR 3   Fill in
CR 4   Fill in
CR 5   Fill in
CR 6   Fill in
CR 7   Fill in

RevOS Customer Health Score - v3   Last edit was yesterday at 9:22 PM
File Edit View Insert Format Data Tools Extensions Help

RevOS - Customer Health Score Dashboard (version 3)

Health Scores   Health Scores & Average   Health Score by Segment   CSM Assignments

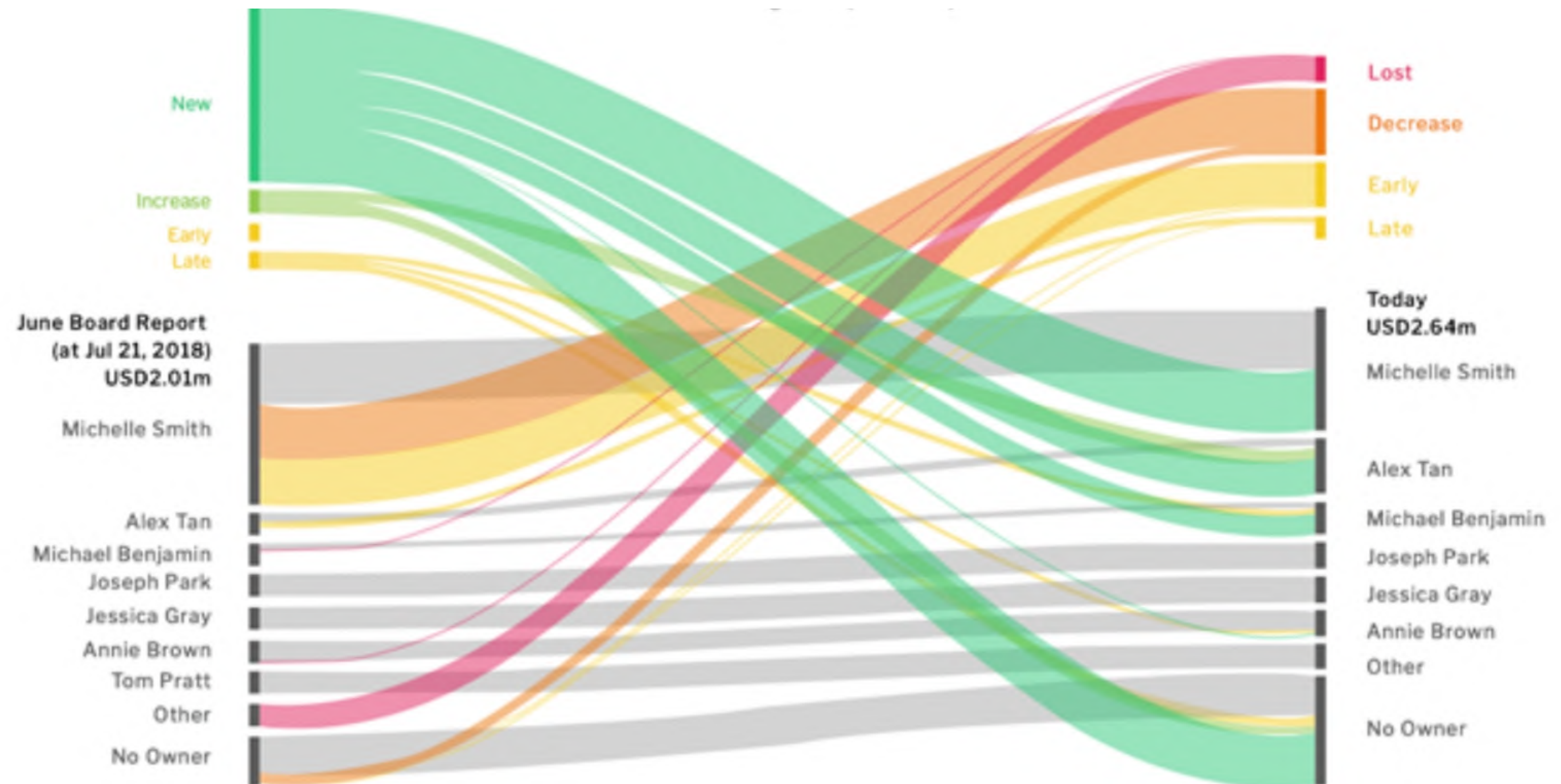| Account	ARR ($) Segment	Responsible CSM	Health	Product Usage (35%)	Support (30%)	Sentiment (25%)	Advocacy (10%)
Burlington Textiles Corp of America	$75,000 Mid-Touch	Beverley Tatiana	6.1	7.6	7.0	3	6.0
Dickenson plc	$115,000 Enterprise	Beverley Tatiana	7.2	9.1	3.0	10	6.0
Edge Communications	$134,000 Enterprise	Beverley Tatiana	5.6	0.0	7.0	10	10.0
Express Logistics and Transport	$5,000 Small / Tech Touch	Weston Nance	2.9	0.0	7.0	1	5.0
GenePoint	$295,000 Mid-Touch	Lila Ridge	5.2	9.7	6.0	1	0.0
Grand Hotels & Resorts Ltd	$106,000 Mid-Touch	Beverley Tatiana	6.2	6.6	10.0	10	7.0
Pyramid Construction	$2,000 Small / Tech Touch	Freddie Annie	6.1	6.6	10.0	3	0.0
sForce	$157,000 Enterprise	Greg Lestrade	7.4	9.9	8.0	4	5.0
United Oil & Gas Corp.	$229,000 Enterprise	Greg Lestrade	4.8	0.4	10.0	5	4.0
United Oil & Gas, Singapore	$2,700 Small / Tech Touch	Freddie Annie	5.5	6.9	9.0	1	4.0
United Oil & Gas, UK	$44,000 Mid-Touch	Lila Ridge	8.8	7.3	10.0	10	7.0
University of Arizona	$50,000 Mid-Touch	Freddie Annie	2.4	3.0	0.0	1	6.0
Winningable Inc.	$222,000 Enterprise	Greg Lestrade	5.7	2.2	10.0	5	7.0
Amazon Inc.	$65,000 Mid-Touch	Greg Lestrade	7.1	1.8	10.0	10	10.0
Apple Inc.	$150,000 Enterprise	Greg Lestrade	5.0	7.1	6.0	1	5.0
CVS Health	$103,000 Enterprise	Weston Nance	1.4	0.0	2.0	1	5.0
ExxonMobil	$109,000 Enterprise	Freddie Annie	3.2				

Advanced KPIs

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Advanced KPIs

1. **Pipeline Velocity**

2. **Deal Slippage**

3. **[Everything] Realtime**

Challenges with traditional approach

- Data Silos with 100+ SaaS on average
- Proper tooling
  - Spreadsheet – universally available but maintenance hell
  - CRM – great system of record but manual data entry and inability to work with time-series or historical data
- Too much data – hard to separate signal from the noice
- Even with limited number of systems number of KPIs can be overwhelming

Pitch

Modern trends and approaches: Predictive analytics with AI/ML Models

- Maschine Learning is a branch of artificial intelligence (AI) and computer science which focuses on the use of data and algorithms to imitate the way that humans learn, gradually improving its accuracy.

☑ Less tolerant to low data quality and/or missing data

☑ Adopt and learn over time – capturing data in time dimension

☑ Automatically select most relevant criteria that affect predicted outcome

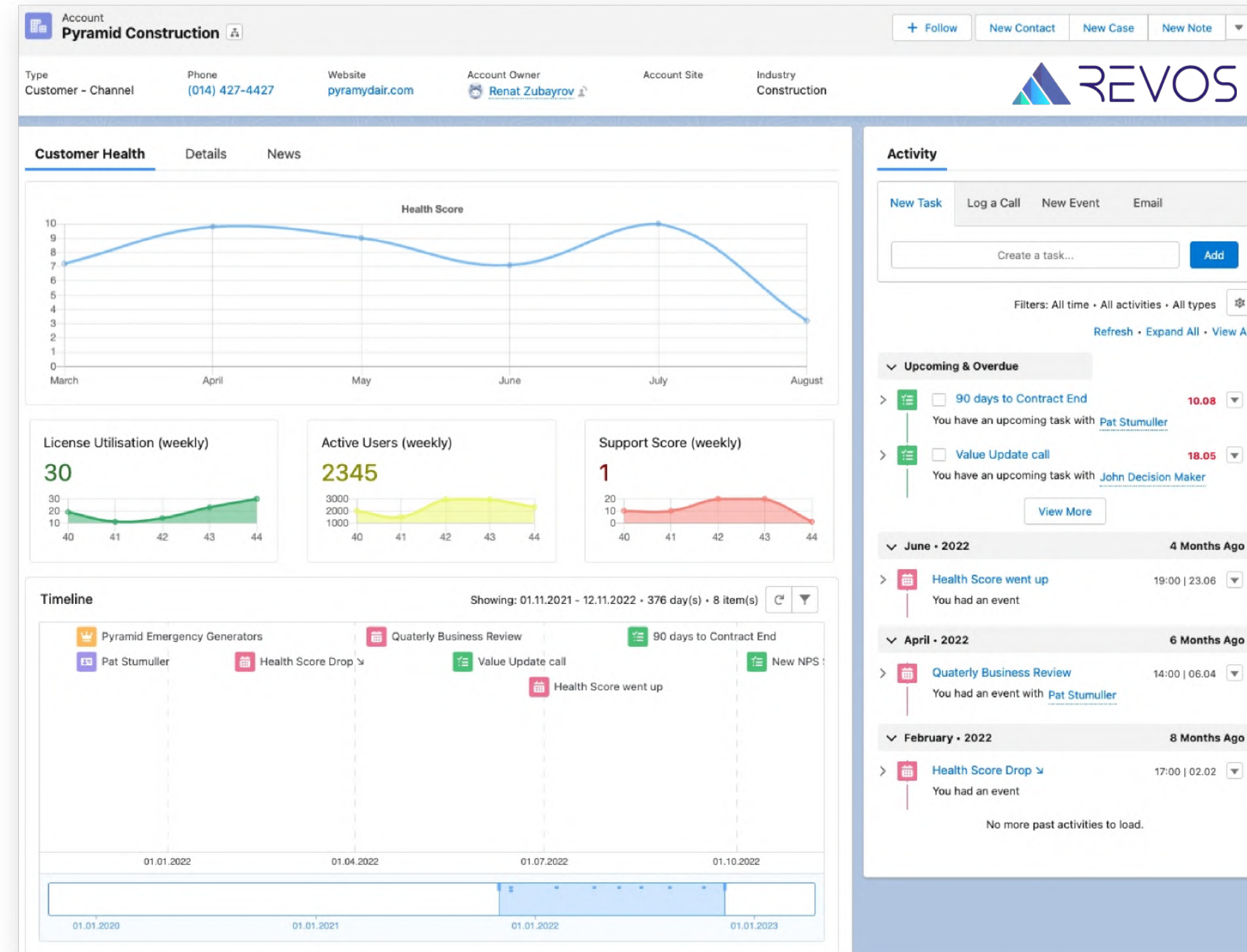☑ Automatically adjust formula (aka. model weights) based on the new data
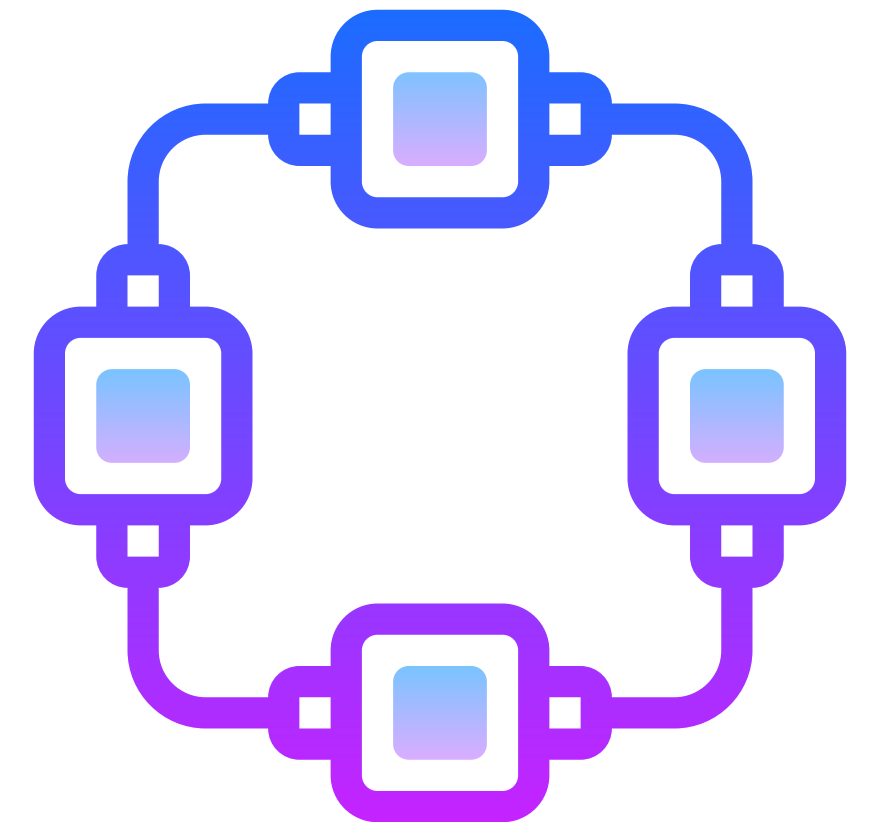
AI and ML models are already in use for sales forecasting however required a dedicated BI and Data Science expertise.

Pitch

RevOS.ai – predictive revenue intelligence

RevOS.ai is a first **no-code AI platform** for Sales, Marketing and Customer Success

- **Simple and fast connectivity** with connectors to your CRM, DWH, Product and Support systems
- **Pre-defined AI models** for customer, pipeline, lead scoring. Sales and customer expansion forecasting and many more.
- **Engagement modules** for deploy model predictions right into your CRM
- **Automated activity capture** to to continuously train and improve your model(s)

Schedule your demo today

https://calendly.com/revos/demo

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