

# Revenue Insights

**Interactive Visualizations That Uncover Business Stories**

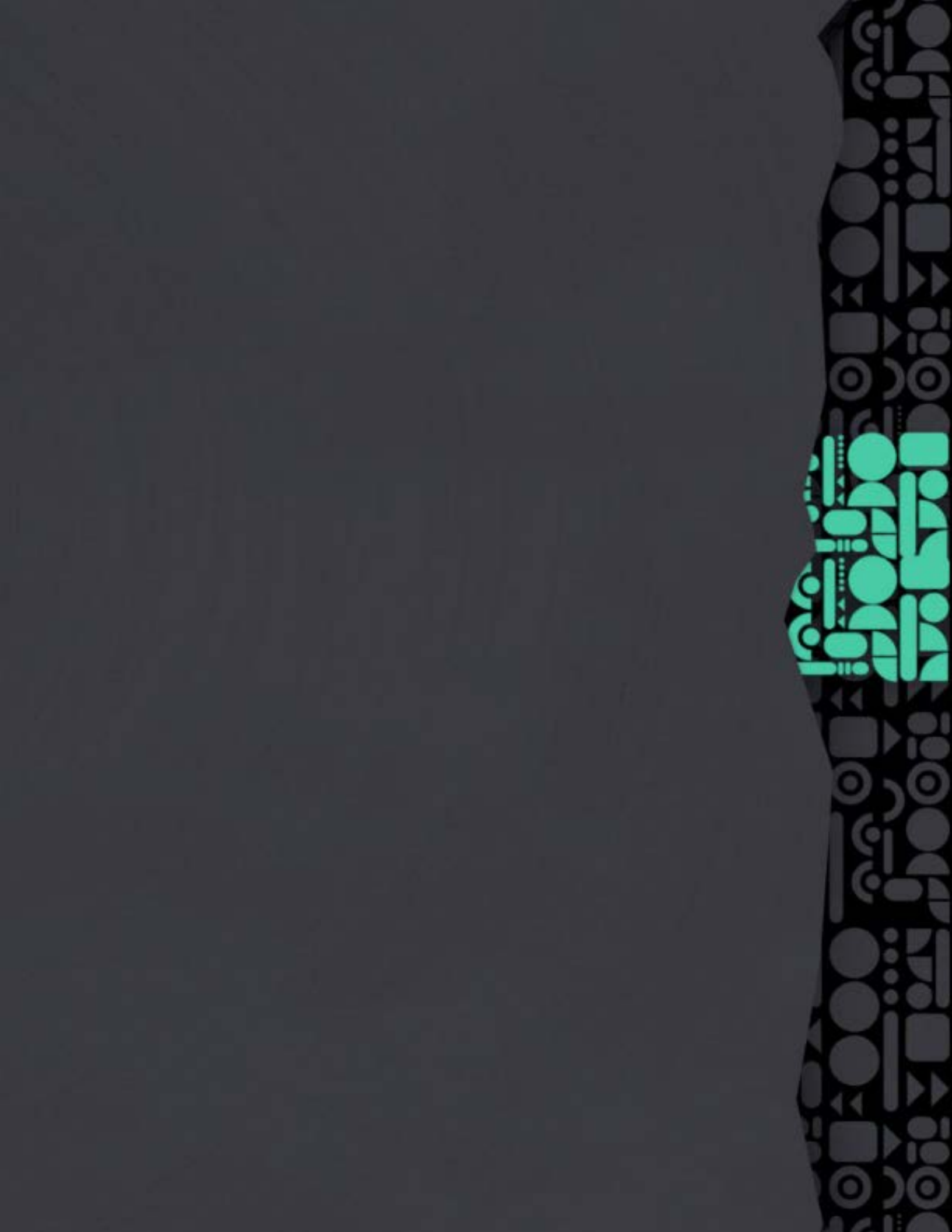


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# Revenue Insights

## What Is Revenue Insights?

Mperativ's Revenue Insights uses the key tenets of data journalism to analyze time series data and bring to surface critical marketing stories and data narrativess. Using Revenue Supply Chain filters, Insights can be used to analyze granular aspects of your business ranging from industry segments, locations, products, campaigns and lead sources. Insights is very flexible and eliminates the need to spend days or weeks preparing for board meetings by massaging data in spreadsheets. The core data narratives included in Insights are Revenue Generated, Revenue Objectives, Pipeline Growth, Pipeline Coverage, Cost Per Milestone, Segmentation Analysis, Cohort Analysis, Key Metrics Cheat Sheet and Marketing Programs Budget.

## How did you come up with your visual design for Revenue Insights?

We were angry about weak UX design across CRM, marketing automation and business intelligence platforms, which has historically been a point of frustration for end-users. Mperativ emphasizes powerful visual design as a core company value. As part of our UX design process, Mperativ interviewed hundreds of stakeholders across marketing, sales, revenue operations, customer success, finance and venture capital (key stakeholders of the information in board meetings).

## Revenue Generated

Revenue Generated Insights allow you to view revenue generated by calendar year or fiscal year from won opportunities. In addition to showing the total revenue closed, the report also breaks down won opportunities by new logo deals and expansion deals. The report is quite powerful because it also supports the broad array of Mperativ filters to analyze specific segments of the business – industry, location, product, campaign, lead source, etc. Essentially, marketing has the ability to not only see where revenue originates from, but also the ability to rapidly click on any revenue metric and see the detailed opportunities behind it.



Figure 6: Revenue Generated Interactive Visualization

# Revenue Insights

## Revenue Objectives

Revenue Objectives allow you to track measurable revenue targets for your company to achieve in a given year. Revenue objectives are typically formal goals established by the executive team and approved by the board. The executive team is often partly compensated based on whether or not these objectives are achieved. Revenue Objectives track goals on a quarterly basis and allow you to easily visualize whether or not a goal has been met. If a Marketing Leader is being asked to contribute 30% of New Logo opportunities and 30% of expansion opportunities, it can now be tracked throughout the year.



Figure 7: Revenue Objectives Interactive Visualization

## Active Sales Pipeline Growth

Active Sales Pipeline Growth (ASPG) shows the sales pipeline added for a specified year (calendar year or fiscal year). It allows a user to see the total pipeline carried over from the previous year, pipeline added quarter over quarter and pipeline retired quarter over quarter. The user can also easily see total pipeline added for the year. ASPG enables a user to understand how rapidly they are building pipeline and to see pipeline growth momentum for new logo pipeline and expansion pipeline. This report also supports filters so you can analyze pipeline growth across specific segments of the business.



Figure 8: Pipeline Growth Interactive Visualization

## Revenue Insights

### Active Sales Pipeline Coverage

Active Sales Pipeline Coverage Identifies pipeline coverage for a specified period of time and compares it to the new logo, expansion and total revenue objective for the same period in time. This chart can be run based on Annual Contract Value (ACV) or Total Contract Value (TCV). The pipeline coverage is calculated by dividing the pipeline coverage number by the revenue objective. For ex, If the pipeline coverage is \$10M and ACV Objective is \$3M then the pipeline coverage is 3.3x (\$10M/\$3M)

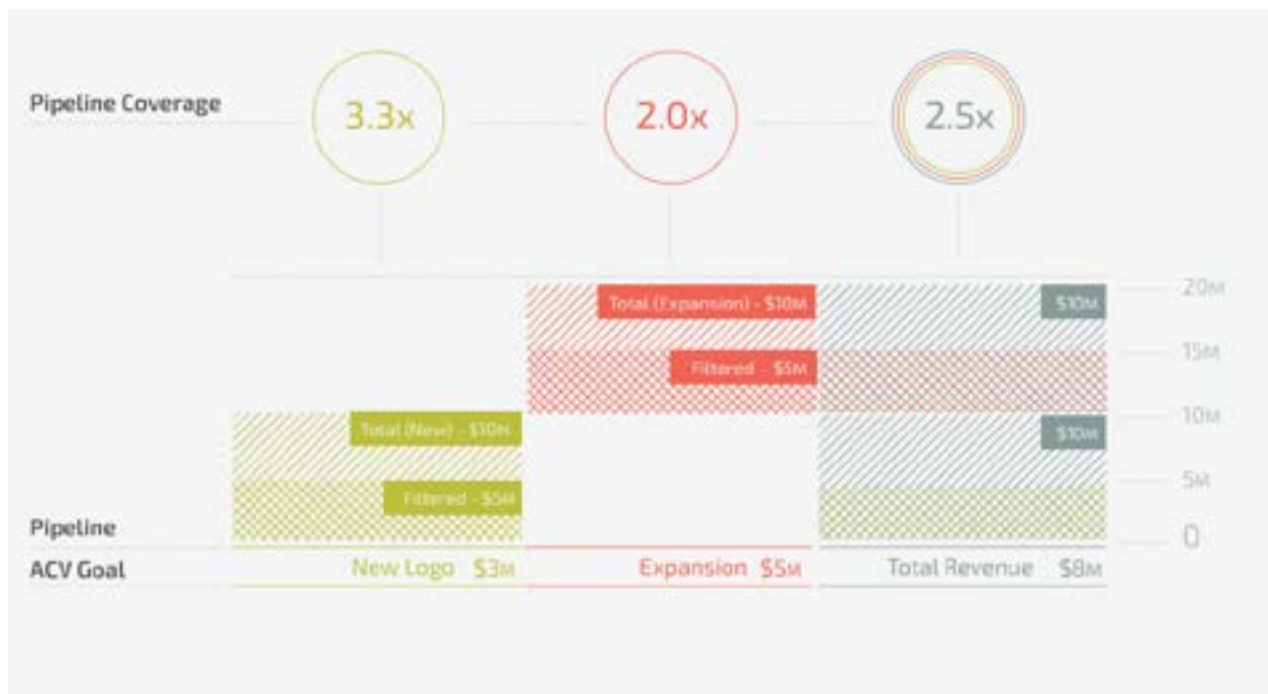


Figure 9: Pipeline Coverage Interactive Visualization

## Cost Per Milestone

Cost Per Milestone measures the level of marketing efficiency in relation to demand engine output. It assesses revenue supply chain momentum in relation to marketing expenditure. Essentially it allows us to measure revenue supply chain output in relation to every dollar spent on marketing during the same period in time. The goal of this report is to transform marketing metrics into a dollar driven language that the rest of the company understands and values. It also enables marketing to establish Cost Per Milestone baselines that they can use to drive efficiency improvements that better optimize The Revenue Supply Chain.



Figure 10: Cost Per Milestone Interactive Visualization

# Revenue Insights

## Segmentation Analysis

Segmentation Analysis allows you to split your customers into different groups based on industry or location. This in return gives the ability to understand The Revenue Supply Chain by segment, create tailor-made and relevant advertisement campaigns, and optimize overall brand positioning. Segmentation analysis helps you better understand when to enter a segment, the velocity of a segment, and successfully position yourself against your competitors and understand trends so you can target your audience with the right marketing messages.

| <div> Industry Group Location </div> |             |                  |                          |            |                    |
|--------------------------------------|-------------|------------------|--------------------------|------------|--------------------|
| Industry Group                       | Sales Ready | Sales Validation | Active Sales Opportunity | Closed Won | Avg. Days to Close |
| Financial Services                   | \$75.0M     | \$37.0M          | \$26.2M                  | \$10.5M    | 355                |
| Government & Military                | \$50.0M     | \$25.0M          | \$17.5M                  | \$7.0M     | 270                |
| Healthcare                           | \$50.0M     | \$25.0M          | \$17.5M                  | \$7.0M     | 402                |
| Manufacturing                        | \$40.0M     | \$20.0M          | \$14.0M                  | \$5.6M     | 70                 |
| Media & Entertainment                | \$25.0M     | \$12.0M          | \$8.7M                   | \$3.5M     | 100                |
| Messaging and Telecommunications     | \$20.0M     | \$10.0M          | \$7.0M                   | \$2.8M     | 80                 |
| Transportation                       | \$10.0M     | \$5.0M           | \$3.0M                   | \$1.4M     | 130                |
| Total                                | \$270.0M    | \$135.0M         | \$94.5M                  | \$37.8M    | 40                 |

Figure 11: Segmentation Interactive Visualization

## Cohort Analysis

Cohort Analysis tracks customer groups based on the year they were acquired. A time-based cohort analysis is critical for understanding customer retention, expansion and churn. Ideally, revenue grows year-over-year and as the business matures average sales price goes up. In addition, Cohort Analysis uses Compound Annual Growth Rate (CAGR) to measure growth. By looking at a holistic view of customer growth over time, marketers can assess the health of any customer cohort and make strategic decisions around the larger marketing mix.



Figure 12: Cohort Analysis Interactive Visualization

# Revenue Insights

## What is the Key Metrics Cheat Sheet?

Choosing the right metrics to monitor is critical for making key decisions to fuel growth. To properly evaluate your business, you need historical metrics to track the growth and identify trends. The Key Metrics Cheat Sheet provides quarterly snapshots of critical metrics to track growth and return on investment. You can filter the Key Metrics Cheat Sheet to look at specific segments of your business or look at your business in aggregate. It also allows you to arm finance with critical metrics for building financial models and forecasting growth.

|                            | « 2019 »  |             |             |             | 2020 »      |             |             |             | CAGR |
|----------------------------|-----------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|------|
|                            | Q1        | Q2          | Q3          | Q4          | Q1          | Q2          | Q3          | Q4          |      |
| Revenue Supply Chain       |           |             |             |             |             |             |             |             |      |
| Revenue Suppliers          | \$500.00M | ▲ \$525.00M | ▲ \$551.25M | ▲ \$578.81M | ▲ \$607.75M | ▲ \$638.14M | ▲ \$670.05M | ▲ \$703.55M | 5%   |
| Sales Ready                | \$300.00M | ▲ \$315.00M | ▲ \$330.75M | ▲ \$347.29M | ▲ \$364.65M | ▲ \$382.88M | ▲ \$402.03M | ▲ \$422.13M | 5%   |
| Sales Validation           | \$100.00M | ▲ \$105.00M | ▲ \$110.25M | ▲ \$115.76M | ▲ \$121.55M | ▲ \$127.63M | ▲ \$134.01M | ▲ \$140.71M | 5%   |
| Active Sales Opportunities | \$50.00M  | ▲ \$52.50M  | ▲ \$55.13M  | ▲ \$57.88M  | ▲ \$60.76M  | ▲ \$63.81M  | ▲ \$67.00M  | ▲ \$70.36M  | 5%   |
| Won Opportunity            | \$5.00M   | ▲ \$5.25M   | ▲ \$5.51M   | ▲ \$5.79M   | ▲ \$6.08M   | ▲ \$6.38M   | ▲ \$6.70M   | ▲ \$7.04M   | 5%   |
| Pipeline Growth            |           |             |             |             |             |             |             |             |      |
| New Logo Pipeline Added    | \$5.00M   | ▲ \$6.00M   | ▲ \$7.20M   | ▲ \$8.64M   | ▲ \$10.37M  | ▲ \$12.44M  | ▲ \$14.93M  | ▲ \$17.92M  | 20%  |
| Expansion Pipeline Added   | \$6.00M   | ▲ \$7.20M   | ▲ \$8.64M   | ▲ \$10.37M  | ▲ \$12.44M  | ▲ \$14.93M  | ▲ \$17.92M  | ▲ \$21.50M  | 20%  |
| Total Pipeline Added       | \$11.00M  | ▲ \$13.20M  | ▲ \$15.84M  | ▲ \$19.01M  | ▲ \$22.81M  | ▲ \$27.37M  | ▲ \$32.85M  | ▲ \$39.41M  | 20%  |
| Pipeline Coverage          |           |             |             |             |             |             |             |             |      |
| Opportunity Count          |           |             |             |             |             |             |             |             |      |
| Revenue Metrics            |           |             |             |             |             |             |             |             |      |
| Customer Metrics           |           |             |             |             |             |             |             |             |      |
| Average Sales Price        | \$50M     | ▲ \$50M     | ▲ \$50M     | ▲ \$50M     | ▲ \$50M     | ▲ \$50M     | ▲ \$50M     | ▲ \$50M     | 0%   |
| Average Days to Close      | \$138M    | ▲ \$138M    | ▲ \$138M    | ▲ \$138M    | ▲ \$138M    | ▲ \$138M    | ▲ \$138M    | ▲ \$138M    | 0%   |

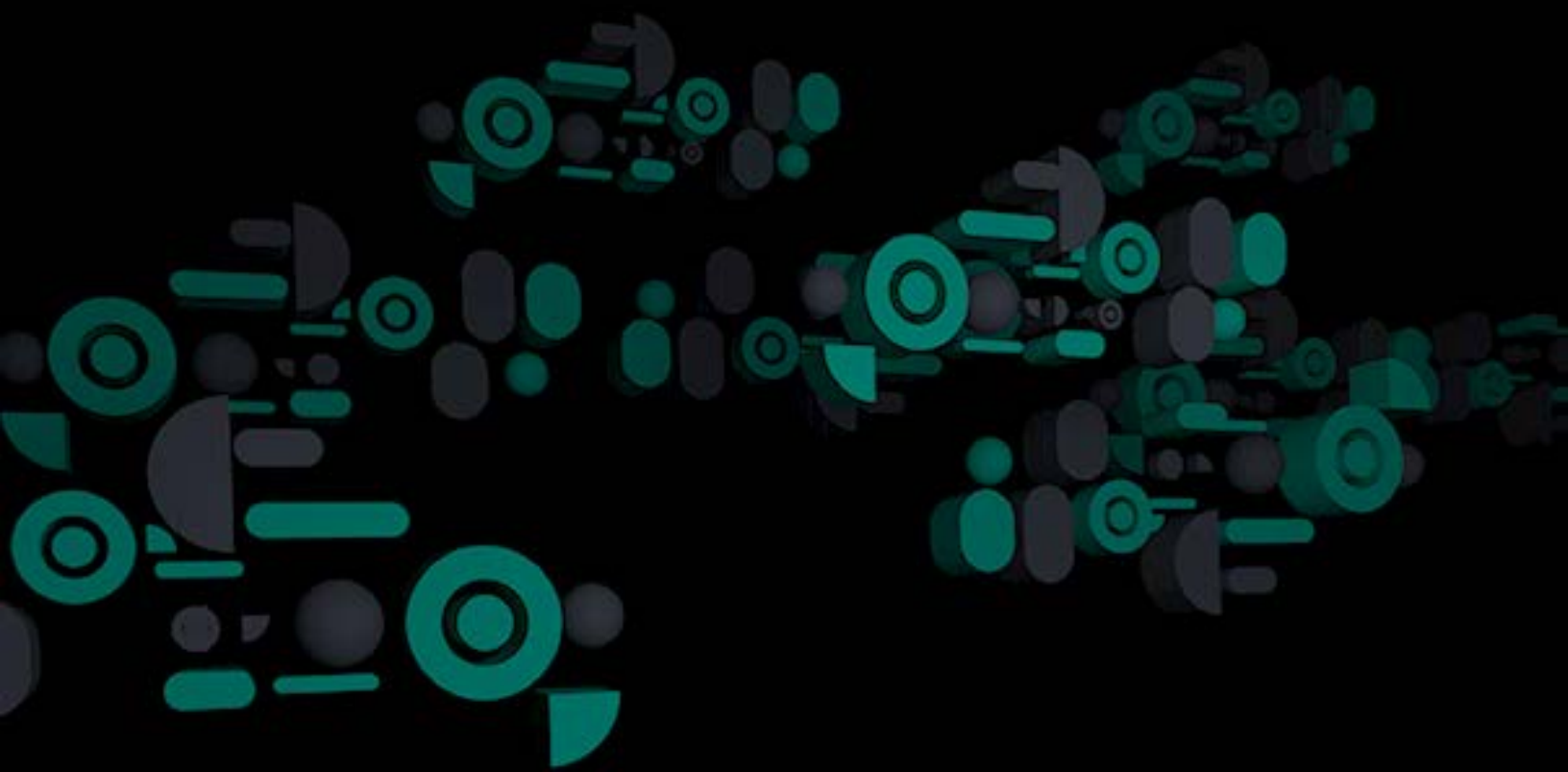
Figure 13: Key Metrics Interactive Visualization

## What is Marketing Program Budget?

Most leaders track marketing budgets using spreadsheets or financial tracking applications that are siloed from operational data. Mperativ enables marketing leaders to track quarterly marketing spend to ensure you stay within your planned, annual budget. Mperativ tracks marketing budget and actuals on a quarterly basis. The budget is broken into two categories -- Demand Generation and Brand Generation. At the start of a year, the marketing leader enters the planned quarterly budget. At the end of each quarter, the marketing leader inputs the actuals to track whether they are over or under budget. We do this at the high-level rather than item by item to ensure annual budgets are not exceeded. Most importantly, budget data is tracked over time, which allows us to measure marketing output of a year's worth of revenue growth for every dollar spent on marketing.



Figure 14: Marketing Budget Interactive Visualization



**Revenue Insights:**

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Whitepaper 11/2021

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