The Data Diet Menu

Questions To Answer Every Week

The Question	The Data-Driven Answer
(1) Are we on track to hit this quarter's bookings plan?	• To-Go Pipeline Coverage + Updated Forecast 　○ *Target = 3x+ to-go coverage* 　○ *Target = "Always be upsloping" forecast trend*
(2) What's our path to the quarter? Which deals matter the most?	• List of key deals with close-dates in this quarter, including: 　○ *Owner* 　○ *Opportunity name* 　○ *Amount* 　○ *Create + Close Date* 　○ *Age + Stage Duration* 　○ *Push count* 　○ *Next steps* 　○ *Last activity*
(3) Are we adding enough new opportunities to the pipeline?	• Qualified Opportunities created per week vs. target 　○ *Count: Target = 4 opportunities / week* 　○ *Amount: Target = $45k / week*
(4) Are we setting ourselves up to hit our bookings plan next quarter?	• To-Go Pipeline Coverage for Q+1 and Q+2 vs. plan 　○ *Target = Start each quarter with 3x+ pipeline coverage*
(5) How is the sales team performing?	• Bookings attainment vs. quota by sales rep – table incl. 　○ *Start date* 　○ *Last quarter results (bookings + % of quota)* 　○ *This quarter results:* 　　■ *Bookings + % of quota* 　　■ *Open pipeline + to-go coverage vs. quota* 　　■ *Count of open opportunities* 　　　• *This Q* 　　　• *All Q*
(6) How is marketing performing?	• Web traffic broken out by paid vs. organic • New marketing-sourced pipeline created by week 　○ *Amount: Target = $20k/week* 　○ *Count: Target = 2 week*

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(1) How is our forecast accuracy? Is it getting better over time?	• Week 4 forecast vs. final bookings by quarter, trended over time ○ *Target = Week 4 forecast = +/- 10% of final bookings each Q*
(2) How much pipeline did we convert to bookings? Is that trend getting better over time?	• Week 4 pipeline conversion %, trended for last 4 quarters of results ○ *Target = 40%+ week 4 conversion rate*
(3) What's our win-rate? Is it getting better over time?	• Closed-won / total closed won + lost bookings, trended for the last 4 quarters ○ *Target = QOQ growth of "total oppties seen" + improving win-rates*

(4) How efficient is our sales + marketing spend?	• Customer Acquisition Cost, trended for the last 4 quarters
	   ○ *Target = <$10k CAC*
	• CAC Payback period, trended for last 4 quarters
	   ○ *Target = <2 year CAC Payback*

(5) Where is the cross-sell whitespace for existing customers? Are we making progress converting it to bookings?	• % penetration by product w/ existing customers, trended for last 4 Q • Updated total whitespace amount ($) for core products