

Data Analysis & Recommendation

Business Challenge	Top Lead Sources by # of Leads and Opportu..	Highest Value Opportunities	Opportunity Owners	Win/Loss	Key Insights	Hypothesis
--------------------	--	-----------------------------	--------------------	----------	--------------	------------

Where should management invest further or scale back efforts to increase revenue output from the sales team?

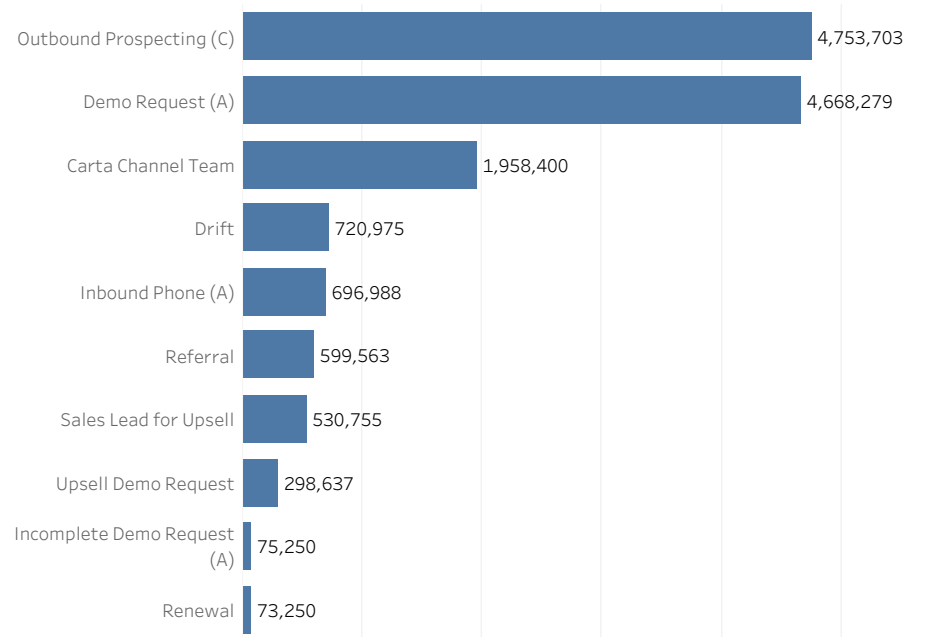
What opportunities and problems can be identified the analysis?

What should management do about them going forward?

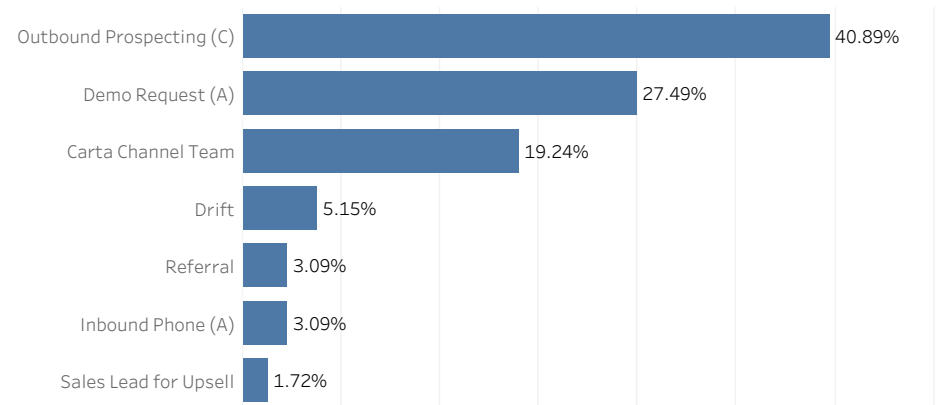
Data Analysis & Recommendation

Business Challenge	Top Lead Sources by # of Leads and Opportu..	Highest Value Opportunities	Opportunity Owners	Win/Loss	Key Insights	Hypothesis
--------------------	--	-----------------------------	--------------------	----------	--------------	------------

Top 10 Most Valuable Lead Sources



of Open Opportunities from Lead Sources



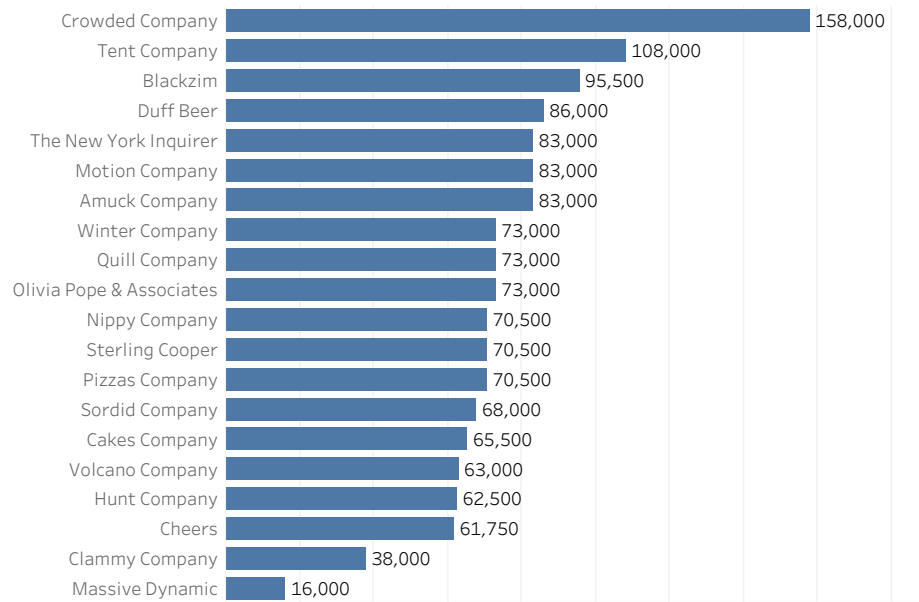
Data Analysis & Recommendation

Business Challenge	Top Lead Sources by # of Leads and Opportu..	Highest Value Opportunities	Opportunity Owners	Win/Loss	Key Insights	Hypothesis
--------------------	--	-----------------------------	--------------------	----------	--------------	------------

Highest Value Amount by Type



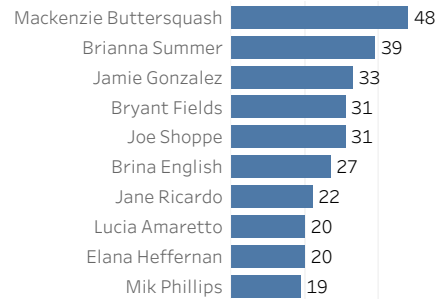
Top Open Opportunities



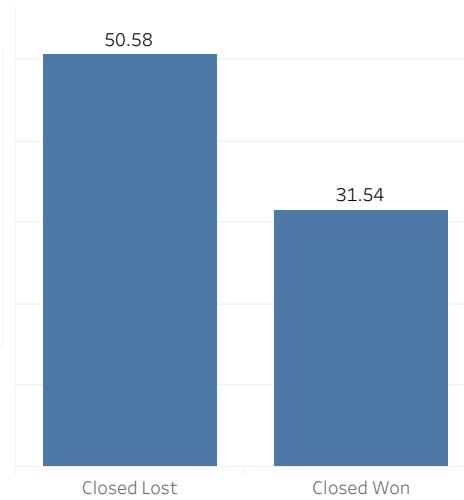
Data Analysis & Recommendation

Business Challenge	Top Lead Sources by # of Leads and Opportu..	Highest Value Opportunities	Opportunity Owners	Win/Loss	Key Insights	Hypothesis
--------------------	--	-----------------------------	--------------------	----------	--------------	------------

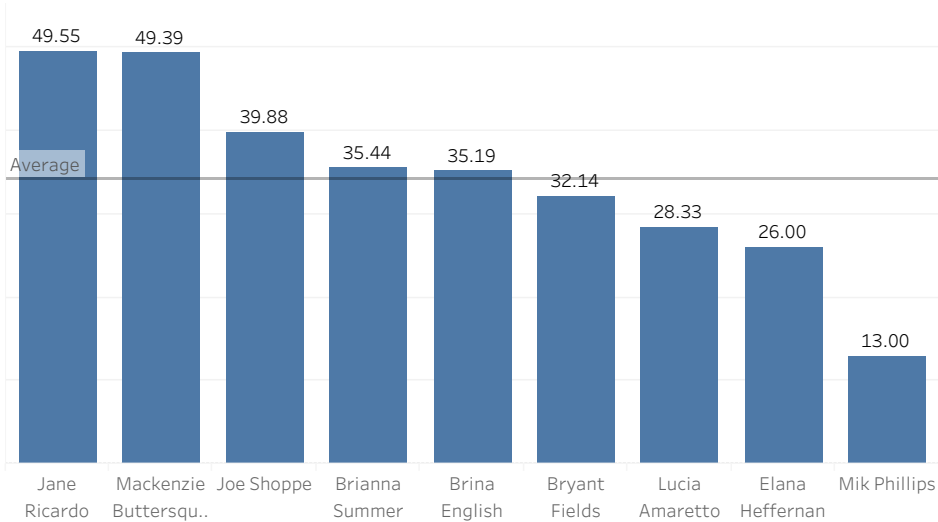
of Open Opportunities per Owner



Avg Days to Close by Stage

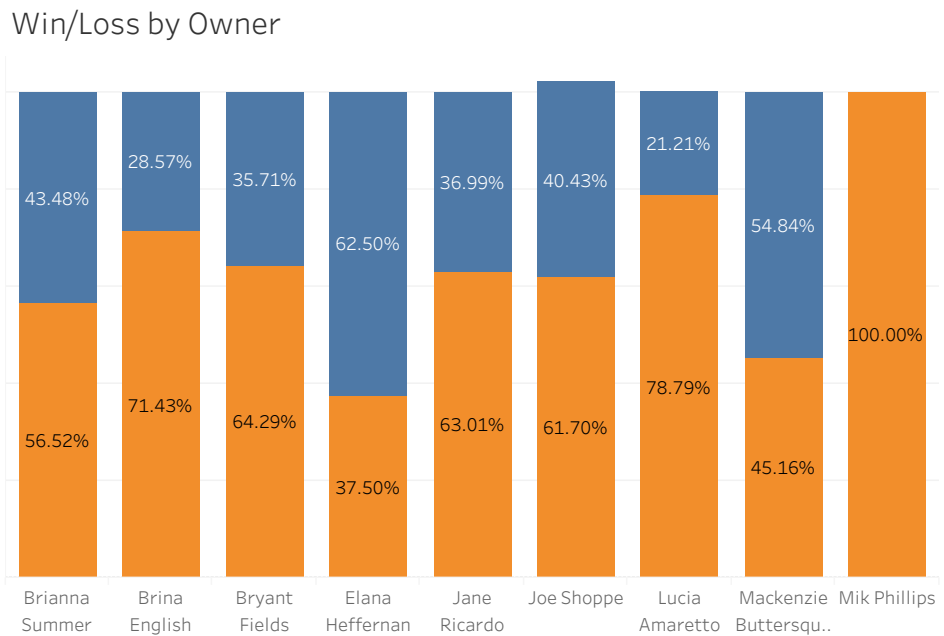
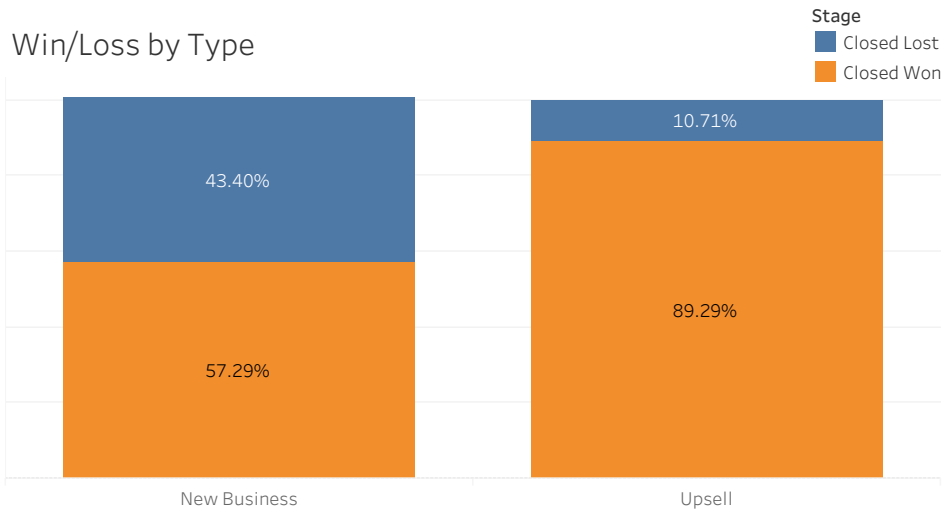


Avg Days to Close per Owner



Data Analysis & Recommendation

Top Lead Sources by # of Leads an..	Highest Value Opportunities	Opportunity Owners	Win/Loss	Key Insights	Hypothesis	Proposed Approach
-------------------------------------	-----------------------------	--------------------	----------	--------------	------------	-------------------



Data Analysis & Recommendation

Top Lead Sources by #.	Highest Value Opportunities	Opportunity Owners	Win/Loss	Key Insights	Hypothesis	Proposed Approach
------------------------	-----------------------------	--------------------	----------	--------------	------------	-------------------

Outbound prospecting, demo requests, and the Carta Channel Team represent 87.62% of the total number of leads

New business represents 96.05% of the potential revenue opportunity

The number of deals per owner is not spread out evenly

The average time to close a deal is 34 days

The win rate is 57% among new business and 89% among upsell opportunities

Data Analysis & Recommendation

Top Lead Sources by #.	Highest Value Opportunities	Opportunity Owners	Win/Loss	Key Insights	Hypothesis	Proposed Approach
------------------------	-----------------------------	--------------------	----------	--------------	------------	-------------------

Will allocating new leads more evenly across sales reps will increase overall win rates for the Carta sales team?

Null Hypothesis: Win rates do not increase

Alternative Hypothesis: Win rates increase

Data Analysis & Recommendation

Top Lead Sources by #.	Highest Value Opportunities	Opportunity Owners	Win/Loss	Key Insights	Hypothesis	Proposed Approach
------------------------	-----------------------------	--------------------	----------	--------------	------------	-------------------

Step 1: Rotating lead allocation

- Ensure each new lead gets evenly distributed among the sales rep by implementing a rotation

Step 2: Alignment

Align with the appropriate stakeholders to ensure the new methodology and process is agreed upon and understood by all relevant parties:

- Business Operations
- Carta Channel Team
- Marketing
- Outbound Prospecting Team
- Sales Team (Leadership, Operations, Reps, Strategy)

Step 3: Measuring results

- Win rates would be the "north star" metric
- Align on a specific win rate that the team can consider "successful"
- Other key performance indicators to measure are: win rate per type, win rate per rep, average time to close a deal, average time to close a deal per rep, number of open opportunities per rep, and win-loss ratio