



BoostUp[!]

Quarterback

Forecast & Pipeline Risk Assessment

BoostUp's "Quarterback" will surface the 'BS' in your pipeline, key deals at risk, winning (and losing) patterns of your reps, and what to do about it.

80% of the B2B buying experience is digital yet **64%** of Revenue Leaders are NOT using Data-Driven -Quantitative- methods to Forecast.

Stop guessing and get ahead of your competition. BoostUp turns your activity data into Forecasting and Revenue Insights so you know where the risk is and what to do about it.

Here's what you'll get:

- Actionable next steps to hit your forecast
- Risk profile for your current quarter pipeline
- Key risk indicators & most prevalent risk factors
- Specific deals at risk and potential upside (Potential pull forwards and upside deals)
- High and low performer patterns and analysis

Key Findings & Recommendations (example)

43% of all Current active deals are at high risk

Early-stage opportunities in CQ at higher risk

Opportunities to reduce risk with better rep execution

Total pipeline, and risk heavily weighted towards end of quarter

High degree of stagnancy/ inaccuracy driving risk in early stages

Increase rep activity and engagement with critical stakeholders

What we need from you...

CRM Access for Data pull (done via OAuth)

App installed into email system

2 weeks to complete analysis of data

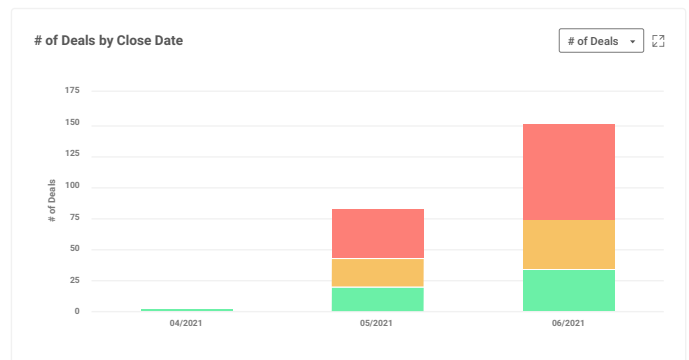
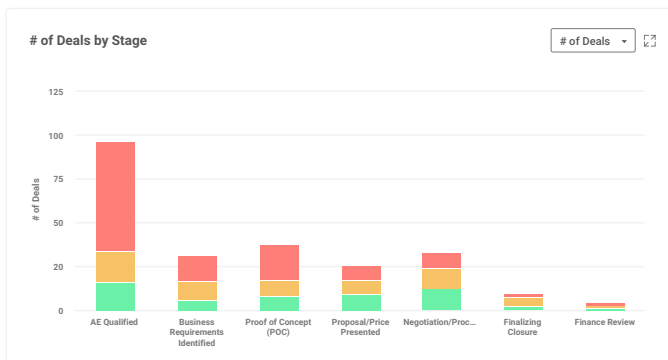
No user adoption — we'll just plug into your data and show you where the risk is.

GET STARTED

Risk Profile

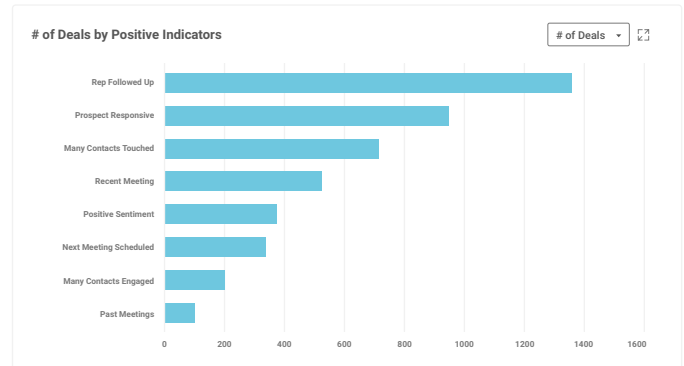
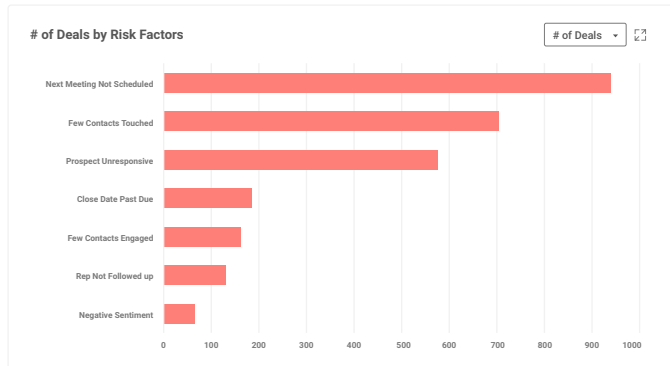


Inspecting current quarter pipeline, we see that 43.5% of all active deals by volume are flagged as high risk, when looking at risk as a percentage of revenue that rate reduces to 34%. High risk deals are fairly proportionate as stages progress, but the rate of medium risk deals tends to increase at the Negotiation stage. Low risk deals tend to increase at Proof of Concept, but then decrease closer to close.



Looking at risk by stage and time in quarter, we see the risk trends visualized differently. Key findings are that early stages which have higher risk profiles have a majority of close dates set to end of quarter. Furthermore, we found 12% of deals in stage 1 have been created 8 or more months ago with no progress, all were found to be in the high risk category. Digging further in deals set to close in the last quarter of the month had the highest risk profile, and the highest rate of stagnancy, unless addressed this will lead to large numbers of pushes coming in to the end of quarter.

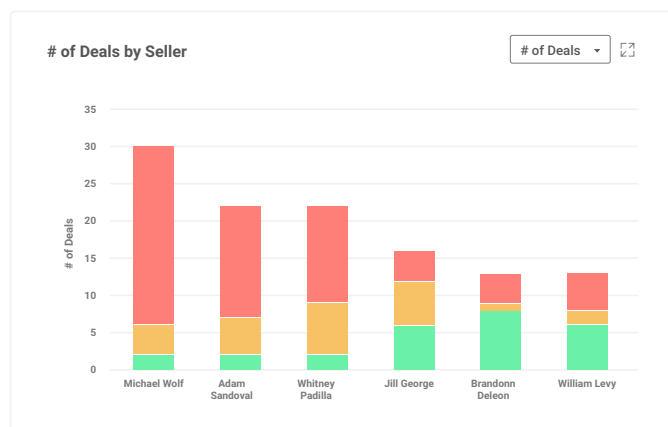
Risk Factors



Looking at the most common risk factors we see that the top 3 most common factors are: Not scheduling the next meeting, Too Few contacts touched in target accounts, and unresponsive prospects. These factors may be biased by the early-stage deals not being managed or eliminated from the pipeline appropriately. These factors can be resolved with coaching reps to correct the behavior and cleaning out their pipeline.

We are seeing some healthy behavior and good follow-up from reps fairly broadly throughout the pipeline.

High and Low Performers



When analyzing the risk profiles of your reps we found risk to be directly correlated with level of activity with low performers. Deals tend to have lower activity from the rep and low engagement from the customer, many of these deals fall into the stagnant early stage cohort of deals.

High performing reps with lower overall risk profiles tend to fall into the upper middle of activity, but accel in customer responsiveness and number of individuals involved from the customer side of deals.



Key Deals at Risk

After analyzing current quarter commit deals, we see that 82 deals worth \$1.6 Million are considered to be at high risk, and 138 deals worth \$4.2 Million are at medium risk. The majority of these committed deals are currently in negotiation stages. A typical risk profile of this type with commit deals typically suggests a shortfall of \$2.5-3.5Million compared to what exists in commit today.

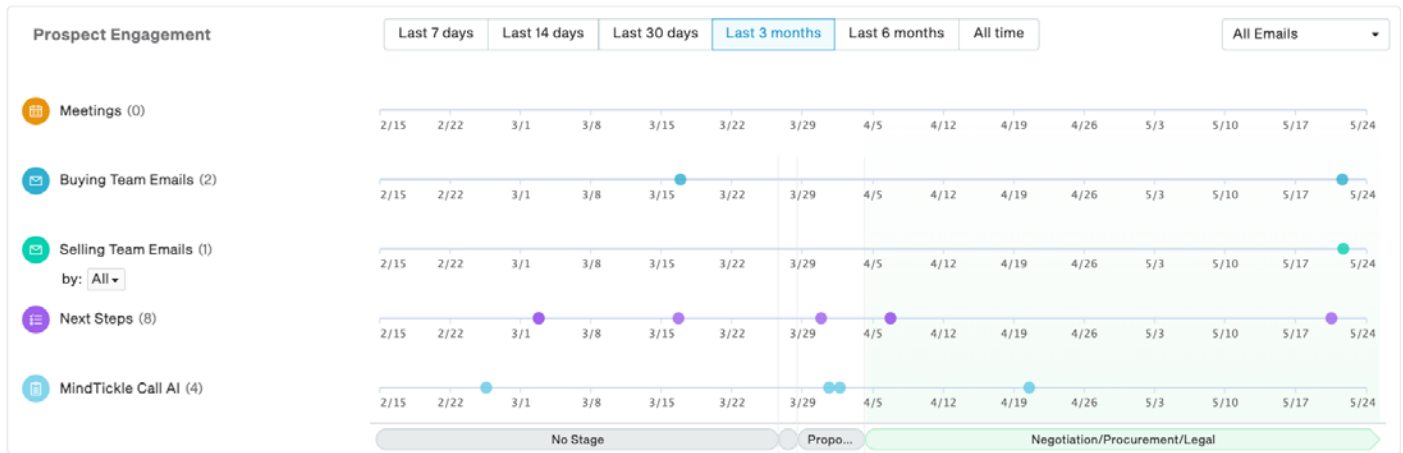
An analysis of larger deals in high or medium risk which need some additional attention are below.

 **Nunez Group** | \$470,000 | **Risk Score: 64/74 (Medium Risk)**

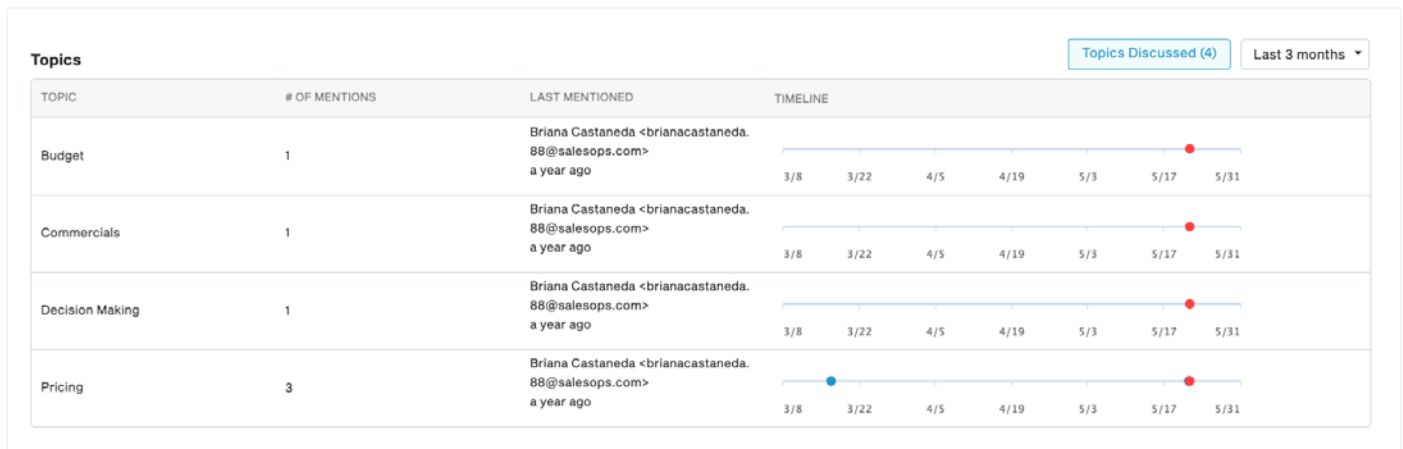
Risk Factors

All (4)	 (1)	 (3)
No meeting scheduled since last meeting 4 months ago		
Rep followed up (5 emails) after last meeting		
Prospect engaged in the past day		
2 contacts touched in the past 14 days		

The most relevant risk factor in this deal is the lack of recent meetings when compared to earlier in the sales cycle. We do see positive indications of rep activity, although relative activity is low for the time frame considered. Prospect has recently re-engaged with sales.



Looking at the most recent 3 months of interaction data, we see that there is limited engagement between buying and selling teams. They have recently begun communicating again, but the level of communication is not indicative of an opportunity in an active negotiation cycle.



Data suggests that this deal will push.

When analyzing the recent topics discussed we do see some discussions that would align with negotiations, but as the color of the dots suggest, these topics are being proactively mentioned by the sales team, with no reciprocation by the customer currently.

What are you waiting for?

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