

This Revenue and KPI Assessment Report Document for SC Testing, Inc. (Sample Company Testing Inc.), was created as a template to help companies model their own business overviews.

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If you want some perspective on how you or your company needs to enhance their Sales/Client Management Capabilities, please email me at shubhanjan.saha@gmail.com

Please Note that the Names, locations and numbers in this Report are all fictional

Deal Support Guy

New Revenue and KPI Assessment Report Sample Analysis

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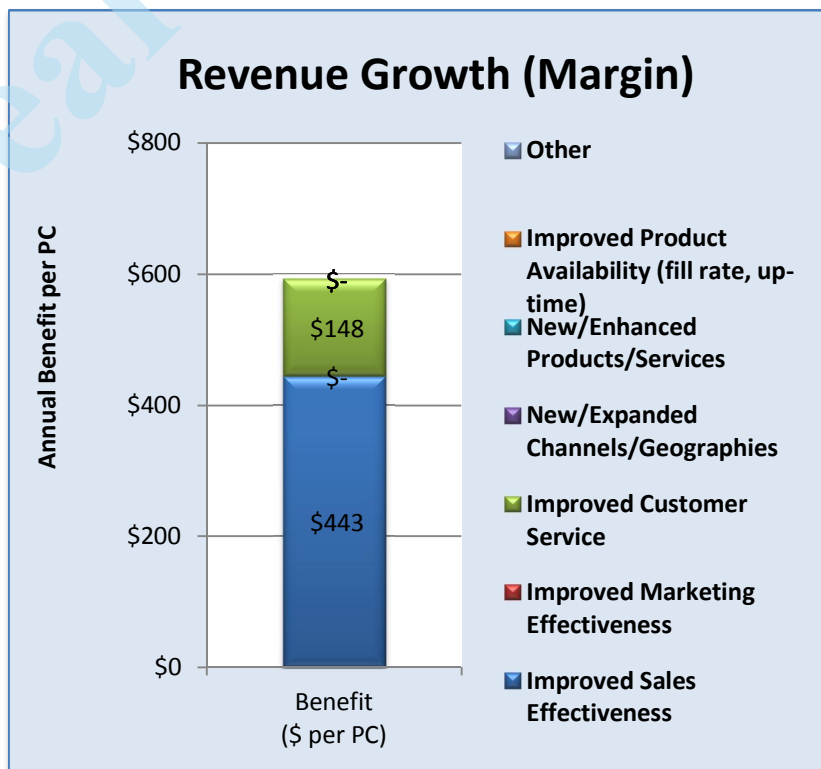
Revenue Increment

This report reflects the incremental revenue enabled by the solution.

Note : As not all projects will have credibly quantifiable revenue impacts, so revenue impacts can be difficult to accurately assess. Research, analysis, and supplemental modelling is likely needed to credibly estimate true revenue impacts. One key is to target (at a detailed level) precisely what portion of revenue is likely to be impacted (the segment) and how the solution is enabling the revenue increase (the driver). This report assumes the initiative will enable a one-time revenue increase (the same annual revenue benefit throughout the life of the solution). Note that the benefit is the marginal profit on the incremental revenue, not the revenue itself. As in the long run, on average, fixed costs tend to increase at the same rate as revenue growth

SUMMARY

	Revenue (\$000)	Margin (\$000)	Benefit (\$ per PC)
Improved Sales Effectiveness	\$16,067	\$3,702	\$443
Improved Marketing Effectiveness			
Improved Customer Service	\$ 5,356	\$1,234	\$148
New/Expanded Channels/Geographies			
New/Enhanced Products/Services			
Improved Product Availability (fill rate, up-time)			
Other			
Total (Annual)	\$21,423	\$4,936	\$591
Total (3-Year)	\$64,268	\$14,809	\$1,773



Addressed Segments (products, channels, geographies, business unit, and/or markets)	Segment Revenue			Revenue Increase Driver %							Annual Benefit (\$000)
	Revenue (% of Total)	Revenue (\$000)	Profit Margin (% of Sales)	Improved Sales Effectiveness	Improved Marketing Effectiveness	Improved Customer Service	New/Expanded Channels/Geographies	New/Enhanced Products/Services	Improved Product Availability (fill rate, up-time)	Other	
Segment A1	3.0%	\$146,064	23	1.5	0	0.5	0	0	0	0	\$673
Segment A2	3%	\$146,064	23	1.5	0	0.5	0	0	0	0	\$673
Segment A3	3%	\$146,064	23	1.5	0	0.5	0	0	0	0	\$673
Segment A4	2%	\$97,376	23	1.5	0	0.5	0	0	0	0	\$449
Segment B1	2%	\$97,376	23	1.5	0	0.5	0	0	0	0	\$449
Segment B2	2%	\$97,376	23	1.5	0	0.5	0	0	0	0	\$449
Segment B3	2%	\$97,376	23	1.5	0	0.5	0	0	0	0	\$449
Segment B4	1%	\$48,688	23	1.5	0	0.5	0	0	0	0	\$224
Segment C1	1%	\$48,688	23	1.5	0	0.5	0	0	0	0	\$224
Segment C2	1%	\$48,688	23	1.5	0	0.5	0	0	0	0	\$224
Segment C3	1%	\$48,688	23	1.5	0	0.5	0	0	0	0	\$224
Segment C4	1%	\$48,688	23	1.5	0	0.5	0	0	0	0	\$224
All Other (Not Impacted)	78%	\$3,797,665	0	0	0	0	0	0	0	0	
Total	100%	\$4,868,801	5.1								\$4,936

KPI Assessment

Not all benefits can credibly be translated into financial (\$) benefit terms. These are sometimes referred to as intangible benefits. This report provides a structure (one of many) to estimate how the initiative may impact non-financial KPIs.

Note : The percentiles shown are how the organization's KPI performance compares to others in the industry. 0% represents worst performance in the industry (laggard); 50% is average performance; 100% is best in the industry (world class performance). For example, being at the 20th percentile implies that 80% of the other organizations in the industry perform better. The "Improvement" indicates how much the organization is expected to improve KPI performance due to the solution. The report assumes a linear relationship between KPI performance and industry percentile

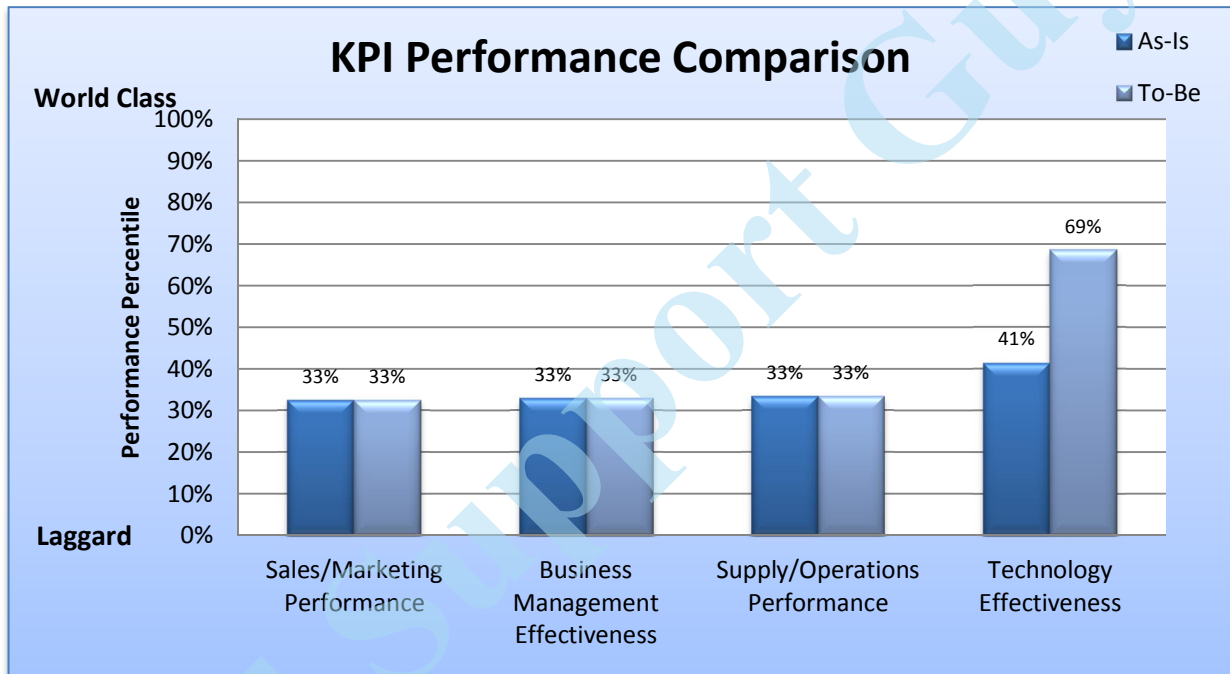
SUMMARY

The category as-is, to-be, and improvement average percentiles are summarized below.

Note: the improvement (Imp.) is not the KPI value % improvement, it shows the percentile point improvement.

Sales/Marketing Performance
Business Management Effectiveness
Supply/Operations Performance
Technology Effectiveness
Average

Percentile		
As-Is	To-Be	Imp.
33%	33%	0%
33%	33%	0%
33%	33%	0%
41%	69%	27%
35%	42%	7%



Business Objective	KPI / Metric	Industry KPI Values		Organization Performance				
		Laggard	World Class	Percentile		KPI Value		
				As-Is	To-Be	As-Is	To-Be	Improvement %

Sales/Marketing Performance

Customer Acquisition	Close rate (% of qualified sales opportunities)	15%	19%	30%	30%	16%	16%	0%
Customer Retention	Customer annual turnover (%)	12%	10%	30%	30%	11%	11%	0%
Customer Satisfaction	% of customers that are highly satisfied when surveyed	30%	95%	40%	40%	56%	56%	0%
Sales-based document collaboration Efficiency	Time to respond to RFP (days)	10.0	5.0	30%	30%	8.5	8.5	0%

Business Management Effectiveness

Decision-Making Speed / Reaction Time to Market Event/Opportunity	Days to accumulate information, analyze, collaborate, decide, plan (for information-intensive decisions)	10.0	5.0	30%	30%	8.5	8.5	0%
Business Visibility	% of analytical data easily accessible to authorized decision-makers	15%	75%	30%	30%	33%	33%	0%
Business Alignment	% of org. with auto-updated KPIs linked to corporate objectives	15%	75%	30%	30%	33%	33%	0%
Decision-Making Effectiveness	Decision success rate %	65%	75%	30%	30%	68%	68%	0%
Information Availability	% of desired information readily available	30%	60%	30%	30%	39%	39%	0%
Information Quality	% of analytical data with single trusted access point	30%	75%	30%	30%	44%	44%	0%
Mergers & Acquisition Analysis Speed	Months to complete analysis, workflows, due diligence, regulatory approvals, legal docs, etc.	5.0	3.0	50%	50%	4.0	4.0	0%

Supply/Operations Performance

Quality of Products/Services	Customer preference vs. competitive products % (e.g. blind taste test)	30%	70%	30%	30%	42%	42%	0%
Defect rate	# of process/product/service defects/errors per 1000	45.0	2.0	50%	50%	23.5	23.5	0%
Forecast Accuracy	Avg forecast error %	25%	13%	30%	30%	21%	21%	0%
Supply Chain Effectiveness	On-time delivery	90%	95%	30%	30%	91%	91%	0%
Cash Cycle Time	Days	30.0	24.0	30%	30%	28.2	28.2	0%
Project management effectiveness	% of document-intensive projects that complete on-time / on-budget	50%	70%	30%	30%	56%	56%	0%

Technology Effectiveness

Records Compliance (centralized content control)	% of electronic content (shared documents, reports, web content, email) that is controlled (retention, security, reuse, storage) centrally	30%	99%	30%	50%	51%	65%	27%
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Service Level Agreement Performance	SLA achievement %	10%	90%	40%	70%	42%	66%	57%
Maturity Level	Best practice adoption %	10%	90%	40%	70%	42%	66%	57%
System response time	Average system (local/LAN/WAN) response delay (Seconds)	3.0	0.2	50%	80%	1.6	0.8	53%
Application delivery agility	Time (days) to deliver applications; time to start delivery	120.0	35.0	50%	80%	77.5	52.0	33%
User computing experience satisfaction	% of users that are highly satisfied when surveyed	30%	95%	40%	60%	56%	69%	23%
Security	# of vulnerabilities (reduce attack surface)	50.0	20.0	40%	70%	38.0	29.0	24%