



New User Onboarding

Your path to revenue growth.

Agenda & Objectives

Creating a GTM Plan

Configuring Insights (Dashboards)

Refining Model Inputs

Measuring & Tracking Progress

Creating Scenarios

Managing Playbooks

MultiplyGTM Glossary of terms: <https://multiplygtm.com/glossary>

Objectives

- ✘ Understand your model
- ✘ Learn how to leverage insights
- ✘ Optimize & adjust over time

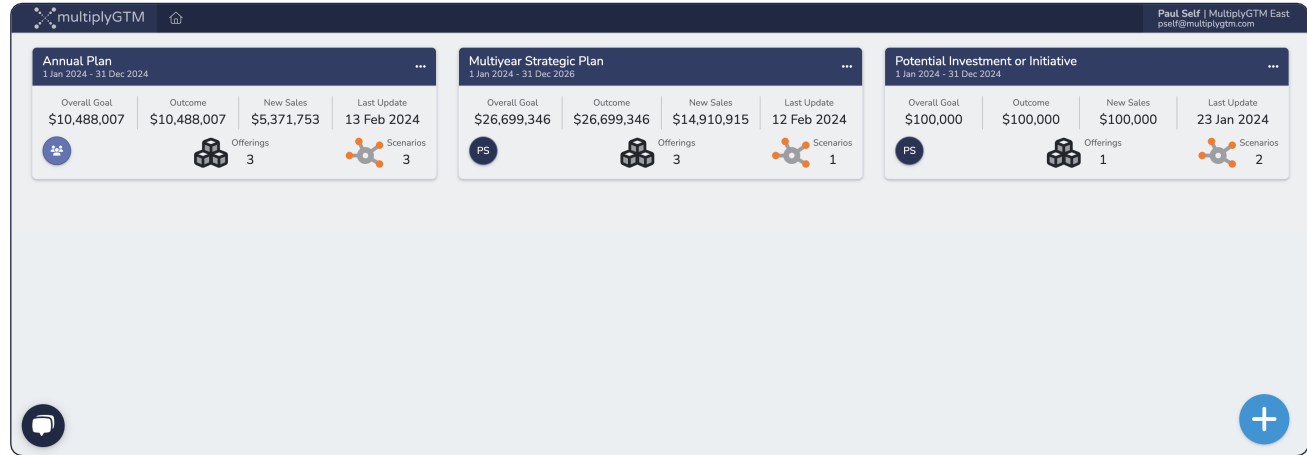
**Provide a clear
roadmap to harness
your growth
potential.**

Creating a GTM Plan

Navigation Overview

MultiplyGTM Home

Link: my.multiplygtm.com



The screenshot displays the MultiplyGTM dashboard with three main plan cards. Each card shows financial metrics and update information.

Plan Type	Overall Goal	Outcome	New Sales	Last Update	Offerings	Scenarios
Annual Plan (1 Jan 2024 - 31 Dec 2024)	\$10,488,007	\$10,488,007	\$5,371,753	13 Feb 2024	3	3
Multiyear Strategic Plan (1 Jan 2024 - 31 Dec 2026)	\$26,699,346	\$26,699,346	\$14,910,915	12 Feb 2024	3	1
Potential Investment or Initiative (1 Jan 2024 - 31 Dec 2024)	\$100,000	\$100,000	\$100,000	23 Jan 2024	1	2

Playbook Listing:

- ✘ Playbook summary
- ✘ Copy & delete existing playbooks
- ✘ Create new playbooks

Playbook Create

Establish Foundation

Projected Outcome (\$) 10,000,000
New Sales (\$) 10,000,000
Monthly Recurring Revenue (\$) 833,333

Playbook Name
[New Playbook]

Plan Duration
Next year

Start
1 Jan 2024

Finish
31 Dec 2024

Goal Type
Total Revenue

Goal
\$ 10,000,000

Existing Revenue (Monthly)
\$ 0

New Sales Growth
Increase over time

Lead Stages & Target Performance
Basic AIDA

Lead Origin
Marketing (Inbound) 40% | Sales (Outbound) 60%

Pipeline Performance

Adopt industry benchmarks or automatically interrogate your own CRM historical performance to form the basis of your pipeline characteristics

Goal Hierarchy

- [New Playbook] +
- Geo/Region 1 x +
- Team/Seller x +
- Geo/Region 2 x +
- Team/Seller x +

Offerings

Name	Recurring	Unit Price
Product 1	<input checked="" type="checkbox"/>	\$10,000
Service 1	<input type="checkbox"/>	\$5,000

Budget

Marketing (Inbound) \$ 0 | Sales (Outbound) \$ 0

Cost Per Lead

Marketing (Inbound) Awareness | Sales (Outbound) Interest

Cost Per Lead \$ 0 | Cost Per Lead \$ 0

Goal Type | Goal Hierarchy | Offerings | Lead Stages | Customer Acquisition Cost: Budget + Calculated Cost

Timeline Filter

Filter & progress to any point in time



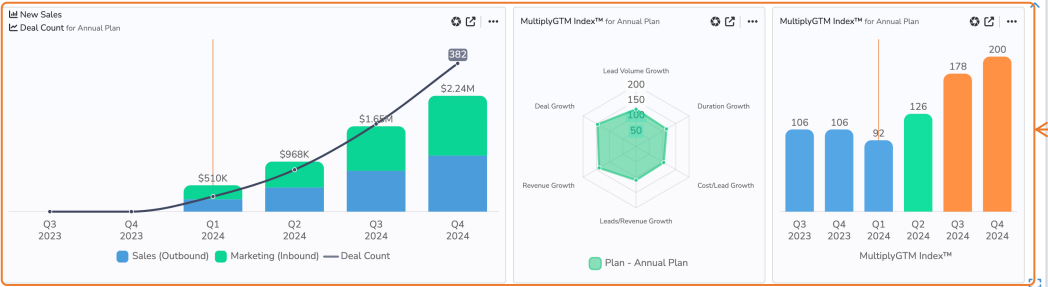
Ribbon

Select from library of metrics

Insight Sections

Configurable grouping of Insights

- 1. Summary
- 2. MultiplyGTM Index
- 3. Marketing Plan
- 4. Sales Plan
- 5. Leads and New Sales
- 6. Timeline
- 7. Recurring Revenue
- 8. Cost



Selected Insights

- 4 Types + Templates
- Exec. Summary
- Value Analyzer
- Volume Analyzer
- Velocity Analyzer

Model Input Categories

Refine inputs to your model at a granular level

Acquisition	Goal Type	New Sales			Retention	New Sales Target			
Goal Hierarchy	ARR	Closed Won	In Play	Left To Go	MRR	Q1 2024	Q2 2024	Q3 2024	Q4 2024
Annual Plan 100%	\$10,000,000	\$0	\$0	\$5,371,753	\$450,000	\$644,610	\$966,916	\$1,665,243	\$2,094,984
North America 20%	\$1,956,450	\$0	\$0	\$2,045,990	\$0	\$245,519	\$368,278	\$634,257	\$797,936
Enterprise 7.4%	\$1,446,073	\$0	\$0	\$1,508,751	\$0	\$181,050	\$271,575	\$467,713	\$588,413
New 8.2%	\$1,190,880	\$0	\$0	\$1,253,558	\$0	\$150,427	\$225,640	\$388,603	\$488,888
Upsell 18%	\$255,193	\$0	\$0	\$255,193	\$0	\$30,623	\$45,935	\$79,110	\$99,525
Mid-Market 26%	\$510,377	\$0	\$0	\$537,239	\$0	\$64,469	\$96,703	\$166,544	\$209,523
Europe 3.1%	\$3,159,475	\$0	\$0	\$3,325,763	\$0	\$399,092	\$598,637	\$1,030,987	\$1,297,048
Retention 8.9%	\$4,884,075	\$0	\$0	\$0	\$450,000	155 Index	\$0	\$0	\$0

Goal Hierarchy

Allocation of goal responsibility
Filters Insights & Metrics

Timeline Filter



Turquoise marker with goal flag:

- ✘ Acts as a model filter for insights & metrics displaying values that support wins up to the specified date.

Orange performance-to-date bar:

- ✘ Automatically positioned based upon last date you synchronized with HubSpot or Salesforce

All insights, ribbon metrics, & reporting adhere to these markers.

Plan Refinement Input Categories



Goal Allocation

Allocate goal responsibility across your goal hierarchy.



Quarterly Goals

Establish quarterly new sales / bookings targets.



Offerings

Identify recurring & non-recurring offerings.

Define unit price.

Assign new sales / bookings responsibility to offerings.



Customer Retention

Add existing recurring revenue.

Enter expected customer lifetime.

Define expected churn.



Lead Stages

Integrate or define marketing & sales stages.

Modify or enter stage duration & conversion rate.



Lead Origin

Define marketing & sales lead generation responsibility.



Customer Acquisition Cost

Establish marketing & sales budget.

Define cost elements as either fixed or variable.

Compare calculated cost to budgeted values.

Guidance

- ✘ Review each input category & refine the inputs where required.
- ✘ All inputs can be modified at the summary level or by exception for each element in your goal hierarchy.

Purpose: Allocate your goal across your defined goal hierarchy.

Goal Allocation

Quarterly Goals		New Sales			
Goal Hierarchy	Outcome	New Sales Goal	Actual	Remaining	
<ul style="list-style-type: none"> SaaS 2024 Plan 100% North America 41% Enterprise 77% New 71% Upsell 29% Mid-Market 23% EMEA 59% Enterprise 65% Mid-Market 35% 	\$10,500,000	\$5,383,746	\$1,177,694	\$4,206,052	
	\$4,000,000	\$2,209,311	\$483,287	\$1,726,024	
	\$2,950,000	\$1,696,518	\$371,113	\$1,325,404	
	\$2,450,000	\$1,196,518	\$261,738	\$934,779	
	\$500,000	\$500,000	\$109,375	\$390,625	
	\$1,050,000	\$512,793	\$112,174	\$400,620	
	\$6,500,000	\$3,174,435	\$694,408	\$2,480,027	
	\$4,225,000	\$2,063,383	\$451,365	\$1,612,018	
	\$2,275,000	\$1,111,052	\$243,043	\$868,010	
					\$133,326
					\$199,989
					\$344,426
					\$433,310

Goal Hierarchy	%	New Sales Goal
SaaS 2024 Plan	100%	\$5,383,746
North America	41%	\$2,209,311
Enterprise	77%	\$1,696,518
New	71%	\$1,196,518
Upsell	29%	\$500,000
Mid-Market	23%	\$512,793
EMEA	59%	\$3,174,435
Enterprise	65%	\$2,063,383
Mid-Market	35%	\$1,111,052

Steps:

- ✗ Select summary.
- ✗ Top-Down Option: Enter percentage spread to allocate goal value.
- ✗ Bottom-Up Option: Enter goal value & the summation will update changing the total goal value.

Purpose: Establish quarterly targets for new sales / bookings.

Quarterly Goals

Quarterly Goals			New Sales			New Sales Target			
Goal Hierarchy	Outcome	New Sales Goal	Actual	Remaining	Q1 2024	Q2 2024	Q3 2024	Q4 2024	
▼ SaaS 2024 Plan 100%	\$10,500,000	\$5,383,746	\$1,177,694	\$4,206,052	\$646,050	\$969,074	\$1,668,961	\$2,099,661	
▼ North America 41%	\$4,000,000	\$2,209,311	\$483,287	\$1,726,024	\$265,117	\$397,676	\$684,886	\$861,631	
▼ Enterprise 77%	\$2,950,000	\$1,696,518	\$371,113	\$1,325,404	\$203,582	\$305,373	\$525,921	\$661,642	
New 71%	\$2,450,000	\$1,196,518					\$370,921	\$466,642	
Upsell 29%	\$500,000	\$500,000					\$155,000	\$195,000	
Mid-Market 23%	\$1,050,000	\$512,793					\$158,966	\$199,989	
▼ EMEA 59%	\$6,500,000	\$3,174,435					\$984,075	\$1,238,030	
Enterprise 65%	\$4,225,000	\$2,063,383					\$639,649	\$804,719	
Mid-Market 35%	\$2,275,000	\$1,111,052					\$344,426	\$433,310	

Fill Down ✕

Q1 2024	Q2 2024	Q3 2024	Q4 2024
→ <input type="text" value="12%"/>	<input type="text" value="18%"/>	<input type="text" value="31%"/>	<input type="text" value="39%"/>
\$646K	\$969K	\$1.67M	\$2.1M

Override Plugged Values

Steps:

- ✕ Click summary or child quarterly goal.
- ✕ Enter percentage spread for each quarter.
- ✕ If a summary is selected, you can optionally override previously "plugged" values for child elements by checking the "Override Plugged Values" checkbox.

Purpose: Identify new sales / bookings by offering.

Offerings

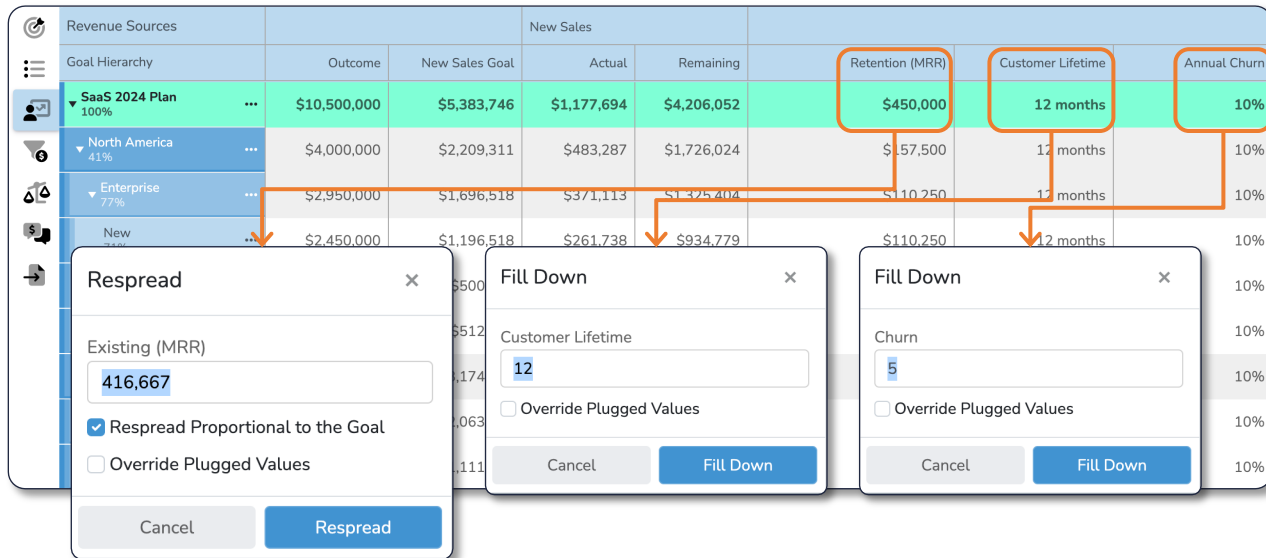
Offerings		New Sales				Starter Package	Pro Package	Onboarding Services			
Goal Hierarchy	Outcome	New Sales Goal	Actual	Remaining	New Sales %	Unit Price	New Sales %	Unit Price	New Sales %	Unit Price	
▼ SaaS 2024 Plan 100%	\$10,500,000	\$5,383,746	\$1,177,694	\$4,206,052	33.33%	\$8,000	61.9%	\$25,000	4.76%	\$10,000	
▼ North America 41%					30.63%	\$8,000	65%	\$40,000	4.38%	\$10,000	
▼ Enterprise 77%					29.07%	\$8,000	66.78%	\$40,000	4.15%	\$10,000	
▼ New 71%					35%	\$8,000	60%	\$40,000	5%	\$10,000	
▼ Upsell 29%	\$1.79M	\$3.33M	\$256K		0%	\$8,000	100%	\$40,000	0%	\$10,000	
▼ Mid-Market 23%								\$40,000	5%	\$10,000	
▼ EMEA 59%								\$20,000	5%	\$10,000	
▼ Enterprise 65%	\$4,225,000	\$2,063,383	\$451,365	\$1,612,018				\$20,000	5%	\$10,000	
▼ Mid-Market 35%	\$2,275,000	\$1,111,052	\$243,043	\$868,010				\$20,000	5%	\$10,000	

Steps:

- ✗ Offerings can be either recurring (included in MRR or ARR) or non-recurring.
- ✗ Add new offerings using “+” icon.
- ✗ Modify existing offerings using “...” ellipsis.
- ✗ Update percentage spread for new sales / bookings for each offering.
- ✗ Update unit price for each offering.
- ✗ If a summary is selected, you can optionally override previously “plugged” values for child elements by checking the “Override Plugged Values” checkbox.

Customer Retention

Purpose: Capture inputs related to customer revenue & retention.



Goal Hierarchy	Outcome	New Sales Goal	Actual	Remaining	Retention (MRR)	Customer Lifetime	Annual Churn
SaaS 2024 Plan 100%	\$10,500,000	\$5,383,746	\$1,177,694	\$4,206,052	\$450,000	12 months	10%
North America 41%	\$4,000,000	\$2,209,311	\$483,287	\$1,726,024	\$157,500	12 months	10%
Enterprise 77%	\$2,950,000	\$1,696,518	\$371,113	\$1,325,404	\$110,250	12 months	10%
New	\$2,450,000	\$1,196,518	\$261,738	\$934,779	\$110,250	12 months	10%

Respread

Existing (MRR)

Respread Proportional to the Goal

Override Plugged Values

Cancel Respread

Fill Down

Customer Lifetime

Override Plugged Values

Cancel Fill Down

Fill Down

Churn

Override Plugged Values

Cancel Fill Down

Steps:

- ✗ Click summary or child “Existing (MRR)”, “Customer Lifetime”, or “Annual Churn”.
- ✗ Update values.
- ✗ If a summary is selected, you can optionally override previously “plugged” values for child elements by checking the “Override Plugged Values” checkbox.
- ✗ For “Existing MRR” you can optionally spread the value across child elements based upon the distribution of your goal.

Purpose: Integrate or define customer journey.

Lead Stages

CRM Integration

Lead Stages	Outcome	New Sales Goal	New Sales		Impressions	MQLs	SQL	Evaluating	Proposal						
Goal Hierarchy			Actual	Remaining	Duration	Conv. Rate	Duration	Conv. Rate	Duration	Conv. Rate	Duration	Conv. Rate			
SaaS 2024 Plan 100%	\$10,500,000	\$5,383,746	\$1,177,694	\$4,206,052	5 days	3%	5 days	25%	14 days	40%	25 days	60%	45 days	80%	
North America 41%	\$4,000,000	\$2,209,311	\$483,287	\$1,726,024	5 days	3%	5 days	25%	14 days	40%	25 days	60%	45 days	80%	
Enterprise 77%	\$2,950,000				5 days						40%	25 days	60%	45 days	80%
New 71%	\$2,450,000				5 days						40%	25 days	60%	45 days	80%
Upsell 29%	\$500,000				5 days						40%	25 days	60%	45 days	80%
Mid-Market 23%	\$1,050,000				5 days						40%	25 days	60%	45 days	80%
EMEA 59%	\$6,500,000				5 days						40%	25 days	60%	45 days	80%
Enterprise 65%	\$4,225,000				5 days						40%	25 days	60%	45 days	80%
Mid-Market 35%	\$2,275,000				5 days						40%	25 days	60%	45 days	80%

Fill Down

Duration

5 days

Override Plugged Values

Cancel Fill Down

Fill Down

Conversion Rate

2

Override Plugged Values

Cancel Fill Down

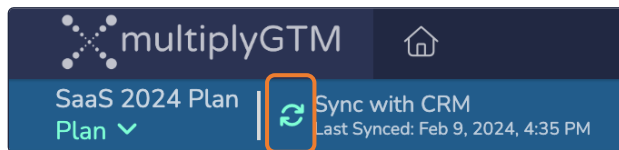
Details on HubSpot & Salesforce (CRM) Integration:

- ✗ The CRM integration will pull sales (deal) stages from the selected pipeline including historical conversion rates and stage durations based upon the selections you make.
- ✗ Additionally, the synchronization will automatically pull in your “in play” pipeline and closed won deals as of the sync date
- ✗ Syncing CRM data is done at the Playbook level, not across the tenancy (only the current Playbook you are syncing will be updated).
- ✗ In the event you want to sync an existing Playbook, MultiplyGTM will allow you to overwrite your current deal stage definition in the Playbook with your CRM sales stages.

Lead Stages

CRM Integration

Purpose: Integrate or define customer journey.



Sync Playbook with HubSpot? ✕

Deal Pipeline Sales Qualified Lead -> Demo/Meeting -> Workshopping -> Value Realization -> Proposal/Negotiation

Sales ▼

Pipeline Performance
Update stage conversion rates and durations based on your actual performance

Performance History

Twelve Months ▼

Only Closed Deals

Override Plugged Values

Deal Import
Bring in deals from Playbook Start to Finish
Jan 1, 2024 - Dec 31, 2024

Progress Your Playbook
Syncing will progress the Performance to Date
Feb 13, 2024

Details on HubSpot & Salesforce (CRM) Integration Options:

- ✕ The sync option allows you to manually trigger an update from your CRM.
- ✕ MultiplyGTM will update your existing playbook with CRM sales (deal) stages & modify the conversion rates & stage durations based upon current performance.
- ✕ Additionally, existing "in play" pipeline and closed won deals will be synchronized & plan performance targets will be updated based upon these values.
- ✕ Select the desired pipeline.
- ✕ Identify how far back you want pull "Pipeline Performance" data.
- ✕ Optionally filter the analysis to include "Only Closed Deals".
- ✕ Optionally "Override Plugged Values" if you wish to replace those values with CRM data. If not selected, manually entered values will NOT be overridden.

Purpose: Integrate or define customer journey.

Lead Stages

Standalone

Lead Stages	Outcome	New Sales Goal	New Sales		Impressions	MQLs	SQL	Evaluating	Proposal					
Goal Hierarchy			Actual	Remaining	Duration	Conv. Rate	Duration	Conv. Rate	Duration	Conv. Rate	Duration	Conv. Rate		
SaaS 2024 Plan 100%	\$10,500,000	\$5,383,746	\$1,177,694	\$4,206,052	5 days	3%	5 days	25%	14 days	40%	25 days	60%	45 days	80%
North America 41%	\$4,000,000	\$2,209,311	\$483,287	\$1,726,024	5 days	3%	5 days	25%	14 days	40%	25 days	60%	45 days	80%
Enterprise 77%	\$2,950				5 days									
New 71%	\$2,450				5 days									
Upsell 29%	\$500				5 days									
Mid-Market 23%	\$1,050				5 days									
EMEA 59%	\$6,500				5 days									
Enterprise 65%	\$4,225				5 days									
Mid-Market 35%	\$2,275				5 days									

Fill Down

Duration

5 days

Override Plugged Values

Cancel Fill Down

Fill Down

Conversion Rate

2

Override Plugged Values

Cancel Fill Down

Steps:

- ✗ New marketing or sales stages can be added using the “...” next to each stage.
- ✗ You can override the stage names, conversion rates, & stage durations by synchronizing with your CRM.
- ✗ Select a summary or child.
- ✗ Update the stage duration and/or the conversion rate for the selected stage.
- ✗ If a summary is selected, you can optionally override previously “plugged” values for child elements by checking the “Override Plugged Values” checkbox.

Lead Origin

Purpose: Assign lead origin responsibility between marketing & sales.

Lead Origin		New Sales		Marketing (Inbound) →		← Sales (Outbound)	
Goal Hierarchy	Outcome	New Sales Goal	Actual	Remaining			
▼ SaaS 2024 Plan 100%	\$10,500,000	\$5,383,746	\$1,177,694	\$4,206,052	52%	48%	
▼ North America 41%	\$4,000,000	\$2,209,311	\$483,287	\$1,726,024	62%	38%	
▼ Enterprise 77%	\$2,950,000	\$1,696,518	\$371,113	\$1,325,404	65%	35%	
New 71%	\$2,450,000	\$1,196,518	\$261,738	\$934,779	75%	25%	
Upsell 29%	\$500,000	\$500,000	\$109,375	\$390,625	15%	85%	
Mid-Market 23%	\$1,050,000	\$512,793	\$112,174	\$400,620	55%	45%	
▼ EMEA 59%	\$6,500,000	\$3,174,435	\$694,408	\$2,480,027	46%	54%	
Enterprise 65%	\$4,225,000	\$2,063,383	\$451,365	\$1,612,018	30%	70%	
Mid-Market 35%	\$2,275,000	\$1,111,052	\$243,043	\$868,010	75%	25%	

Steps:

- ✗ Select summary or child.
- ✗ Drag the slider to reflect the percentage responsibility for lead generation between marketing & sales.

Customer Acquisition Cost Budget

Purpose: Define a budget for customer acquisition cost & calculate expected cost based upon lead volume.

Customer Acquisition Cost			New Sales			Marketing Budget	Sales Budget		Marketing - Impres...	Sales - SQL	
Goal Hierarchy	Outcome	New Sales Goal	Actual	Remaining	Total Budget	Budget	Budget		Total Cost	Cost Per Lead Impressions	Cost Per Lead SQL
SaaS 2024 Plan 100%	\$10,500,000	\$5,383,746	\$1,177,694	\$4,206,052	\$1,200,000	\$550,000	\$650,000		\$456,373 -\$743,627	\$1.25 \$166,174	\$150 \$280,199
North America 41%	\$4,000,000	\$2,209,311	\$483,287	\$1,726,024	\$420,000	\$192,500	\$227,500		\$161,793 -\$258,207	\$1.25 \$66,895	\$150 \$94,897
Enterprise 77%	\$2,950,000	\$1,696,518				\$4,750	\$159,250		\$120,646 -\$173,354	\$1.25 \$51,288	\$150 \$69,358
New 71%	\$2,450,000	\$1,196,518				\$0	\$0		\$109,252 -\$184,748	\$1.25 \$49,660	\$150 \$59,592
Upsell 29%	\$500,000	\$500,000				\$0	\$0		\$11,393 \$11,393	\$1.25 \$1,628	\$150 \$9,766
Mid-Market 23%	\$1,050,000	\$512,793				\$7,750	\$68,250		\$41,147 -\$84,853	\$1.25 \$15,607	\$150 \$25,540
EMEA 59%	\$6,500,000	\$3,174,435				\$7,500	\$422,500		\$294,581 -\$485,419	\$1.25 \$99,279	\$150 \$195,302
Enterprise 65%	\$4,225,000	\$2,063,383				\$2,375	\$274,625		\$169,262 -\$337,738	\$1.25 \$42,315	\$150 \$126,846
Mid-Market 35%	\$2,275,000	\$1,111,052				\$25,125	\$147,875		\$125,319 -\$147,681	\$1.25 \$56,963	\$150 \$68,356

Respread ✕

Budget

Respread Proportional to the Goal

Override Plugged Values

Cancel
Respread

Steps:

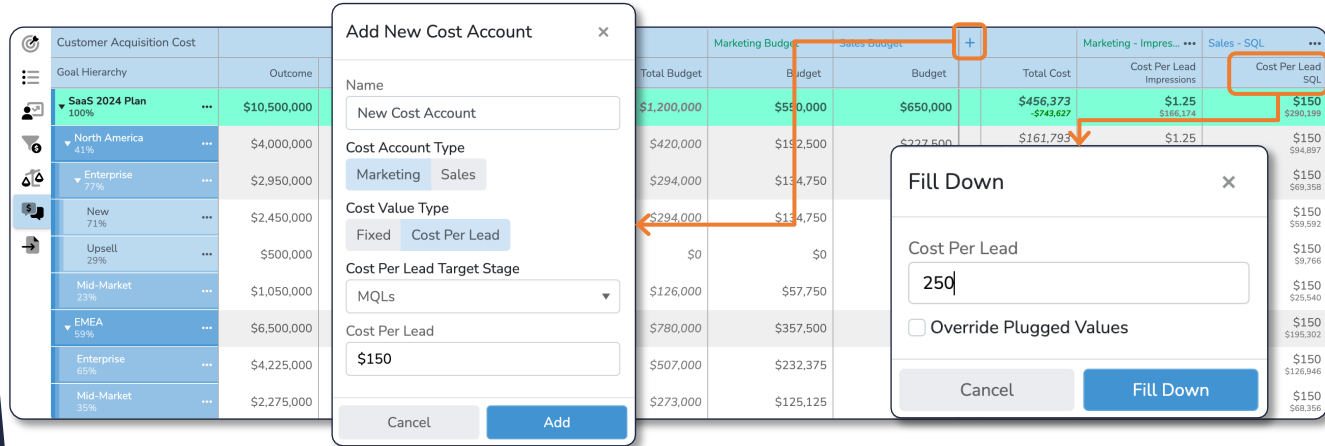
Marketing & Sales Budget

- ✕ Select summary or child.
- ✕ Enter the value for marketing & sales budget.
- ✕ Optionally spread that budget proportional to the allocation of your goal.
- ✕ If a summary is selected, you can optionally override previously "plugged" values for child elements by checking the "Override Plugged Values" checkbox.

Customer Acquisition Cost

Calculate Expected Cost

Purpose: Define a budget for customer acquisition cost & calculate expected cost based upon lead volume.



The screenshot displays the 'Customer Acquisition Cost' table with columns for Goal Hierarchy, Outcome, Marketing Budget, Sales Budget, Total Cost, Marketing - Impressions, and Sales - SQL. A dialog box 'Add New Cost Account' is open, showing a form to create a new cost account. The form includes fields for Name, Cost Account Type (Marketing/Sales), Cost Value Type (Fixed/Cost Per Lead), Cost Per Lead Target Stage (MQLs), and Cost Per Lead (\$150). A 'Fill Down' dialog is also open, showing a 'Cost Per Lead' value of 250 and an 'Override Plugged Values' checkbox.

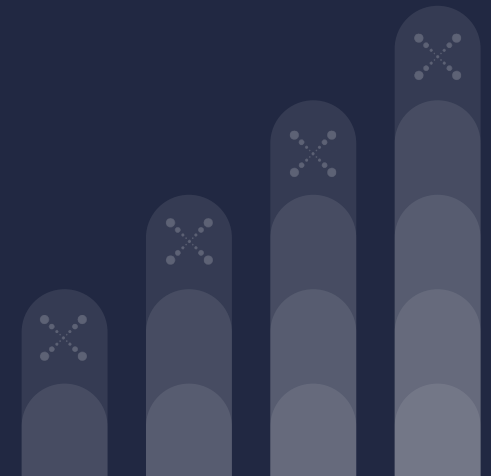
Steps:

Calculating Expected Marketing & Sales Cost

- ✘ New "Cost Accounts" can be added using the "+" icon.
- ✘ Existing "Cost Accounts" can be edited using the "..." next to each Cost Account.
- ✘ **Fixed Cost:** marketing & sales values for fixed cost spend.
- ✘ **Variable Cost:** cost per lead tied to any lead stage.
- ✘ **Compare to budget:** The values beneath the calculated "Total Cost" show the delta between marketing & sales budget & the calculated cost values.
- ✘ If a summary is selected, you can optionally override previously "plugged" values for child elements by checking the "Override Plugged Values" checkbox.

Insights & Reporting

Configuration



Insight Configuration

Add New Insights Section

Name
New Insight Section

Choose the Insights Section configuration

One Two

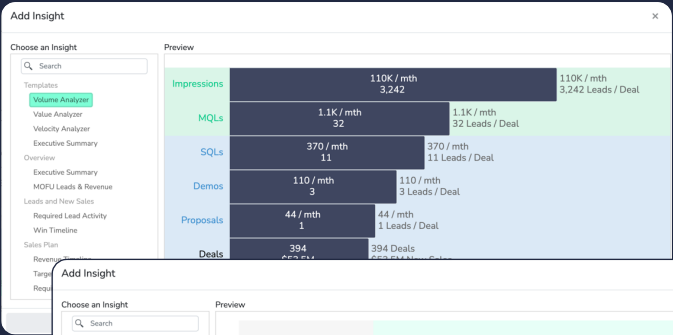
Three Four

Cancel Add

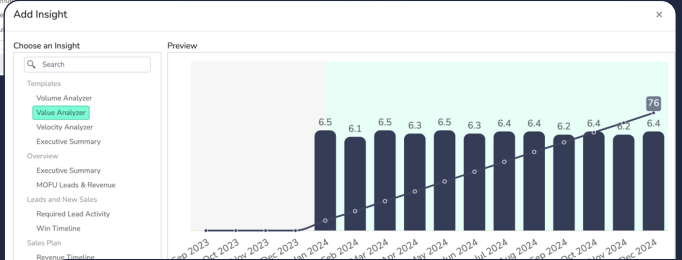
- Leads and New Sales**
- 1. Overview
 - 2. Leads and New Sales
 - 3. Sales Plan

+ Add Insight to Leads and New Sales

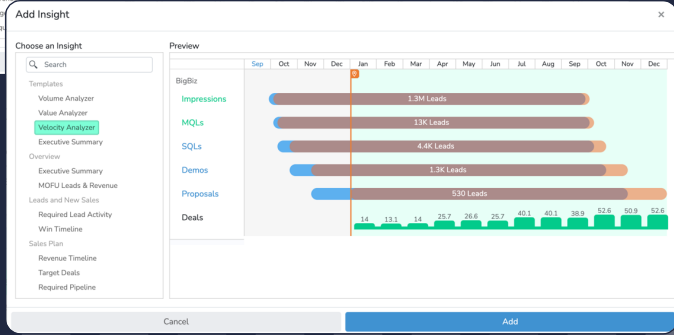
Remove Leads and New Sales



Volume Analyzer
Lead stages (funnel)
Multiple segmentation options
Selection of metrics to display



Value Analyzer
Time-phased histogram + chart types
Multiple segmentation options
Per period & cumulative values



Velocity Analyzer
Timeline view
Multiple segmentation options
Created & converted date targets

Insight Configuration

Chart Types

Xply Analyzer Options

View Presets

MOFU Leads & Revenue

Show Tabular Data

Compare with None

Time Units

Month

Bars

Display Leads Interest

Segment by Offering

Line

Display \$ Total Revenue

Segment by Revenue (Existing | Actual | New | Recurring)

Time Units

Month | Quarter | Year | Playbook

Per Period Value

Display & Segmentation Options

Compare

Select scenarios to compare against
During execution, compare to plan

Cumulative Values

Display & Segmentation Options

Better Insight Means Better Decisions

Display Options: For per period & cumulative values

<p>Growth Analysis</p> <ul style="list-style-type: none"> ✖ MultiplyGTM Index™
<p>Lead & Pipeline Analysis</p> <ul style="list-style-type: none"> 👤 Leads 💰 Sales Pipeline (Weighted) 💰 Sales Pipeline (Non-Weighted) 👤 Sales Pipeline Volume
<p>Sales Analysis</p> <ul style="list-style-type: none"> 💰 Model Outcome 👤 Deal Count 💰 New Sales
<p>Recognized Revenue Analysis</p> <ul style="list-style-type: none"> 💰 Recognized Revenue 💰 MRR 💰 ARR 💰 Churn
<p>Cost Analysis</p> <ul style="list-style-type: none"> 💰 Cost 💰 Customer Acquisition Cost 🕒 CAC Payback

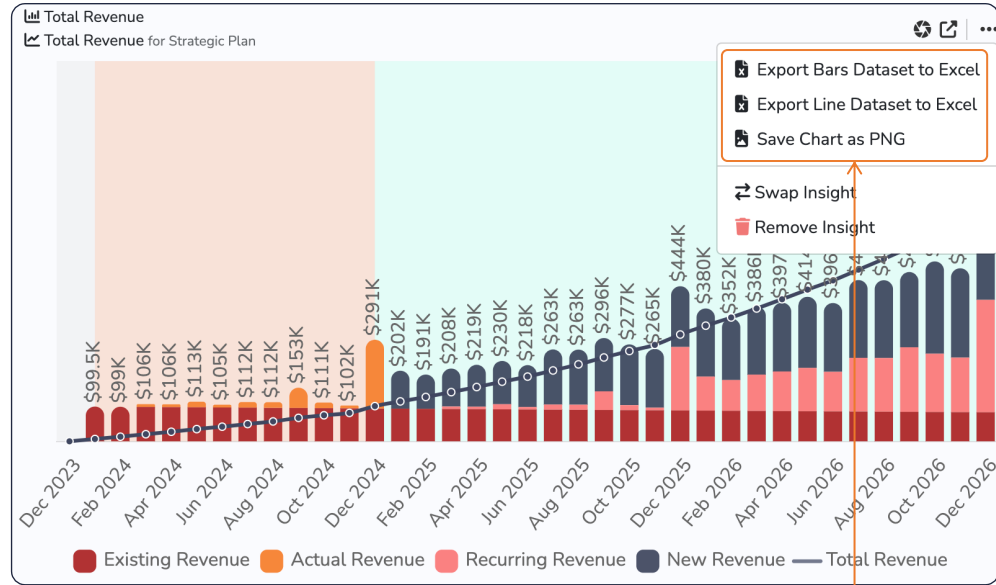
- ✖ MultiplyGTM Index™: Scores aggressiveness of your plan as compared
- ✖ Leads: Quantity & timing of lead production & conversion
- ✖ Sales Pipeline: Required pipeline at any point in time
- ✖ Outcome: Revenue generated from new sales, existing revenue, & renewals from new sales (in multi-year plans)
- ✖ New Sales: Count & value of new sales bookings
- ✖ Recognized Revenue: estimation of recognizable revenue for recurring & non-recurring offerings & sales
- ✖ MRR & ARR: estimated recurring revenue
- ✖ Churn: estimation of lost revenue based upon entered churn %
- ✖ Cost: marketing & sales cost
- ✖ CAC: cost to acquire a customer
- ✖ CAC Payback: number of months to recover CAC

Segmentation Options: Breakdown of values for greater visibility

Source (Retention Closed Won Recurring New)
Pipeline Status
Offering
Marketing (Inbound) vs Sales (Outbound)
Quarterly Spread
Goal Hierarchy

- ✖ Source: view by existing, actual, new, & recurring
- ✖ Pipeline Status: in play pipeline impact & left to go
- ✖ Offering: contribution by deal type / offering
- ✖ Inbound vs. Outbound: segment by origin / source
- ✖ Quarterly Spread: visualize values by the quarterly goal they support
- ✖ Goal Hierarchy: breakdown by elements in the goal hierarchy

Exporting Data



All Insight data can be exported to Excel
Images can be exported as PNG

Measuring & Tracking Progress

Performance Tracking & Forecasting Options

Continuous Performance Tracking & Calibration



Current Date

Upon sync, model will automatically adjust to reflect progress to date

Sync Playback with HubSpot?

Deal Pipeline: Falcon Sales Pipeline

Qualified to buy -> Appointment scheduled -> Presentation scheduled -> Decision Maker Bought-In -> Contract sent

Deal Import: Bring in deals from Playback Start to Finish Jan 1, 2024 - Dec 31, 2024

Progress Your Playback: Syncing will progress the Performance to Date Feb 14, 2024

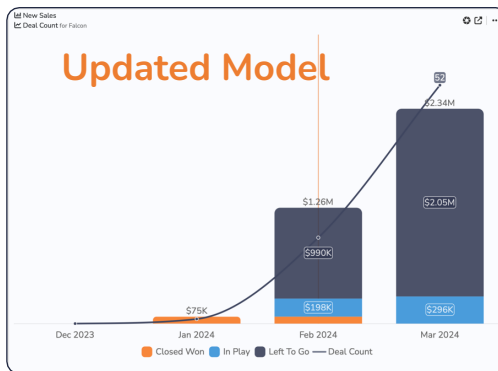
Buttons: Cancel, Sync

Presentation scheduled							Total
Name	Expected Close	Owner	Value	Linked Goal Hierarchy	Linked Offering		\$445,000
BCom1	Jan 5, 2024	Paul Self	\$57,500	Falcon *	Product L *		
ACom2	Jan 8, 2024	Paul Self	\$71,000	Falcon *	Blended Offering MIA *		
ACom3	Feb 12, 2024	Paul Self	\$80,000	Falcon *	Blended Offering MIA *		
BCom4	Mar 17, 2024	Dan Patterson	\$113,300	Falcon *	Blended Offering MIA *		
ACom5	Mar 18, 2024	Dan Patterson	\$116,000	Falcon *	Blended Offering MIA *		

Decision Maker Bought-In							Total
Name	Expected Close	Owner	Value	Linked Goal Hierarchy	Linked Offering		\$346,500
Lulu's Cafe	Jan 2, 2024	Paul Self	\$100,000	Falcon *	Blended Offering MIA *		
BCom3	Jan 7, 2024	Paul Self	\$65,500	Falcon *	Blended Offering MIA *		
ACom3	Feb 10, 2024	Paul Self	\$80,000	Falcon *	Blended Offering MIA *		

Contract sent							Total
Name	Expected Close	Owner	Value	Linked Goal Hierarchy	Linked Offering		\$423,500
BCom3	Feb 13, 2024	Dan Patterson	\$93,500	New Sales *	Blended Offering MIA *		
BCom5	Feb 15, 2024	Owner Not Found	\$102,500	Falcon *	Blended Offering MIA *		
ACom4	Feb 16, 2024	Paul Self	\$107,000	Expansion *	Blended Offering MIA *		
BCom6	Mar 19, 2024	Paul Self	\$120,500	Falcon *	Blended Offering MIA *		

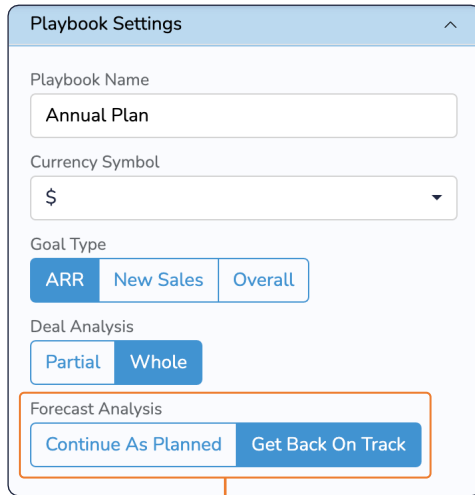
Closed Won							Total
Name	Close	Owner	Value	Linked Goal Hierarchy	Linked Offering		\$15,000
Nali Deal	Jan 4, 2024	Paul Self	\$0	Falcon *	Blended Offering MIA *		
Zens Deal	Feb 11, 2024	Owner Not Found	\$0	Falcon *	Blended Offering MIA *		
Central Park	Jul 31, 2024	Owner Not Found	\$15,000	Falcon *	Blended Offering MIA *		



CRM Feedback Loop

In-play pipeline is incorporated into the plan, resulting in an updated determination of left-to-go activity.

Forecasting Modes



The screenshot shows a 'Playbook Settings' dialog box with the following fields and options:

- Playbook Name:** Annual Plan
- Currency Symbol:** \$
- Goal Type:** ARR (selected), New Sales, Overall
- Deal Analysis:** Partial (selected), Whole
- Forecast Analysis:** Continue As Planned (selected), Get Back On Track

An orange box highlights the 'Forecast Analysis' section, and an orange arrow points from it to the text below.

Forecast Modes

Continue As Planned: future wins remain as planned.

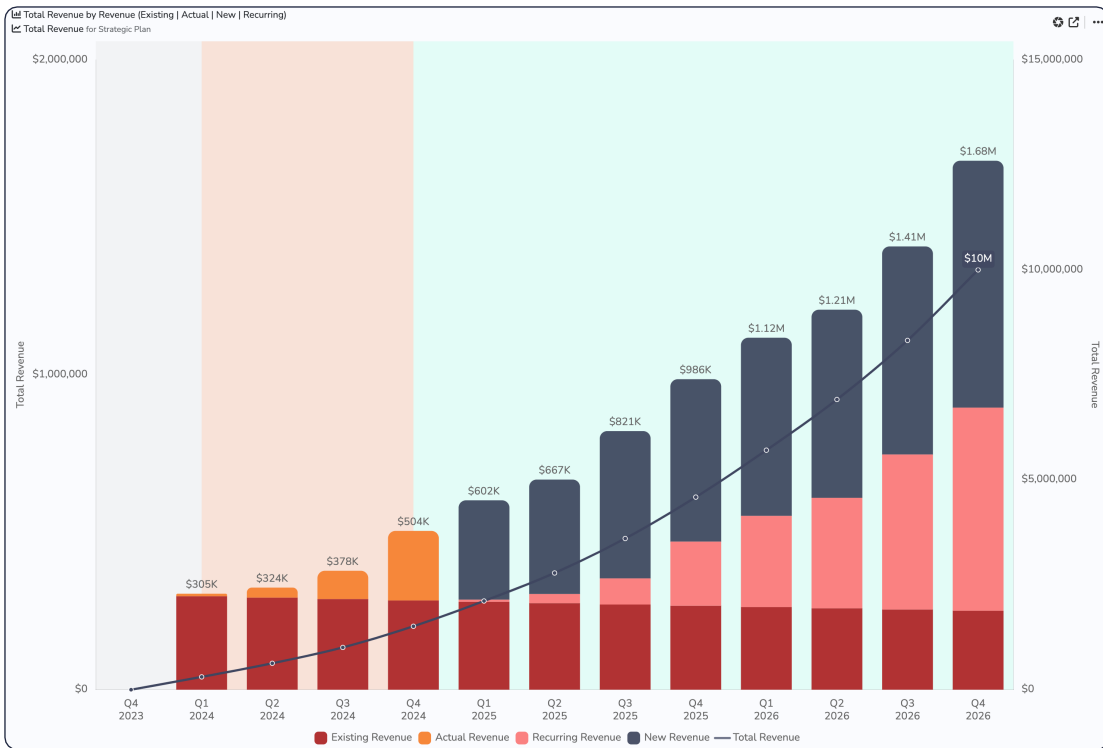
If behind plan, the projected outcome will show a shortfall.

If ahead of plan, the projected outcome will exceed original goal.

Get Back On Track: future wins will adjust to achieve original goal.

Projected lead volume by stage recalculates based upon performance.

Recurring Revenue Analysis: Multi-year plan example



- ✘ **Existing Revenue:** recurring revenue at playbook start
- ✘ **Actual Revenue:** recurring revenue from new sales won during playbook
- ✘ **Recurring Revenue:** future revenue from actualized wins
- ✘ **New Revenue:** required revenue from new sales projection

Model adjusts to performance.

Creating Scenarios

Exploring Alternate Outcomes

Scenarios

Scenarios provide the ability to compare decisions & alternate outcomes to your original plan.

Shared Elements (Playbook Structure):

- × Goal Hierarchy, Offering listing, Lead Stages, & Actuals

Unique Elements (Model Inputs):

- × All model inputs can be modified to visualize & compare outcomes

Analytics:

- × Insight compare mode provides side-by-side comparison
- × Ribbon Metrics compare different outcomes

Creating Scenarios:

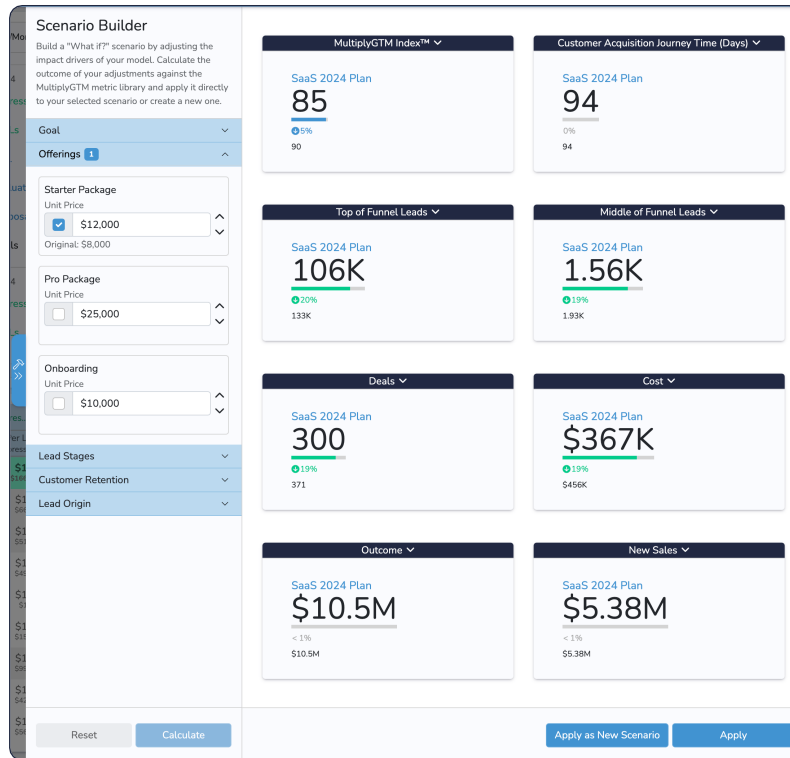
- × Use Sensitivity Analyzer to create scenarios
- × Copy from original model

Use Cases:

- × Compare plan vs. actual performance
- × Model impact of potential decisions (e.g., improved conversion rates)
- × Visualize alternate outcomes (e.g., stretch goals)

Sensitivity Analysis

Scenario Creation



- ✘ Single click scenario creation
- ✘ Preview impact on key metrics before scenario creation
- ✘ Can be done at any level in the Goal Hierarchy
- ✘ Continue to refine new scenario after creation

Comparing Scenarios

Stretch Goal 12,075,000	Projected Outcome (\$) 10,500,000	13% lower	Stretch Goal 6,958,746	New Sales (\$) 5,383,746	23% lower	Stretch Goal 986,902	Monthly Recurring Revenue (\$) 855,652	13% lower
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Xply Analyzer Options

View Presets: Custom

Show Tabular Data

Time Units: Month

Bars: Leads, MQLs

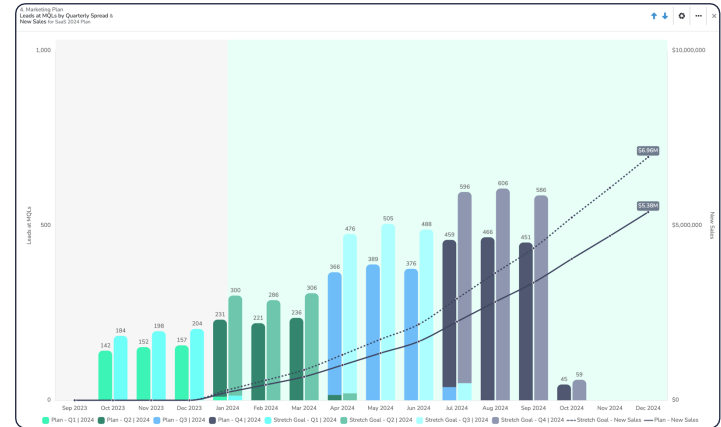
Segment by: Quarterly Spread

Compare with Stretch Goal: **Stretch Goal**

Display: New Sales

Segment by: None

Select Scenario for Comparison



Two Modes:

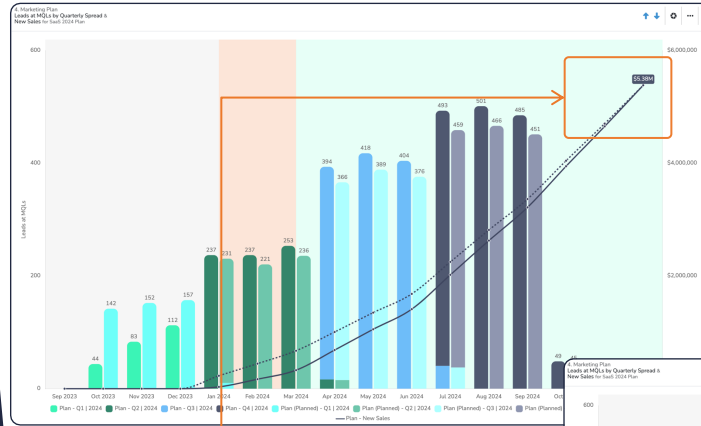
- ✘ Compare scenarios
- ✘ Compare plan against actual performance



Get Back On Track

Future wins will adjust to achieve original goal.

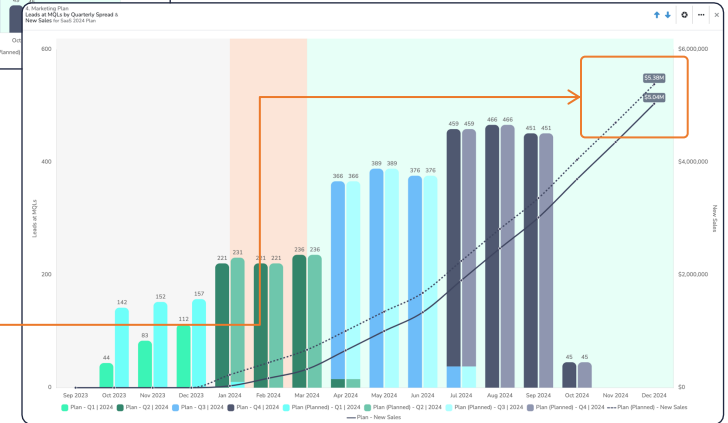
Projected lead volume by stage recalculates based upon performance.
Calculations are in context of the timeline filter.



Continue As Planned

Future wins remain as planned.

If behind plan, the projected outcome will show a shortfall.
If ahead of plan, the projected outcome will exceed original goal.



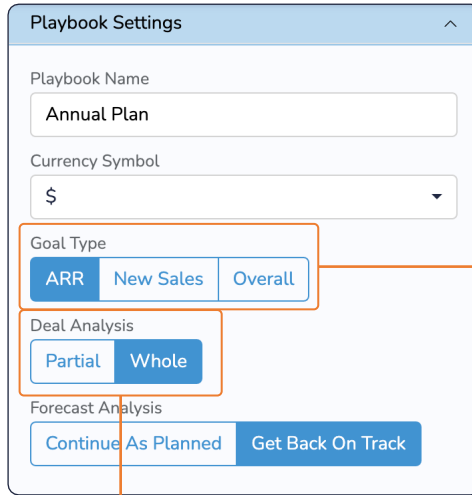
Model adjusts to achieve original plan.

Model reflects shortfall due to underperformance.

Forecasting Selection Impact

Managing Your Playbooks

Additional Configuration Options



The screenshot shows the 'Playbook Settings' window with the following sections:

- Playbook Name:** Annual Plan
- Currency Symbol:** \$
- Goal Type:** Three buttons: ARR (selected), New Sales, Overall.
- Deal Analysis:** Two buttons: Partial, Whole (selected).
- Forecast Analysis:** Two buttons: Continue As Planned, Get Back On Track.

Orange arrows point from the 'Goal Type' and 'Deal Analysis' sections to their respective descriptions on the right.

Ability to toggle between settings.

Goal Type: define your goal

- ✗ ARR: Annual Recurring Revenue, includes existing recurring revenue
- ✗ New Sales (or Bookings): end of playbook new sales goal you want to achieve
- ✗ Overall Goal: end of playbook revenue goal you want to achieve

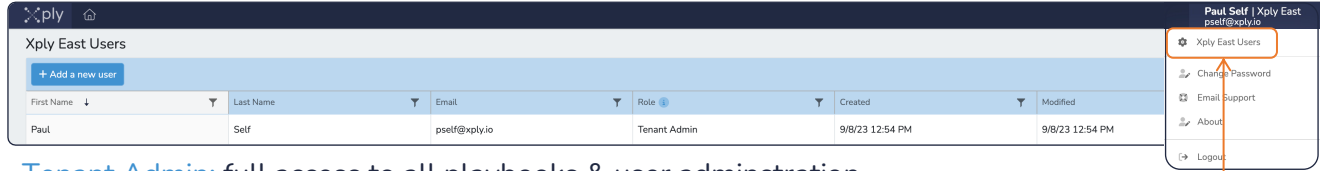
Deal Analysis: impacts calculations

- ✗ Partial: Model will give credit for partial deal counts over time (e.g., 8.2)
- ✗ Whole: Model will only give credit for whole number wins

User Management:

Tenant & Playbook Level Access

Assigning Users to Tenancy



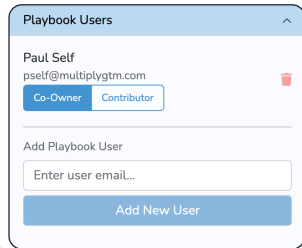
Tenant Admin: full access to all playbooks & user administration

Tenant Playbook Creator: create & copy playbooks, view & edit playbooks they are assigned to

Tenant Playbook Viewer: view playbooks they are assigned to

Tenant Admins can manage users

Assigning Users to Playbooks



Playbook Co-Owner: full access to assigned playbooks

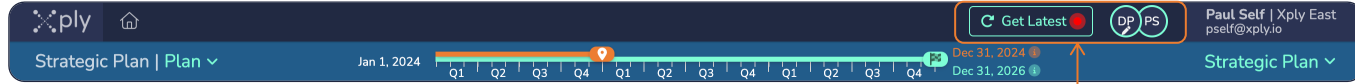
- ✗ Add additional users to the playbook

New users can be added by selecting from existing list or entering the email address for a new user. New users are automatically added to the tenancy as **Tenant Playbook Viewers**.

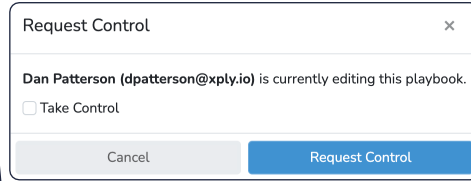
Playbook Contributor: limited edit rights, contributors can:

- ✗ Create scenarios
- ✗ Edit scenarios they create
- ✗ View original model & all scenarios (cannot edit)
- ✗ Cannot edit or view dashboard settings or playbook settings

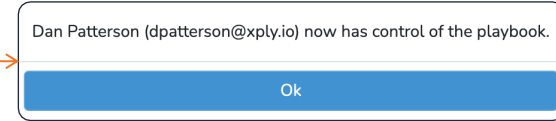
Concurrent Usage



Lists active users in the selected playbook.
"Get Latest" beacon notifies users when there is a change.



Request or take control.



Allows for sharing of edit rights between users.

A single change can ripple throughout your model & plan.

To protect the integrity of your data, only one user at a time can edit the original plan or selected scenario.