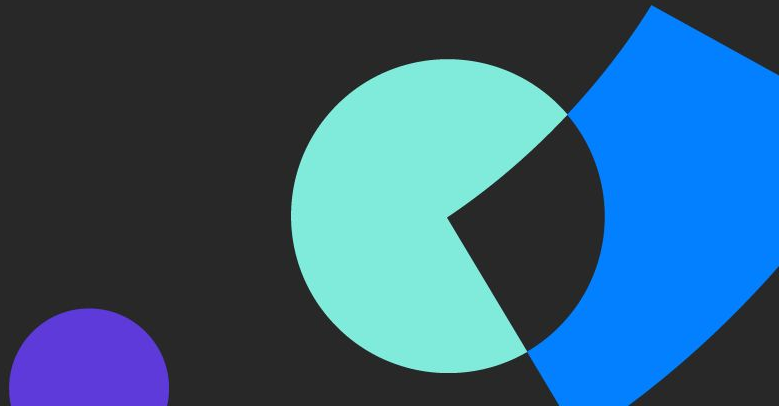Clari

# Revenue Diagnostic: <Portco Name>
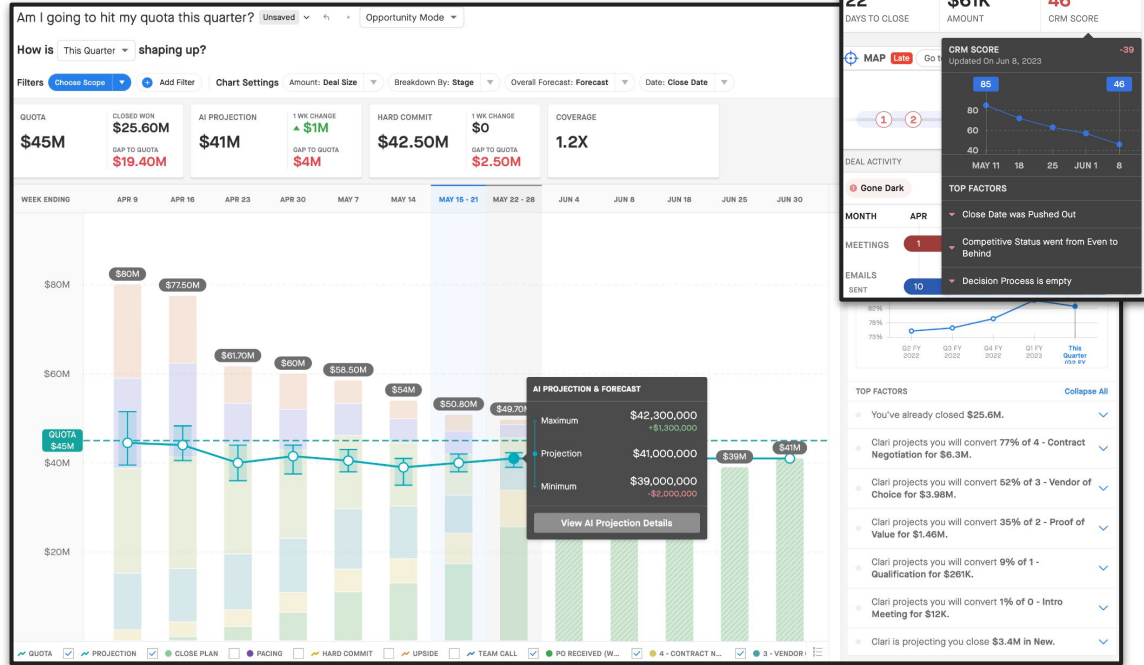
# Diagnostic Summary

<Company Name>

## Key Performance Indicators

- [Pipeline Creation Metric]
- [Pipeline Conversion Metric]
- [Win Rate Metric]
- [Slip Rate Metric]
- [Rep Performance Note]

## Clari Predictions

- [AI Projection Callout 1]
- [AI Projection Callout 2]
- [CRM Score Callout 1]
- [CRM Score Callout 2]
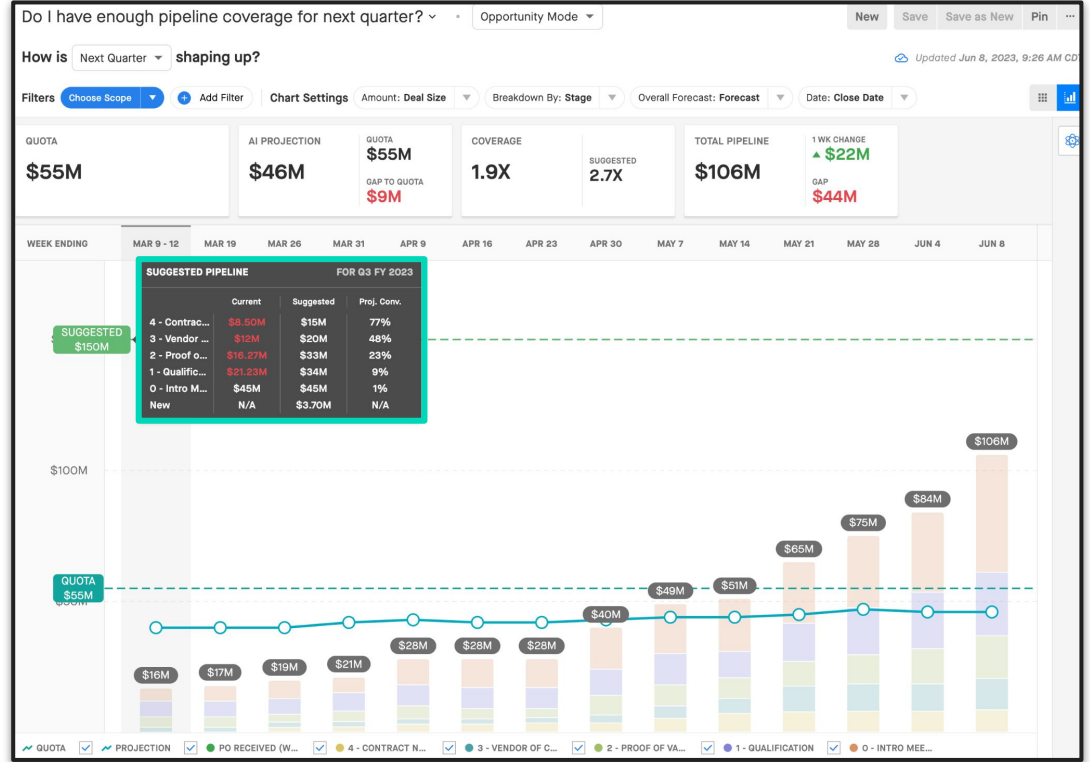
# Pipeline Creation

<Company Name>

## Observations

- [insert observation 1]
- [insert observation 2]
- [insert observation 3]

## Context

- [insert context 1]
- [insert context 2]
- [insert context 3]

# Pipeline Conversion

\<Company Name\>

## Observations

- [insert observation 1]
- [insert observation 2]
- [insert observation 2]

## Context

- [insert context 1]
- [insert context 2]
- [insert context 3]
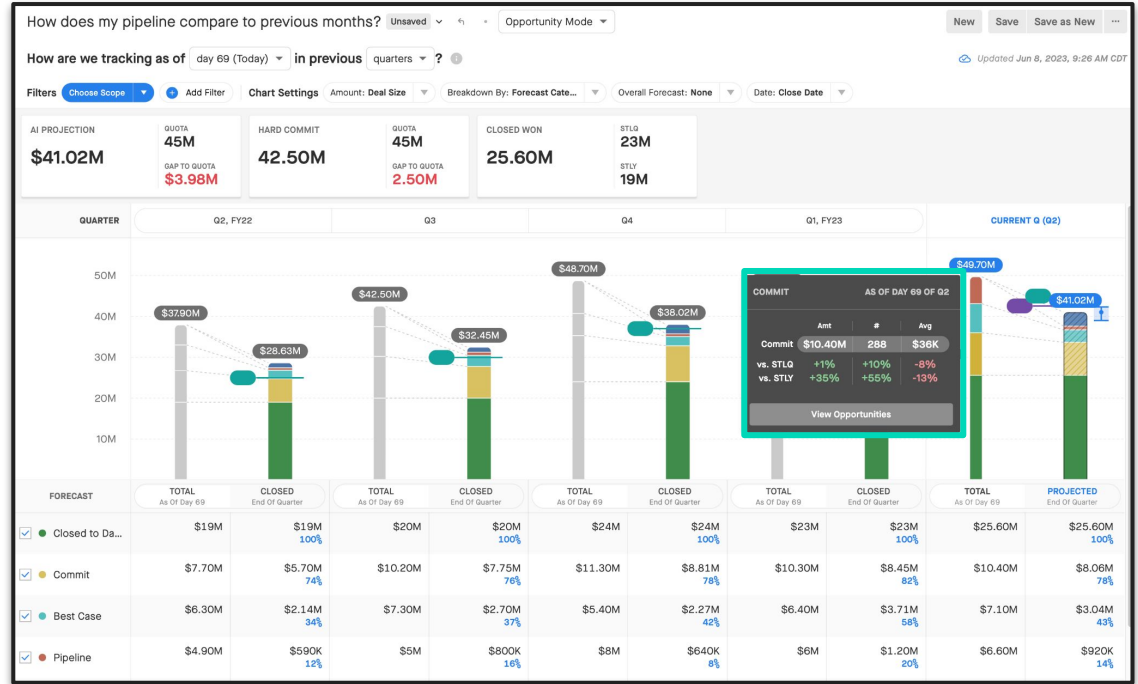
# Win Rates

<Company Name>

## Observations

- [insert observation 1]
- [insert observation 2]
- [insert observation 3]

## Context

- [insert context 1]
- [insert context 2]
- [insert context 3]

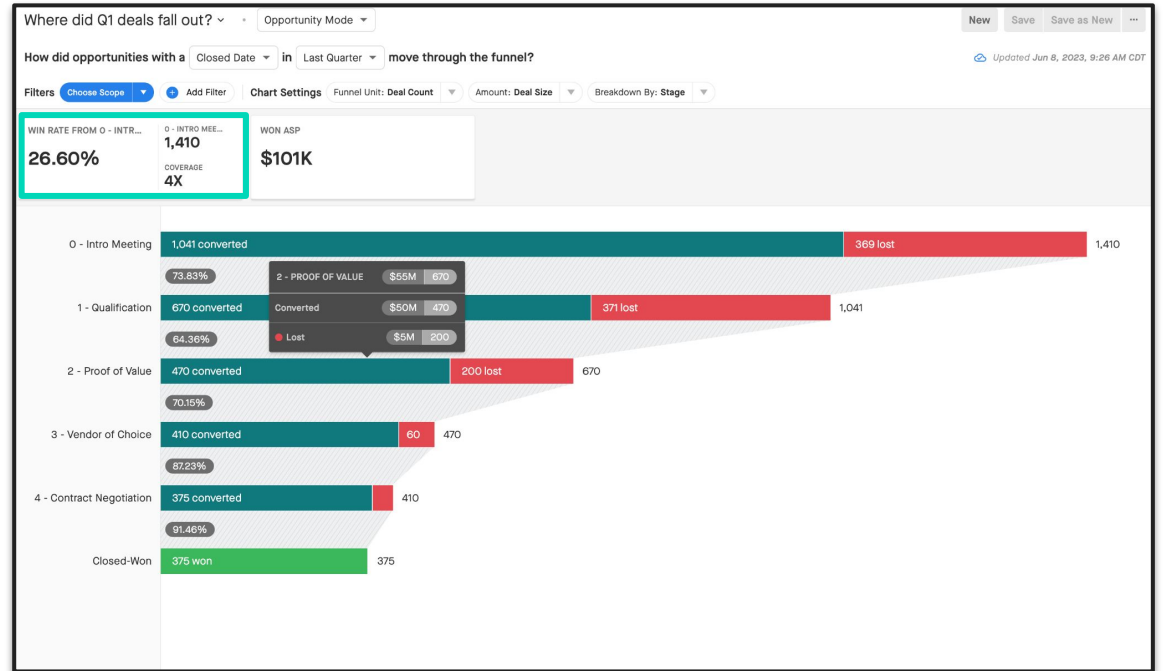# Slip Rates

<Company Name>

## Observations

- [insert observation 1]
- [insert observation 2]
- [insert observation 3]

## Context

- [insert context 1]
- [insert context 2]
- [insert context 3]

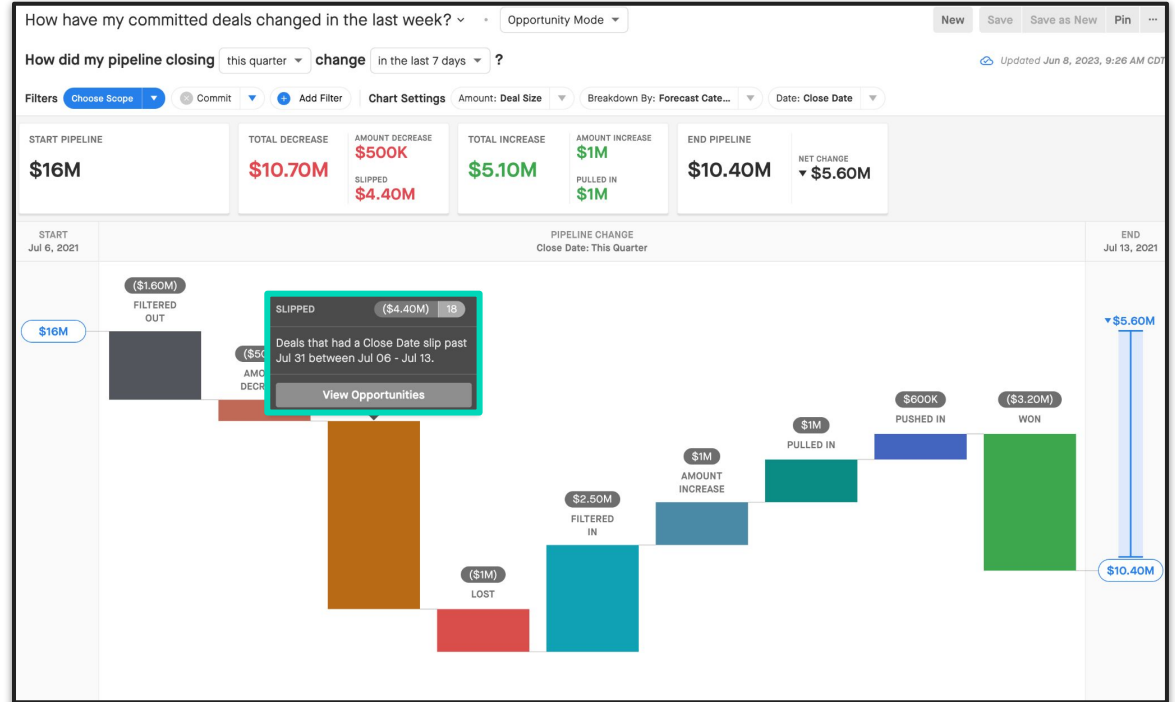# Rep Performance

<Company Name>

## Observations

- [insert observation 1]
- [insert observation 2]
- [insert observation 3]

## Context

- [insert context 1]
- [insert context 2]
- [insert context 3]

# Rep Activity

<Company Name>
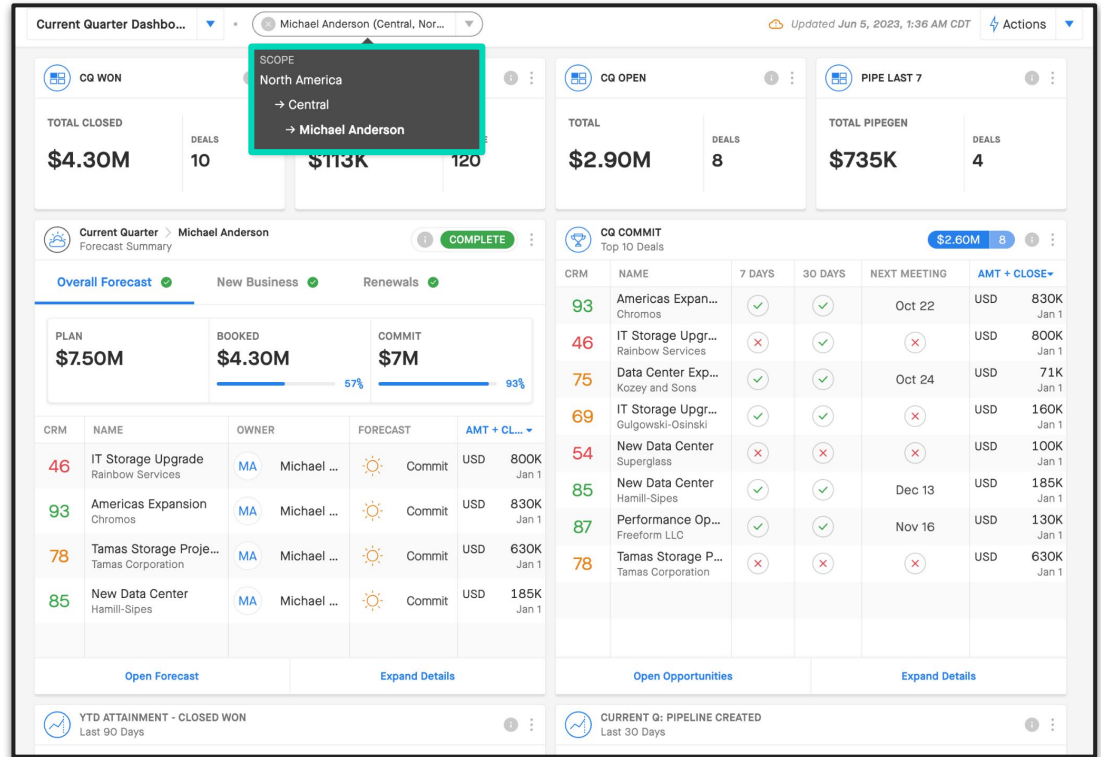
## Observations

- [insert observation 1]
- [insert observation 2]
- [insert observation 3]

## Context

- [insert context 1]
- [insert context 2]
- [insert context 3]

# Forecast Simulation

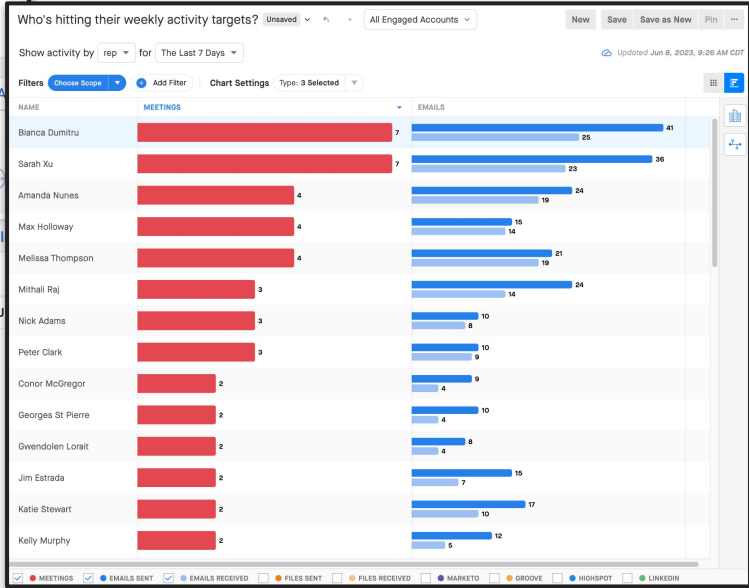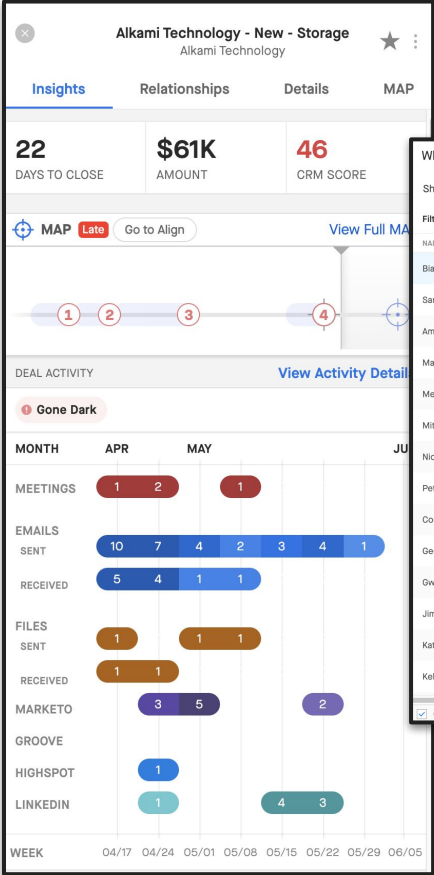<Company Name>
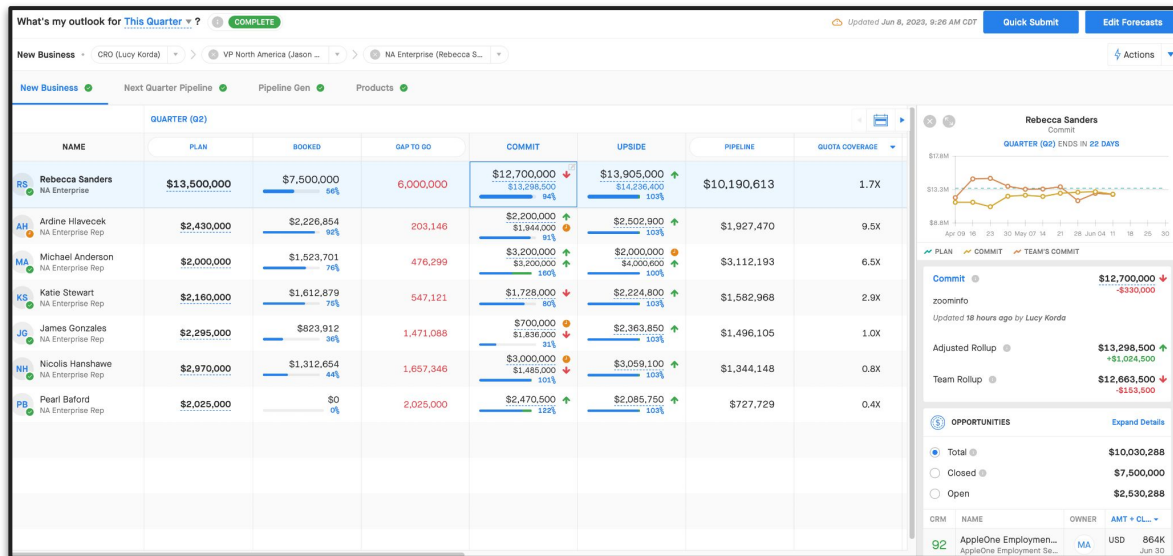
## Observations

- [insert observation 1]
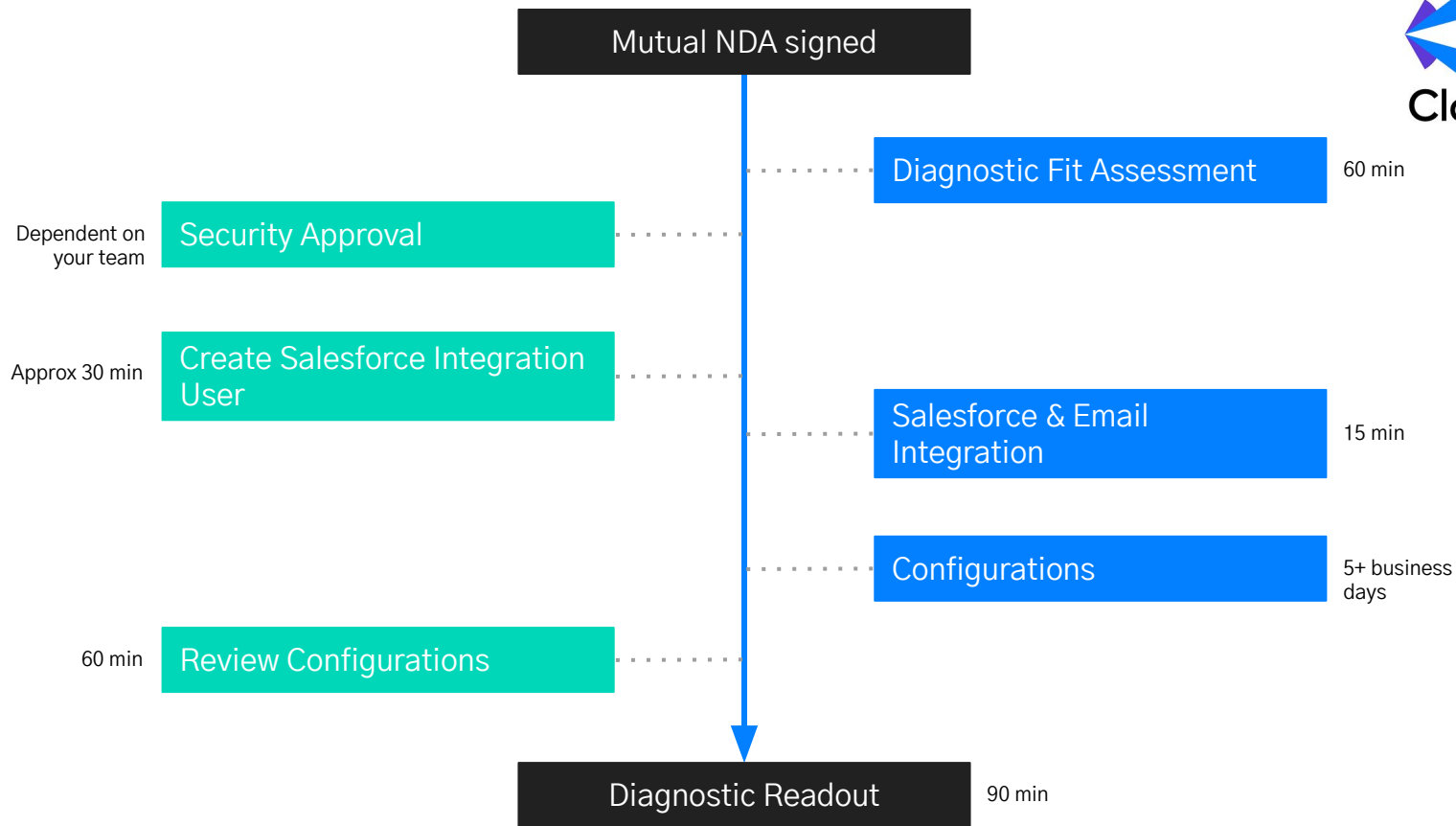- [insert observation 2]
- [insert observation 3]

## Context

- [insert context 1]
- [insert context 2]
- [insert context 3]

# Appendix

# Get Started on Revenue Leak Assessment

Mutual NDA signed

Diagnostic Fit Assessment — 60 min

Dependent on your team — Security Approval

Approx 30 min — Create Salesforce Integration User

Salesforce & Email Integration — 15 min

Configurations — 5+ business days

60 min — Review Configurations

Diagnostic Readout — 90 min
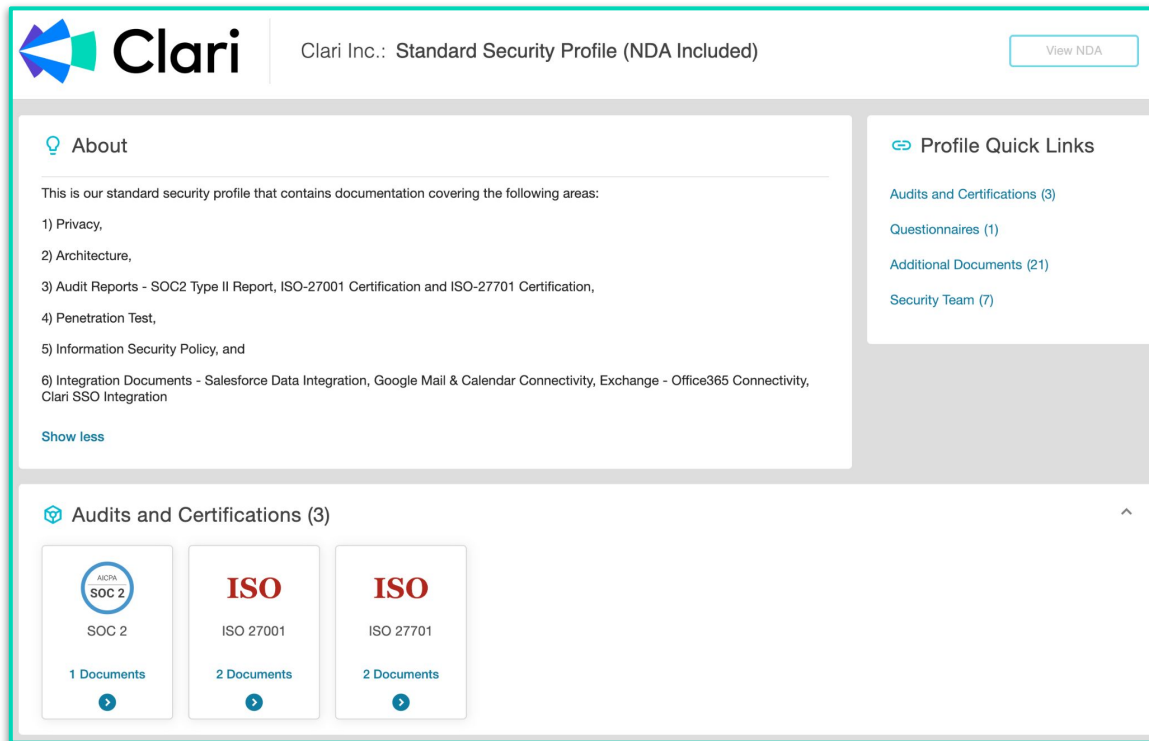
# Diagnostic Fit Assessment

**SFDC schema** we consider when assessing Clari configuration

**Ownership**
- Opportunity Owner
- Account Owner
- Territory User
- Custom Overlay User Lookup

**Rollup Method**
- Role Hierarchy
- Enterprise Territory Management

**Object**
- Opportunity
- Account
- Split
- Product
- Other Custom Objects

**Rollup Amount**
- Currency (Amount)
- Number (Count)

**Time Period**
- Date
- Define where Month, Qtr, Week is applicable
- CRM FY Calendar

**Segmentation**
- By what field delineation
- By what nature (business unit, product, spend)

**Progression**
- Stage and Forecast Category
- Standard, non-standard
- By segment or use case

# Security Approval



Clari has conveniently documented all relevant security information to expedite any approvals required by the target company.

We will submit all documentation and policy through a portal based view (Whistic) for review.

# Salesforce Integration



1. Open a Google tab (**NOTE:** Internet Explorer is not supported)
2. Log into production Salesforce.com using the integration user.
3. Open another tab in the same browser and go to **app.clari.com**
4. Select **"Create a new account"**
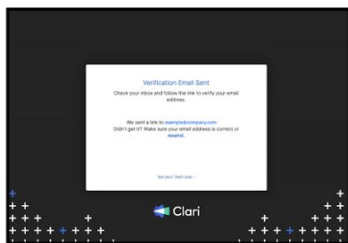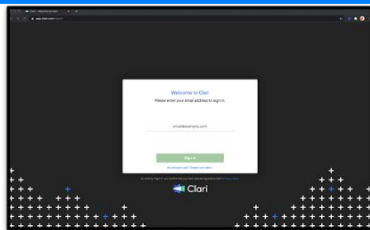
5. Enter your **company email address**
6. Create the password
7. Wait a few moments for **verification email** to verify
8. When prompted, connect Salesforce.com. It should detect the open Salesforce.com session in the other browser tab and ask you to Allow
9. Connect email by entering your credentials

10. Enter your mobile number to receive a text with a link to download the Clari mobile app
11. **Select your role:**
    Sales Rep
    Manager
    Exec
    Sales Ops
12. You're all set!
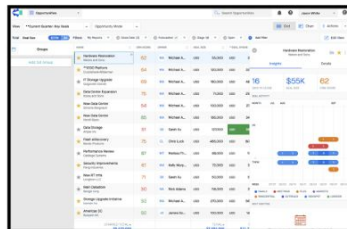
Forging the initial API connection that drives Clari connectivity is as simple as logging in for the first time using the newly established SFDC-side integration user.

Once you've made the connection/first log in, your Clari team handles the configuration using known context and discovery.

More information on Integration User requirements [here].

# Available Metrics

| Metric |
| --- |
| Conversion rates by opportunity stage |
| Conversion rates by forecast category |
| Slip rates |
| Win / Loss rates |
| Pipeline growth analysis |
| Trend based analysis (e.g. QoQ rate of change) |
| Segmentation analysis by Opp owner & management  (e.g. How many deals has Americas Enterprise slipped in the past 60 days?) |
| Total number of deals in pipeline |
| Customer retention rate |

Clari