Oracle® Fusion Transactional Business Intelligence 11.1.1.9.0

Sales - CRM Customer Overview Subject Area

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Contents

Sales - CRM Customer Overview

Description

This subject area enables you to perform comprehensive customer analysis across the sales process – leads, pipeline revenues, sales cycles, win/loss and interactions. Use this subject area to understand customer lead generation, open and closed revenues for your customer segments, level of marketing and sales interactions that your sales resources have with your customers and prospects, pipeline revenue exposure to competition, win/loss analysis for your strategic customers as well as industry segments and such other analyses. Apart from being a repository of a rich set of performance measures, the subject area can also be used to report on customer information such as lists of customers and their primary contacts. For these 'list' reports, the metric under the 'Sales Account Facts' folder needs to be used as part of report criteria. By default, the 'implicit' fact table for this subject area, which is the Revenue fact, will be used to return results. This means that in the absence of any metric, a report would include only such customer and other data that are associated with opportunity revenue transactions.

Business Questions

This subject area can be used to answer business questions such as:

- What are the top ten accounts by revenue?
- What are my most active accounts? Where are these located?
- How can I identify up-sell and cross-sell opportunities within my existing accounts?
- What are my best performing product lines by customer geographies?
- How actively are my sales reps engaged with customers?
- Where are the white spaces for me to sell a specific product?
- How well am I winning against competition?
- What percentage of my revenue is exposed to competition?

Job Roles

The following job roles are used to secure access to this subject area:

- Sales Administrator
- Sales Manager
- Sales Representative
- Sales VP

BI Duty Roles

The following BI duty roles are used to secure access to this subject area:

- Sales Administrative Transaction Analysis Duty
- Sales Executive Transaction Analysis Duty
- Sales Managerial Transaction Analysis Duty
- Sales Transaction Analysis Duty

BI Product Offering

Oracle® Fusion Transactional Business Intelligence

BI Product Release

Release 9

Dimensions

Dimension Folder Name	Description	Special Considerations	Fusion CRM Navigation
Activity	Contains all attributes for an Activity, be it a Task, an Appointment or a Call Report		Navigator->Activity Navigator->Application Composer->Standard Objects->Activity->Fields->Standard Navigator->Application Composer->Standard Objects->Activity->Fields->Custom
Auxiliary Classification 1	Customer attributes pertaining to custom classification codes.		Navigator->Customers->[Select the customer]->classification Nodes
Auxiliary Classification 2	Customer attributes pertaining to custom classification codes		Same as above
Auxiliary Classification 3	Customer attributes pertaining to custom classification codes.		Same as above
Contact	Attributes of customer's contact, such as Name, Job Title, Phone and other key information. Has the 'Contact-Additional Attributes' 'Contact Extension' subfolders		Navigate->Customers->Manage Contacts->[Select a contact]->Edit Navigator->Customization->Application Composer->Standard Objects->Contact->Fields->Standard Navigator->Customization->Application Composer->Standard Objects->Contact->Fields->Custom
Currency	Used to prefix amounts with the user's preferred currency.		N/A
Customer	Contains all key attributes of a customer. Has the 'Customer-Additional Attributes' , 'Customer Group Extension' , 'Customer Organization Extension', ' 'Customer Person Extension' and 'Sales Account Extension' subfolders		Navigate->Customers->[Select a Customer]->Edit Navigator->Customization->Application Composer->Standard Objects->Account->Fields->Standard Navigator->Customization->Application Composer->Standard Objects->Sales Account->Fields->Standard
Customer Contact Profile	Stores contact profile attributes for an organization contact.		Navigator->Customization->Application Composer->Standard Objects->Customer Contact->Fields->Standard
Customer Organization Type	A hierarchical dimension that stores organization type names and IDs.		Navigator->Customers->[Select the customer]->Organization type section
Employee	Employee, often the sales resource.		Navigator->Customization->Application Composer->Standard Objects->Resource->Fields->Standard
Employee > Employee Organization	The internal org to which the employee belongs.		Same as above
Employee > Sales Resource	The reporting hierarchy in		

Hierarchy	a sales org. Used to report on rolled up metrics.		Same as above
Industry	Attributes of the Industry to which the customer belongs.		Navigator->Customers->[Select the customer]->Industry Section
Lead	Holds attributes of a sales lead.		Navigator->Customization->Application Composer->Standard Objects->Sales Lead->Fields->Standard
Opportunity	Holds attributes of a sales opportunity.		Navigator->Customization->Application Composer->Standard Objects->Opportunity->Fields->Standard
Product	Holds all attributes for a product including the product hierarchy.		Navigator->Customization->Application Composer->Standard Objects->Product Group->Fields->Standard
Revenue	Holds all descriptive attributes for a Revenue line, often used with line level metrics.		Navigator->Customization->Application Composer->Standard Objects->Opportunity Revenue->Fields->Standard Navigate->Opportunities->[Select an Opportunity]->Revenue Item section
Sales Geography Zone	Specific to Territory Management. Not meant to be used with other metrics.		N/A
Secondary Dates	Folder for the less commonly used dates in reporting.		N/A
Secondary Dates > Secondary Dates – Additional Attributes	Folder for the less commonly used attributes amongst secondary dates.		N/A
Territory	Holds all key attributes of the sales territory dimension.		Navigator->Customization->Application Composer->Standard Objects->Forecast Territory Details->Fields->Standard
Territory > Territory Hierarchy	Holds all hierarchical attributes of a sales territory.		Same as above
Time	Contains all key attributes for the canonical date (driving date) for the subject area. Although this date is displayed in generic terms (unlike a 'Secondary Date'), it has a specific business meaning depending on the metric that is used, as follows: **Pipeline facts** – Expected Close Date of Opportunity. **Pipeline Detail facts** – Expected Close Date of Revenue Line. **Sales Cycle facts/Win Loss facts -** Expected Close Date of Opportunity or Revenue Line depending on whether it is a header or line level metric.		N/A

	Leads facts – Lead Creation Date. **Activity facts –** Activity Start Date.		
Time > Time – Additional Attributes	Contains additional attributes of Canonical/Driving Date.		N/A

Facts

Fact Name	Description	Special Considerations
Activity Facts	The measure(s) under this folder is used to assess the level of sales activities performed by resources.	The metrics in this folder should be used with the following dimensions: Activity, Business Unit, Time (Activity Start Date: Due date for Task, Start Date for Appt), Lead, Opportunity, Marketing Source Customer, Customer Contact, Industry, Employee, Currency, Sales Geography Zone and all Extension/Custom Attributes of base dimensions listed above as applicable. Several metrics can be derived at the report level with the generic '# of Activities' metric as the basis and by using attributes related to Activity status, End Date, etc. For Example, # of Open/Closed Activities; # of Opportunities/ Customers with Activities, Average # of activities per employee, etc.

Metric/Measure	Description/Meaning	Calculation – where applicable
# of Activities	Count of all customer activities of all Activity Function Types - Tasks, Appointments and Call Reports	
Activity Duration	The duration of the activity. Please the unit of measure depends on the default set in the source system.	

Fact Name	Description	Special Considerations
Lead Facts	Folder that holds all measures related to leads such as # of accepted leads, # of open leads, etc.	The metrics in this folder should be used with the following dimensions: Time, Lead, Customer, Customer Contact, Customer Contact Profile, Industry, Employee, Product, Territory, Auxiliary Classification 1, Auxiliary Classification 2, Auxiliary Classification 3,Organization Type, Currency, Sales Geography Zone and all Extension/Custom Attributes of base dimensions listed above as applicable.

Metric/Measure	Description/Meaning	Calculation – where applicable
# Converted / # Qualified (%)	Number of converted leads expressed as a percentage of the number of qualified leads.	100 * # of Converted Leads /# of Qualified Leads
# Highly-Rank Qualified/# Qualified (%)	Number of highly ranked qualified leads expressed as a percentage of the number of qualified leads.	100 * # of Highly Qualified Leads /# of Qualified Leads
# Highly-Ranked Qualified Leads	Number of highly ranked qualified leads.	# of Qualified Leads where Rank is 'Hot'
# Low-Ranked Qualified Leads	Number of low ranked qualified leads.	# of Qualified Leads where Rank is 'Cool'
# Medium-Rank Qualified/# Qualified (%)	Number of medium ranked qualified leads expressed as a percentage of the number of qualified leads.	100 * # of Medium Qualified Leads /# of Qualified Leads
# Medium-Ranked Qualified Leads	Number of medium ranked qualified leads.	# of Qualified Leads where Lead Rank is 'WARM'
# of Accepted Leads	Number of leads accepted by the assignee.	# of Leads when Accepted Flag is 'Y'

# of Assigned Leads	Number of leads assigned to a sales group or sales representative.	# of Leads when Assignment Status is 'Assigned'
# of B2B Customer with Leads	Number of leads associated with business to business customers.	# of Customer with Leads where Party Type is 'ORGANIZATION'
# of B2C Customer with Leads	Number of leads associated with business to consumer customers.	# of Customer with Leads where Party Type is 'PERSON'
# of Contacts with Leads	Number of customer contacts that have at least one lead associated with them.	# of Primary Contacts that are associated with Leads
# of Customer Leads Converted	Number of leads already associated with customers that have been converted to an opportunity.	# of Leads from Customer where Status is 'Converted'
# of Customer with Leads	Number of customers with at least one lead associated with them.	# of Customers that are associated with Leads
# of Excellent Leads Converted	Ignore.	
# of Excellent Leads	Ignore.	
# of Lead Interactions	Number of customer interactions associated with a lead.	# of Interactions that are associated with Leads
# of Leads Converted	Number of leads converted to opportunities.	# of Leads where Status is 'Converted'
# of Leads from B2B Customer	Number of leads generated from business to business customers.	# of Leads from Customer where Party Type is 'ORGANIZATION'
# of Leads from B2C Customer	Number of leads generated from business to consumer customers.	# of Leads from Customer where Party Type is 'PERSON'
# of Leads from Campaign	Number of leads generated from marketing campaigns.	# of Leads generated from marketing campaigns
# of Leads from Customer	Number of leads created from existing customers.	# of Leads for Customer
# of Leads from Event	Ignore.	
# of Leads from Prospect	Number of leads created from prospects.	# of Leads for Prospect
# of Leads Generated from Marketing Source	Number of leads generated from marketing source – could be marketing campaign.	# of Leads generated by any marketing activities
# of Leads Generated from Non Marketing Source	Leads generated from sources other than a marketing source.	# of Leads not generated by any marketing activities
# of Leads	Total number of leads that exists in the system.	# of Leads created
# of Open Leads	Number of leads that are 'Open', that is, not acted upon.	# of Leads where Status is 'Unqualified'
# of Prospect Leads Converted	Number of leads generated from prospects and converted to opportunities.	# of Leads from Prospect where Status is 'Converted'
# of Qualified Leads	Number of Leads that have been qualified.	# of Leads where Status is 'Qualified'
# of Rejected Leads	Number of Leads rejected.	# of Leads where Assignment Status is 'Rejected'
# of Retired Leads	Number of leads retired.	# of Leads where Status is 'Retired'
# of Unaccepted Leads	Number of assigned leads not yet accepted by sales persons.	# of Leads where Status is 'Unqualified' and Accepted Flag is 'N'
# of Unassigned Leads	Leads not assigned to any sales person to act upon.	# of Leads - # of Assigned Leads
# of Unconverted Leads	Number of leads which were not converted.	# of Leads - # of Leads Converted
# of Unqualified Leads	Number of leads that are yet to be qualified	# of Leads where Status is 'Unqualified'
# Qualified / # Unqualified (%)	Ratio between qualified leads and unqualified leads.	100 * # of Qualified Leads / # of Unqualified Leads
# Qualified Leads not Followed up before Expiration	Ignore.	

# Retired / # Unqualified (%)	Number of retired leads expressed as a percentage of the number of unqualified leads.	100 * # of Retired Leads /# of Unqualified Leads
Actual Cost	Ignore.	
Average # of Days Open for Unqualified Leads	Average number of days that unqualified leads are open.	Average number of days from lead creation date to current date (report date) for unqualified leads
Average # of Days to Assign Leads	Average number of days took to assign the leads.	Average number of days from lead creation date to owner assigned date for assigned leads
Average # of Days to Convert Leads	Average number of days it took to covert the leads to opportunity.	Average number of days from lead creation date to owner assigned date for converted leads
Avg Cost Per Lead	Ignore.	Actual Marketing Cost /# of Leads Generated from Marketing Source
Avg Lead Age (Days)	Average number of Days before the lead is converted/ rejected / retired. The number of days lead is open until having a final outcome.	For resolved leads (lead status is 'Converted' or 'Retired'), this means that average number of days from lead creation date to the date on which lead is resolved (Converted or Retired). For other leads, this means that average number of days from lead creation date to current date (report date).
Estimated Revenue (Internal)	This metric is for internal use only.	
Estimated Revenue	Revenue estimated by Sales Prediction Engine (SPE). Applicable for leads generated by SPE.	Lead Item Average Revenue Amount for Leads that are generated by Sales Prediction Engine
Lead Qualification Rate (%)	Number of leads qualified expressed as a percentage of the total number of leads created.	100 * # of Qualified Leads /# of Leads
Leads to Opportunity Conversion (%)	Number of leads converted to opportunities expressed as a percentage of the total number of leads created.	100 * # of Converted Leads /# of Leads
Potential Revenue	This is the deal size entered on the transaction area of the screen for the lead.	Lead Deal Size
Rejected Leads (%)	Number of leads rejected expressed as a percentage of the total number of leads created.	100 * # of Rejected Leads /# of Leads
Retired Leads (%)	Number of leads retired expressed as a percentage of the total number of leads created.	100 * # of Retired Leads /# of Leads
Total Market Potential	Total expected revenue from all open leads.	Total Lead Deal Size from Leads where Status is 'Qualified' or 'Unqualified'

Fact Name	Description	Special Considerations
Pipeline Detail Facts	This folder contains revenue measures at the opportunity line/revenue level.	Metrics from this folder are at the 'detail' level. They should be used with the following dimensions: Time, Secondary Dates, Customer, Contact, Customer Contact Profile, Industry, Employee, Product, Opportunity, Territory, Revenue, Auxiliary Classification 1, Auxiliary Classification 2, Auxiliary Classification 3, Customer Organization Type, Currency, Sales Geography Zone and all Extension/ Custom Attributes of base dimensions listed above as applicable.

Metric/Measure	Description/Meaning	Calculation – where applicable
# Contacts with Opportunities	Number of Contacts with Opportunities.	
# of Closed Opportunity Non Credit Revenue Lines	Number of opportunity revenue lines which are closed-won but not contributing to a sales person's quota.	
# of Closed Opportunity Revenue Lines	Number of opportunity revenue lines which are closed-won. Only quota contributing revenue considered.	
# of Competitive Opportunity Revenue Lines	Number of opportunity revenue lines which have at least one competitor. Only quota contributing revenue considered.	
# of Lost Competitive Opportunity Revenue Lines	Number of lost opportunity revenue lines which have at least one competitor. Only quota contributing revenue considered.	
# of Lost Opportunity Revenue Lines	Number of lost opportunity revenue lines. Only quota contributing revenue considered.	
# of Open Opportunity Revenue Lines	Number of opportunity revenue lines which are in the 'open' status category. Only quota contributing revenue considered.	
# of Opportunity Revenue Lines	Number of opportunity revenue lines of all statuses. Only quota contributing revenue lines considered.	
# of Products	Number of Products.	
# of Won Competitive Opportunity Revenue Lines	Number of won opportunity revenue lines which have at least one competitor. Only quota contributing revenue considered.	
# of Won Opportunity Revenue Lines	Number of lost opportunity revenue lines. Only quota contributing revenue considered.	
# of Won/Lost Opportunity Revenue Lines	Number of won/lost opportunity revenue lines. Only quota contributing revenue considered.	
Average Closed Opportunity Line Revenue	Closed opportunity line revenue averaged over number of revenue lines.	Closed Opportunity Line Revenue / # of Closed Opportunity Revenue Lines
Closed Competitive Opportunity Line Revenue	Total opportunity line revenue which are closed-won and have at least one competitor associated with the revenue line. Only quota contributing revenue considered.	
Closed Opportunity Line Non-Revenue Credits QTD	Quarter –to-date total opportunity line revenue which are closed-won but not contributing to a sales person's quota.	
Closed Opportunity Line Non-Revenue Credits YTD	Year –to-date total opportunity line revenue which are closed-won but not contributing to a sales person's quota.	
Closed Opportunity Line Non-Revenue Credits	Total opportunity line revenue which are closed-won but not contributing to a sales person's quota.	
Closed Opportunity Line Revenue - Period	Quarter –to-date total opportunity line revenue for the fiscal period which are closed-won but not contributing to a sales person's quota.	
Closed Opportunity Line Revenue - Year	Quarter –to-date total opportunity line revenue for the calendar year which are closed-won but not contributing to a sales person's quota.	
Closed Opportunity Line Revenue QTD	Quarter –to-date total opportunity line revenue which are closed-won. Only quota contributing	

	revenue considered.	
Closed Opportunity Line Revenue YTD	Year –to-date total opportunity line revenue which are closed-won. Only quota contributing revenue considered.	
Closed Opportunity Line Revenue	Total opportunity line revenue which are closed-won. Only quota contributing revenue considered.	
Competitive Opportunity Line Revenue	Total closed-won opportunity line revenue with at least one competitor associated with the opportunity revenue line. Only quota contributing revenue considered.	
Competitor Win Rate of Opportunity Lines	Win rate of opportunity revenue lines where there is at least one primary competitor.	100 * # of Won Competitive Opportunity Revenue Lines /# of Competitive Opportunity Revenue Lines
Expected Opportunity Line Revenue	Expected revenue at the opportunity line level. Only quota contributing revenue considered.	Source calculation: Expected Revenue = Opportunity Revenue * Win Probability
Lost Competitive Opportunity Line Revenue	Total opportunity line revenue which are lost and have at least one competitor associated with the revenue line. Only quota contributing revenue considered.	
Lost Opportunity Line Revenue	Total opportunity line revenue which is in lost status category. Only quota contributing revenue considered.	
No sale Opportunity Line Revenue	Total opportunity line revenue with a 'No Sale' status category. Only quota contributing revenue considered.	
Open Competitive Opportunity Line Revenue	Total opportunity line revenue with an 'Open' status category and at least one competitor. Only quota contributing revenue considered.	
Open Opportunity Line Non-Revenue Credits	Total Revenue of opportunities with an 'Open' status category but not contributing to a sales person's quota.	
Open Opportunity Line Revenue	Total opportunity line revenue with an 'Open' status category. Only quota contributing revenue considered.	
Opportunity Line Non Credit Revenue	Total opportunity line revenue with an 'Open' status category but not contributing to a sales person's quota.	
Opportunity Line Revenue	Total revenue at the opportunity line level. Only quota contributing revenue considered.	
Predicted Opportunity Line Revenue	Total predicted revenue at the opportunity line level. Only quota contributing revenue considered.	
Total Sales Cycle of Opportunity Revenue Lines	Difference between the actual close date and created date for closed opportunity revenue lines.	
Win Rate of Revenue Lines	Number of closed-won opportunity revenue lines as a percentage of closed-won and lost opportunity revenue lines.	100*# of Closed (that is, won) Opportunity Revenue Lines / # of Won/Lost Opportunity Revenue Lines

Fact Name	Description	Special Considerations
Pipeline Facts	This folder contains revenue measures at the opportunity header level.	Metrics from this folder are at the opportunity 'header' level. They should be used with the following dimensions: Time, Secondary Dates, Customer, Contact, Customer Contact Profile, Industry, Employee, Opportunity,

		Territory, Revenue, Auxiliary Classification 1, Auxiliary Classification 2, Auxiliary Classification 3, Customer Organization Type, Currency, Sales Geography Zone and all Extension/Custom Attributes of base dimensions listed above as applicable.

Metric/Measure	Description/Meaning	Calculation – where applicable
# of Accounts with Opportunities	Number of distinct customers who have at least one opportunity associated.	
# of Closed Opportunities	Number of Closed-Won Opportunities.	
# of Customers	Number of opportunities that are closed-won.	
# of Days to Close	Number of days till expected close date for an open opportunity.	Difference between current date and expected close date
# of Lost Opportunities	Number of opportunities lost to competition.	
# of New Opportunities	Number of opportunities created in the last 90 days.	Count of opportunities where creation date > (Current date - 90)
# of Open Opportunities	Number of opportunities with an 'Open' status category.	
# of Opportunities	Number of all opportunities irrespective of status.	
# of Referenced Opportunities	Number of opportunities with at least one reference.	
# of Won Referenced Opportunities	Number of won opportunities with at least one reference.	
All Resource Average Deal Size	Average Deal Size for closed opportunities across all sales resources. Used for comparison between a single employee or specific set of employees and all others.	
Average Opportunity Deal Size	Average opportunity revenue for closed-won opportunities.	"Closed Opportunity Revenue" / "# of Closed Opportunities"
Close Rate	Number of won opportunities expressed a percentage of the total number of opportunities.	
Closed Opportunity Revenue	Total revenue of opportunities which are closed-won.	
Cumulative Closed Opportunity Revenue	Running sum of total revenue of opportunities which are closed-won.	
Cumulative Expected Opportunity Revenue	Running sum of expected revenue of opportunities.	
Cumulative Opportunity Revenue	Running sum of total revenue of opportunities.	
Days Stalled	Number of days that an opportunity has been residing in the current sales stage. Applicable to open opportunities.	
Expected Opportunity Revenue	Expected revenue at the opportunity header level. Only quota contributing revenue considered.	
Leads to Opportunity Conversion (%)	Number of leads converted to opportunities as a percentage of the total number of leads.	100 * # of Leads Converted / # of Leads
No sale Opportunity Revenue	Total Revenue of opportunities with a 'No Sale' status category. Only quota contributing revenue considered.	
Open Opportunity Revenue	Total Revenue of opportunities with an 'Open' status category.	
Opportunity Revenue	Total revenue at the opportunity header level.	

	Only quota contributing revenue considered.	
Win Rate	Number of closed-won opportunities as a percentage of closed-won and lost opportunities.	100.0 * # of Closed (that is, Won) Opportunities / # of Won/Lost Opportunities
Win Rate of Revenue Lines	Number of closed-won opportunity revenue lines as a percentage of closed-won and lost opportunity revenue lines.	# of Closed (that is, Won) Opportunity Revenue Lines / # of Won/Lost Opportunity Revenue Lines

Fact Name	Description	Special Considerations
Sales Account Facts	This folder contains metric (s) related to Sales Account. The metric(s) are used in analysis criteria to report on customer/customer attributes, but rarely displayed on the report themselves.	# of sales accounts, which is the sole sales account fact, is used along with Customer attributes to retrieve all Customer data in the report. If this is not used only those who have revenue transactions are returned. Should be used with the following dimensions: Time, Employee, Customer, Auxiliary Classification 1, Auxiliary Classification 2,, Auxiliary Classification 3, Territory, Industry.

Metric/Measure	Description/Meaning	Calculation – where applicable
# of Sales Accounts	Number of distinct sales accounts.	

Fact Name	Description	Special Considerations
Sales Cycle Facts	Folder containing measures related to opportunity velocity and sales cycle duration.	Metrics from this folder are at the opportunity 'header' level. They should be used with the following dimensions: Time, Secondary Dates, Customer, Contact, Customer Contact Profile, Industry, Employee, Opportunity, Territory, Revenue, Auxiliary Classification 1, Auxiliary Classification 2, Auxiliary Classification 3, Customer Organization Type, Currency, Sales Geography Zone and all Extension/Custom Attributes of base dimensions listed above as applicable.

Metric/Measure	Description/Meaning	Calculation – where applicable
# Days in Stage	Number of days an opportunity is resident in a particular sales stage.	
# of Stalled Opportunities	Number of open opportunities in any stage which have exceeded the max number of days applicable for that particular stage.	
All Resource Average Sales Cycle	Average Sales Cycle across all sales resources. Used for comparison between a single employee or specific set of employees and all others.	
Average Days at Stage	Average number of days that an opportunity resides in any particular sales stage.	SUM Days at Stage /# of Opportunities
Average Deal Size	Average opportunity revenue for closed-won opportunities.	Closed Opportunity Revenue/ # of Closed Opportunities
Average Sales Cycle of Revenue Lines	Average sales cycle of closed-won opportunity revenue lines.	SUM(Sales Cycle of Opportunity Revenue Lines)/ # of Closed Opportunity Revenue Lines
Average Sales Cycle	Average sales cycle of closed-won opportunities. Sales Cycle is the duration in number of days	SUM(Sales Cycle of closed opportunities)/ # of Closed

	between opportunity creation date and the date it was closed-won.	Opportunities
Opportunity Average Days Open	Average number of days since opportunity was created, for open opportunities.	SUM (Days Open)/# of Open Opportunities
Total Sales Cycle of Opportunities	Difference between the actual close date and created date for closed opportunities.	
Total Sales Cycle of Opportunity Revenue Lines	Difference between the actual close date and created date for closed opportunity revenue lines.	

Fact Name	Description	Special Considerations
Win Loss Facts	Folder containing metrics related to opportunity win/loss.	This folder contains win loss metrics at the opportunity header level as well as the revenue line level. Header level metrics should be used with the following dimensions: Time, Secondary Dates, Customer, Contact, Customer Contact Profile, Industry, Employee, Opportunity, Territory, Revenue, Auxiliary Classification 1, Auxiliary Classification 2, Auxiliary Classification 3, Customer Organization Type, Currency, Sales Geography Zone and all Extension/Custom Attributes of base dimensions listed above as applicable. Line level metrics can be used with any of the above dimensions plus product.

Metric/Measure	Description/Meaning	Calculation – where applicable
# of Competitive Opportunities	Number of all opportunities with at least one competitor.	
# of Competitive Won/Lost Opportunities	Number of all won and lost opportunities which have at least one competitor.	
# of Competitors	Total number of distinct competitors who are associated with at least one revenue line.	
# of Lost Competitive Opportunities	Number of all lost opportunities which have at least one competitor.	
# of Lost Competitive Opportunity Revenue Lines	Number of lost opportunity revenue lines which had at least one competitor. Only quota contributing revenue considered.	
# of Lost Opportunity Revenue Lines	Number of lost opportunity revenue lines. Only quota contributing revenue considered.	
# of Won Competitive Opportunities	Number of all won opportunities which have at least one competitor.	
# of Won Competitive Opportunity Revenue Lines	Number of won opportunity revenue lines. Only quota contributing revenue considered.	
# of Won Opportunity Revenue Lines	Number of won opportunity revenue lines. Only quota contributing revenue considered.	
# of Won/Lost Opportunities	Number of won or lost opportunities which have at least one competitor. Only quota contributing revenue considered.	
# of Won/Lost Opportunity Revenue Lines	Number of won or lost opportunity revenue lines which have at least one competitor. Only quota contributing revenue considered.	

All Resource Win Rate	Win Rate across all sales resources. Used for comparison between a single employee or specific set of employees and all others.	
Closed Competitive Opportunity Line Revenue	Total opportunity line revenue which are closed-won and have at least one competitor associated with the revenue line. Only quota contributing revenue considered.	
Closed Competitive Opportunity Revenue	Total closed-won opportunity header revenue with at least one competitor associated with the opportunity. Only quota contributing revenue considered.	
Competitive Opportunity Line Revenue	Total closed-won opportunity line revenue with at least one competitor associated with the opportunity revenue line. Only quota contributing revenue considered.	
Competitive Opportunity Revenue	Total opportunity header revenue with at least one competitor associated with the opportunity revenue line. Only quota contributing revenue considered.	
Competitive Won/Lost Opportunities	Number of all won and lost opportunities which have at least one competitor.	
Competitor Win Rate of Opportunities	Win rate of opportunities where there is at least one primary competitor.	100 * # of Won Competitive Opportunities / # of Competitive Opportunities
Competitor Win Rate of Opportunity Lines	Win rate of opportunity revenue lines where there is at least one primary competitor.	100 *# of Won Competitive Opportunity Revenue Lines / # of Competitive Opportunity Revenue Lines
Loss Rate	Number of lost opportunities as a percentage of closed-won and lost opportunities.	100 * # of Lost Opportunities/ # of Won/Lost Opportunities
Lost Competitive Opportunities	Number of all lost opportunities which have at least one competitor.	
Lost Competitive Opportunity Line Revenue	Total opportunity line revenue which are lost and have at least one competitor associated with the revenue line. Only quota contributing revenue considered.	
Lost Competitive Opportunity Revenue Lines	Number of lost opportunity revenue lines. Only quota contributing revenue considered.	
Lost Competitive Opportunity Revenue	Total lost opportunity header revenue with at least one competitor associated with the opportunity revenue line. Only quota contributing revenue considered.	
Lost Opportunity Line Revenue	Total opportunity line revenue which are lost. Only quota contributing revenue considered.	
Lost Opportunity Revenue Lines	Number of lost opportunity revenue lines. Only quota contributing revenue considered.	
Lost Opportunity Revenue	Total lost opportunity header revenue. Only quota contributing revenue considered.	
Opportunity Win Probability	Win probability of the opportunity expressed as a percentage.	
Reference Win Rate	Win rate of opportunities that have at least one revenue line associated with a reference.	100 * # of Won Referenced Opportunities /# of Referenced Opportunities
Sum of Won/Expected Opportunity Revenue	Sum of Won/Expected Opportunity Revenue.	Closed Opportunity Revenue + Expected Opportunity Revenue
Win Rate of Revenue Lines	Number of closed-won opportunity revenue lines as a percentage of closed-won and lost opportunity revenue lines.	100 * # of Closed (that is, Won)Opportunity Revenue Lines / # of Won/Lost Opportunity Revenue Lines

Win Rate	Number of closed-won opportunities as a percentage of closed-won and lost opportunities.	100 * # of Closed (that is, Won) Opportunities / # of Won/Lost Opportunities
Won Competitive Opportunities	Number of closed-won opportunity revenue lines as a percentage of closed-won and lost opportunity revenue lines.	
Won Competitive Opportunity Revenue Lines	Number of won opportunity revenue lines which had at least one competitor. Only quota contributing revenue considered.	
Won Opportunity Revenue Lines	Number of won opportunity revenue lines. Only quota contributing revenue considered.	
Won/Lost Opportunities	Number of all won and lost opportunities.	
Won/Lost Opportunity Revenue Lines	Number of won or lost opportunity revenue lines.	

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