



What's Available in Metrics & Analytics?

February 2023

Dashboard: Billing & Collections

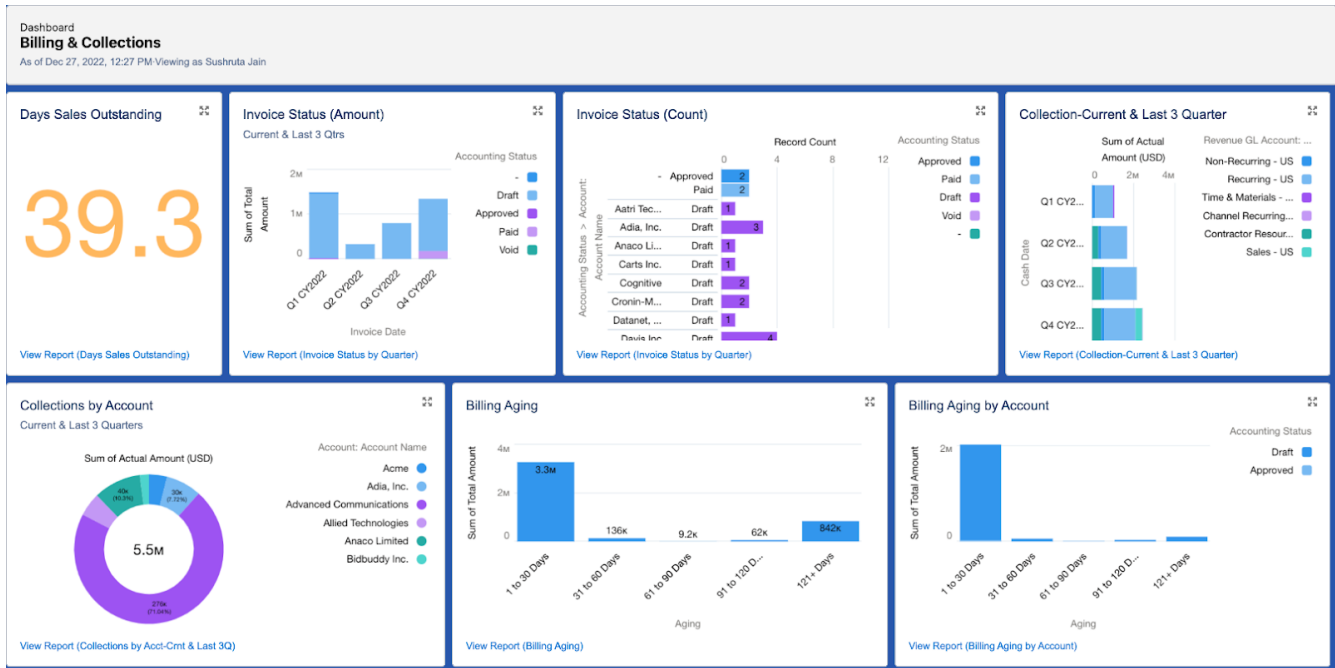
Maintaining and understanding customer billing details is a major part of managing cash income. This dashboard provides seven new components for understanding the risk, timing, status, and other details related to managing accounts receivable and customer billing operations.

Report

- Billing Aging
- Billing Aging by Account
- Collections by Account - Current & Last 3 Quarters
- Collections - Current & Last 3 Quarters
- Days Sales Outstanding
- Invoice Status (Amount)
- Invoice Status (Count)

Related Product

- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing



Dashboard: Board Sales Performance

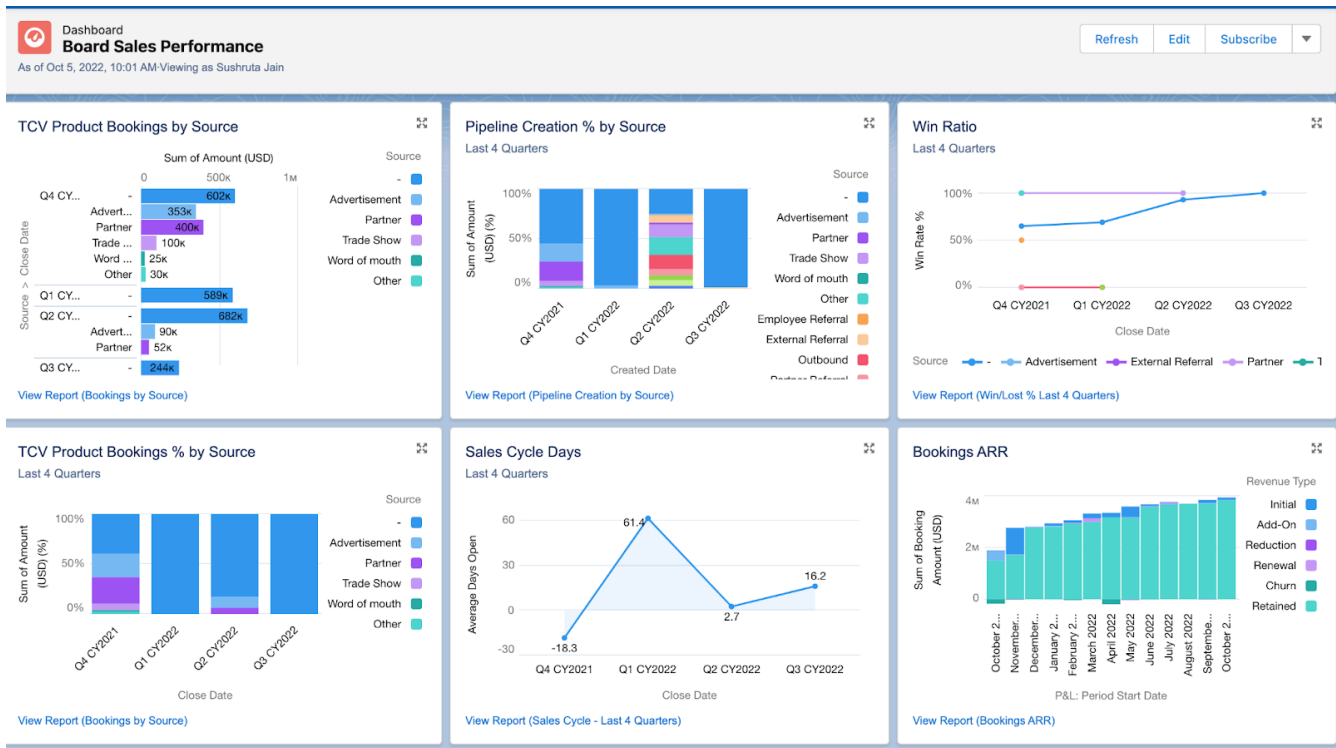
In a SaaS business, keeping the board of directors informed about the progress of the company's sales efforts is just as crucial as keeping employees and investors in-the-know. This dashboard offers six sales-related components from five new reports to share with board members on-demand.

Report

- Booked ARR
- Bookings by Source
- Pipeline Creation by Source
- Sales Cycle - Last 4 Quarters
- Win/Loss % - Last 4 Quarters

Related Product

- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Salesforce Sales Cloud



Dashboard: Bookings & Customers

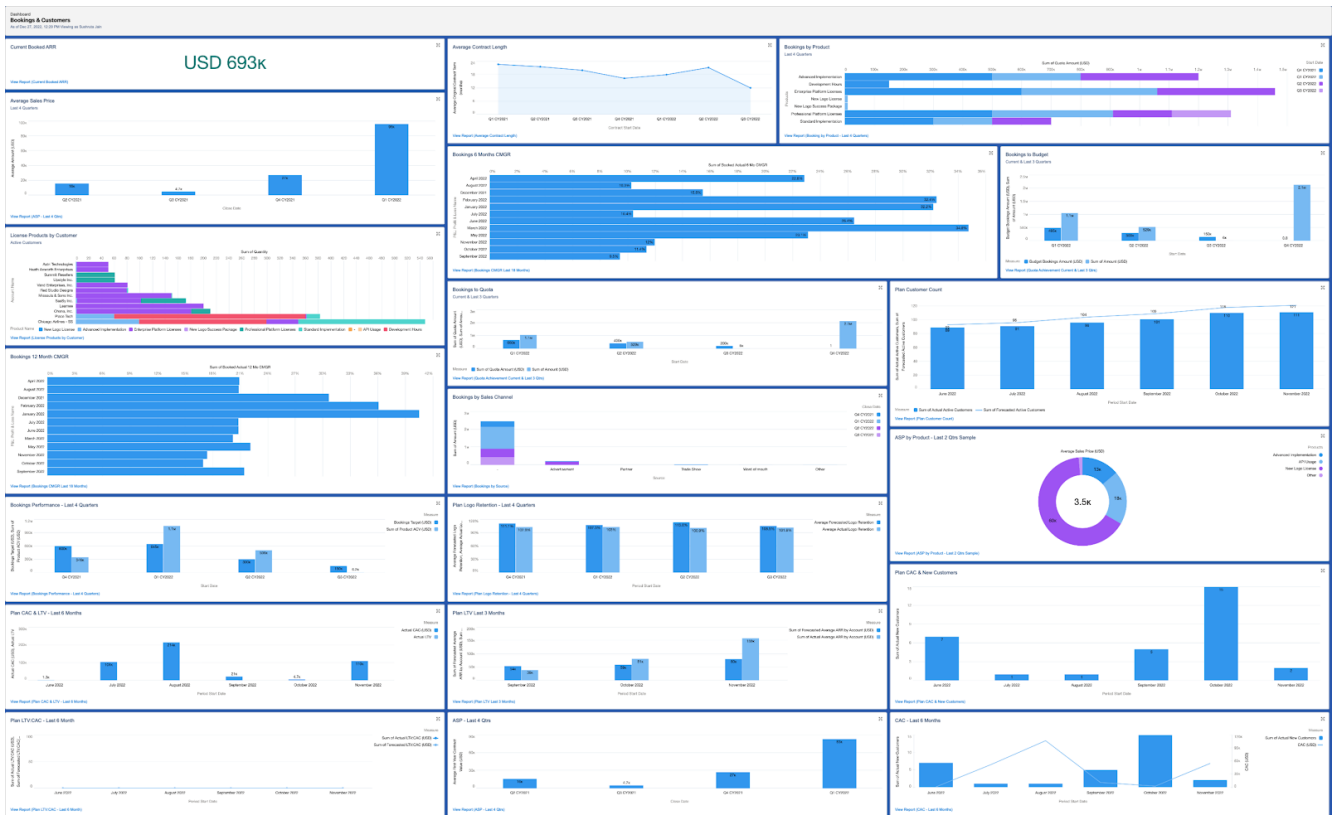
SaaS revenue leaders have little time to create dashboards when they're managing new business acquisition. Use this dashboard to gain instant insight into detailed product bookings performance that flows from the data revenue teams are already entering into Salesforce as they bring-in new contracts.

Report

- Quota Achievement - Current & Last 3 Quarters
- Average Contract Length
- Average Sales Price - Last 4 Quarters
- Average Sales Price by Product Line - Last 2 Quarters
- Bookings 6 Month CMGR
- Bookings 12 Month CMGR
- Bookings by Product - Last 4 Quarters
- Bookings by Sales Channel
- Bookings Performance - Last 4 Quarters
- CAC - Last 6 Months
- Current Booked ARR
- Customer Count
- License Products by Customer

Related Product

- Forecasting & Planning
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing



Dashboard: Cashflow & Expenses

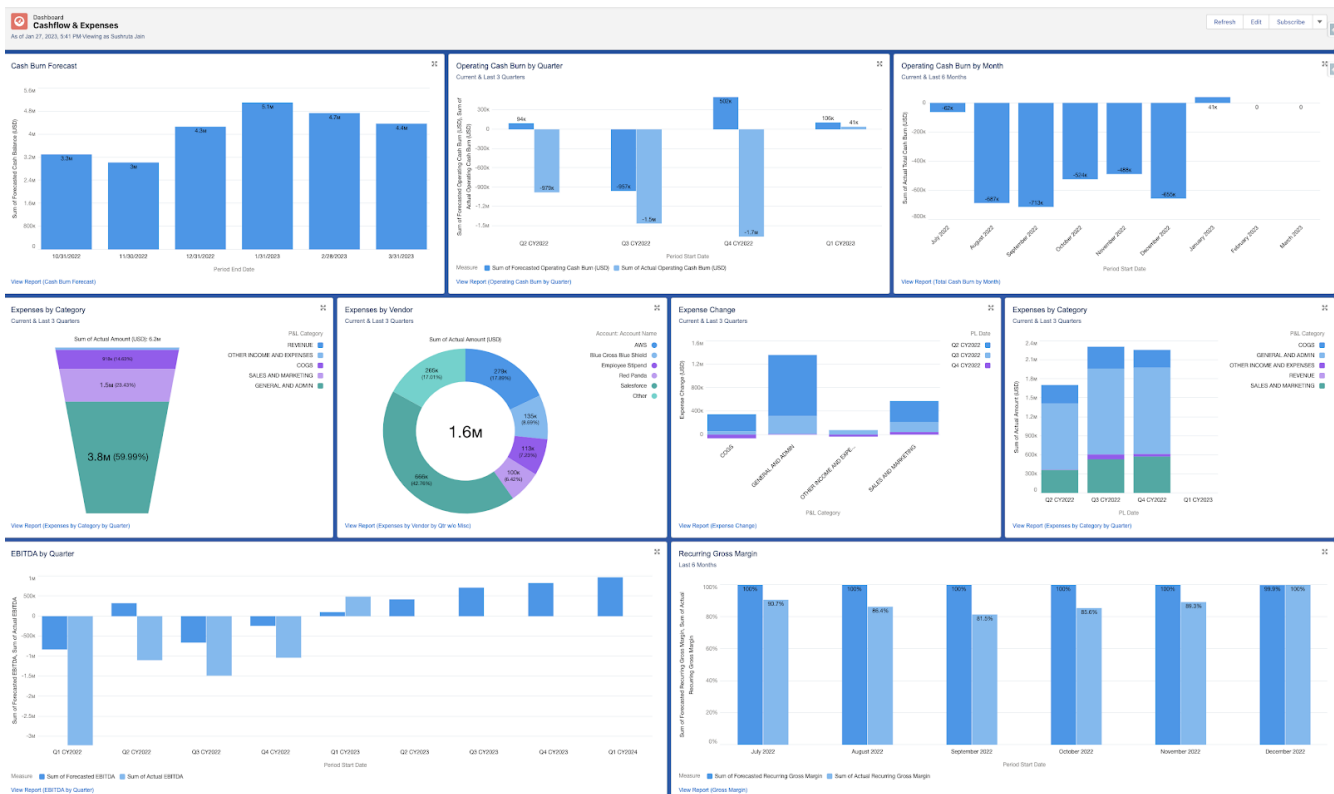
In any economy, wisely managing the flow of cash expenses pays off. This dashboard offers eight components from your forecasts and cash actuals to easily understand and analyze what's going on with your expenses and help you better predict and prepare for the future.

Report

- Cash Burn Forecast
- Expenses by Category by Quarter
- Expense by Vendor by Qtr w/o Misc
- Expense Change
- Gross Margin
- Operating Cash Burn by Quarter
- Total Cash Burn by Month
- Total Cash Burn by Month
- EBITDA by Quarter

Related Product

- Forecasting & Planning
- Forecasting & Planning
- Forecasting & Planning
- Forecasting & Planning
- Forecasting & Planning
- Forecasting & Planning
- Forecasting & Planning
- Forecasting & Planning
- Forecasting & Planning



Dashboard: Leadership Snapshot

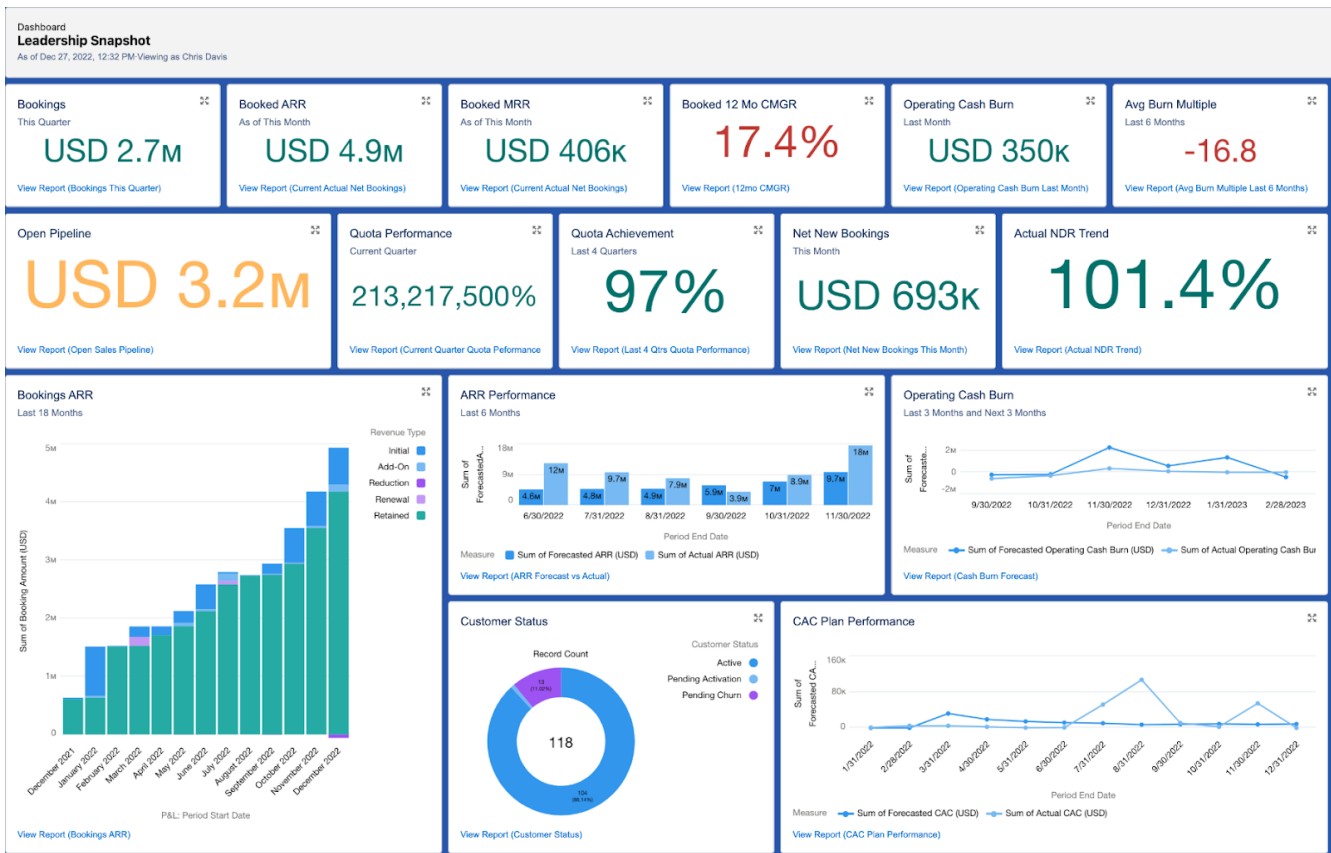
In order to successfully lead a SaaS business, the CEO, CFO, and the rest of the executive leadership team must get on the same page when it comes to revenue, cash burn, and the company's trajectory based on their related trends. This dashboard puts the power of Place into the hands of every business leader whose job influences how the company performs financially.

Report

- ARR Forecast vs. Actual
- Average Burn Multiple - Last 6 Months
- CMGR - Last 12 Months
- CAC Plan Performance
- Cash Burn Forecast
- Operating Cash Burn - Last Month
- Quota Performance - Current Quarter
- Quota Performance - Current Quarter
- Actual Net Bookings - Current Month
- Actual Net Dollar Retention Trend
- Bookings ARR
- Bookings - Current Quarter
- Customer Status
- Net New Bookings - Current Month
- Open Sales Pipeline

Related Product

- Forecasting & Planning
- Forecasting & Planning
- Forecasting & Planning
- Forecasting & Planning
- Forecasting & Planning
- Forecasting & Planning
- Forecasting & Planning
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Salesforce Sales Cloud



Dashboard: Pipeline

SaaS companies survive or perish based on their ability to create, know, and manage their sales pipelines. This dashboard enables revenue leadership to quickly analyze their sales pipelines from every level.

Report

Bookings Performance - Last 4 Quarters

Bookings Up for Renewal

Open Pipeline by Account Executive

Open Pipeline by Industry

Opportunities Won Last Quarter

Pipeline Snapshot

Stale Pipeline List

Stale Pipeline by Owner

Stale Pipeline by Stage

Related Product

Revenue & Billing

Revenue & Billing

Salesforce Sales Cloud

Salesforce Sales Cloud

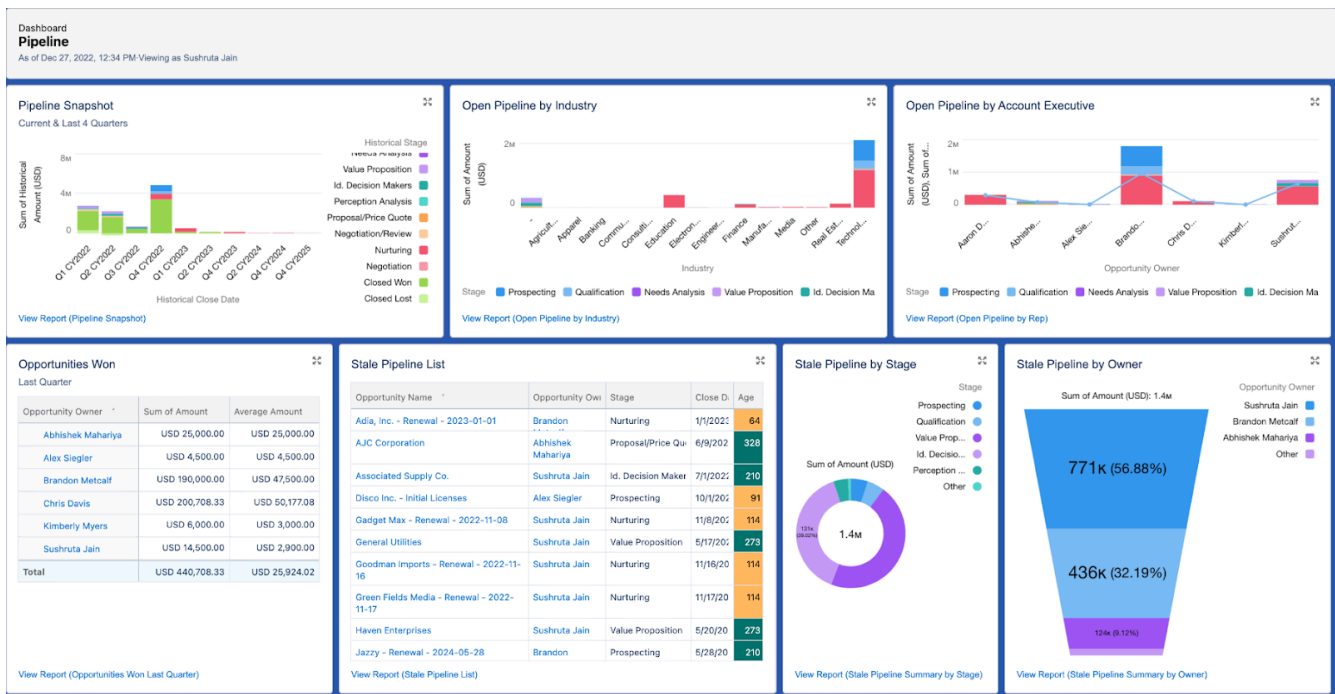
Salesforce Sales Cloud

Salesforce Sales Cloud

Salesforce Sales Cloud

Salesforce Sales Cloud

Salesforce Sales Cloud



Dashboard: Plan Cashflow & Expenses

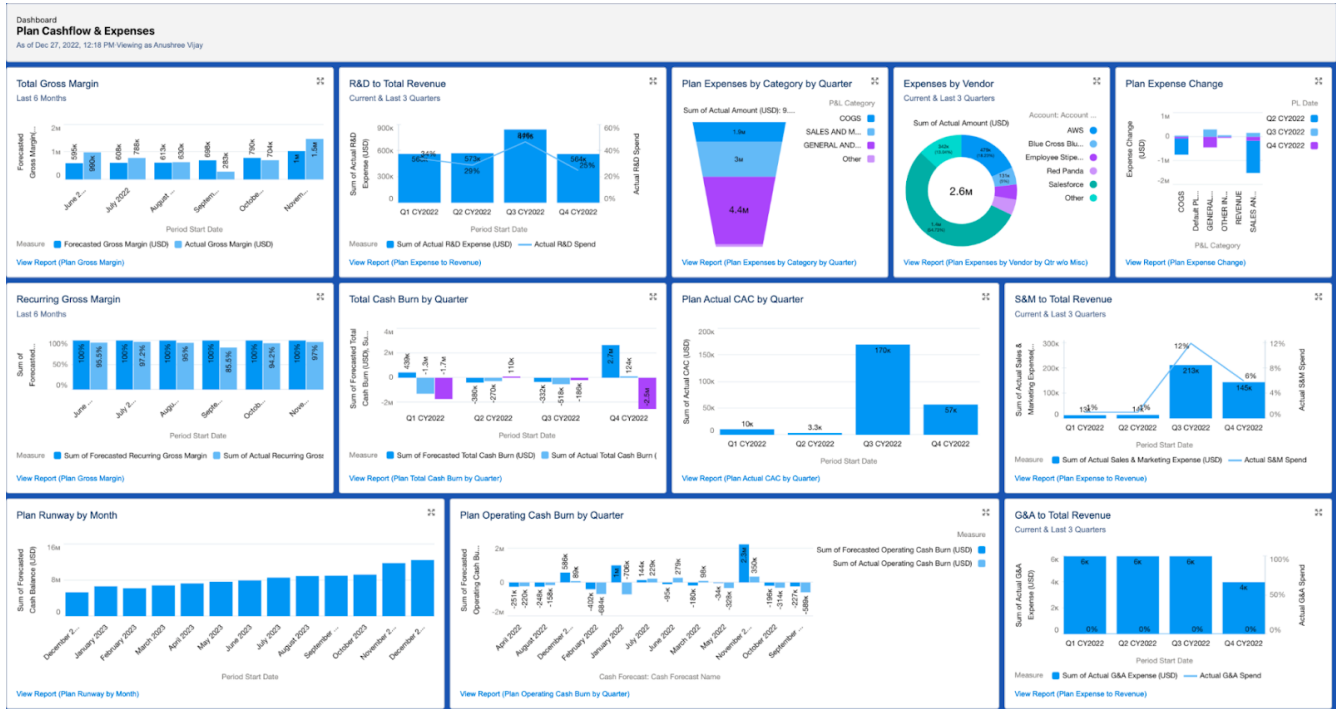
This dashboard combines data from the corporate financial plan with actual achievement to make it easy to analyze how a variety of expense and cash flow metrics have been performing to plan.

Report

- Plan CAC & New Customers
- Plan CAC & LTV - Last 6 Months
- Plan Logo Retention - Last 4 Quarters
- Plan LTV - Last 3 Months
- Plan LTV:CAC - Last 6 Months

Related Product

- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing



Dashboard: Revenue, ARR & MRR

Calculating, analyzing, and sharing data about the various forms of revenue metrics can be a daunting task in any business. This dashboard offers nine ways to better understand and communicate SaaS revenue performance from new and familiar perspectives.

Report

- ARR Growth MoM
- ARR by Customer - Current
- ARR by Customer - Last 4 Quarters
- Budget Total Revenue - Last 12 Months
- Plan Total Revenue - Last 12 Months
- ARR by Product Line
- Monthly Recurring Revenue by Deal Size
- Monthly Recurring Revenue by Month
- Revenue by Customer - Last 12 Months
- Revenue by Employee - Current & Last 6 Months
- Revenue by Employee - Current and Last 3 Quarters
- Revenue by Product - Last 12 Mths
- Revenue Run Rate
- Revenue by Year
- Magic Number by Month
- Magic Number by Quarter

Related Product

- Forecasting & Planning
- Forecasting & Planning
- Forecasting & Planning
- Forecasting & Planning
- Forecasting & Planning
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Revenue & Billing
- Forecasting & Planning
- Forecasting & Planning

