

Sample ABM reporting dashboard

Target account logo

ABM DASHBOARD

Q1 2018

Quarter highlights

Meeting secured with Erica Li on 15/01 re GDPR
Workplace transformation opportunity progressed to SS2 at \$1,200,000
Thirst for Knowledge campaign launched with good initial response
Brand campaign billboard outside GSK London office secured for Q2
Project Joel kick-off scheduled for 18/02

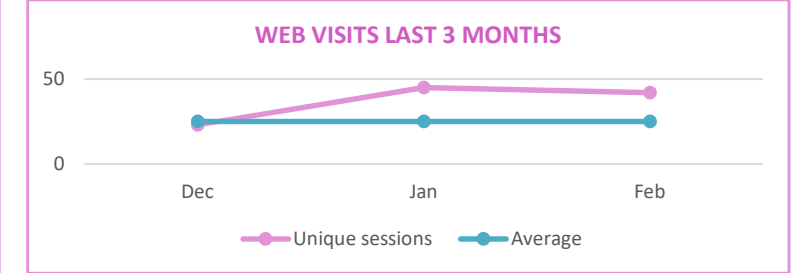
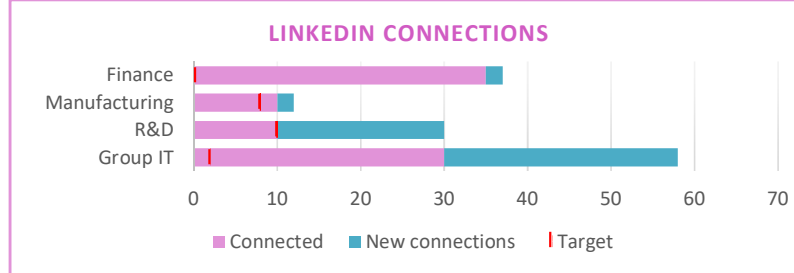
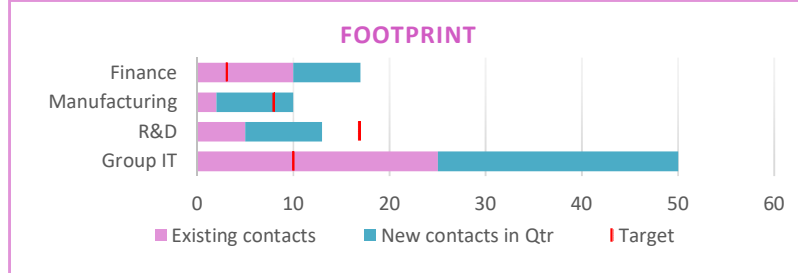
Latest insight

Internal cost review programme has initiated several efficiency initiatives with contacts open to meet if clear business case can be presented.
Conversations have indicated a lack of awareness of the term workplace transformation and requirement for clarity in value proposition.
Erica Li has been vocal on the subject of using GDPR as an opportunity to be more customer-centric.

Awareness

2018 objectives

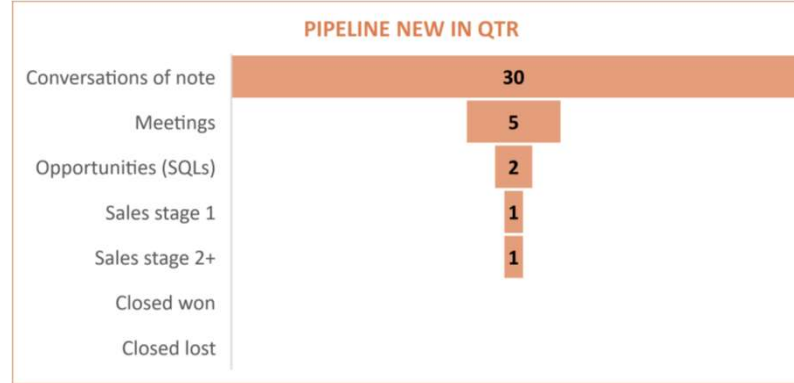
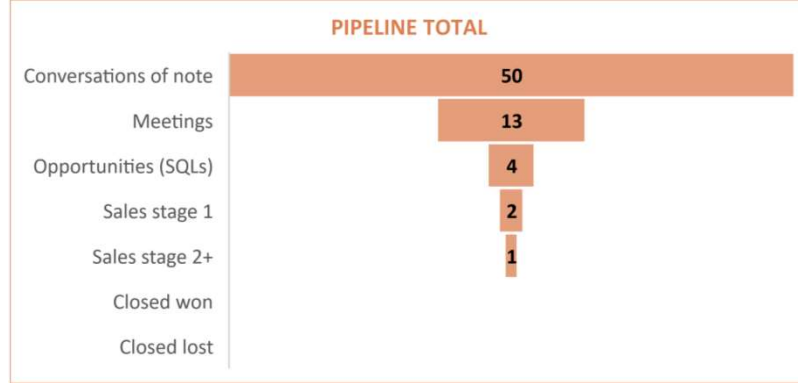
- Engage 40 new C/D level contacts in IT division
- Engage 20 new contacts within R&D



Pipeline

2018 objectives

- Marketing to identify opportunities with pipeline value of \$8m in 2018
- Marketing to identify 6x new opportunities
- Marketing to source 2x new wins



Opportunity	KEY OPPORTUNITIES				
	Not started	Biz dev.	Live opp	SS1	SS2
Workplace transformation			X		X
Endpoint security			X	X	
Project Joel	X				

Key wins

2018 objectives

- Marketing to support Project Joel RFP through bid cycle
- Identify at least 2x new opportunities in X division

SQL value \$5,250,000 (+\$3,250,000)
SS2 value \$1,200,000 (+\$1,200,000)

Comments
Meeting secured with Erica Li on 15/01 re GDPR
Workplace transformation opportunity progressed to SS2 at \$1,200,000
Michael Swiftknot opportunity progressed to SS1 with a value of \$250,000
Laura Knell opportunity qualified out due to her move to RB

VIP targets

2018 objectives

- Raise profile of Lucy Hosenboek, Account Executive
- Meetings with 50% of top named VIP targets: Dane Johnson, Global Head of Transformation; Erica Li, Strategy Director; Michael Bussington, Group Financial Controller; Bernd Hagel, Group COO

Name	Title	VIP TARGETS						Interactions of note
		Unaware	Aware	Met	Warm	Live Opp	Advocate	
D Johnson	Global Head of Transformation	X						
E Li	Strategy Director		X	X				Meeting on 15/01 regarding GDPR programme
M Bussington	Group Financial Controller			X	X			Made introduction to CFO
Bernd Hagel	Group COO		X					Attended break out at PSR 2018



Satisfaction & retention

2018 objectives

- NPS score return to positive overall
- Build retention programme for 2019 renewal of Y deal

