



## RevenueTEK<sup>®</sup>

# Revenue Performance Scorecarding with Telemetry RT3

*Elevating the role of metrics and process in high-participation revenue planning*

### Highlights

- Link high-participation revenue planning, budgeting and forecasting processes to actual performance results.
- Model and deploy integrated metrics to every contributor's workspace.
- Create and share Revenue Performance Heat Maps, impact diagrams and custom diagrams in a customizable, closed-loop revenue performance analysis and management system.
- Deliver revenue performance data and insights through a variety of interfaces.

### Overview

Revenue performance scorecards can be extremely effective tools for helping organizations define, align, monitor, steer and communicate progress toward their revenue and profitability objectives. Scorecarding capabilities now available in Telemetry RT3<sup>®</sup> enable organizations to integrate metrics and leading key performance indicators (KPIs) into high-participation revenue planning, budgeting and forecasting processes to drive greater accountability and close the loop on revenue performance management.

### Linking revenue performance to KPI's, planning and forecasting

For many years, businesses both large and small have used scorecards to compare strategic and operational plans with actual results and show employees and managers how well corporate objectives are being met. The process of creating scorecards helps organizations define their objectives and translate strategies into tactics aligned with clear, measurable performance targets. Scorecards are the practical, everyday tools that help teams and individuals monitor the metrics and KPIs that measure progress toward those targets.

Now revenue performance scorecards created in Telemetry can ensure that an organization's progress towards revenue targets — or lack of it — is consistently understood and communicated from the corporate center to the marketing and sales operators at the front lines of the business. Using an almost infinite variety of customizable, intuitive data visualizations, charts, graphs and trend lines, as well as strategy maps and diagrams, the organization's revenue performance metrics and KPIs can be displayed to help managers share a common understanding of corporate revenue performance. Revenue scorecards provide clarity as to what is or is not working and what is or is not a priority. And scorecards are far more effective at getting this critical revenue information across than simple rows and columns on a spreadsheet.

Telemetry RT3<sup>®</sup>

## Revenue Risk & Performance Heat Maps impact diagrams and custom visualizations

In addition to performance scorecards that display metrics for dimensions such as territory, product, channel or time period, Telemetry provides unique visualizations for revenue insights and data: heat maps, impact diagrams and custom visualizations.

- A *Revenue Performance Heat Map* is a visual tool that shows the causal relationships between an organization's core demand and revenue drivers, the performance blockages in and between those drivers, actions needed to achieve those objectives; even the tactical and resource commitments required to execute those actions.
- *Impact diagrams* help illustrate the ripple effect that different actions or resource allocations within core revenue drivers can have on future revenue, margin and profitability. For example, if resources are diverted between marketing campaigns, sales of certain products in certain territories may improve in the short term but the pipeline may suffer in the longer term. Impact diagrams help bring these trade-offs into focus.
- *Custom visualizations* can displays metrics and revenue performance indicator icons overlaid on a user-defined custom image to show revenue performance by region, territory, product, channel, marketing campaign or sales reps.

Revenue Performance Heat Maps, impact diagrams and custom visualizations all function as part of a closed loop revenue performance management system. The organizational strategy aligns with revenue objectives and plans, with execution through metrics that are linked to tactical actions, which are then tied to resource allocations (see Figure 1). When used effectively, Heat Maps, impact diagrams and custom visualizations are tightly connected to long-term revenue planning, budgeting and forecasting processes.



Figure 1: Revenue scorecarding linked to KPIs and planning.

### Gain time, control and confidence

The revenue scorecarding functionality now available in Telemetry enables organizations to link their high-participation planning, budgeting and forecasting processes with actual revenue performance results and present those results to decision makers. This linkage saves time in the creation of the scorecards and provides greater control over how results are presented. Telemetry provides a single, centralized data store for metrics used in company-wide revenue scorecarding. It helps ensure accuracy and consistency, driving greater ownership and accountability while reducing latency and uncertainty in decision making.

From discrete departmental projects to company-wide revenue initiatives, Telemetry scorecards can be managed by line-of-business users without the need for regular IT assistance. And the comprehensive, unified approach to scorecarding in Telemetry promotes the adoption of sound revenue performance management throughout the enterprise.

With the powerful multi-dimensional technology of Telemetry, users can:

- Model and deploy integrated revenue metrics in the same environment used to build plans, budgets and forecasts.
- Access marketing, sales and customer data from disparate sources and systems and display it within scorecards and dashboards.
- Measure revenue performance relative to targets or benchmarks to help align tactics with strategic revenue initiatives.
- Pinpoint the source of revenue performance shortfalls.
- Display dimensions such as geography, product group or time period using a variety of graphical elements.
- Explore the impact of one metric on another.
- Add integrated metrics to every contributor's workspace.
- Deliver revenue performance data through a variety of interfaces to mobile and other devices.

Revenue performance scorecards can be valuable for corporate-wide revenue performance management, enabling marketing and sales executives to map out the marketing and sales strategies and communicate them in clear, comprehensible terms. Revenue scorecards can also be customized to display different levels of detail for different audiences. Employees, managers and reps at the business unit or department level can use scorecards to monitor their performance against targets and users can apply security to ensure that specific metrics are accessible only to specific users, groups or roles.

### **Choose your interface**

Telemetry scorecards can be accessed through a variety of user interfaces. They can be accessed through Telemetry Web for working with plans, budgets and forecasts; through Telemetry Insight or Telemetry Workspace for working with dashboards that allow users to combine scorecards with other reporting views and visualizations; and give marketing and sales executives quick access to their most important KPIs and allow them to identify and investigate problems in detail.

The following examples show how the simple, intuitive revenue scorecarding graphics in Telemetry can help users evaluate performance results quickly.

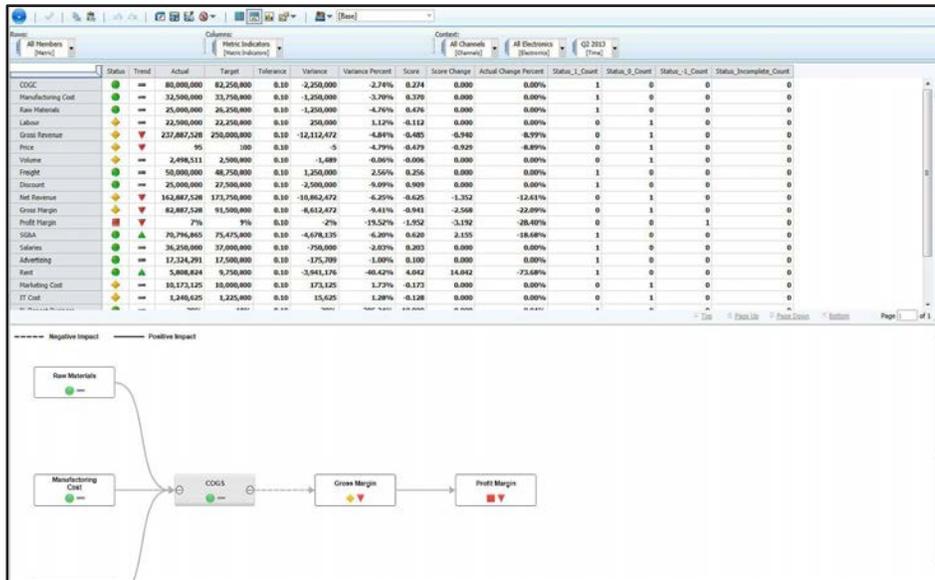


Figure 2: Impact diagrams show how changes to one variable can affect other variables.

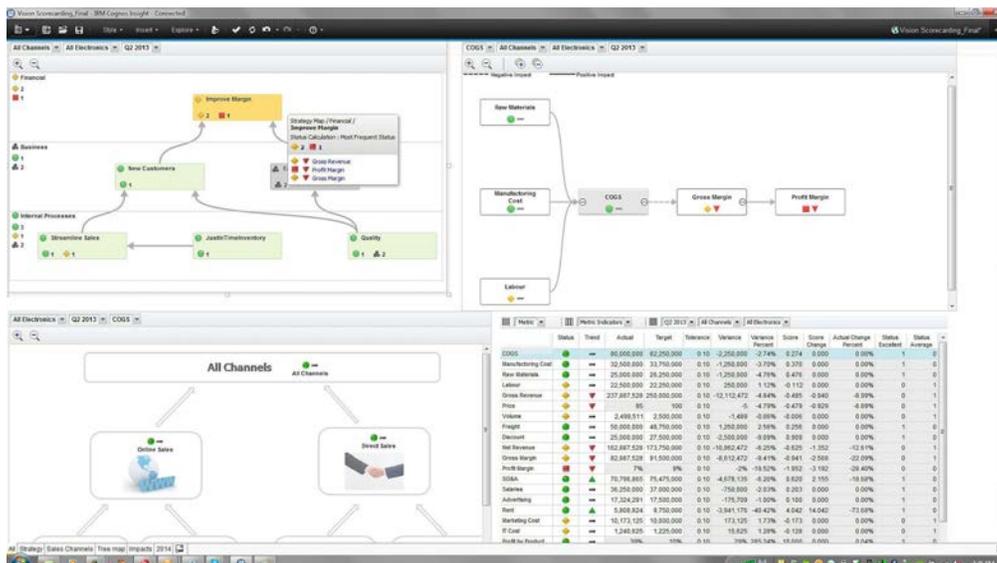


Figure 3: Viewing Telemetry Revenue Performance scorecards through lets users see multiple scorecards and diagrams all at once.

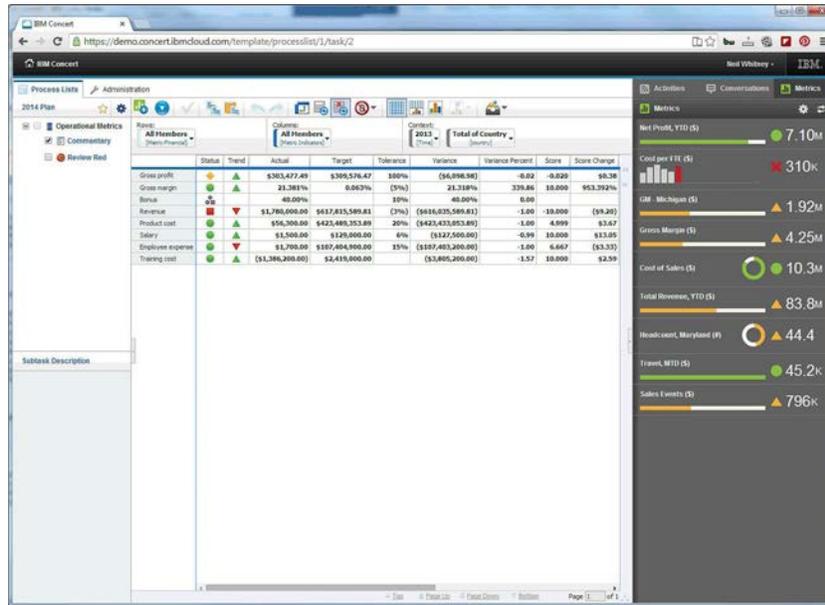


Figure 4: The Telemetry Viewer can be embedded in the main pane of the Telemetry interface.

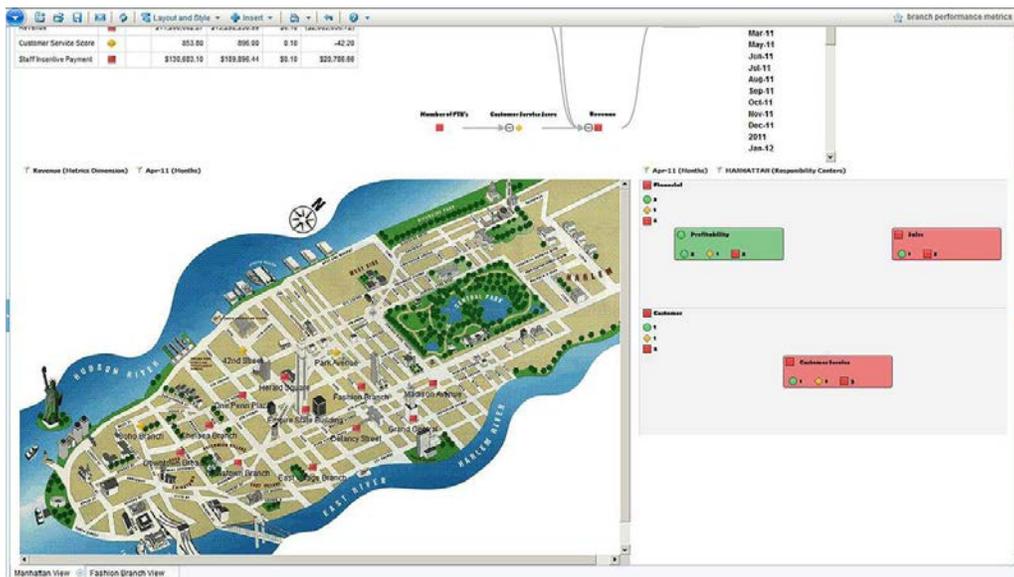


Figure 5: Vivid custom diagrams can include full-color maps of retail locations or sales territories.

### Revenue metrics made mobile

Scorecards help organizations speed their decision-making by presenting revenue performance data that is easy to grasp at a glance. But what happens when key decision makers are out of the office?

Telemetry Revenue Performance scorecards can be shared with users on the go through their Apple iPads or iPhones. Users can access reports containing Telemetry data to monitor progress on marketing campaigns, sales plans and forecasts, receive notifications and alerts, and drill down into the details of key metrics. This mobile capability can dramatically improve the speed and quality of team-based decision-making.

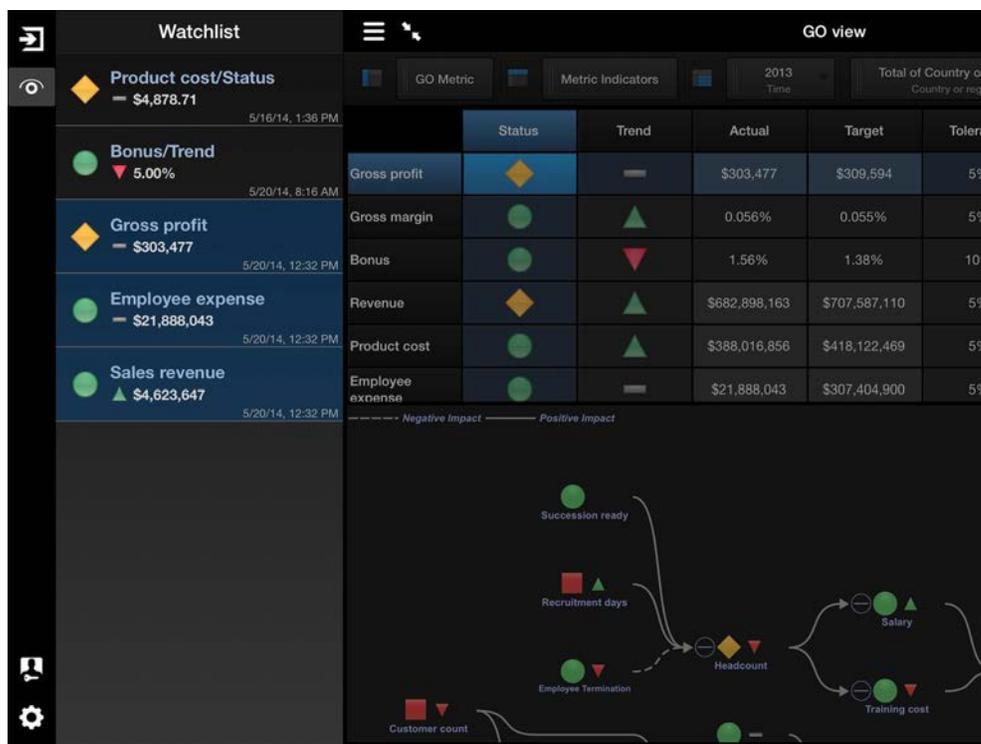


Figure 6: The Telemetry mobile application includes Watchlist, which tracks selected key marketing and sales metrics.

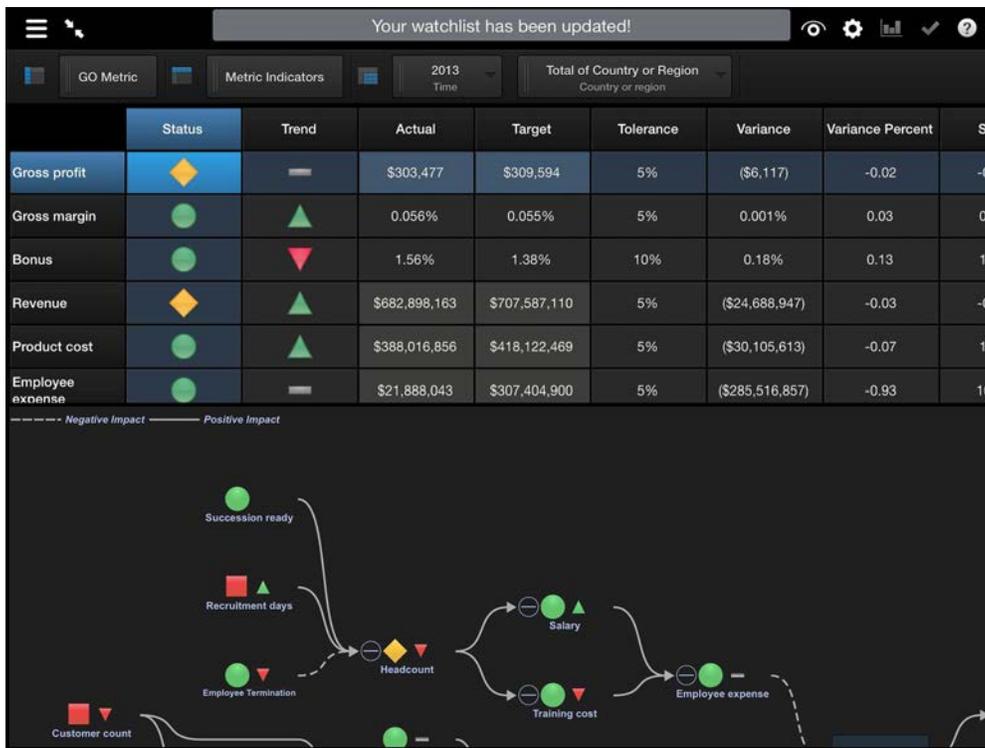


Figure 7: Watchlist provides notifications to alert users to changes in revenue performance metrics.

## Conclusion

Revenue performance scorecards make critical information easily accessible and understandable. And they help to drive greater accountability throughout the organization. Telemetry enhances the power of conventional scorecards by enabling organizations to blend scorecarding and strategy management capabilities into their revenue performance management process.

With Telemetry scorecards, users can assess the dynamic revenue performance of the business quickly, using strategy maps and diagrams to pinpoint the source of performance problems and spot trends — both positive and negative — at the early stages, when corrective actions can be most effective. Scorecards help tie strategy to execution. And when KPI's and metrics are linked directly to both data and processes within the powerful, multi-dimensional Telemetry platform, it closes the loop on revenue performance management.

## About RevenueTEK

RevenueTEK's Revenue Analytics software delivers data-driven insights that help organizations market and sell smarter and outperform their peers. This unique portfolio includes revenue solutions for business intelligence, predictive and prescriptive analytics, decision management, revenue performance management and risk management.

RevenueTEK's solutions enable companies to identify and visualize trends and patterns in their marketing and sales that can have a profound effect on business performance. They can compare scenarios; anticipate potential threats and opportunities; better plan, budget and forecast sales and resources; balance risks against expected returns and work to meet revenue targets. By making revenue performance analytics widely available, organizations can align tactical and strategic marketing and sales decision making to achieve business goals.

For more information, see [www.revenuetek.com](http://www.revenuetek.com)

## Request a call

To request a call or to ask a question, go to [moreinfo@revenuetek.com](mailto:moreinfo@revenuetek.com) and we will respond to your inquiry promptly.

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