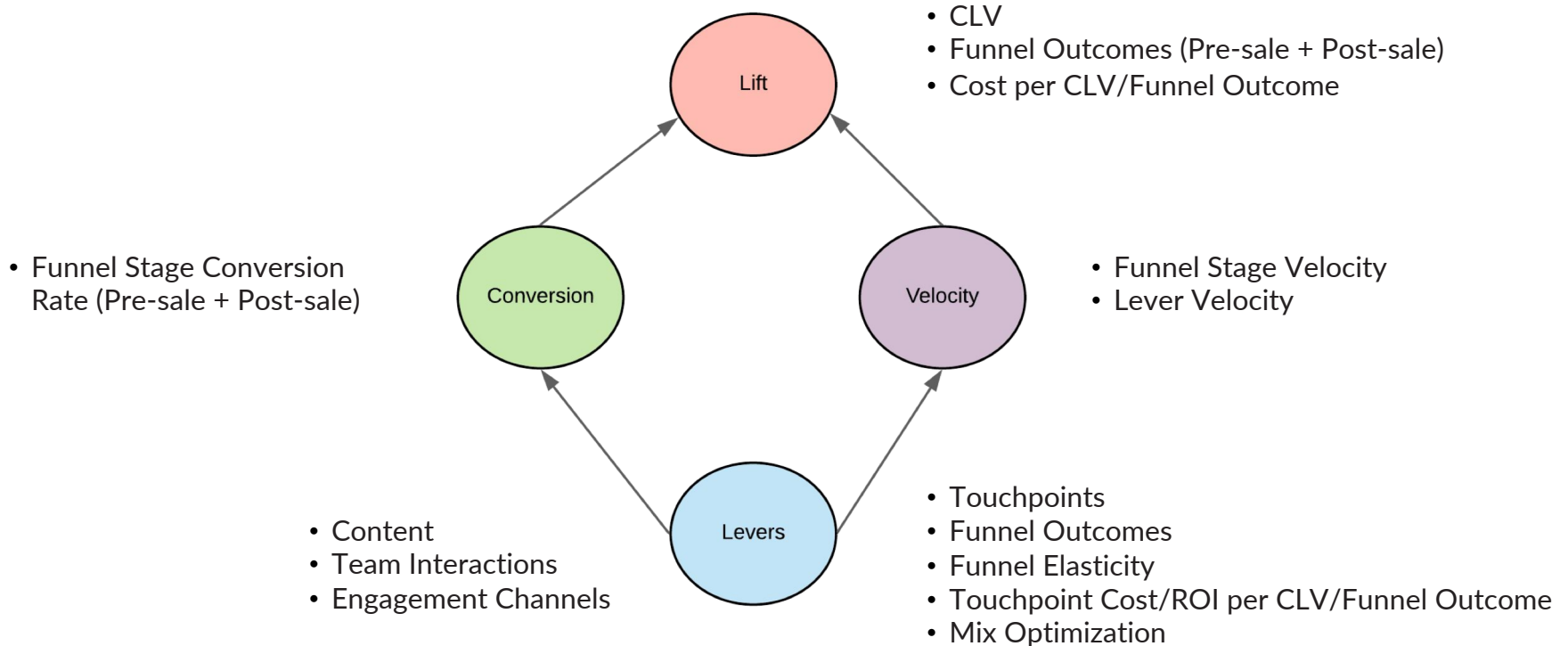


# ANNUITAS GTM KPI System

# A System of Outcome-oriented GTM KPIs



# Key “Lift” GTM KPIs – Customer Growth, GTM Results, Investment Ratios

KPI - Category	KPI - Measure	KPI - Frame	#	\$	%	Time Periods
Lift	Customer Health	Total Customers	#			Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current
	Customer Health	Average Annual Customer Value (ACV)		\$		
	Customer Health	Average Customer Lifetime Value (CLV)		\$		
	Customer Health	Net-new Customers	#			
	Top-line Results	Total Income / Recognized Revenue		\$		Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current
	Top-line Results	Total Bookings		\$		
	Top-line Results	Closed Won Opportunity / Bookings Volume	#			
	Top-line Results	Average Deal Size (ADS)		\$		
	GTM Investment Ratios	Average Customer Acquisition Cost (CAC)		\$		Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current
	GTM Investment Ratios	CAC:ACV ratio	#			
	GTM Investment Ratios	CAC:CLV ratio	#			
	GTM Investment Ratios	Average Cost per Closed Won Opportunity (CPCW)		\$		
	GTM Investment Ratios	CPCW:ADS ratio	#			
	GTM Investment Ratios	Return on Engagement Channels Spend / Return on Ad Spend (ROAS)	#			

# Key “Lift” GTM KPIs – Funnel Health

KPI - Category	KPI - Measure	KPI - Frame	#	\$	%	Time Periods
Lift	Funnel Outcomes	Total Impressions	#			Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current
	Funnel Outcomes	Prospect	#			
	Funnel Outcomes	Engaged	#			
	Funnel Outcomes	Qualified Lead Warm	#			
	Funnel Outcomes	Qualified Lead Hot	#			
	Funnel Outcomes	Zero Stage Opportunity	#			
	Funnel Outcomes	Opportunity	#	\$		
	Funnel Outcomes	Closed Won / Bookings	#	\$		
	Cost Per Funnel Outcome	Total Impressions		\$		Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current
	Cost Per Funnel Outcome	Engaged		\$		
	Cost Per Funnel Outcome	Prospect		\$		
	Cost Per Funnel Outcome	Qualified Lead Warm		\$		
	Cost Per Funnel Outcome	Qualified Lead Hot		\$		
	Cost Per Funnel Outcome	Zero Stage Opportunity		\$		
	Cost Per Funnel Outcome	Opportunity		\$		
	Cost Per Funnel Outcome	Closed Won / Booking		\$		
	Carrying Pipeline Value	Opportunities - Weighted		\$		Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current
	Carrying Pipeline Value	Opportunities - Unweighted		\$		
	Carrying Pipeline Value	Opportunity:Closed Won ratio	#		%	

# Key “Conversion” GTM KPIs – Conversion Health

KPI - Category	KPI - Measure	KPI - Frame	#	\$	%	Time Periods	
Conversion	Conversion Rate	Engaged > Qualified Lead Warm			%	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current	
	Conversion Rate	Engaged > Qualified Lead Hot			%		
	Conversion Rate	Qualified Lead > Zero Stage Opportunity			%		
	Conversion Rate	Zero Stage Opportunity > Opportunity			%		
	Conversion Rate	Qualified Lead > Closed Won			%		
	Conversion Rate	Zero Stage Opportunity > Closed Won			%		
	Conversion Rate	Opportunity > Closed Won			%		
	Conversion Rate	Engaged > Closed Won			%		
	QL Fate	QLs Converted		#	%	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current	
	QL Fate	QLs Turned Back		#	%		
	QL Fate	QLs Rejected		#	%		
	QL SLAs	In-policy QLs		#	%	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current	
	QL SLAs	Out-of-policy QLs		#	%		
	Opportunity Fate	Closed Won		#	%	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current	
	Opportunity Fate	Closed Lost		#	%		
	Opportunity Fate	Closed Out		#	%		
Opportunity Health	Active Opportunities		#	%	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current		
Opportunity Health	Stalled Opportunities		#	%			

# Key “Velocity” GTM KPIs – Critical Path Pacing + Sequencing

KPI - Category	KPI - Measure	KPI - Frame	#	\$	%	Time Periods
Velocity	Stage Velocity - Days	Engaged > Qualified Lead	#			
	Stage Velocity - Days	Qualified Lead > Zero Stage Opportunity	#			
	Stage Velocity - Days	Zero Stage Opportunity > Opportunity	#			
	Stage Velocity - Days	Qualified Lead > Closed Won	#			
	Stage Velocity - Days	Zero Stage Opportunity > Closed Won	#			
	Stage Velocity - Days	Opportunity > Closed Won	#			
	Stage Velocity - Days	Engaged > Closed Won	#			
	Stage Velocity - Days	Engaged > Closed Won	#			
	Lever Velocity - Days	Content > Qualified Lead	#			Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current
	Lever Velocity - Days	Content > Zero Stage Opportunity	#			
	Lever Velocity - Days	Content > Opportunity	#			
	Lever Velocity - Days	Content > Closed Won	#			
	Lever Velocity - Days	Engagement Channel > Qualified Lead	#			
	Lever Velocity - Days	Engagement Channel > Zero Stage Opportunity	#			
	Lever Velocity - Days	Engagement Channel > Opportunity	#			
	Lever Velocity - Days	Engagement Channel > Closed Won	#			
	Lever Velocity - Days	Salesperson Interaction > Zero Stage Opportunity	#			
	Lever Velocity - Days	Salesperson Interaction > Opportunity	#			
	Lever Velocity - Days	Salesperson Interaction > Closed Won	#			

# Key “Lever” GTM KPIs – Engagement Channel Optimization

KPI - Category	KPI - Measure	KPI - Frame	#	\$	%	Time Periods
Levers - Engagement Channels	Engagement Channels Spend	Total Engagement Channels Spend		\$		Week, Month, Quarter, Year, Custom
	Engagement Channels Spend	Spend per Engagement Channel		\$	%	Date Range, Cumulative, Current
	Impressions - Engagement Channel	Total Impressions	#			Week, Month, Quarter, Year, Custom
	Impressions - Engagement Channel	Prospect > Engaged			%	Date Range, Cumulative, Current
	Touchpoints - Engagement Channel	Total Touchpoints	#		%	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current
	Touchpoints - Engagement Channel	Acquisition (First) Touchpoints	#		%	
	Touchpoints - Engagement Channel	Influence (2+) Touchpoints	#		%	
	Outcomes - Engagement Channel	Engaged	#			Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current
	Outcomes - Engagement Channel	Qualified Lead	#			
	Outcomes - Engagement Channel	Zero Stage Opportunity	#	\$		
	Outcomes - Engagement Channel	Opportunity	#	\$		
	Outcomes - Engagement Channel	Closed Won	#	\$		
	Elasticity - Engagement Channel	Engaged			%	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current
	Elasticity - Engagement Channel	Qualified Lead			%	
	Elasticity - Engagement Channel	Zero Stage Opportunity			%	
	Elasticity - Engagement Channel	Opportunity			%	
	Elasticity - Engagement Channel	Closed Won			%	
	Impact Expectation - Engagement Channel	Opportunity	#			Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current
	Impact Expectation - Engagement Channel	Closed Won	#			
	Cost per Outcome - Engagement Channel	Touchpoint			\$	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current
	Cost per Outcome - Engagement Channel	Engaged			\$	
	Cost per Outcome - Engagement Channel	Qualified Lead			\$	
	Cost per Outcome - Engagement Channel	Zero Stage Opportunity			\$	
	Cost per Outcome - Engagement Channel	Opportunity			\$	
	Cost per Outcome - Engagement Channel	Closed Won			\$	
	ROI - Engagement Channel	Closed Won			\$	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current
	Mix Optimization - Engagement Channels	Maximize Closed Wons			%	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current
Mix Optimization - Engagement Channels	Maximize Qualified Leads			%		
Mix Optimization - Engagement Channels	Maximize Growth			%		
Mix Optimization - Engagement Channels	Maximize ROI			%		

# Key “Lever” GTM KPIs – Content Offer Optimization

KPI - Category	KPI - Measure	KPI - Frame	#	\$	%	Time Periods	
Levers - Content Offers	Content Offers Spend	Total Content Offers Spend		\$		Week, Month, Quarter, Year, Custom	
	Content Offers Spend	Spend per Content Offer		\$	%	Date Range, Cumulative, Current	
	Impressions - Content Offer	Total Impressions	#			Week, Month, Quarter, Year, Custom	
	Impressions - Content Offer	Prospect > Engaged			%	Date Range, Cumulative, Current	
	Touchpoints - Content Offer	Total Touchpoints	#		%	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current	
	Touchpoints - Content Offer	Acquisition (First) Touchpoints	#		%		
	Touchpoints - Content Offer	Influence (2+) Touchpoints	#		%		
	Outcomes - Content Offer	Engaged	#			Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current	
	Outcomes - Content Offer	Qualified Lead	#				
	Outcomes - Content Offer	Zero Stage Opportunity	#	\$			
	Outcomes - Content Offer	Opportunity	#	\$			
	Outcomes - Content Offer	Closed Won	#	\$			
	Elasticity - Content Offer	Engaged			%	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current	
	Elasticity - Content Offer	Qualified Lead			%		
	Elasticity - Content Offer	Zero Stage Opportunity			%		
	Elasticity - Content Offer	Opportunity			%		
	Elasticity - Content Offer	Closed Won			%		
	Impact Expectation - Content Offer	Opportunity	#			Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current	
	Impact Expectation - Content Offer	Closed Won	#				
	Cost per Outcome - Content Offer	Touchpoint			\$	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current	
	Cost per Outcome - Content Offer	Engaged			\$		
	Cost per Outcome - Content Offer	Qualified Lead			\$		
	Cost per Outcome - Content Offer	Zero Stage Opportunity			\$		
	Cost per Outcome - Content Offer	Opportunity			\$		
	Cost per Outcome - Content Offer	Closed Won			\$		
	ROI - Content Offer	Closed Won			\$	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current	
	Mix Optimization - Content Offers	Maximize Closed Wons				%	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current
	Mix Optimization - Content Offers	Maximize Qualified Leads				%	
Mix Optimization - Content Offers	Maximize Growth				%		
Mix Optimization - Content Offers	Maximize ROI				%		

# Key “Lever” GTM KPIs – Salesperson Interaction Optimization

KPI - Category	KPI - Measure	KPI - Frame	#	\$	%	Time Periods	
Levers - Salesperson Interactions	Sales Team Salaries	Total Sales Team Spend		\$		Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current	
	Sales Team Salaries	Spend per Salesperson		\$	%		
	Touchpoints - Salesperson Interaction	Total Touchpoints	#		%	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current	
	Touchpoints - Salesperson Interaction	Acquisition (First) Touchpoints	#		%		
	Touchpoints - Salesperson Interaction	Influence (2+) Touchpoints	#		%		
	Outcomes - Salesperson Interaction	Zero Stage Opportunity	#	\$		Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current	
	Outcomes - Salesperson Interaction	Opportunity	#	\$			
	Outcomes - Salesperson Interaction	Closed Won	#	\$			
	Elasticity - Salesperson Interaction	Zero Stage Opportunity			%	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current	
	Elasticity - Salesperson Interaction	Opportunity			%		
	Elasticity - Salesperson Interaction	Closed Won			%		
	Impact Expectation - Salesperson Interaction	Opportunity	#			Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current	
	Impact Expectation - Salesperson Interaction	Closed Won	#				
	Cost per Outcome - Salesperson Interaction	Touchpoint			\$	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current	
	Cost per Outcome - Salesperson Interaction	Zero Stage Opportunity			\$		
	Cost per Outcome - Salesperson Interaction	Opportunity			\$		
	Cost per Outcome - Salesperson Interaction	Closed Won			\$		
	ROI - Salesperson Interaction	Closed Won			\$	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current	
	Mix Optimization - Sales Team	Maximize Closed Wons				%	Week, Month, Quarter, Year, Custom Date Range, Cumulative, Current
	Mix Optimization - Sales Team	Maximize Zero Stage Opportunities				%	
Mix Optimization - Sales Team	Maximize Growth				%		
Mix Optimization - Sales Team	Maximize ROI				%		