

# Analytics Team

1<sup>st</sup> Quarter Update: April 20<sup>th</sup>, 2019

TEMPLATE

## Title of Research Update Goes Here

### Summary

Summary highlights of business activity and results against targets in the quarter. Expected hits and/or misses. Also mention prior executive level action items and if they were on schedule. ut nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

### Highlights:

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### Key Points

- **Phrase of key points.** Single paragraph explainer. exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
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### Quarter Financial Summary

#### Annual Recurring Revenue (ARR)

	Con	Biz	Total
Qtr	\$	\$	\$
Target	%	%	%
P Qtr	%	%	%
PY Qtr	%	%	%

	New	Renew	Total
Qtr	\$	\$	\$
Target	%	%	%
P Qtr	%	%	%
PY Qtr	%	%	%

#### Bookings

	Con	Biz	Total
Qtr	\$	\$	\$
Target	%	%	%
P Qtr	%	%	%
PY Qtr	%	%	%

	New	Renew	Total
Qtr	\$	\$	\$
Target	%	%	%
P Qtr	%	%	%
PY Qtr	%	%	%

### Year to Date Financial Summary

#### Annual Recurring Revenue (ARR)

	Con	Biz	Total
Qtr	\$	\$	\$
Target	%	%	%
PY	%	%	%

	New	Renew	Total
Qtr	\$	\$	\$
Target	%	%	%
PY	%	%	%

#### Bookings

	Con	Biz	Total
Qtr	\$	\$	\$
Target	%	%	%
PY	%	%	%

	New	Renew	Total
Qtr	\$	\$	\$
Target	%	%	%
PY	%	%	%

### Questions:

Contact Information here

**Any major data disclosures are explained here in three lines at most.** amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute i

## Enterprise Forecast Update

### Forecast Thesis

Summary of the forecast for the overall enterprise. Paragraph of details to include specific major programs and expected initiatives. What groups are planning on doing to address gaps in prior quarter or push successes further. Lorem Ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

### Base Scenario

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### Upside Scenario

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### Downside Scenario

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- List key assumptions. Ipsum dolor sit amet, consectetur adipiscing elit

### Next Quarter Projections

#### Annual Recurring Revenue (ARR)

	Con	Biz	Total
Qtr	\$	\$	\$
Target	%	%	%
P Qtr	%	%	%
PY Qtr	%	%	%

	New	Renew	Total
Qtr	\$	\$	\$
Target	%	%	%
P Qtr	%	%	%
PY Qtr	%	%	%

#### Bookings

	Con	Biz	Total
Qtr	\$	\$	\$
Target	%	%	%
P Qtr	%	%	%
PY Qtr	%	%	%

	New	Renew	Total
Qtr	\$	\$	\$
Target	%	%	%
P Qtr	%	%	%
PY Qtr	%	%	%

### Full Year Projections

#### Annual Recurring Revenue (ARR)

	Con	Biz	Total
Year	\$	\$	\$
Target	%	%	%
PY	%	%	%

	New	Renew	Total
Year	\$	\$	\$
Target	%	%	%
PY	%	%	%

#### Bookings

	Con	Biz	Total
Year	\$	\$	\$
Target	%	%	%
PY	%	%	%

	New	Renew	Total
Year	\$	\$	\$
Target	%	%	%
PY	%	%	%

# Quarterly Analysis Executive Summary

Describe the in-depth analysis that has happened in the quarter. Combination of independent analysis of programs and analysis spawned from business partner requests into Analytics Team.

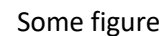
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## 1. Project 1 Title

**Summary:** Describe the business problem: Lorem Ipsum dolor sit amet, consectetur adipiscing

**Conclusion:** Lorem Ipsum dolor sit amet, consectetur adipiscing

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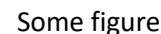
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## 2. Project 2 Title

**Summary:** Describe the business problem: Lorem Ipsum dolor sit amet, consectetur adipiscing

**Conclusion:** Lorem Ipsum dolor sit amet, consectetur adipiscing

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### 3. Project 3 Title

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**Conclusion:** Lorem Ipsum dolor sit amet, consectetur adipiscing

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Some figure

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## References

- **Annual Recurring Revenue (ARR)** is evaluated as of the last day of the quarter, with data as of [Date], unless otherwise specified.
- Reporting Link to Top Line Report
- Reporting Link to Forecast Report
- Etc.

## Analyst References

List of references and links that are referred to in the Analysis section (use EndNote references)

**Analytics Team** is [description of group]. Lorem Ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

**Mission Statement**

Provide a streamlined and trusted data platform, user-friendly self-service, and insightful analytics that enable impactful, fact-driven decisions for our business partners.

**Vision Statement**

Drive business success by becoming the central data analysis hub that empowers our partners to learn from the past, be well-informed about the present, and to make insightful evidence-based decisions about the future.

**Forecast Methodology**

**What is the underlying data / model used for forecasting?** Lorem Ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum. Lorem Ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

**Source Data**

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**Disclosures**

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# Business Reporting Performance

Definition of “on time” and a brief summary of what % business reporting was “on time” daily IN QUARTER. Of the down time, what % was within team responsibility vs. outside team responsibility. Lorem Ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

A brief summary of what % business reporting was “on time” daily PAST 12 MONTHS. Of the down time, what % was within team responsibility vs. outside team responsibility. Trend comments, steps to resolution. Etc. Lorem Ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

Some table of performance numbers

## Reporting Environment Changes

Summary of major changes to the reporting environment (or underway) Lorem Ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

## Metric Definition Changes

- **Metric:** New definition. Changed from Old definition. Requested business unit.
- **Metric:** New definition. Changed from Old definition. Requested business unit.
- **Metric:** New definition. Changed from Old definition. Requested business unit.

## Notable In-Progress or Upcoming Projects in Next Quarter

- **Name of Project:** Short summary of project. Lorem Ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
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