

Setting up the Cohort Dashboard for Exit Rate Reports

1

Navigate to the CaliberMind Funnels Application>>Funnels Cohort Analysis Dashboard

2

Ensure you have selected the desired date range using the date range selector at the top of the dashboard.

Date Range

This Year

From Date:

01/01/2022

To Date:

12/31/2022

3 Click the Metric Selection dropdown list.

The screenshot shows a dashboard interface with several panels. On the left, there is a bar chart titled "ite Stage Opportunity - Best Case/Commit" with a green bar at level 4. Below it is a table with two columns: "Stage" and "Journey Success Rate". The right side of the dashboard contains several filter panels: "Navigate To" with a "Go" button, "Funnel Selection" with "Demand Generation" and an "Apply" button, "Metric Selection" with "Active Journeys" and an "Apply" button (highlighted with an orange circle), "Cohort Selection" with "Is Inbound" and an "Apply" button, and "Date Aggregation".

Stage	Journey Success Rate
60	0.11%
73	0.70%
36	7.48%
62	10.67%
41	42.11%

4 Choose "Exit Rate" and click "Apply."

This screenshot is identical to the previous one, but the "Metric Selection" panel now shows "Exit Rate" selected in the dropdown menu, and the "Apply" button next to it is highlighted with an orange circle.

5 Click the Cohort Selection dropdown list.

06: Cust

Stage	Journey Success Rate
60	0.11%
73	0.70%
36	7.48%
62	10.67%
41	42.11%
130	100.00%

Metric Selection: Exit Rate [Apply]

Cohort Selection: Is Inbound [Apply]

Date Aggregation: Quarters [Months] [Weeks] [Days]

Additional Filters: + Add Filter

6 Select "Automatically Qualified Account"

06: Cust

Stage	Journey Success Rate
60	0.11%
73	0.70%
36	7.48%
62	10.67%
41	42.11%
130	100.00%

Metric Selection: Exit Rate [Apply]

Cohort Selection: Is Inbound [Apply]

Date Aggregation: Quarters [Months] [Weeks] [Days]

Additional Filters: + Add Filter

- Is Inbound
- Automatically Qualified Account
- Sales Qualified Account
- Sales Accepted Opportunit...
- Late Stage Opportunity - B...
- Customer

7 Click "Apply"

The screenshot shows a dashboard interface. On the left, there is a table titled "Journey Success Rate" with the following data:

Stage	Journey Success Rate
60	0.11%
73	0.70%
36	7.48%
62	10.67%
41	42.11%
130	100.00%

On the right, there are four configuration panels:

- Metric Selection:** A dropdown menu is set to "Exit Rate" and a green "Apply" button is visible.
- Cohort Selection:** A dropdown menu is set to "Automatically Qualified..." and a green "Apply" button is visible.
- Date Aggregation:** Four buttons are shown: "Quarters" (highlighted in green), "Months", "Weeks", and "Days".
- Additional Filters:** A green button with a plus sign and the text "Add Filter" is visible.

8 Note the changes to "01: Is Inbound" are now set to 0

The screenshot shows a dashboard interface. At the top, there is a "Date Range" dropdown set to "This Year" and a "From Date:" field set to "01/01/2022". Below this is a table titled "Cohort Date" with the following data:

Cohort Date	01: Is Inbound	02: Automatically Qualified Account	03: Sales Qualified Account	04: Sales Accepted	Exit Rate
2022 Q1	0	0.78	0.19		
2022 Q2	0	0.64	0.34		
2022 Q3	0	0.62	0.05		
2022 Q4	0	0	0.16		

At the bottom, there is a table titled "Stage" with the following data:

Stage	Journeys Hitting Stage	True Starts	Conversion Rate	Removed
01: Is Inbound	1,186	463	100%	

9

Note the changes to 01: Is Inbound and 02: Automatically Qualified Account are both "1,186." This is correct as the baseline for further analysis will be 02: Automatically Qualified Account.

Current Date	01: Is Inbound	02: Automatically Qualified Account	03: Sales Qualified Account	04: Sales Accepted
2022 Q1	0	0.78	0.19	
2022 Q2	0	0.64	0.34	
2022 Q3	0	0.62	0.05	
2022 Q4	0	0	0.16	

ADD TITLE

Stage	Journeys Hitting Stage	True Starts	Conversion Rate	Removed
01: Is Inbound	1,186	463	100%	
02: Automatically Qualified Account	1,186	707	9.53%	579
03: Sales Qualified Account	113	12	70.8%	20
04: Sales Accepted Opportunity - Pipeline	80	1	28.75%	28
05: Late Stage Opportunity - Best Case/Commit	23	3	43.48%	1
06: Customer	10		0%	10