AIKO Node

# Sales X-Ray

Consultant's report

Prepared for: **Example Supplies Ltd**

Period analysed: 2024-01 – 2025-12

Date: 30 March 2026

# Executive summary

Project goal: Understand why revenue grows on paper but every year we replace a fifth of it, and agree on 3 actions.

| £3.7M | 97.4% | 15.3% | 62.7% | 57.6% | 72/100 |
|---|---|---|---|---|---|
| Revenue | From repeat customers | Churn, % of revenue | Top-5 customer share | Win rate | Predictability score |

> Over the last 12 months revenue was £3,696,996 (-5.5% against the previous 12 months). 97.4% of it came from customers who also bought last year; retention is 87.5%, churn £596,869. The top-5 customers make up 62.7% and 9 customers deliver 80% of revenue. In the top-20 the sales team sees 25 possible new product lines (£1,320,998). In the funnel the win rate is 57.6%; most deals are lost at the "Proposal" stage. The predictability score is 72/100. If nothing changes, revenue over the next 12 months is £3,267,974.

## Three key findings

1. **How much of the revenue will repeat.** 97.4% of revenue comes from customers who also bought last year; retention is 87.5%, churn £596,869.
2. **What the revenue rests on.** The top-5 customers make up 62.7% and the top-20 92.9% of revenue; 9 customers deliver 80% of it.
3. **Where the funnel leaks.** Of 64 deals, 34 were won and 25 lost: win rate 57.6%, average won deal £12,835.

## The options and what they are worth

| OPTION | ASSUMPTION | REVENUE IN 12 MONTHS | DIFFERENCE |
|---|---|---|---|
| **Baseline, nothing changes** | current trend | £3,267,974 | – |
| **Retention +5 pp** | retention +5 pp | £3,463,486 | +£195,512 |
| **Breadth: +1 product line in the top 20** | +1 product group in the top-20, half of the marked "could buy" | £4,588,972 | +£1,320,998 |
| **Depth: +10% of customer need in the top 20** | depth +10 % | £3,395,111 | +£127,137 |
| **Win rate +5 pp at the leakiest stage** | win rate +5 pp | £3,305,837 | +£37,863 |
| **Acquisition: new customers +20%** | new-customer revenue +20 % | £3,287,554 | +£19,580 |
| **Risk: the largest customer leaves** | the largest customer leaves | £2,620,769 | £-647,205 |

| | | | |
|---|---|---|---|
| **Combined: retention, breadth, win rate** | retention + breadth + win rate | £4,822,346 | +£1,554,372 |

**Our proposal in brief.** We suggest starting with "Breadth: +1 product line in the top 20": the largest single effect (+£1,320,998 of revenue over 12 months) and a decision within your own control. *(see "Proposal for next steps")*

# Method

The Sales X-Ray is a product of the AIKO Node OUT method (Observe • Understand • Transform). It answers one question: will your revenue repeat and grow: where customers come from, whether they stay, how much more they could buy and where in the funnel growth is leaking. The analysis uses reports the company already produces plus the last 20 deals; every conclusion is tested against three layers: the numbers, the manager's knowledge and the sales team's view.

| O Observe | U Understand | T Transform |
|---|---|---|
| We collect the sales data, the deals and the sales costs, check the quality and calculate the customer cycle: new, retained, growing, declining, lost. | We set the numbers against the manager interview, the sales-team survey and the customer × product matrix. Where these layers diverge, there is a finding. From this come the baseline and the options. | In a management workshop the team chooses the target and the initiatives that fill the gap, with owners and deadlines. |

## Calculation model

Each customer is assigned a lifecycle state from its last-12-month revenue against the previous 12: new, retained (±10%), growing, declining, lost. Retention is the share of customers who stay; churn is the revenue of lost customers. Loyalty is the number of purchase months out of 12. CLV = annual contribution × expected lifetime (1 ÷ churn share, capped at 5 years). Breadth = the share of product groups a customer buys; depth = current revenue ÷ the customer's total need (from the matrix). The funnel is the win rate by stage and source from the deal list. The predictability score weighs concentration, retention, source diversity and data completeness. The baseline extends the revenue trend; each option changes one parameter.

## Four customer groups

Customers are placed on two axes: size (share of revenue) and dynamics (growth against the previous 12 months).

| | |
|---|---|
| **Engines** | large and growing: protect and expand. |
| **Dependencies** | large but flat or declining: this is where the risk and the negotiation weight sit. |
| **Leak** | declining or lost: why, and are they recoverable. |
| **Long tail** | small and occasional: worth serving, or move to self-service. |

## How to read the charts

| | |
|---|---|
| **Customer-cycle map** | Each dot is a customer. Further right means a larger share of revenue; higher means faster growth. The colour shows the group. |
| **Cycle structure** | Revenue by state: new, retained, growing, declining, lost, last year and this year. |
| **Matrix** | Top-20 customers × product groups: buys / could buy / potential in money. |
| **Funnel** | Deals by stage: how many won, how many lost and where; win rate by source. |
| **Baseline and options** | The line is revenue on current trends 12 months ahead; the markers are the option outcomes. |

## Data checks

Before the calculation the data is checked automatically: whether all months are present, whether sales match the P&L, whether the deal list has enough rows and named sources, and whether the matrix "total need" is not below current revenue. Every issue was discussed with you; the remaining notes are listed in this report.

## Confidentiality and AI

Customer, product and personal names are replaced with codes on the server before any analysis. The AI model sees only codes and numbers that are already calculated; it does not calculate, and every sentence passes a quality filter: no number that is not in the data can reach the text. In this report the codes are replaced with the real names again. The conclusions were reviewed by an AIKO Node specialist.

# Data and data checks

The analysis used your sales report by customer, product and month, the profit and loss statement, the deal list (CRM or the 20-deals form), the sales costs and the customer × product matrix.

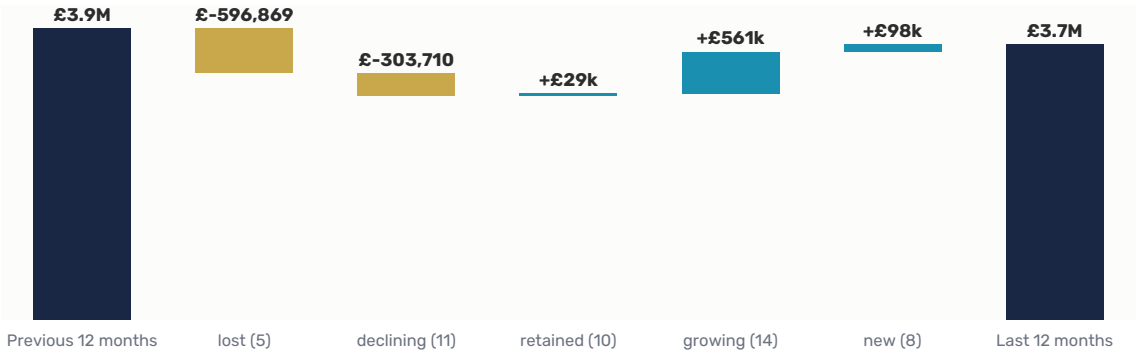
> 1261 rows, 48 customers, 8 products, 24 months (2024-01 to 2025-12), sales total £7,733,325; P&L revenue £3,696,996.

## Data check notes

The data passed all checks without notes.

## Revenue dynamics and the funnel

Top: revenue by customer state. Bottom: the deal funnel by stage and source.




WHAT THIS SAYS

Revenue moved -5.5%: from £3,910,233 to £3,696,996.

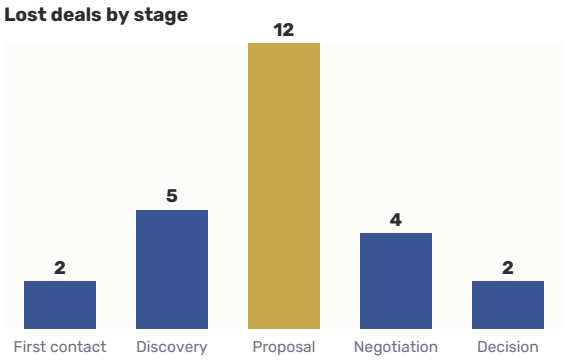
New customers (8) brought £97,902.

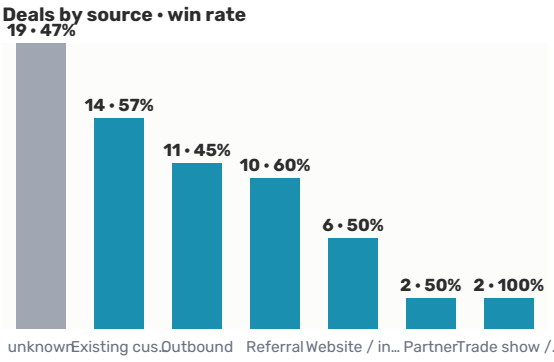
Growing customers (14) added £560,666.

▼ Lost customers (5) took away £596,869: 15.3% of the previous year's revenue.

▼ Declining customers (11) took away £303,710.

→ Growth is spent covering the leak first: until it is stopped, new customers only fill the hole.




Total 64 deals: won 34, lost 25, open 5 • win rate 57.6%

WHAT THIS SAYS

Win rate 57.6%; average won deal £12,835; open pipeline £68,582.

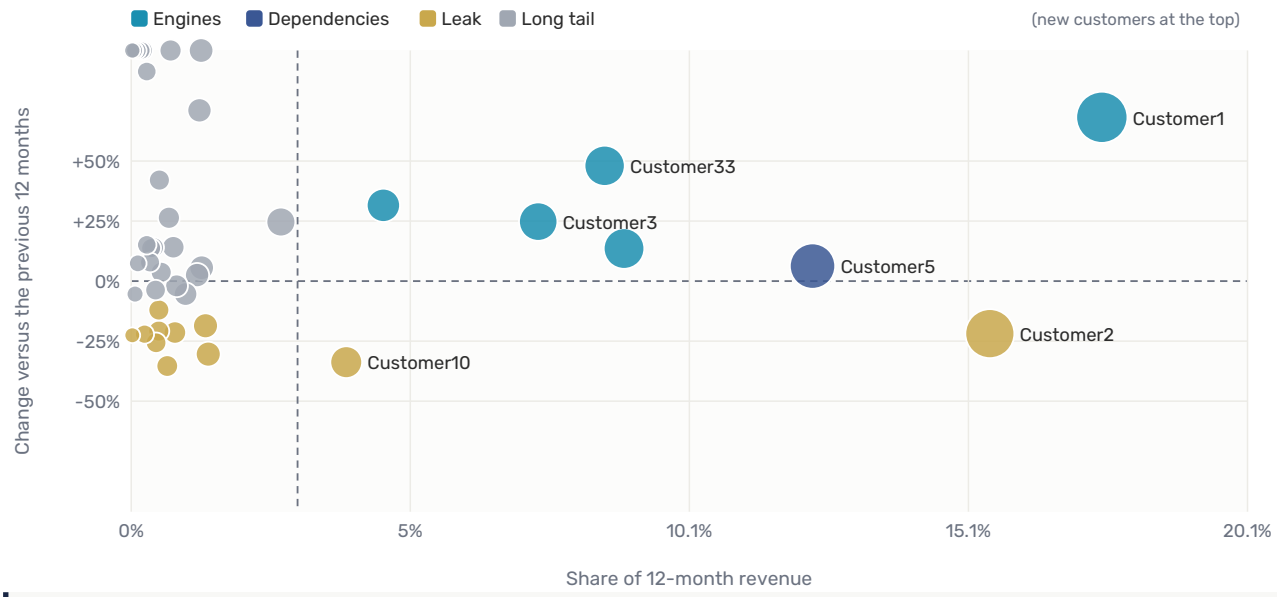
The best source is "Referral": win rate 60.0% from 10 deals.

▼ Most deals are lost at the "Proposal" stage (12 of 25 lost).

→ One percentage point of win rate is worth £7,573 a year.

# Customer-cycle map

Dots are customers; the largest are labelled. The colour shows the group.




WHAT THIS SAYS

5 engines (large and growing) deliver 46.8% of revenue.

Long tail: 26 customers, 15.7% of revenue.

▼ 1 dependencies (large but not growing): 12.3% of revenue; the largest risk sits here.

▼ 16 customers are declining or lost: Customer4 -£306,759, Customer2 -£159,893, Customer20 -£136,469.

→ The engines carry the revenue; the lever is breadth inside them and stopping the leak.

## Largest customers

| CUSTOMER | REVENUE, 12 MONTHS | SHARE, % | CHANGE, % | MONTHS | GROUPS | STATE | GROUP |
|---|---|---|---|---|---|---|---|
| Customer1 | £647,205 | 17.5% | +68.2% | 12 | 4 | growing | Engines |
| Customer2 | £572,720 | 15.5% | -21.8% | 12 | 3 | declining | Leak |
| Customer5 | £454,237 | 12.3% | +6.3% | 12 | 4 | retained | Dependencies |
| Customer11 | £328,607 | 8.9% | +13.5% | 12 | 3 | growing | Engines |
| Customer33 | £315,606 | 8.5% | +48.0% | 9 | 1 | growing | Engines |
| Customer3 | £271,302 | 7.3% | +24.8% | 12 | 2 | growing | Engines |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Customer31 | £168,164 | 4.6% | +31.5% | 9 | 3 | growing | **Engines** |

## What the numbers show

> Over 12 months 97.4% of revenue came from repeat customers; retention is 87.5%, churn £596,869 (15.3% of the previous year's revenue). New customers: 8, averaging £12,238. The top-5 customers make up 62.7% of revenue and 9 customers deliver 80% of it. The predictability score is 68/100.

## Exceptions and your explanations

| | |
|---|---|
| Customer1 carries a large share of revenue: what is the contract, who manages it and when does it end? | *Customer1 is on a three-year framework contract managed by our commercial director; it ends next year.* |
| Customer2 is declining or lost: do you know the reason, and is it recoverable? | *Customer2 moved half of its volume to a competitor after a service issue in spring.* |
| Customer41 is a new customer: where did it come from, and do you expect a repeat purchase? | *The new customers came from a trade show; we have not followed up on repeat orders.* |

# Loyalty, concentration and CLV

How much revenue rests on a few customers, how many buy regularly and what a customer is worth over its lifetime.

| SEGMENT | CUSTOMERS | AVG REVENUE / YEAR | CONTRIBUTION / YEAR | EXPECTED LIFETIME | CLV |
|---|---|---|---|---|---|
| Large | 15 | £218,992 | £99,138 | 5.0 yrs | **£495,690** |
| Medium | 15 | £22,446 | £10,161 | 5.0 yrs | **£50,806** |
| Small | 13 | £5,803 | £2,627 | 5.0 yrs | **£13,134** |

| LOYALTY (PURCHASE MONTHS OUT OF 12) | CUSTOMERS | REVENUE SHARE |
|---|---|---|
| Loyal (8+ months) | 18 | 86.2% |
| Regular (4–7 months) | 9 | – |
| Occasional (3 months or fewer) | 16 | – |

WHAT THIS SAYS

- 9 of 43 customers deliver 80% of revenue; 18 are loyal (8+ months) and make up 86.2% of revenue.
- ▼ The top-5 make up 62.7%: losing one would change the year's result.
- → A large customer's lifetime value is £495,690: that is what retaining one is worth and what losing one costs.

## Sales efficiency

Sales costs over 12 months: £280,000; revenue growth: £-213,238; growth per unit of sales cost: -0.76.

WHAT THIS SAYS

- Sales costs £280,000 a year: 7.6% of revenue; per new customer £35,000.
- ▼ Each unit of sales cost produced -0.76 of revenue growth.
- → Sales costs should be compared with growth, not with revenue.

# Potential inside existing customers: breadth and depth

Top-20 customers × product groups: what is bought, what could be bought and what it is worth.

WHAT THIS SAYS

The average top-20 customer buys 29.4% of 8 product groups.

The sales team marked 25 possible new lines: breadth potential £1,320,998, depth £1,271,373.

▼ Only 14 of 20 customers assessed.

→ The cheapest growth is inside existing customers: they already buy, already trust you, the relationship exists.

buys (from the data) • + could buy (sales team assessment) • Need = the customer's total annual need in your category (sales team estimate).

| CUSTOMER | PRODUCT5 | PRODUCT3 | SERVICE2 | SERVICE1 | PRODUCT1 | PRODUCT6 | PRODUCT2 | PRODUCT4 | REVENUE |
|---|---|---|---|---|---|---|---|---|---|
| Customer1 | + | | ■ | ■ | | ■ | ■ | | £647k |
| Customer2 | ■ | ■ | ■ | | | + | | | £573k |
| Customer5 | | + | ■ | | ■ | ■ | ■ | + | £454k |
| Customer11 | + | ■ | ■ | + | | ■ | + | | £329k |
| Customer33 | ■ | | + | | | + | | | £316k |
| Customer3 | | ■ | ■ | | + | | | + | £271k |
| Customer31 | ■ | | | + | | ■ | ■ | | £168k |
| Customer10 | ■ | | + | | | + | | | £143k |
| Customer23 | | + | | | ■ | | | + | £100k |
| Customer22 | ■ | | ■ | ■ | | | + | | £51k |
| Customer34 | | | ■ | | ■ | + | ■ | | £49k |
| Customer13 | ■ | + | | | + | ■ | | + | £47k |
| Customer41 | + | | | ■ | | | + | | £47k |
| Customer9 | | | + | | ■ | + | | | £45k |
| Customer27 | ■ | | | ■ | | | | | £44k |
| Customer24 | | ■ | ■ | | | | ■ | | £36k |
| Customer39 | | ■ | | | | ■ | | ■ | £30k |
| Customer38 | | | | | | ■ | | ■ | £29k |
| Customer16 | | | ■ | ■ | | | ■ | | £28k |
| Customer42 | | | | ■ | ■ | | | | £26k |

# Why it is so: findings

Findings arise where the numbers, the manager's answers and the team's view diverge.

1

### How much of the revenue will repeat

97.4% of revenue comes from customers who also bought last year; retention is 87.5%, churn £596,869. Loyal customers (8+ months): 18; occasional (3 months or fewer): 16. One percentage point of retention is worth £39,102 a year.

2

### What the revenue rests on

The top-5 customers make up 62.7% and the top-20 92.9% of revenue; 9 customers deliver 80% of it. The potential inside existing customers is not assessed (matrix not filled), which is a finding in itself: average breadth is only 29.4% of the available product groups.

3

### Where the funnel leaks

Of 64 deals, 34 were won and 25 lost: win rate 57.6%, average won deal £12,835. Most are lost at the "Proposal" stage (12 deals); 29.7% of deals have no source. One percentage point of win rate is worth £7,573 a year.

# Manager interview and team survey

## Manager interview: summary

| | |
|---|---|
| **How the best customers arrive** | The manager said: Our best customers are distributors who order every month and buy three or four product lines; they came by referral years ago. We lost two accounts this year: one after a pricing dispute, one after our key account manager left. |
| **Why we lose** | The manager said: The referral customers stay the longest; trade-show leads rarely order twice. Deals are decided by the sales director on gut feel; we have no written criteria. |
| **Who decides to buy from us** | Sales reports are weekly revenue by salesperson, nothing by customer. |
| **Pricing and discount practice** | The manager said: We have a CRM but only half of the team uses it; stage and source are rarely filled in. Repeat orders come in by e-mail; nobody owns the account after the first sale. |
| **What would happen if the best salesperson left** | The manager said: Repeat orders come in by e-mail; nobody owns the account after the first sale. Repeat orders come in by e-mail; nobody owns the account after the first sale. |

## Team survey

Employees who answered: 6. Results are anonymous and shown only in aggregate.

Is it clear which customers we sell to, and which we do not?




Why do we usually win a deal?




At which stage do we most often lose deals?




Is the next-quarter forecast we give a real one?




Where does your selling time go?




How many of your customers could buy one more of our product groups?

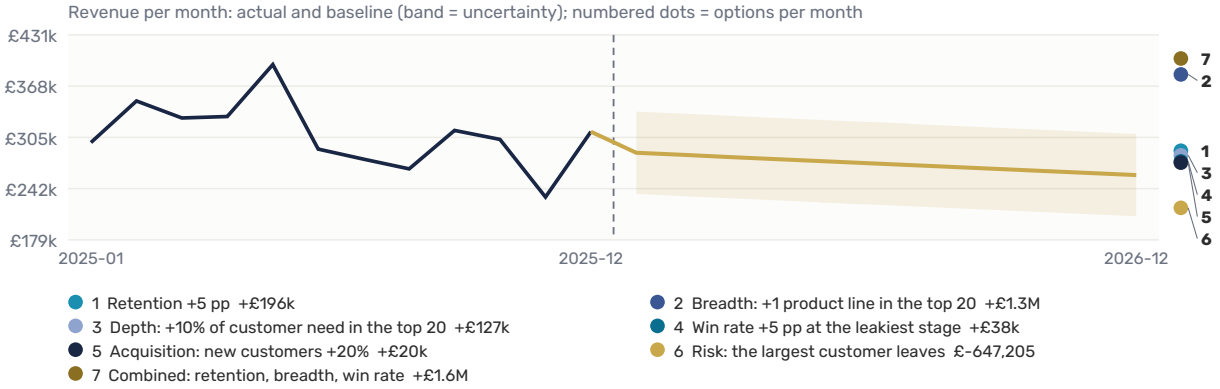


## Suggestions from the team

- Nobody owns the account after the first order
- We do not know why deals are lost
- Pricing is decided case by case
- Quotes take a week
- CRM is not used
- One account plan per key customer
- Record the loss reason
- A price list with rules

# Simulations: what happens to revenue under different decisions

The baseline shows what happens to revenue over 12 months if the current trend continues. Each option changes one parameter (retention, breadth, depth, win rate or acquisition) and shows the effect on revenue and contribution. These are not recommendations but a map of possibilities: which to take is decided by the management team in the workshop.




WHAT THIS SAYS

Revenue trend: £-2,480 a month.

▼ Baseline revenue over 12 months: £3,267,974 (£-429,022 against the last 12 months).

▼ The trend already includes churn of 15.3% a year: that much new revenue is needed every year just to hold it.

→ The band shows the uncertainty: the decisions must work at its lower edge too.

## Sensitivity: revenue over 12 months as retention and breadth change

Other parameters unchanged. Blue is better than the baseline, gold is worse.

| RETENTION ↓ • BREADTH (LINES IN THE TOP-20) → | +0 | +1 | +2 |
|---|---|---|---|
| **-5 pp** | £3.1M | £4.4M | £5.7M |
| **0 pp** | £3.3M | £4.6M | £5.9M |
| **+5 pp** | £3.5M | £4.8M | £6.1M |
| **+10 pp** | £3.7M | £5.0M | £6.3M |

WHAT THIS SAYS

1 pp of retention = £39,102, 1 pp of win rate = £7,573, 1% of new-customer revenue = £979.

▼ Worst cell (retention -5 pp, no breadth): £3,072,462; best: £6,300,992.

→ Retention and breadth work inside existing customers, without acquisition cost, which is why they come first on the workshop agenda.

## All options in one table

| OPTION | ASSUMPTION | REVENUE IN 12 MONTHS | DIFFERENCE | CONTRIBUTION AFTER |
|---|---|---|---|---|
| **Baseline, nothing changes** | current trend | £3,267,974 | — | £1,479,412 |
| **Retention +5 pp** | retention +5 pp | £3,463,486 | +£195,512 | £1,567,920 |
| **Breadth: +1 product line in the top 20** | +1 product group in the top-20, half of the marked "could buy" | £4,588,972 | +£1,320,998 | £2,077,427 |
| **Depth: +10% of customer need in the top 20** | depth +10 % | £3,395,111 | +£127,137 | £1,536,967 |
| **Win rate +5 pp at the leakiest stage** | win rate +5 pp | £3,305,837 | +£37,863 | £1,496,552 |
| **Acquisition: new customers +20%** | new-customer revenue +20 % | £3,287,554 | +£19,580 | £1,488,276 |
| **Risk: the largest customer leaves** | the largest customer leaves | £2,620,769 | £-647,205 | £1,186,422 |
| **Combined: retention, breadth, win rate** | retention + breadth + win rate | £4,822,346 | +£1,554,372 | £2,183,076 |

WHAT THIS SAYS

- Largest single lever: "Breadth: +1 product line in the top 20" +£1,320,998.
- ▼ Losing the largest customer means £-647,205 of revenue: that much rests on one contract.
- → The whole programme is worth +£1,554,372 over 12 months; the workshop question is which part of it is realistic within a year.

# The options up close

For every option: assumption, mechanism, result, evidence in your data, what it needs, risks and the first step.

## 1 Retention +5 pp — +£195,512

| | |
|---|---|
| Assumption | retention +5 pp |
| How it works | Retention rises by 5 percentage points: some of the customers who would have been lost or declined stay. Recovered revenue = previous-year revenue × 5 pp. |
| Result over 12 months | **£3,463,486 (+£195,512, +6.0%; contribution £1,567,920)** |
| Evidence in your data | Retention now 87.5%, churn £596,869; 5 pp = £195,512 a year. |
| What it needs | A list of declining and lost customers with the reason and an owner; 90 days without an order as a signal; an annual top-20 review. |
| Risks and side effects | Effort spent on customers that cannot be recovered; discounts instead of fixing the reasons. |
| First step | List 10 declining or lost customers and learn the reason within 30 days. |

## 2 Breadth: +1 product line in the top 20 — +£1,320,998

| | |
|---|---|
| Assumption | +1 product group in the top-20, half of the marked "could buy" |
| How it works | Every top-20 customer marked "could buy" takes one more product group; we assume half succeed and a line is worth that customer's average line. |
| Result over 12 months | **£4,588,972 (+£1,320,998, +40.4%; contribution £2,077,427)** |
| Evidence in your data | 14 of 20 customers assessed; 25 "could buy" marked; 50% of them counted. |
| What it needs | The matrix as the sales plan: one specific offer per customer per quarter; a salesperson accountable for each line. |
| Risks and side effects | Offers without a customer need; cross-selling with a discount erodes margin. |
| First step | Review the matrix with the sales team and pick 10 lines for the first quarter. |

## 3 Depth: +10% of customer need in the top 20

+£127,137

| | |
|---|---|
| Assumption | depth +10 % |
| How it works | In the top-20 your share of the customer's annual need grows 10% (from the matrix "total need"); without the matrix, 10% of top-20 revenue, halved. |
| Result over 12 months | **£3,395,111 (+£127,137, +3.9%; contribution £1,536,967)** |
| Evidence in your data | Unserved need in the top-20: £1,271,373; 10% counted. |
| What it needs | A need estimate for every top-20 customer; contract and price review; the aim of "main supplier" status. |
| Risks and side effects | Customer need overestimated; competitor contracts; dependence on the top-5 grows further. |
| First step | Verify the "total need" directly with the 5 largest customers. |

## 4 Win rate +5 pp at the leakiest stage

+£37,863

| | |
|---|---|
| Assumption | win rate +5 pp |
| How it works | The win rate rises 5 pp at the leakiest stage; deals closed per year and the average won deal come from your list. |
| Result over 12 months | **£3,305,837 (+£37,863, +1.2%; contribution £1,496,552)** |
| Evidence in your data | Win rate now 57.6%, ~59 deals closed a year, average won £12,835. |
| What it needs | Loss reasons at the leakiest stage; a proposal template and deadlines; a weekly review of open deals. |
| Risks and side effects | Reasons stay opinions if deals are not recorded; pressure to win with discounts. |
| First step | Record the stage and the reason for every lost deal in the next 30 days. |

## 5 Acquisition: new customers +20%

+£19,580

| | |
|---|---|
| Assumption | new-customer revenue +20 % |
| How it works | New-customer revenue grows 20% (more new customers or larger first orders); other parameters as in the baseline. |
| Result over 12 months | **£3,287,554 (+£19,580, +0.6%; contribution £1,488,276)** |
| Evidence in your data | New customers in the year: 8, £97,902; sales cost per new customer £35,000. |
| What it needs | Clear sources (where the best customers come from); an acquisition budget by source win rate. |
| Risks and side effects | The most expensive lever: the cost of a new customer and the long road to a repeat purchase. |
| First step | Compare win rate and average deal by source; strengthen the best one. |

## 6 Risk: the largest customer leaves

£-647,205

| | |
|---|---|
| Assumption | the largest customer leaves |
| How it works | A risk scenario: the largest customer leaves, other parameters as in the baseline. It shows how much revenue rests on one contract. |
| Result over 12 months | **£2,620,769 (£-647,205, -19.8%; contribution £1,186,422)** |
| Evidence in your data | Customer1: £647,205 (17.5% of revenue). |
| What it needs | Contract terms and end date; a second contact on the customer side; a plan B. |
| Risks and side effects | Not a choice but a risk: a scenario for the workshop, not an initiative. |
| First step | Spell out what would happen in the first 90 days after losing this customer. |

## 7 Combined: retention, breadth, win rate

+£1,554,372

| | |
|---|---|
| Assumption | retention + breadth + win rate |
| How it works | Three levers together: retention +5 pp, breadth +1 line in the top-20, win rate +5 pp. The effects add up; some may overlap. |
| Result over 12 months | **£4,822,346 (+£1,554,372, +47.6%; contribution £2,183,076)** |
| Evidence in your data | Parts: retention £195,512, breadth £1,320,998, win rate £37,863. |
| What it needs | A management decision on all three; three owners; monthly tracking (churn, new customers, win rate). |
| Risks and side effects | Too many initiatives at once; a sales team without a clear priority. |
| First step | In the workshop, decide which two of the three to start with. |

# Proposal for next steps

The service ends with this report, the workshop deck and the results template. Here we propose the area worth fixing, the ways to fix it and where to start; how to do it is decided by your management team in the workshop.

## The problem worth solving

> Revenue rests on a few customers: the top-5 make up 62.7% and 9 customers deliver 80% of revenue. Churn of 15.3% of the previous year's revenue (£596,869) means every year starts by replacing what was lost before any growth. In the funnel most deals are lost at the "Proposal" stage; the win rate is 57.6%.

## Three ways to solve it

| # | WAY | WHAT WOULD CHANGE | WHY IT FITS YOU |
|---|---|---|---|
| 1 | **Retain and recover** | A list of declining and lost customers with the reason and an owner; a 90-day contact rule for the top-20; option "retention +5 pp" +£195,512. | Churn is £596,869 a year; one pp of retention is worth £39,102. |
| 2 | **Expand inside existing customers** | The customer × product matrix for the top-20 as the sales plan: one new product group per customer where "could buy" is marked; options "breadth" +£1,320,998 and "depth" +£127,137. | Average breadth in the top-20 is 29.4% of the available product groups. |
| 3 | **Fix the funnel and the sources** | Every deal with a stage and a source (a 20-row table, not a CRM); loss reasons at the leakiest stage; option "win rate +5 pp" +£37,863. | Win rate is 57.6% now and 29.7% of deals have no source. |

## Where we suggest starting

> **We suggest starting with "Breadth: +1 product line in the top 20": the largest single effect (+£1,320,998 of revenue over 12 months) and a decision within your own control. In parallel, the deal table with stage and source, because without it every other decision stays at the level of opinion. The whole programme is worth +£1,554,372.**

## What if...

- What if every top-20 customer had an annual plan with the "next product group" and one owner: what would it yield if it worked for half of them?
- What if the largest customer left (£-647,205): how many new customers would it take to offset it (average £12,238)?
- What if 90 days without an order were an automatic signal to the salesperson: how much of the churn (£596,869) could be stopped?
- What if prices for the top-20 were indexed every year: would that cover the churn?

## Questions for the discussion

1. Which 12-month revenue do we treat as the target: the baseline, one of the options or a combination?
2. Which 5 declining or lost customers are recoverable, and who will call them?
3. How many top-20 customers could buy one more product group within 6 months?
4. At which funnel stage do we lose the most, and what is the real reason?
5. What would happen if the best salesperson left: how much revenue and knowledge would leave with them?

# What the workshop must decide: bridging the gap

The workshop is built as gap-filling with initiatives: the baseline shows where revenue will be in 12 months if nothing changes; the team chooses the target (point Y); the difference is the gap that specific initiatives, with owners and deadlines, must fill. The 2-hour workshop deck is a separate PDF on your page.

## Three decisions in 2 hours

1. Do we agree with the diagnosis (what the revenue rests on).
2. What the 12-month revenue target is and how large the gap to it is.
3. Which initiatives, with owners and deadlines, fill the gap.

## The gap arithmetic

| ITEM | REVENUE IN 12 MONTHS | NOTE |
|---|---|---|
| Baseline (nothing changes) | £3,267,974 | point X |
| Target (point Y), chosen by the team | _____ | e.g. one of the options; the whole programme: £4,822,346 |
| **Gap = Y − X** | _____ | what the initiatives must deliver |

## Initiatives table (filled in the workshop)

| # | INITIATIVE | EFFECT IN 12 MONTHS | OWNER | DEADLINE | KPI (NOW → TARGET) |
|---|---|---|---|---|---|
| 1 | | | | | |
| 2 | | | | | |
| 3 | | | | | |
| 4 | | | | | |
| 5 | | | | | |

| | | |
|---|---|---|
| | **Total** | does the total ≥ the gap? |

Enter the initiatives in the form on your project page and the results presentation is extended with each initiative written as a well-formed outcome (optional, while the project is open).

## What next

The report, the workshop deck and the results presentation are the core of the service. In the workshop your team chooses the target and the initiatives; if you enter them on your project page, we add them to the results presentation (while the project is open). We recommend tracking churn, new customers and win rate monthly and repeating the X-Ray in 6–12 months. In a second stage external studies are available: a customer survey, Conjoint (price versus quality).

# Appendix: glossary

| | |
|---|---|
| **Retention** | The share of customers (or their revenue) who bought both last year and this year. |
| **Churn** | Revenue from customers who bought last year and not this year. |
| **Loyalty** | The number of purchase months out of the last 12. |
| **CLV** | Customer lifetime value: annual contribution × expected lifetime. |
| **Breadth** | How many product groups a customer buys out of those available. |
| **Depth** | What share of its need a customer buys from you. |
| **Win rate** | The share of closed deals that were won. |
| **Predictability score** | How predictable next year's revenue is from the structure: concentration, retention, sources, data. |
| **Baseline** | The forecast if nothing changes. |

This report is based on the data and answers provided by the client. It is not legal, tax or investment advice.

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