**Engagement Heat Map**

**Problem Statement**

Our current Industry Advantage (IA) Internal and External Tableau reports provide an abundance of raw data about subscribing companies. This information is often overwhelming for sales and leadership to process. The complexity of raw numbers can make it difficult to extract meaningful insights, which hinders timely decision-making and action.

**Solution**

To simplify this process and ensure that Product and Sales stay on top of key engagement metrics, we are introducing an Industry Advantage Engagement Heat Map. This visual tool will present actionable data at a glance, quickly identify subscribing companies that require attention/are at risk, or present opportunities for growth. Presenting data this way will enable leadership and sales teams to spot trends and prioritize action for immediate impact and to support at-risk accounts and strategically plan for renewal. The heat map will align efforts across sales, leadership, and product teams and provide a shared understanding to allow them to better coordinate strategies and priorities.

**Key Heat Map Insights**

1. **Activation Levels**
   * **High Activation, High Potential (green)**: Companies with consistently high activation and completion rates. These accounts may benefit from upsell opportunities (additional seats) or targeted communications to strengthen partnerships.
   * **Medium Activation (yellow)**: Companies showing steady, moderate usage but with room for deeper engagement. Although these companies do not require immediate action, they should be monitored regularly for changes in utilization patterns.
   * **Low Activation/At-Risk Accounts (red)**: Companies with low activation, declining trends, or low completion rates. A low activation percentage may indicate onboarding or internal promotion challenges. These companies require immediate, personalized outreach to re-engage.
2. **Completion Rate**: The metric assesses how well learners are completing courses and demonstrates the value of the program for learners. This metric can signal course relevance or indicate where additional learner support is needed. It will also be useful when identifying companies that are struggling with course completions and allow us to provide targeted support to increase them.
3. **Targeted Communication Strategies**
   * **High Engagement Companies**: These companies represent upsell opportunities mid- subscription and seat expansion opportunities at renewal.
   * **Low Engagement Companies**: These companies may be in need of additional onboarding support, may benefit from us sharing success stories, or offering assistance with tailored outreach to increase usage.