

SAMPLE CLOSED LOOP REPORT



Please find below a snapshot of your project's progress to date

Result Classification	Target	% complete	Reports to Date
A Lead (3%)	9	89%	8
B Lead (3%)	9	133%	12
Already Leads	0	#DIV/0!	3
C Lead (7%)	17	76%	13
Total A & B Leads	18	111%	20
Total A, B, C & Already Leads	35	103%	36
Suitable No Project/ No Interest/ Duplicate	145	123%	179
Suitable Indirect	90	74%	67
Unsuitable	30	67%	20
Conference calls	14	86%	12 an additional 4 were scheduled but cancelled (see comments below)
TOTAL Reports Shipped			302
Reports to be completed	300		
% of Reports Shipped	101%		

Leads to Date:

Target Company	InSVped	dat	Leads	Follow up Required	Follow Up By	Follow Up Mo	Confere	Confere	Notes Comm	Sales Feedback	Value of business	STATUS	COMPETITOR	VALUE
Company 1		07-Jan-04	A Lead	Yes	Client	February				contact in may 2004	too early to say	OPEN		
Company 2		21-Jan-04	A Lead	Yes	Client	January	01/26/04	2:00 PM	ok	palmer called ISV b4 cc to say they will keep MegaByte	lost	LOST	MegaByte	
Company 3		21-Jan-04	A Lead	Yes	Client	January	01/26/04	10:30am	ok	theo decided to take retail pro as they had already gone a long way down the road with them on the selection route	lost	LOST	Retail Pro	
Company 4		14-Jan-04	A Lead	Yes	Client	January	02/24/04	10am		in the future	too early to say	OPEN		
Company 5		15-Jan-04	A Lead	Yes	Client	February				Nic/Ju to email and call to introduce themselves	too early to say	OPEN		
Company 6		19-Dec-03	A Lead	Yes	Client	January	01/08/04	9:00 AM	ok	demo planned for wc 23rd of feb, go live date is not until 2006 so long term prospect	value proposal sent	PROPOSAL		
Company 7		14-Jan-04	A Lead	Yes	Client	January				not interested in Technology platform	lost	LOST	Technology Issue	
Company 8		08-Jan-04	A Lead	Yes	Client	January	01/22/04	11:00AM	ok	Contract Win	Won	WON		\$600,000
Company 9		21-Jan-04	Already Lead	No						ISV user	other	OTHER		
Company 10		15-Dec-03	Already Lead	No						ISV user	other	OTHER		
Company 11		21-Jan-04	Already Lead	No						jda final chosen supplier	lost	LOST	JDA	
Company 12		22-Jan-04	B Lead	Yes	Client	April	01/28/04	3:00PM	NO, tried 2	cc fell through, tried to re-schedule but prospect said to call in April as project pushed	too early to say	OPEN		
Company 13		15-Jan-04	B Lead	Yes	Client	April	01/28/04	1.30pm	NO, cc can	prospect cancelled cc as long term initiative, might not be a fit as Finance module	other	OPEN		
Company 14		10-Dec-03	B Lead	Yes	Client	January				in contact for 2 years, fit functionality but not platform	other	LOST	Technology Issue	
Company 15		15-Jan-04	B Lead	Yes	Client	July				contact in july 2004	too early to say	OPEN		
Company 16		15-Jan-04	B Lead	Yes	Client	January	01/29/04	2pm	ok	went ahead, long term lead currently got a consultant in reviewing their merch require	too early to say	OPEN		
Company 17		15-Dec-03	B Lead	Yes	Client	March				Nic/ Ju to send information next week (outstanding)	too early to say	OPEN		
Company 18		22-Jan-04	B Lead	Yes	Client	February	02/05/04	02:30 PM	NO	prospect was unavailable, when we tried to re-schedule he said no as the budgets ar	other	SUSPENDED		
Company 19		26-Jan-04	B Lead	Yes	Client	February	02/02/04	13:00	ok	call went ahead, current requirement is a different platform to ISV we need to establish roadmap and speak to him	other	OPEN		
Company 20		22-Jan-04	B Lead	Yes	Client	October				no cc but they are talking prices	too early to say	PROPOSAL		\$400,000
Company 21		15-Dec-03	B Lead	Yes	Client		01/12/04	2:00 PM	NO, tried 2	Nic tried 3 times w/o success, Tamara to re-schedule	other	OPEN		
Company 22		22-Jan-04	B Lead	Yes	Client	January	02/02/04	12noon	ok	Contract Win	Won	WON		\$600,000
Company 23		15-Dec-03	B Lead	Yes	Client	December	12/18/03	2pm	ok	sent prices nicola currently chasing for next stages	value proposal sent	PROPOSAL		\$500,000
Company 24		09-Jan-04	C Lead	Yes	Client	April				ISV to contact in april 2004	too early to say	OPEN		
Company 25		21-Jan-04	C Lead	Yes	Client	December				ISV to contact jan 2005 may look for a new soluton thn	too early to say	OPEN		
Company 26		21-Jan-04	C Lead	Yes	Client	March				ISV to contact march 2004	too early to say	OPEN		
Company 27		13-Feb-04	C Lead							?	other	OPEN		
Company 28		10-Feb-04	C Lead	Yes	Client	February	02/17/04	2.30pm		in the future nic called and he said he had to go into a meeting	other	OPEN		
Company 29		28-Jan-04	C Lead	Yes	Client	May				ISV forwarded on a letter of introduction need to contact in may 2004	too early to say	OPEN		
Company 30		21-Jan-04	C Lead	Yes	Client	June				?	?	OPEN		
Company 31		15-Jan-04	C Lead	Yes	Client	February				?	?	OPEN		
Company 32		21-Jan-04	C Lead	Yes	Client	May	02/12/04	10:00AM	ok	set cc, ISV not free so they re-scheduled, call went well: they are going to be included	too early to say	PROPOSAL		\$400,000
Company 33		26-Jan-04	C Lead	Yes	Client	February	02/02/04	10:00:00	ok	not at desk, ISV said no need to re-schedule as they are implementing SAP and wou	other	LOST	SAP	
Company 34		09-Jan-04	C Lead	Yes	Client	June				want to be updated of ISV information	other	OPEN		
Company 35		09-Jan-04	C Lead	Yes	Client	March				ISV to contact march 2004	too early to say	OPEN		
Company 36		23-Jan-04	C Lead	Yes	Client	April				contact apr 2004	too early to say	OPEN		