

	OPEN	CONVERTED PROPOSALS TO ACTIVE PROJECTS in \$000's												ADJST'D	EXPIRED	AGING	% TOTAL
MONTHS BACK	YEAR END	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	OPEN	LOST		
DEC	0													0		0	0%
NOV	0													0			
OCT	0													0			
SEP	0													0			
AUG	0													0			
JUL	0													0			
JUN	0													0		965	40%
MAY	475													475			
APR	350					50								300			
MAR	98				18	40								40			
FEB	245			20	45	60								120			
JAN	210		65	55	60	0								30		879	36%
1	202		40	30	55									77			
2	196	25		25										146			
3	430		56		35									339			
4	357			100	25									232			
5	92			25	19									48			
6	118	56			25									37			
7	156				36	65								55		269	11%
8	47													47			
9	59													50	9		
10	67													67			
11	125	64												0	61		
12	50													50			
13	15	15												0		221	9%
14	21													21			
15	33					33								0			
16	73													73			
17	81													58	23		
18	69													69		106	4%
19	170	42				66								62			
20	0													0			
21	85		85											0			
22	32													32			
23	37													12	25		
24	25				25									0	0		
SALES Written	1360	202	246	255	343	314	0	0	0	0	0	0	0				

NEW BIDS	1378	210	245	98	350	475													
OPEN TOTAL	2540	2520	2489	2332	2311	2440									2440				
EXPIRED/LOST	118	28	30	0	28	32										118			

2440 100%

INSTRUCTION FOR THE WORKSHEET

1. In your proposal software, run a bids open for the past 24 months. We suggest full year 2014 and full year 2015. Rnter the summary totals in B9 thru B32
- 2.To update the worksheet through April, run a sales written report in QuickBooks or equivalent and determine the proposal bucket eacch sold project came out of.
3. Post the amounts in the respective month column C thru N
- 4.The sales written will total in ROW 33.
5. Record new bids totals in ROW 34 for the last month they will reflect also in B3 thru B14
6. Monthly you will want to go thru the open bids detail and eliminate any expired, lost or closed proposals; showing the deductions in Column "O";
7. the sum of these monthly adjustments should be entered in ROW 36
8. Column "Q" will reflect the aging of open bids by 6 month groupings;
9. The goal is to close as many aging proposals and to begin to understand how long our sales cycle is by monitoring activity in all buckets.
10. Review this dashboard with the Sales Team regularly; Isolate individual sales person's bids when possible.

NOTE: you might be concerned about revisions and changes to the previous periods bid amounts; if so you could reflect column B to reflect net changes