

EXAMPLE

Sales Team Operations by Quarter
01/01/22 - 03/31/22

Region	Province	City	Sales	Item	Unit	Quantity	Quantity	Quantity Sold	Discount	Discount	Gross	Gross Sales	Gross Sales /	
			person		Price (\$)	Sold	Quota	/ Quantity Quota (%)	Applied (%)	Cap (%)	Sales (\$)	Quota (\$)	Gross Sales Quota (%)	
Atlantic	New Brunswick	Moncton	S1	Chair	350	50.00	45.00	11%	10%	10%	\$15,750	\$15,750	0%	
				Desk	750	28.00	30.00	-7%	-5%	5%	\$22,050	\$22,500	-2%	
				Bookshelf	1,200	32.00	30.00	7%	5%	7%	\$36,480	\$36,000	1%	
		Subtotal									\$74,280	\$74,250	0%	
	Newfoundland and Labrador	St. John's	S2	Chair	350	30.00	30.00	0%	10%	10%	\$9,450	\$10,500	-10%	
				Desk	750	18.00	20.00	-10%	-3%	5%	\$13,905	\$15,000	-7%	
				Bookshelf	1,200	10.00	16.00	-38%	5%	7%	\$11,400	\$19,200	-41%	
		Subtotal									\$34,755	\$44,700	-22%	
	Nova Scotia	Halifax	S3	Chair	350	50.00	45.00	11%	10%	10%	\$15,750	\$15,750	0%	
				Desk	750	35.00	30.00	17%	-7%	10%	\$28,088	\$22,500	25%	
				Bookshelf	1,200	32.00	30.00	7%	5%	10%	\$36,480	\$36,000	1%	
		Subtotal									\$80,318	\$74,250	8%	
	Prince Edward Island	Charlottetown	S4	Chair	350	40.00	30.00	33%	10%	10%	\$12,600	\$10,500	20%	
				Desk	750	20.00	25.00	-20%	0%	4%	\$15,000	\$18,750	-20%	
				Bookshelf	1,200	10.00	10.00	0%	5%	9%	\$11,400	\$12,000	-5%	
	Subtotal									\$39,000	\$41,250	-5%		
Total											\$228,353	\$234,450	-3%	
Central	Ontario	Toronto	S5	Chair	350	50.00	45.00	11%	10%	10%	\$15,750	\$15,750	0%	
				Desk	750	28.00	30.00	-7%	-5%	5%	\$22,050	\$22,500	-2%	
				Bookshelf	1,200	32.00	30.00	7%	5%	7%	\$36,480	\$36,000	1%	
			Subtotal									\$74,280	\$74,250	0%
		Ottawa	S6	Chair	350	30.00	30.00	0%	10%	10%	\$9,450	\$10,500	-10%	
				Desk	750	18.00	20.00	-10%	-3%	5%	\$13,905	\$15,000	-7%	
				Bookshelf	1,200	10.00	16.00	-38%	5%	7%	\$11,400	\$19,200	-41%	
		Subtotal									\$34,755	\$44,700	-22%	
		Total									\$109,035	\$118,950	-8%	
	Quebec	Montreal	S7	Chair	350	50.00	45.00	11%	10%	10%	\$15,750	\$15,750	0%	
				Desk	750	35.00	30.00	17%	-7%	10%	\$28,088	\$22,500	25%	
				Bookshelf	1,200	32.00	30.00	7%	5%	10%	\$36,480	\$36,000	1%	
		Subtotal									\$80,318	\$74,250	8%	
		Quebec City	S8	Chair	350	40.00	30.00	33%	10%	10%	\$12,600	\$10,500	20%	
				Desk	750	20.00	25.00	-20%	0%	4%	\$15,000	\$18,750	-20%	
				Bookshelf	1,200	10.00	10.00	0%	5%	9%	\$11,400	\$12,000	-5%	
		Subtotal									\$39,000	\$41,250	-5%	
	Total									\$119,318	\$115,500	3%		
Total											\$228,353	\$234,450	-3%	
TOTAL											\$456,705	\$468,900	-3%	

Notes:

1. Breakdown by region, province, city, salespersons, items
3. Note all subtotals and grans totals
3. The operational report can be transformed based on the stakeholders' needs.
4. Breakdown is possible by items / salespeople / region / etc.
5. It is only an example of the details that an Operational report should have
6. For distribution best practice use PDF formatting, letter size to facilitate printing it.
7. It is a best practice to assess users' needs to incorporate additional details along with comparisons and KPIs that can facilitate business process monitoring and controlling.