

Created Date

Multiple selections

Service Line

All

Service Line Subcategory

All

Specialty Gro...

All

Engagement Le...

All

Internal Referr...

All

Stage

Multiple sele...

Active Opportunities

996

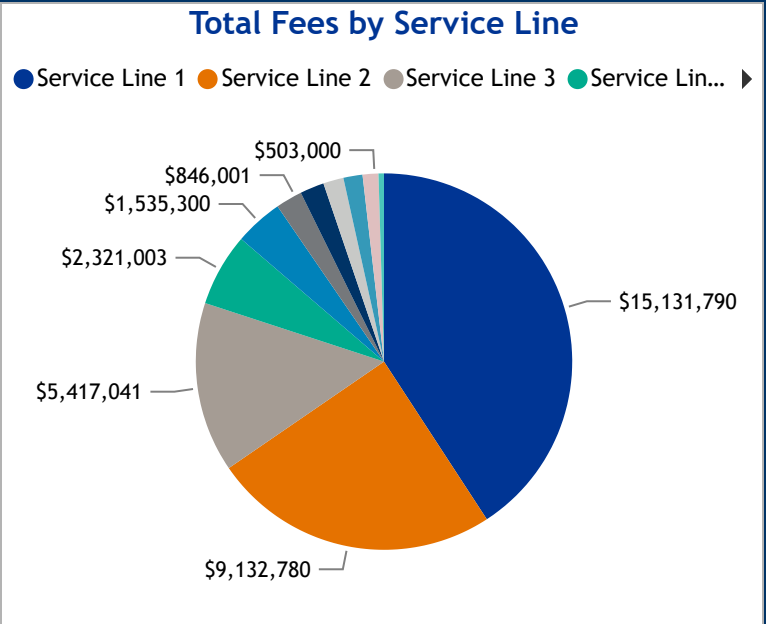
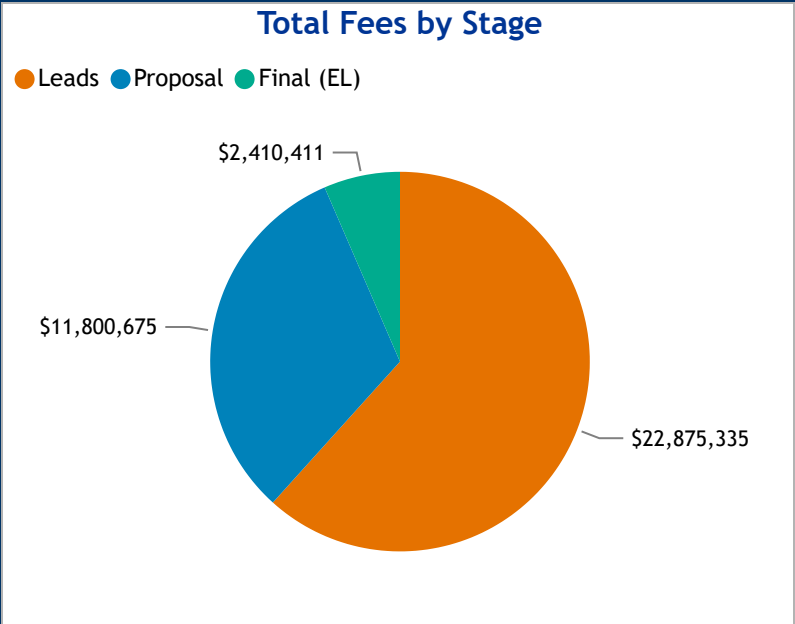
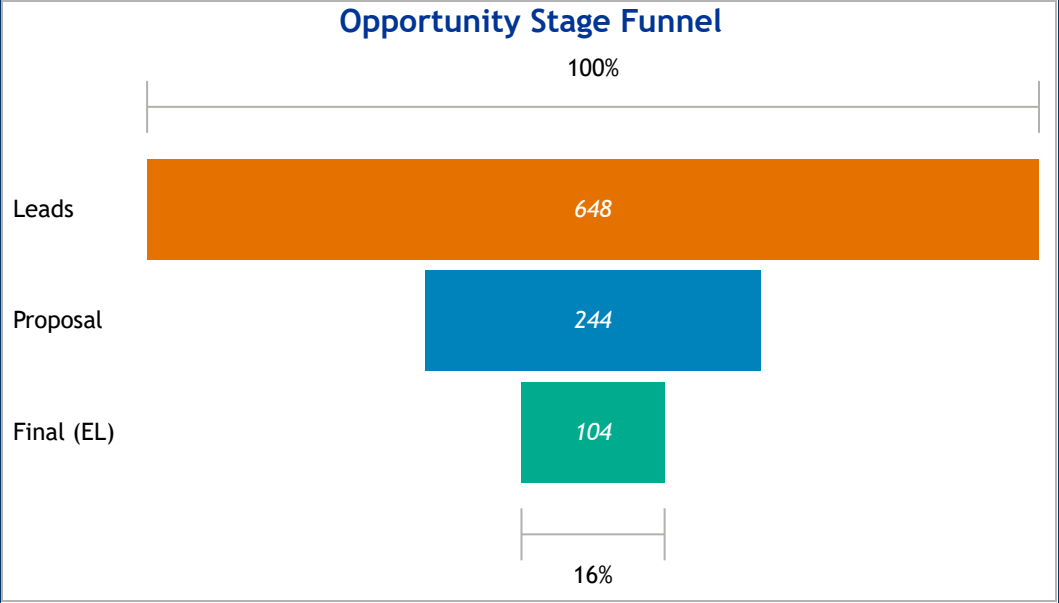
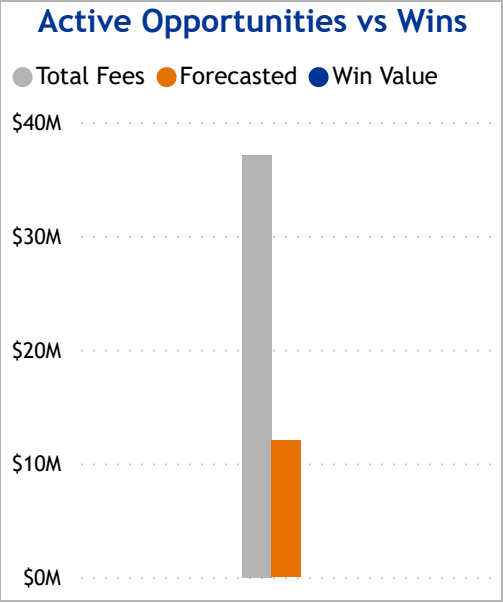
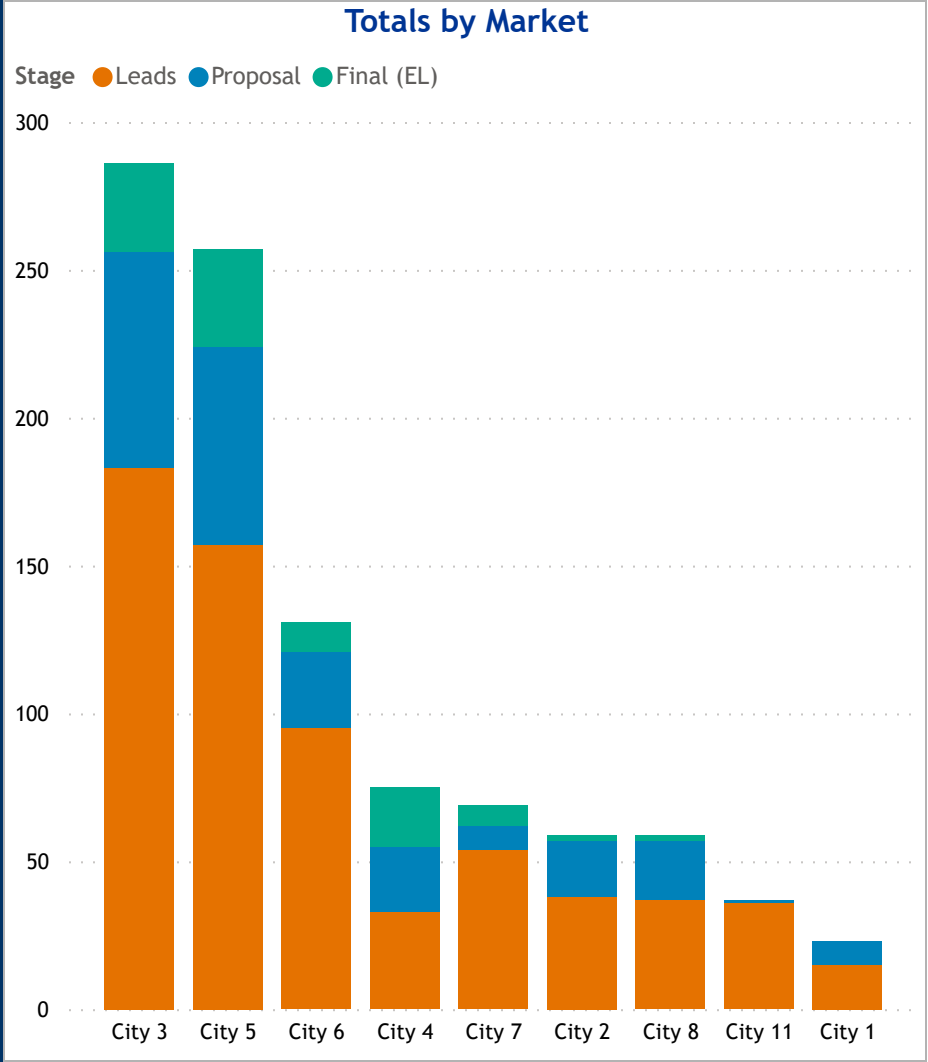
Count

\$37,086,421

Total Fees

\$12,023,895

Forecasted



Created Date

Multiple selections

Service Line

All

Service Line Subcategory

All

Specialty Gro...

All

Engagement Le...

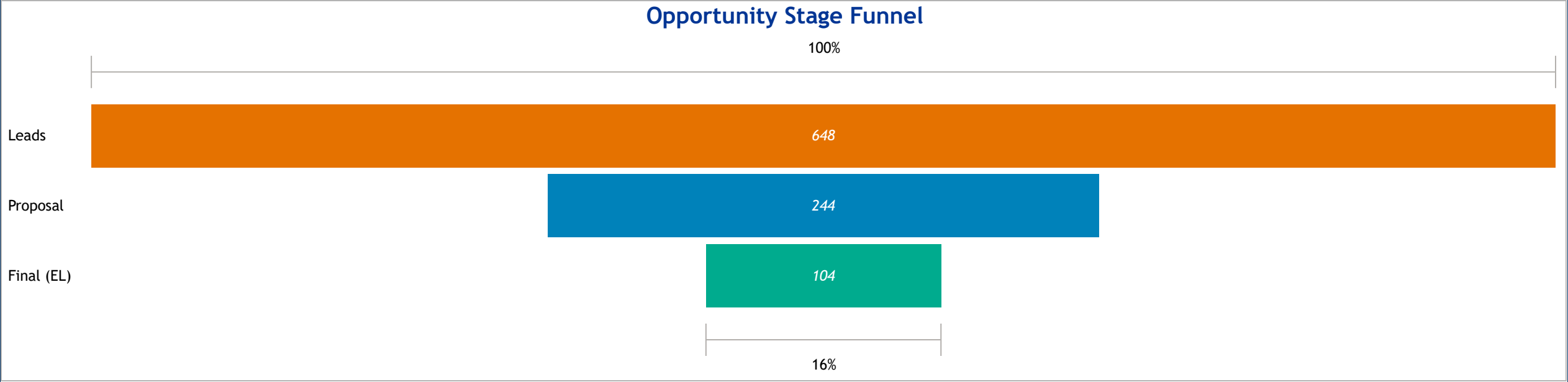
All

Internal Referr...

All

Stage

Multiple sele...



| Stage | Customer Name | Service Line | Engagement Opportunity Lead | Internal Referral Source | New or Existing Client | Win Probability | Forecasted Amount | Created Date | EL Sign Date (Target/Actual) |
|-------|---------------|-----------------|-----------------------------|--------------------------|-------------------------------|-----------------|-------------------|--------------|------------------------------|
| Leads | Customer 100 | Service Line 4 | Employee 251 | Employee 251 | Existing Customer/New Service | | \$0 | 12/14/2022 | |
| Leads | Customer 1001 | Service Line 14 | Employee 330 | Employee 330 | New Customer/New Service | 10.00% | \$200 | 12/12/2022 | |
| Leads | Customer 101 | Service Line 14 | Employee 468 | Employee 468 | New Customer/New Service | | \$0 | 2/9/2023 | |
| Leads | Customer 102 | Service Line 1 | Employee 625 | Employee 625 | New Customer/New Service | | \$0 | 12/6/2022 | |
| Leads | Customer 1029 | Service Line 3 | Employee 328 | Employee 328 | New Customer/New Service | | \$0 | 10/28/2022 | |
| Leads | Customer 1030 | Service Line 3 | Employee 244 | Employee 244 | Existing Customer/New Service | 10.00% | \$0 | 1/20/2023 | |
| Leads | Customer 1039 | Service Line 2 | Employee 350 | Employee 350 | New Customer/New Service | 10.00% | \$6,000 | 8/3/2022 | |
| Leads | Customer 104 | Service Line 2 | Employee 438 | Employee 438 | New Customer/New Service | | \$0 | 12/9/2022 | |
| Leads | Customer 1046 | Service Line 1 | Employee 441 | Employee 441 | New Customer/New Service | | \$0 | 10/17/2022 | |
| Leads | Customer 1048 | Service Line 1 | Employee 350 | Employee 350 | New Customer/New Service | | \$0 | 2/2/2023 | |
| Leads | Customer 1049 | Service Line 1 | Employee 439 | Employee 662 | New Customer/New Service | | \$0 | 2/8/2023 | |
| Leads | Customer 105 | Service Line 2 | Employee 627 | Employee 627 | New Customer/New Service | 10.00% | \$500 | 2/28/2023 | 3/31/2023 |
| Leads | Customer 1055 | Service Line 14 | Employee 4 | Employee 4 | New Customer/New Service | 10.00% | \$4,000 | 10/7/2022 | |
| Leads | Customer 1058 | Service Line 3 | Employee 244 | Employee 414 | Existing Customer/New Service | 10.00% | \$0 | 1/20/2023 | |
| Leads | Customer 1062 | Service Line 1 | Employee 30 | Employee 30 | New Customer/New Service | 10.00% | \$3,000 | 12/5/2022 | |
| Leads | Customer 1073 | Service Line 1 | Employee 437 | Employee 437 | New Customer/New Service | 25.00% | \$10,000 | 11/29/2022 | |
| Leads | Customer 1078 | Service Line 14 | Employee 544 | Employee 544 | New Customer/New Service | | \$0 | 2/20/2023 | |
| Leads | Customer 1079 | Service Line 4 | Employee 251 | Employee 251 | New Customer/New Service | | \$0 | 2/21/2023 | |

Created Date

Multiple selections

Cade...

Month

Service Line

All

Service Line Subcateg...

All

Specialty Gro...

All

Engagement Le...

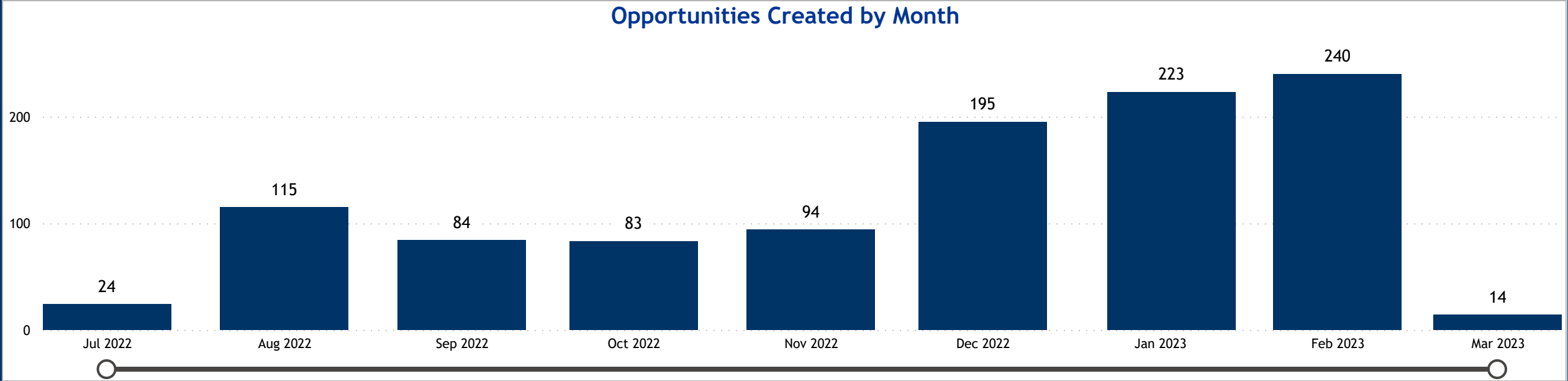
All

Internal Referr...

All

Stage

Multiple sele...



| Stage | Customer Name | Service Line | Engagement Opportunity Lead | Internal Referral Source | New or Existing Client | Win Probability | Forecasted Amount | Created Date | EL Sign Date (Target/Actual) |
|-------|---------------|-----------------|-----------------------------|--------------------------|------------------------|-----------------|-------------------|--------------|------------------------------|
| Other | Customer 12 | Service Line 14 | Employee 662 | Employee 662 | | | \$0 | 1/10/2023 | |
| Other | Customer 4090 | Service Line 14 | Employee 539 | Employee 539 | | | \$0 | 8/3/2022 | |
| Other | Customer 4091 | Service Line 14 | Employee 236 | Employee 236 | | | \$0 | 1/26/2023 | |
| Other | Customer 4092 | Service Line 14 | Employee 539 | Employee 539 | | | \$0 | 8/3/2022 | |
| Other | Customer 4101 | Service Line 14 | Employee 539 | Employee 539 | | | \$0 | 12/2/2022 | |
| Other | Customer 4103 | Service Line 14 | Employee 197 | Employee 197 | | | \$0 | 2/8/2023 | |
| Other | Customer 4105 | Service Line 14 | Employee 236 | Employee 236 | | | \$0 | 1/26/2023 | |
| Other | Customer 4106 | Service Line 14 | Employee 236 | Employee 236 | | | \$0 | 1/26/2023 | |
| Other | Customer 4111 | Service Line 14 | Employee 182 | Employee 182 | | | \$0 | 12/7/2022 | |
| Other | Customer 4115 | Service Line 14 | Employee 539 | Employee 539 | | | \$0 | 8/3/2022 | |
| Other | Customer 4118 | Service Line 14 | Employee 539 | Employee 539 | | | \$0 | 8/3/2022 | |
| Other | Customer 4121 | Service Line 14 | Employee 182 | Employee 182 | | | \$0 | 12/7/2022 | |
| Other | Customer 4125 | Service Line 14 | Employee 197 | Employee 197 | | | \$0 | 2/8/2023 | |
| Other | Customer 4126 | Service Line 14 | Employee 539 | Employee 539 | | | \$0 | 8/3/2022 | |
| Other | Customer 4128 | Service Line 14 | Employee 236 | Employee 236 | | | \$0 | 1/26/2023 | |
| Other | Customer 4130 | Service Line 14 | Employee 236 | Employee 236 | | | \$0 | 1/26/2023 | |
| Other | Customer 4133 | Service Line 14 | Employee 182 | Employee 182 | | | \$0 | 12/7/2022 | |
| Other | Customer 4136 | Service Line 14 | Employee 236 | Employee 236 | | | \$0 | 1/26/2023 | |

Created Date

Multiple selections

View By

Service Line

Service Line

All

Service Line Subcategory

All

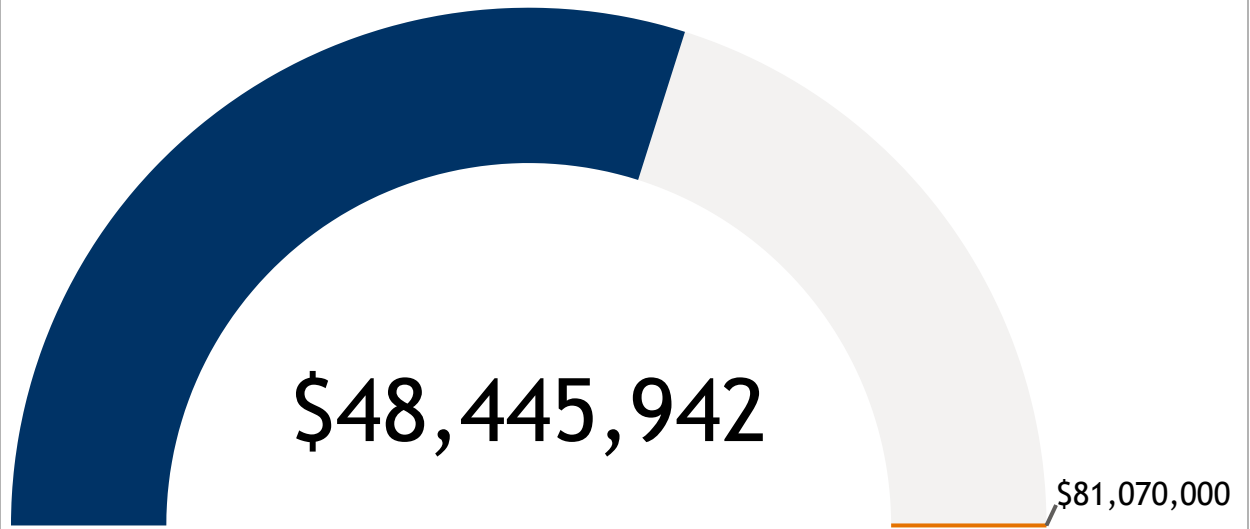
Engagement Lead

All

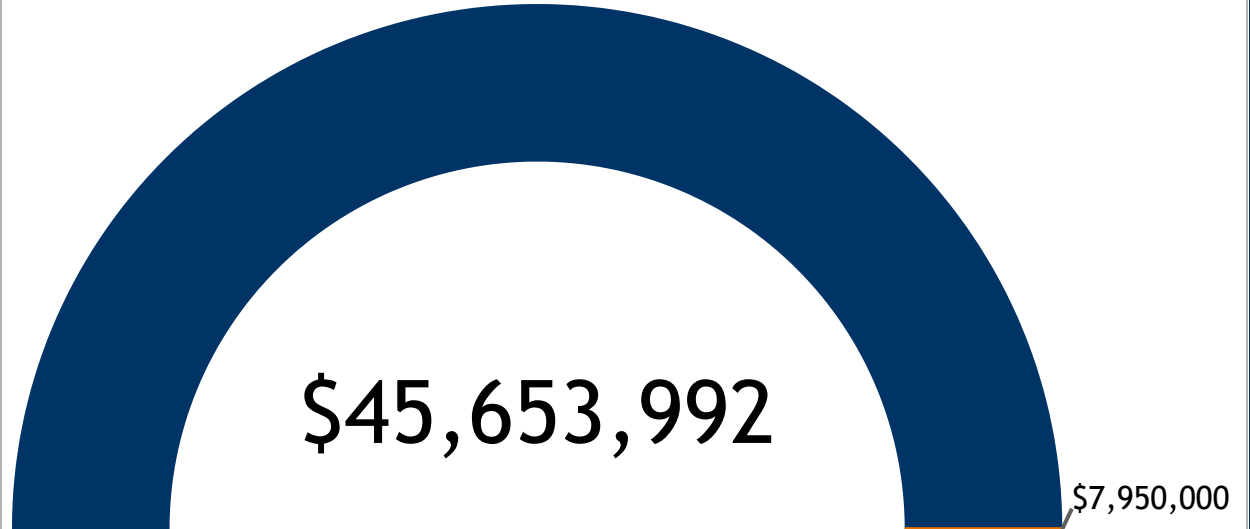
Internal Referral Source

All

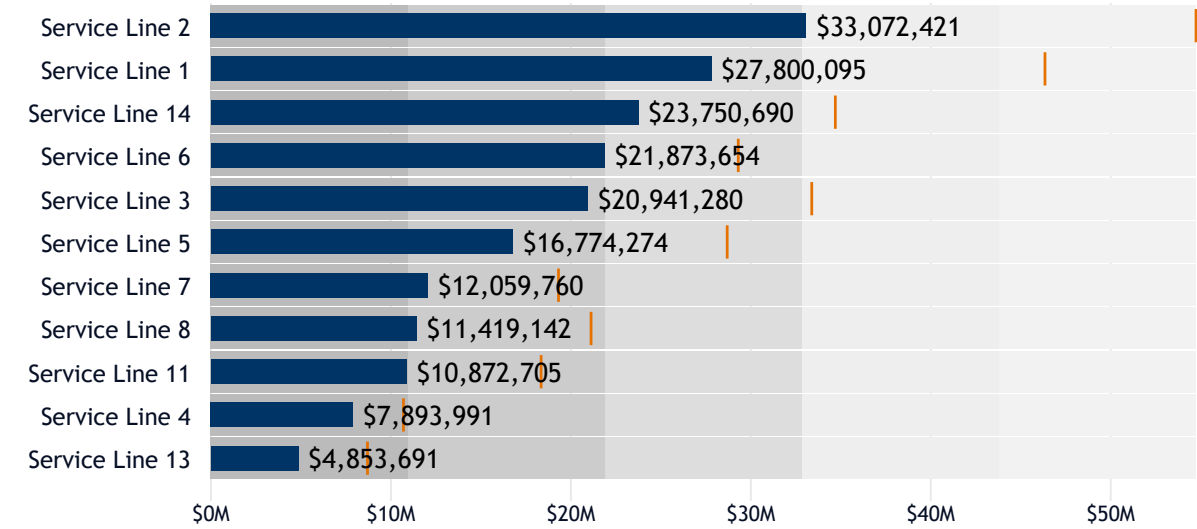
Goal 1 Progress



Goal 2 Progress



Goal 1 By Category



Goal 2 By Category

