

Created Date

Multiple selectio...▼

Service Line

All▼

Service Line Subcategory

All▼

Specialty G...

All▼

Engagement ...

All▼

Internal Refer...

All▼

Stage

Multiple ...▼

Active Opportunities

996

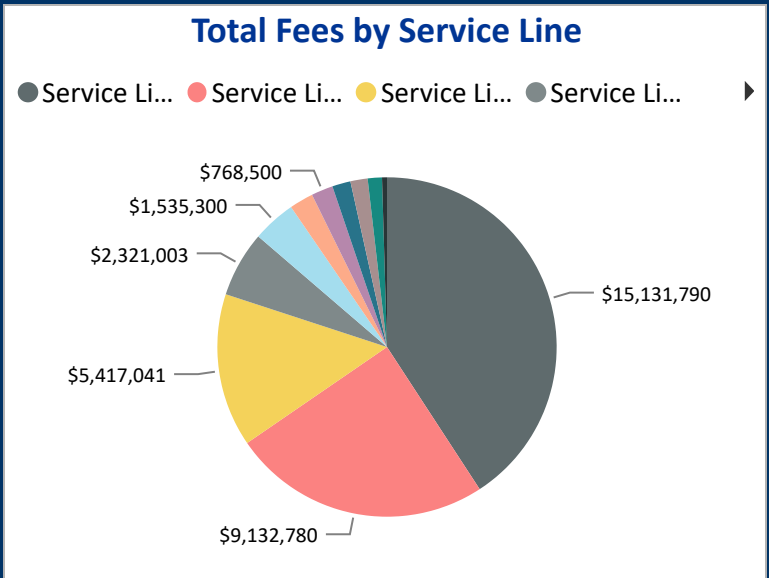
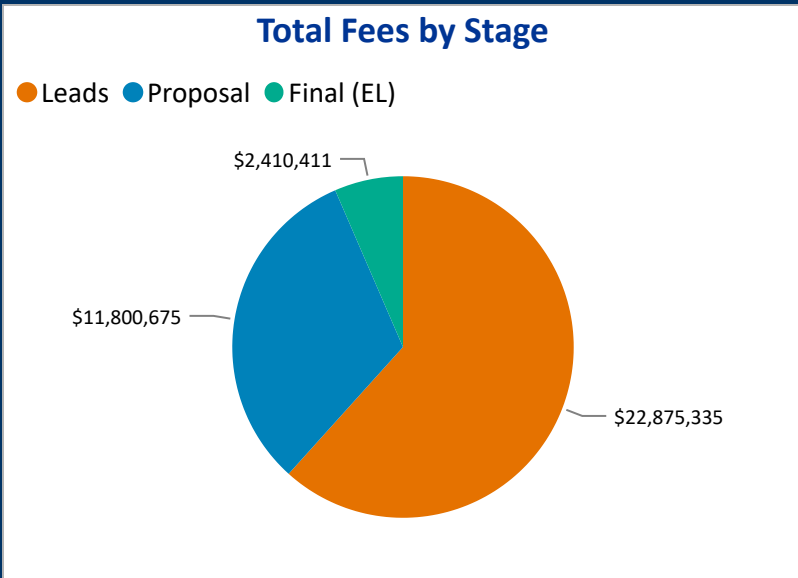
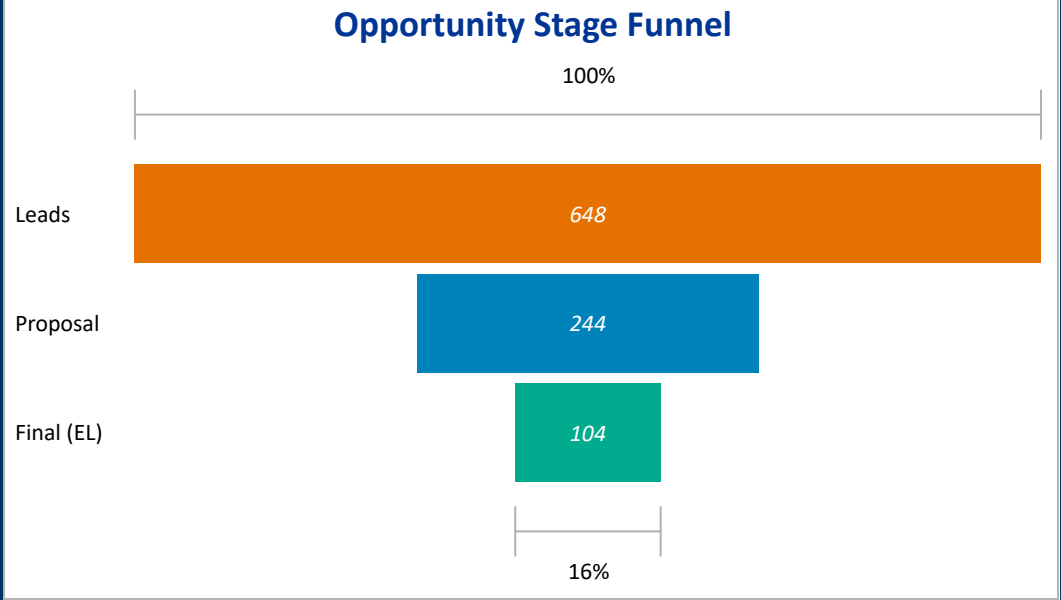
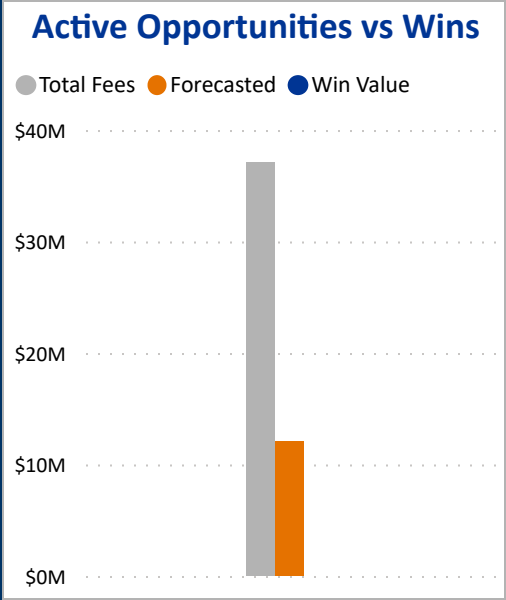
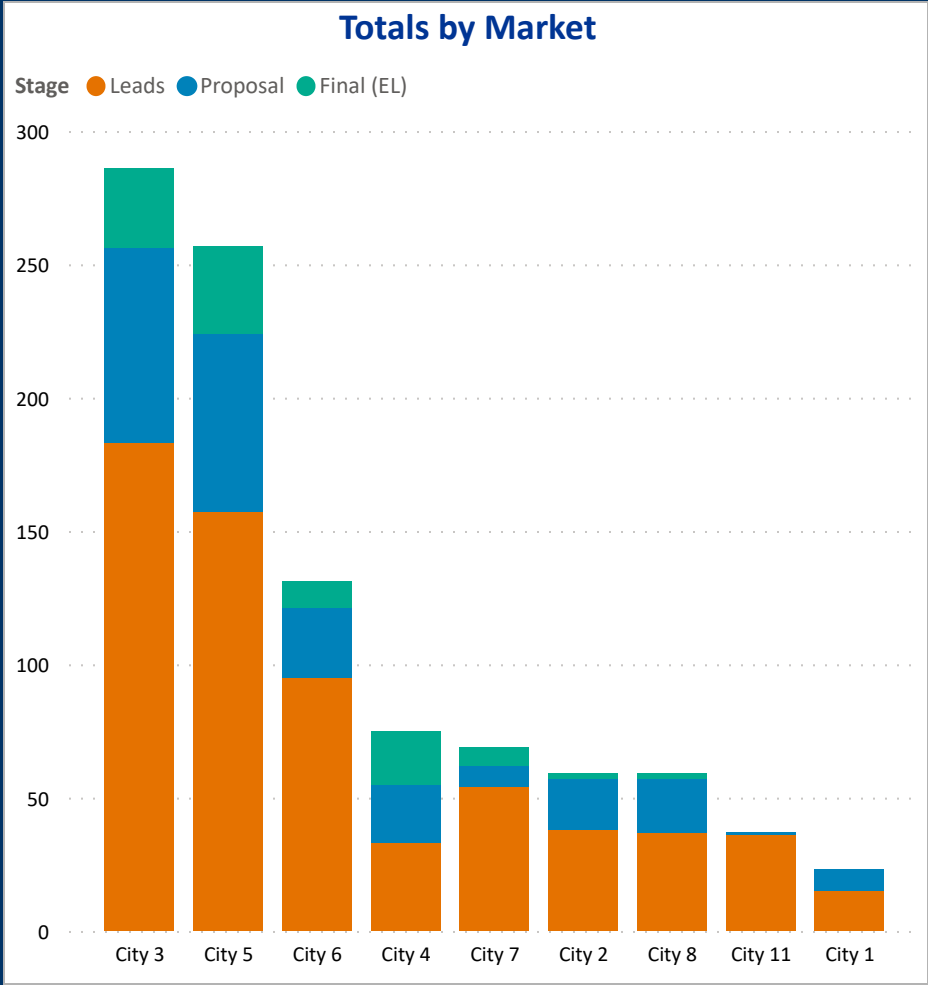
Count

\$37,086,421

Total Fees

\$12,023,895

Forecasted



Created Date

Multiple selectio...▼

Service Line

All▼

Service Line Subcategory

All▼

Specialty G...

All▼

Engagement ...

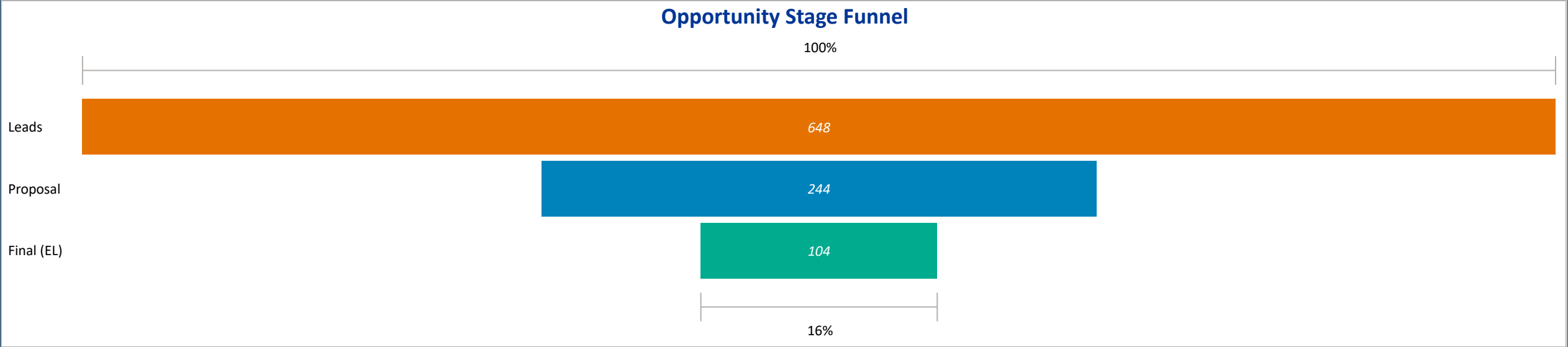
All▼

Internal Refer...

All▼

Stage

Multiple ...▼



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	

Created Date

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Cad...

Month

Week

Service Line

All▼

Service Line Subcat...

All▼

Specialty G...

All▼

Engagement ...

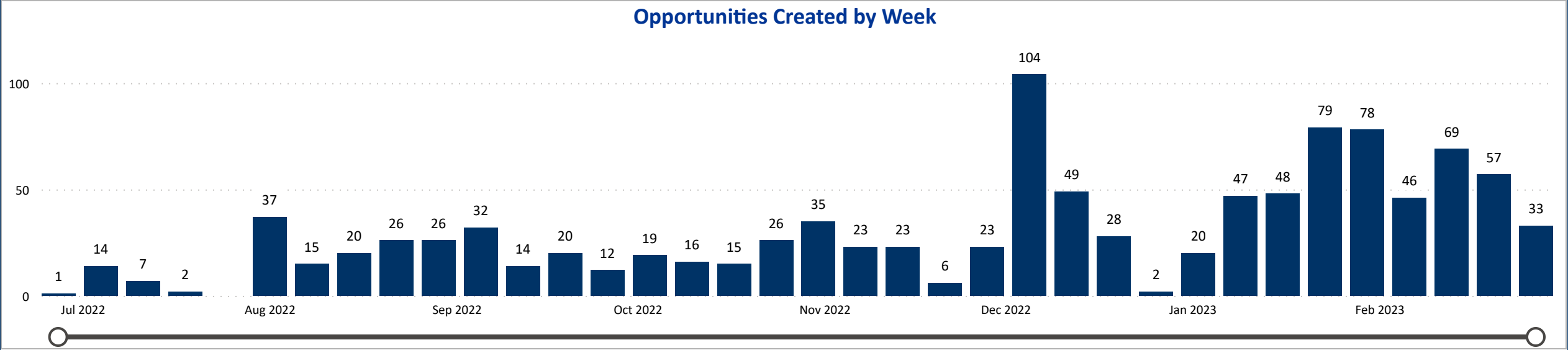
All▼

Internal Refer...

All▼

Stage

Multiple ...▼



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	

Created Date

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View By

Service Line

Service Line

All

Service Line Subcategory

All

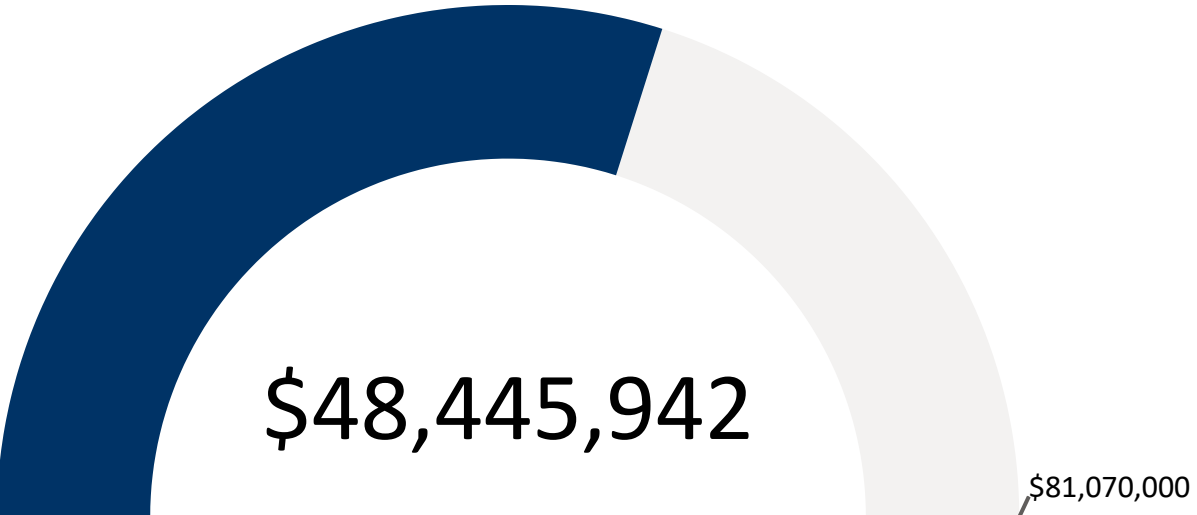
Engagement Lead

All

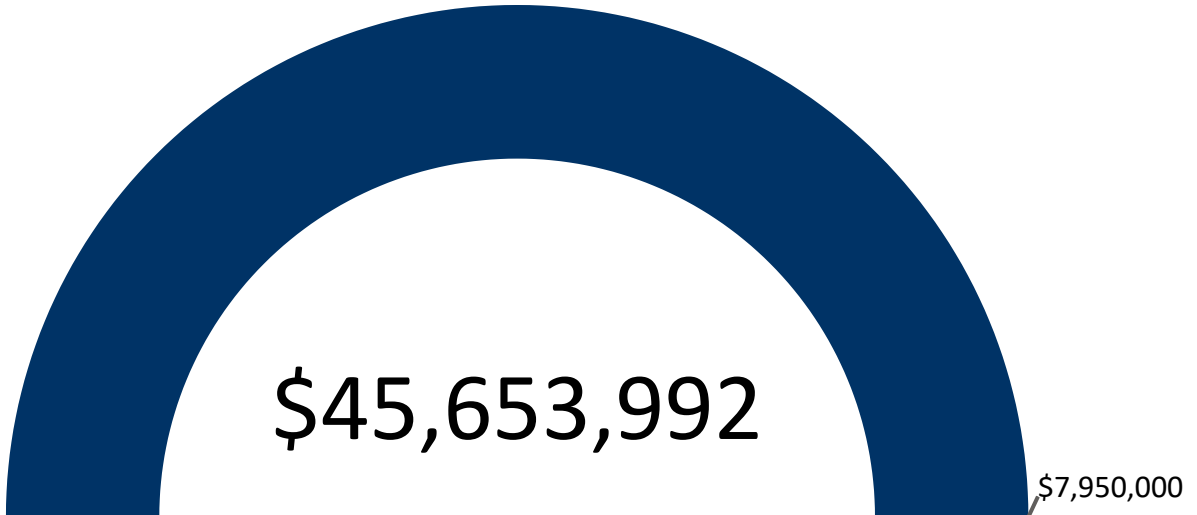
Internal Referral So...

All

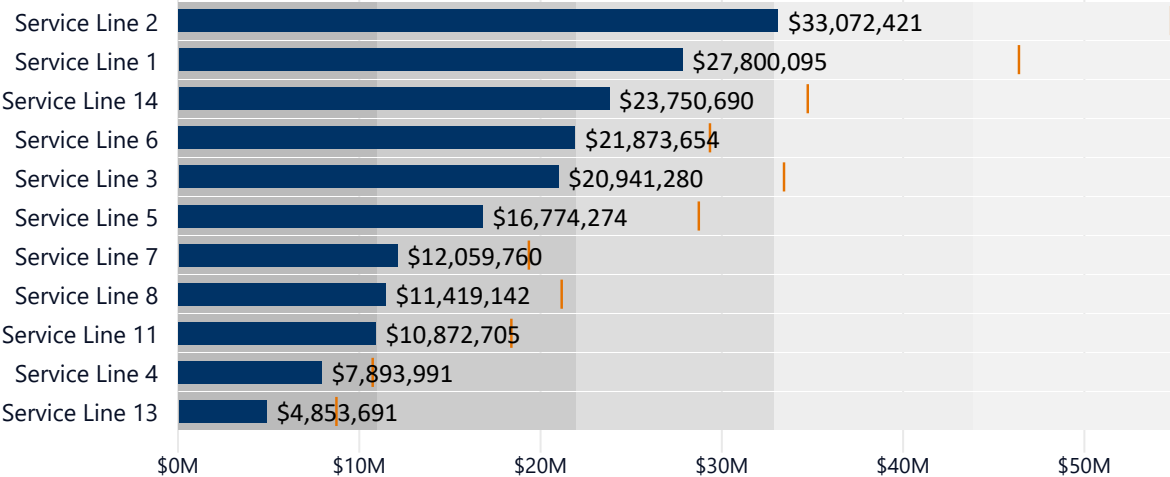
Goal 1 Progress



Goal 2 Progress



Goal 1 By Category



Goal 2 By Category

