All TCV potential
won and lost

$14.75M

Sum of Estimated Value

TCV Potential

$3.38M

TCV Potential (Task Unique)

TCV won

$1.52M

TCV Won (Task Unique)

TCV lost or declined

$1.20M

TCV Lost (Task Unique)

Open Leads

613

Open Leads

Total Leads Closed

229

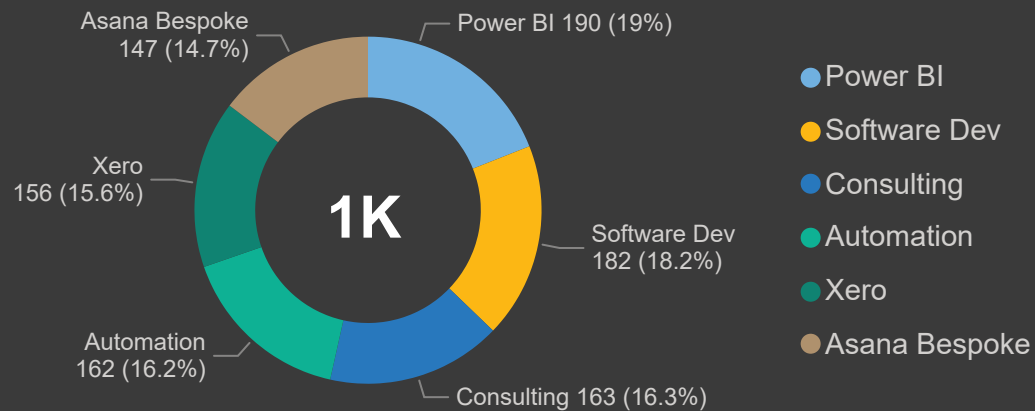Total Leads Closed

Proposals Pending

173

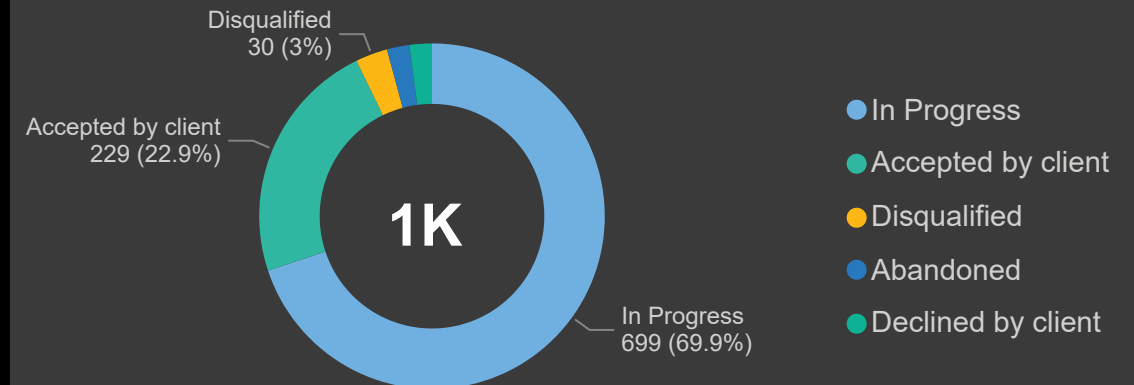Proposals Sent and Awaiting…

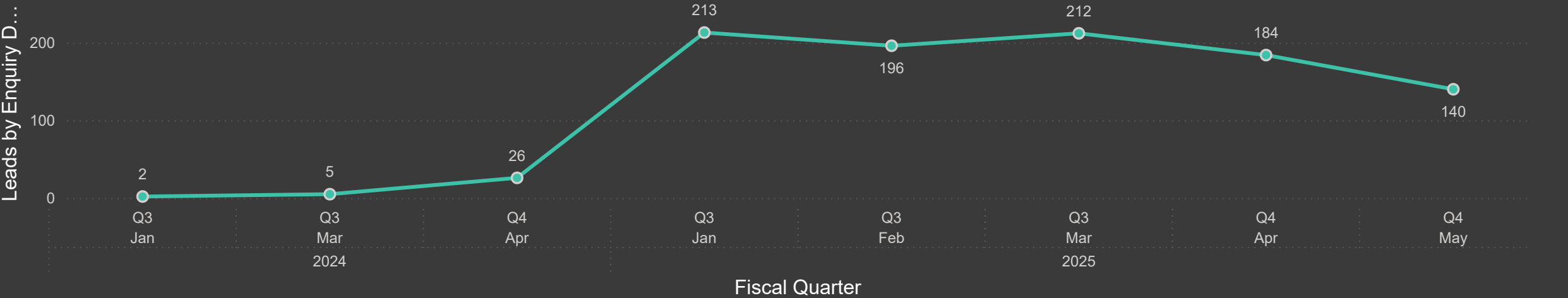## TCV - Pending Proposals

$2.47M

TCV Proposals Pending…

Total leads by Sales Scope

Asana Bespoke
147 (14.7%)

Power BI 190 (19%)

Xero
156 (15.6%)

Software Dev
182 (18.2%)

Automation
162 (16.2%)

Consulting 163 (16.3%)

1K

- ● Power BI
- ● Software Dev
- ● Consulting
- ● Automation
- ● Xero
- ● Asana Bespoke

Total leads by Sales Outcome

Disqualified
30 (3%)

Accepted by client
229 (22.9%)

In Progress
699 (69.9%)

1K

- ● In Progress
- ● Accepted by client
- ● Disqualified
- ● Abandoned
- ● Declined by client

Number of leads by enquiry date

Leads by Enquiry D...

Fiscal Quarter	Value
Q3 Jan	2
Q3 Mar 2024	5
Q4 Apr	26
Q3 Jan	213
Q3 Feb	196
Q3 Mar 2025	212
Q4 Apr	184
Q4 May	140

Number of WON leads by enquiry date

Won Leads by Enquiry D...

Fiscal Quarter	Value
Q3 Jan	1
Q3 Mar 2024	1
Q4 Apr	5
Q3 Jan	56
Q3 Feb	33
Q3 Mar 2025	61
Q4 Apr	34
Q4 May	34
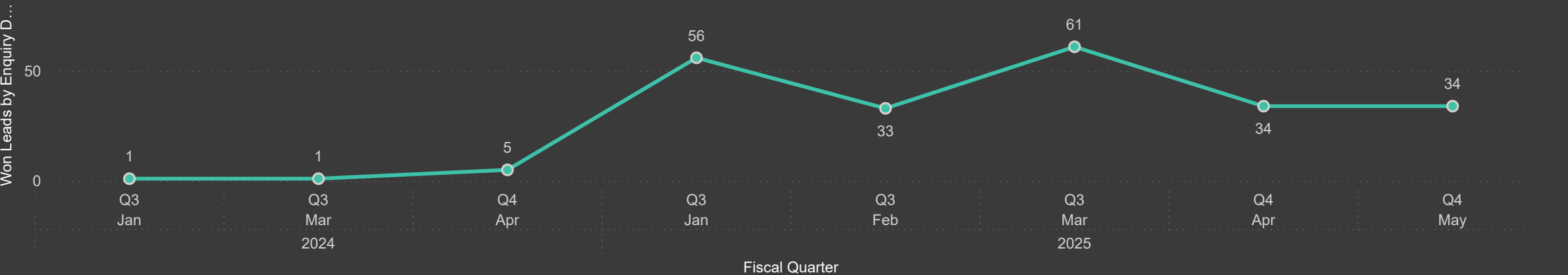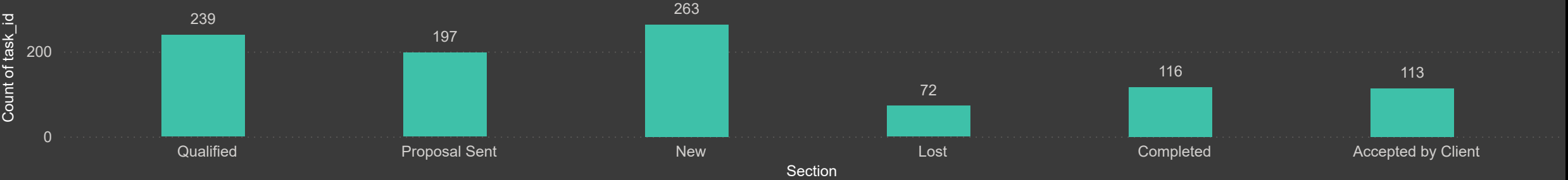
Leads per stage

TCV per stage
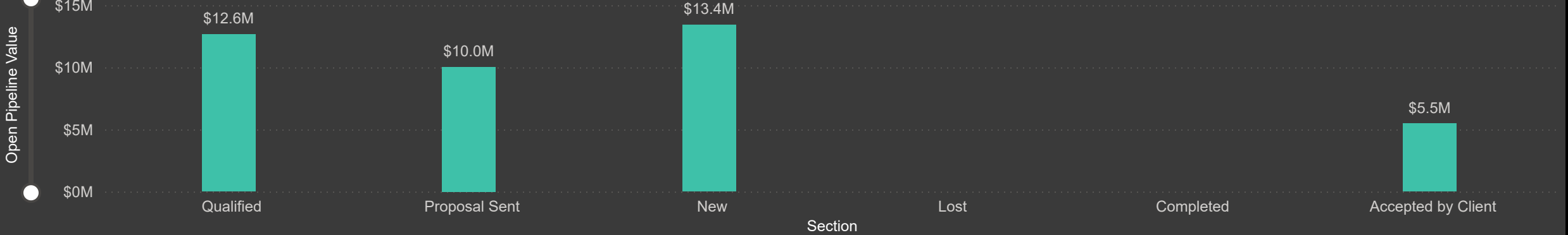
Total upcoming tasks by assignee

is_completed ● FALSE

Sum of Estimated Value by creation date

Estimated Value (Distinct Ta...

$0.0M	$0.1M	$0.4M	$3.2M	$3.0M	$3.1M	$2.6M	$2.1M
Q3 Jan	Q3 Mar	Q4 Apr	Q3 Jan	Q3 Feb	Q3 Mar	Q4 Apr	Q4 May
	2024				2025		
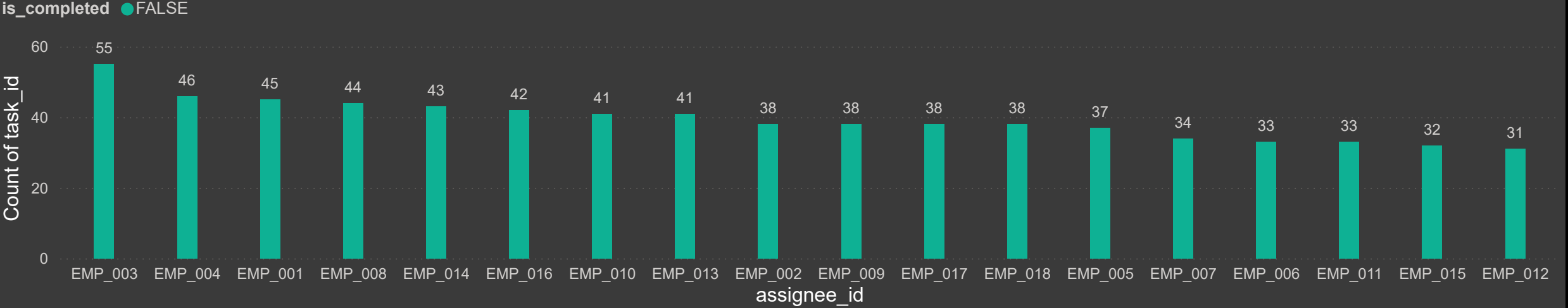
Fiscal Quarter

Won Estimated value by creation date

Won Estimated Valu...

0.01M	0.02M	0.05M	0.74M	0.48M	0.91M	0.40M	0.51M
Q3 Jan	Q3 Mar	Q4 Apr	Q3 Jan	Q3 Feb	Q3 Mar	Q4 Apr	Q4 May
	2024				2025		
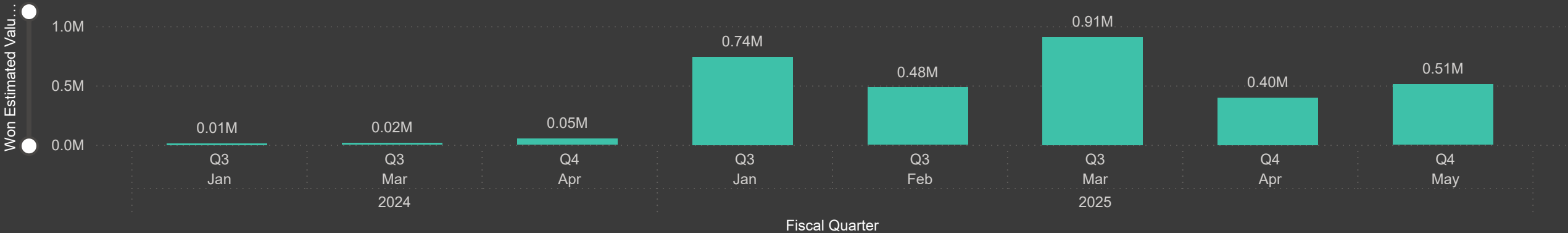
Fiscal Quarter

Lost / Cold /Abandoned Estimated value by creation date

LostColdAbandoned E...

4K	125K	107K	10K	26K	20K
Q4 Apr	Q3 Jan	Q3 Feb	Q3 Mar	Q4 Apr	Q4 May
2024			2025		
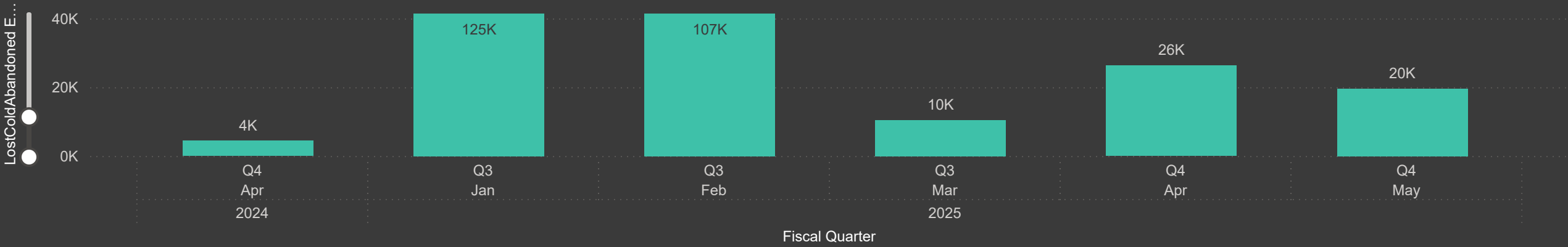
Fiscal Quarter

Positive Leads, Negative Leads and Leads Count by Year, Month and Fiscal Quarter

● Positive Leads ● Negative Leads

Sales Status	Sales Outcome	Section	Sales Scope
☐ Abandoned	☐ Abandoned	☐ Accepted by Client	☐ (Blank)
☐ Disqualified	☐ Accepted by client	☐ Completed	☐ Asana Bespoke
☐ Enquiry	☐ Declined by client	☐ Lost	☐ Automation
☐ Proposal Accepted	☐ Disqualified	☐ New	☐ Consulting
☐ Proposal Sent	☐ In Progress	☐ Proposal Sent	☐ Power BI
☐ Qualified		☐ Qualified	☐ Software Dev
☐ Rock-n-Roll			☐ Xero

Decomposition Tree

Sales Outcome ✕   💡 **Sales Status** ✕   💡 **Sales Scope** ✕

In Progress   Enquiry

Sum of Estimated v...
$58,607,628

In Progress
$40,989,384

Accepted by client
$13,193,550

Disqualified
$1,477,764

Abandoned
$1,240,071

Declined by client
$1,086,498

Enquiry
$15,010,048

Qualified
$14,142,536

Proposal Sent
$11,130,048

Software Dev
$3,283,448

Power BI
$825,342

Asana Bespoke
$779,031

Xero
$748,650

Consulting
$549,194

Automation
$523,328

Year, Fiscal Quarter ⌄

∧ ☐ 2024
  ☐ Q1
  ☐ Q2
  ☐ Q3
  ☐ Q4

∧ ☐ 2025
  ☐ Q3
  ☐ Q4

Sum of Estimated value by Sales Outcome
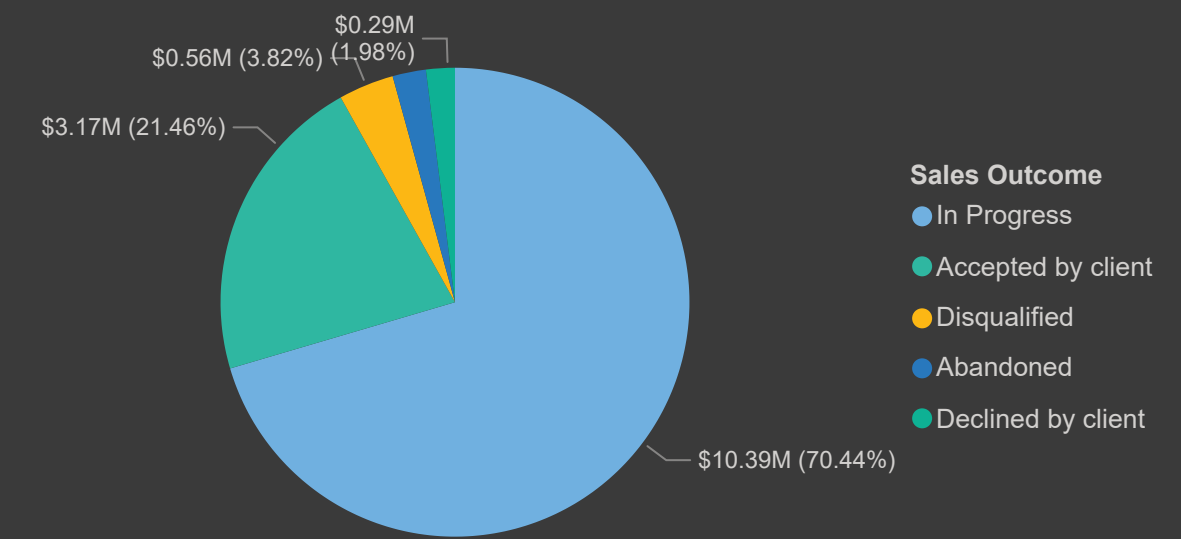
$0.29M (1.98%)
$0.56M (3.82%)
$3.17M (21.46%)
$10.39M (70.44%)

Sales Outcome
- In Progress
- Accepted by client
- Disqualified
- Abandoned
- Declined by client

Sum of Estimated value by Sales Status

$0.65M (4.41%)
$1.52M (10.31%)
$1.64M (11.15%)
$2.83M (19.16%)
$3.38M (22.92%)
$4.18M (28.36%)

Sales Status
- Enquiry
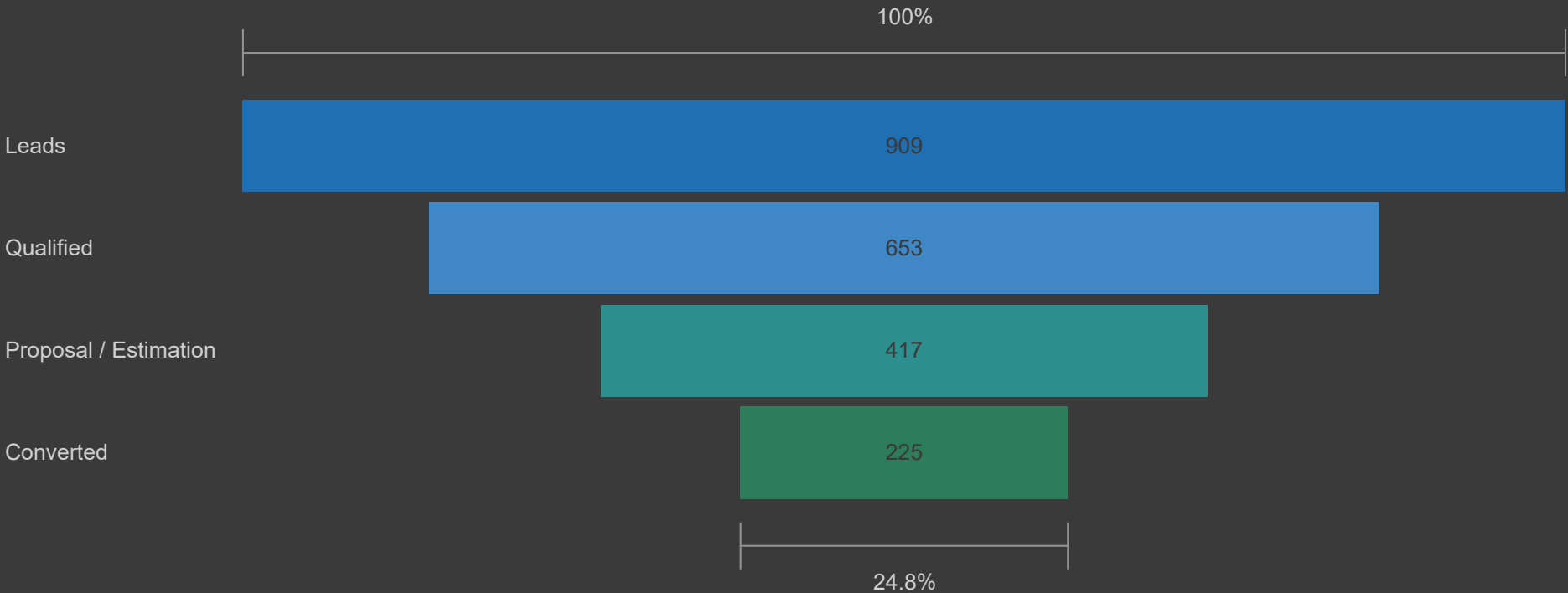- Qualified
- Proposal Sent
- Rock-n-Roll
- Proposal Accepted
- Abandoned
- Disqualified

Sum of Estimated value by Sales Scope

$1.63M (11.02%)
$2.09M (14.18%)
$1.4M (9.48%)
$1.15M (7.78%)
$2.27M (15.36%)
$6.22M (42.18%)

Sales Scope
- Asana Bespoke
- Automation
- Consulting
- Power BI
- Software Dev
- Xero
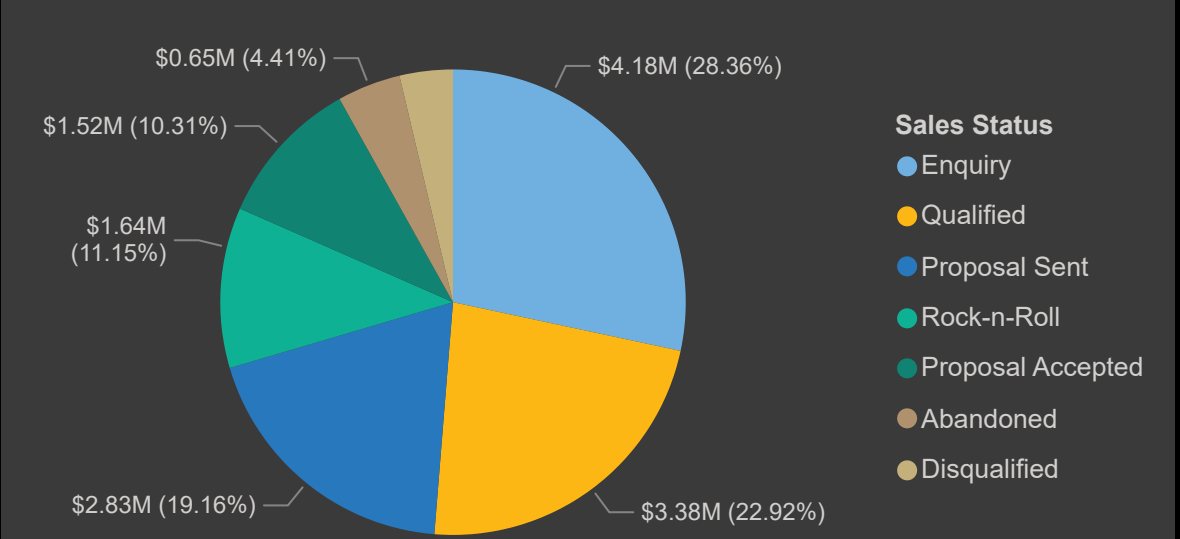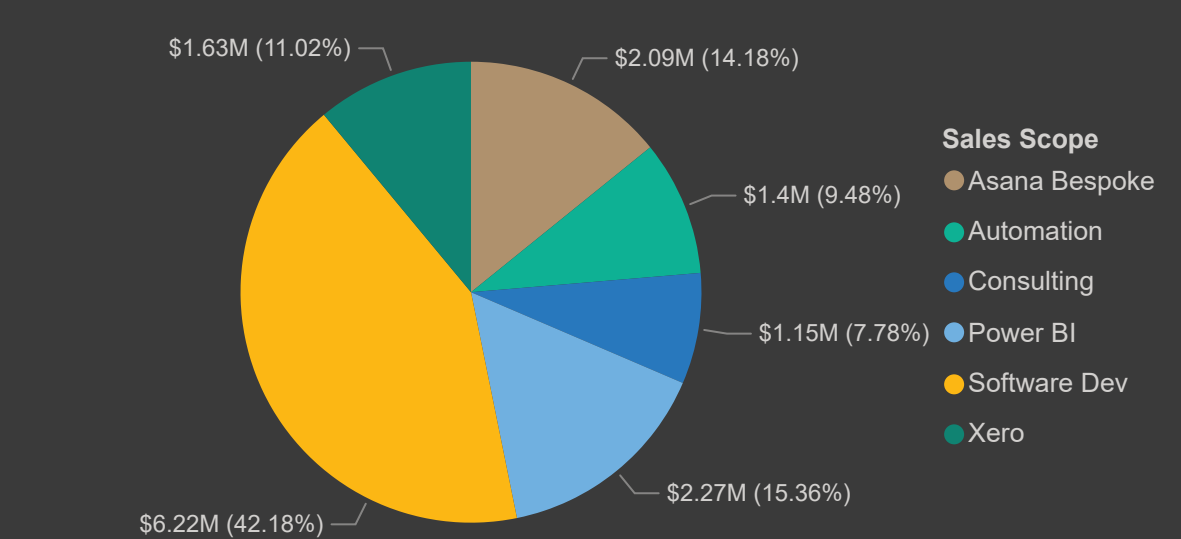
Cumulative Leads (Reached Stage) by Stage

100%

Stage	Count
Leads	909
Qualified	653
Proposal / Estimation	417
Converted	225

24.8%

Average days to convert

45.74
Avg Days to Convert

Year, Fiscal Quarter

- 2024
  - Q1
  - Q2
  - Q3
  - Q4
- 2025
  - Q3
  - Q4

Sales Scope

- Asana Bespoke
- Automation
- Consulting
- Power BI
- Software Dev
- Xero