

Account Code	Account Name	Source	Description	Stage	Target Date	Duration	Est Premium	Est Revenue	Status	Closed Date	Reason	
<b>Commercial Lines - Large</b>												
SONOHIL-01	Sc			Won	12/1/2021	0 Days	22,500	2,250	Won!	11/15/2021		
SONOHIL-01	Sc			Won	12/15/2021	55 Days	10,000	1,000	Won!	1/25/2022		
CROWPRO-01	C			Won	1/13/2022	63 Days	300,000	30,000	Won!	1/13/2022		
TYNDSTA-01	T			Won	1/26/2022	0 Days	15,000	1,500	Won!	1/26/2022		
BOLICON-01	B			Market	3/1/2022	39 Days	400,000	40,000			Past Target. Result?	
THEGARC-01	TI			Validate	4/20/2022	557 Days	715,000	100,000				
MASCHOO-01	M			Market	1/1/2023	125 Days	500,000	75,000				
<b>Commercial Lines - Large</b>				<b>Avg Duration:</b>	<b>120 Days</b>		<b>1,962,500</b>	<b>249,750</b>	<b>Total Closed:</b>	<b>4</b>	<b># Won: 4</b>	<b># Lost: 0</b>
				<b>Still in Pipeline:</b>	<b>3</b>		<b>1,615,000</b>	<b>215,000</b>			<b>% Won: 100%</b>	<b>% Lost: 0%</b>
				<b>Open Past Target:</b>	<b>1</b>						<b>\$ Won: 34,750</b>	
<b>Warren Cleveland</b>				<b>Avg Duration:</b>	<b>99 Days</b>		<b>1,971,000</b>	<b>250,850</b>	<b>Total Closed:</b>	<b>4</b>	<b># Won: 4</b>	<b># Lost: 0</b>
				<b>Still in Pipeline:</b>	<b>5</b>		<b>1,623,500</b>	<b>216,100</b>			<b>% Won: 100%</b>	<b>% Lost: 0%</b>
				<b>Open Past Target:</b>	<b>3</b>						<b>\$ Won: 34,750</b>	
<b>Report Totals:</b>				<b>Avg Duration:</b>	<b>33 Days</b>		<b>2,671,522</b>	<b>327,372</b>	<b>Total Closed:</b>	<b>209</b>	<b># Won: 124</b>	<b># Lost: 85</b>
				<b>Still in Pipeline:</b>	<b>164</b>		<b>1,897,558</b>	<b>243,870</b>			<b>% Won: 59%</b>	<b>% Lost: 41%</b>
				<b>Open Past Target:</b>	<b>136</b>						<b>\$ Won: 72,081</b>	

Account Code	Account Name	Source	Description	Stage	Target Date	Duration	Est Premium	Est Revenue	Status	Closed Date	Reason
STELLI		Referral - D	22 23 Flood New	Won	2/10/2022	0 Days	1,442	288	Won!	2/10/2022	
BARN		Referral - D	22 23 HO6 New	Discover	2/10/2022	4 Days	1,000	100	Lost	2/14/2022	Did not want to participate in our process
200FA		Referral - E	22 23 BRSK	Won	2/11/2022	11 Days	5,115	512	Won!	2/16/2022	
BLAIR		Referral - D	22 22 auto NEW	Market	2/11/2022	46 Days	1,000	100			Past Target. Result?
MART		Referral - B	22 23 HO3 new	Market	2/11/2022	52 Days	1,000	100			Past Target. Result?
MILLS		Referral - D	22 23 Auto New	Market	2/11/2022	4 Days	1,000	100	Lost	2/2/2022	Couldn't get price in line
MORA		Referral - D	22 22 auto New	Won	2/12/2022	16 Days	2,070	207	Won!	2/10/2022	
SULLIV		Referral - D	22 23 HO6 new	Won	2/12/2022	0 Days	685	103	Won!	1/20/2022	
WELLE		Referral - D	22 23 Auto New	Won	2/12/2022	0 Days	1,412	212	Won!	2/1/2022	
KHACH		Referral - B	22 23 New Ho3	Won	2/13/2022	18 Days	4,572	457	Won!	2/1/2022	
OLIVE		Referral - E	22 22 Auto NEw	Won	2/14/2022	1 Day	1,533	230	Won!	2/9/2022	
HINCK		Referral - D	22 23 HO6 New	Market	2/14/2022	1 Day	1,000	100	Lost	2/11/2022	Couldn't get price in line
RICHW		Referral - D	22 23 Ho3 New	Market	2/15/2022	56 Days	1,000	100			Past Target. Result?
MOON		Referral - E	22 22 Auto New	Discover	2/15/2022	34 Days	1,500	150			Past Target. Result?
FOSTE		Referral - D	22 22 Auto New	Market	2/15/2022	54 Days	500	50			Past Target. Result?
SPRIG		Referral - D	22 23 HO3 New	Market	2/15/2022	26 Days					Past Target. Result?
CATES		Referral - E	22 23 HO3 New	Won	2/16/2022	19 Days	2,140	171	Won!	2/3/2022	
LEWIS		Referral - E	22 23 HO3 New	Market	2/16/2022	1 Day	1,000	100	Lost	1/26/2022	Couldn't get price in line
SALVA		Referral - E	22 23 Golf Cart New	Won	2/16/2022	0 Days	267	27	Won!	2/16/2022	
ISBITS		Referral - D	22 22 Auto	Market	2/17/2022	24 Days	800	80			Past Target. Result?
RYANN		Referral - D	22 23 HO6 New	Discover	2/17/2022	6 Days	600	60	Lost	1/24/2022	Couldn't get price in line
RYANN		Referral - D	22 22 Auto New	Discover	2/17/2022	6 Days	600	60	Lost	1/24/2022	Unable to discover a reason to change
DIFILIE		Referral - D	22 23 HO6 New	Discover	2/18/2022	10 Days	1,000	100	Lost	2/15/2022	Did not want to participate in our process
ALBER		Referral - E	22 23 Ho6 new	Won	2/18/2022	0 Days	4,137	414	Won!	2/18/2022	
DOMI		Referral - D	22 22 new Auto	Market	2/18/2022	51 Days	500	50			Past Target. Result?
NEWM		Referral - E	22 23 HO6 New	Won	2/18/2022	31 Days	1,293	194	Won!	2/22/2022	
BABBI		Referral - D	22 23 HO3 New	Discover	2/18/2022	1 Day			Lost	1/26/2022	Couldn't get price in line

**Criteria**

Criteria	Selection	From
Region	All	Opportunity
Agency	All	Opportunity
Branch	All	Opportunity
Department	All	Opportunity
Profit Center	All	Opportunity
<b>Target Close Date</b>	<b>-4 months through open months</b>	<b>Opportunity</b>
Actual Closed Date	All	Opportunity
Closed Status	All	Opportunity
Sales Team	All	Opportunity
Sales Manager Employee	All	Opportunity
Sales Manager Broker	All	Opportunity
Owner Employee	All	Opportunity
Owner Broker	All	Opportunity
Estimated Premium	All	Opportunity
Stage Premium	All	Opportunity
Estimated Revenue	All	Opportunity
Stage Revenue	All	Opportunity
Parameter Page	Include parameter page	ParameterPage

Include selections     Exclude selections

All dates  
 Blanks only  
 Fixed date range    From  Open    Through  Open  
 Specific date   

Relative date range    From system date  -  4 Months    Through end of system date  Open  Months  
" +0" is equal to today, or today's month

**Sample Results Based on Date Selections**

If run today, report will include items from 11/1/2021 through OPEN

If run 1 month from today, report will include items from 12/1/2021 through OPEN

## S-Opportunity Report

Layouts: Complete Detail  
Generated By: ABSOL

Criteria	Incl/Excl Selections	Selections
Region		All
Agency		All
Branch		All
Department		All
Profit Center		All
<b>Target Close Date</b>	Include	-4 Months Through Open Months From 11/1/2021 Through Open
<b>Actual Closed Date</b>		All
<b>Closed Status</b>		All
<b>Sales Team</b>		All
<b>Sales Manager Employee</b>		All
<b>Sales Manager Broker</b>		All
<b>Owner Employee</b>		All
<b>Owner Broker</b>		All
<b>Estimated Premium</b>		All
<b>Stage Premium</b>		All
<b>Estimated Revenue</b>		All
<b>Stage Revenue</b>		All

This Opportunity report layout combines a Pipeline report with a Hit Ratio Report. It is based on the "Hit Ratio" Opportunity report in Epic.

The Relative date range criteria can be set to go back as many months as desired.

The detection and automatic color coding of opportunities that have been left open past the Target Date is the most requested "fancy" layout enhancement for opportunity pipeline reports.