Sales Person:

Week Ending*:

Forecast:
A=Hot 80%+ Likelihood of Closing
B=Medium 60-70% Likelihood of Closing
C=Lukewarm 20-50% Likelihood of Closing

Selling Sales Phase
1-Initial Interest
2-Educate
3-Application
4-Propose
5-Close

Bold - Business Won
X - Business Lost

Year:_____

80%+ Probablity to Close

Customer	Loan Size	Deposit Size	A/B/C	Phase	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
			A													
			A													
			A													
			A													
			A													
			A													
			A													
			A													
			A													
			A													
			A													
Totals by Month					$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Totals by Quarter							$0			$0			$0			$0
Quota per Quarter																
% of Quota by Quarter							#DIV/0!			#DIV/0!			#DIV/0!			#DIV/0!

60%+ Probablity

Customer	Loan Size	Deposit Size	A/B/C	Phase	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
			B													
			B													
			B													
			B													
			B													
			B													
			B													
			B													
			B													
Projected Totals					$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0

20%+ Probablity/Potential

Customer	Loan $	Deposit $	A/B/C	Phase	Customer	Loan $	Deposit $	A/B/C	Phase	Customer	Loan $	Deposit $	A/B/C	Phase