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Differentiate
between
Actual Sales
and **Potential**

TOP Clients and Prospects evaluation and potential Summary

	Clients	Overall RATING	Sales Year 1	Sales Year 2	Sales Current	% of Total Sales	Trend U/S/D	Profitability	Payment	Potential for Growth	Relations	NOTES and Comments
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												
13												
14												
15												
	TOTAL of Top 15											
	Total Sales											

Overall Rating: A = Excellent B = Good/Satisfactory C = Need Improvements D = Drop Sales Year 1 = Sales one year ago Sales Year 2 = Sales 2 years ago Sales: Current Sales Trend: UP / Steady / Down
 Profitability: A = Excellent B = Good/Satisfactory C = Need Improvements Payment: A = Prompt B = Slow C = Need improvements Potential for Growth: A = Excellent B = Good C = Limited

	Prospects	Overall RATING	Prospect Trend U/S/D	Estimated Annual Sales	Estimated employees	C1	C2	C3	Potential first order \$ and timing	Relation	NOTES and Comments Describe in few words potential, opportunities, challenges, our history with prospect and our suggested next steps to make them a client
1											
2											
3											
4											
5											
6											
7											
8											
9											
10											
	TOTAL										

Relations: Rate our relationship with client A = Excellent B = Good C = Need improvements Overall Rating: A = Excellent B = Good/Satisfactory C = OK but limited Potential Sales for current year, next year and year 2 C = Competitor 1 – 2 – 3 Relations: Rate our relationship with client A = Excellent B = Good C = Need work

Based on above analysis, what are the **next steps (actions - decisions)** for next Month/quarter:

- 1
- 2
- 3
- 4
- 5