|  |  |
| --- | --- |
|  | Campaign report |

Summary table

|  |  |
| --- | --- |
| Submitted by  |  |
| Date |  |
| Campaign |  |
| Start date |  |
| End date |  |
| # of total leads |  |
| # of prospects at needs assessment stage |  |
| # of prospects at proposal stage |  |
| # of prospects at decision stage |  |
| Closed won | X accounts for a total of $X in new business |

Sales stage summary

**Needs assessment prospects**

|  |  |  |
| --- | --- | --- |
| **Name** | **Notes** | **Next steps** |
|  |  |  |
|  |  |  |
|  |  |  |

**Proposal prospects**

|  |  |  |
| --- | --- | --- |
| **Name** | **Notes** | **Next steps** |
|  |  |  |
|  |  |  |
|  |  |  |

**Decision prospects**

|  |  |  |
| --- | --- | --- |
| **Name** | **Notes** | **Next steps** |
|  |  |  |
|  |  |  |
|  |  |  |

**Closed won prospects**

|  |  |  |
| --- | --- | --- |
| **Name** | **Notes** | **Next steps** |
|  |  |  |
|  |  |  |
|  |  |  |

**What went well (**what should we do more of in the future)

|  |
| --- |
|  |
|  |
|  |
|  |
|  |

**What didn’t go well** (what should we do differently in the future)

|  |
| --- |
|  |
|  |
|  |
|  |
|  |

**Recommendations** (what should we do in the future)

|  |
| --- |
|  |
|  |
| 1.
 |
|  |
|  |

**Other comments**

|  |
| --- |
|  |
|  |
|  |
|  |
|  |