EXAMPLE DATA - ILLUSTRATIVE FORMAT - NOT CLIENT RESULTS

01 / REPORTING PERIOD & OVERVIEW

One view of the month.

Sample company | 1-31 August 2026 | CRM cut-off: 31 August, 23:59 HKT
Approved channels: paid search, email, organic search and partner/referral. Currency: USD.

02 Executive summary

- 150 valid enquiries are represented in this sample; 65 meet the sample qualified-lead definition.
- 18 enquiries progressed to an opportunity. Their illustrative open pipeline value totals $54,000.
- 12 enquiry records have overdue follow-up. Eight records still need a consistent source label.

Proposed priorities: review overdue follow-up, resolve source labels, and retest the workflow exception queue.

03 Channel overview

Channel	Spend	Enquiries	Qualified	Open opp.	Pipeline
Paid search	$1,800	60	24	6	$18,000
Email	$400	30	15	5	$15,000
Organic search	$0	40	16	4	$12,000
Partner / referral	$0	20	10	3	$9,000
Total	**$2,200**	**150**	**65**	**18**	**$54,000**

Spend is channel media/distribution cost only; zero does not mean a channel has no operating cost. Pipeline is unweighted open opportunity value, not recognised revenue. Method notes are on page 3.

04 Funnel snapshot

150
Valid enquiries
Baseline

65
Qualified leads
43.3% of enquiries

18
Open opportunities
27.7% of qualified leads

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02 / DELIVERY & OPERATIONS

What moved. What needs work.

Illustrative CRM activity and delivery log. All counts, statuses and owners are fictional and included to demonstrate the report structure.

05 CRM activity

Measure	Sample value	Interpretation
New CRM records	180	150 valid enquiries, plus 30 excluded duplicate, test or spam records.
Lifecycle movement	65 qualified / 18 open opportunities	Snapshot for the reporting cohort at the cut-off.
Follow-up	138 current / 12 overdue	Status across the 150 valid enquiries.
Data quality	8 missing source labels	Subset of valid enquiries; counted once in the channel table after manual review.
Automation exceptions	3 open	Separate workflow exceptions; not additional enquiries.

06 Work completed

Campaigns. Updated the approved search and email campaign calendar.

CRM configuration. Documented lifecycle definitions, owners and follow-up rules.

Data quality. Reviewed duplicate rules and prepared a source-mapping checklist.

Automation and handover. Recorded workflow tests, exception notes and the operating guide.

07 Open items & dependencies

Item	Dependency / decision	Owner
Overdue follow-up	Review 12 records and assign next actions.	Client sales lead
Source labels	Approve eight source corrections.	Client CRM owner
Workflow exceptions	Confirm test access and retry rules.	Verta project lead

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03 / NEXT PERIOD & METHOD

Actions with an owner.

An example action plan for the next reporting period, followed by the definitions and limitations needed to interpret the sample.

08 Next actions

Action	Owner	Target date	Completion evidence
Review overdue follow-up	Client sales lead	3 Sep 2026	12 records reviewed; next steps recorded.
Approve source mapping	Client CRM owner	4 Sep 2026	Eight corrections approved and logged.
Retest workflow exceptions	Verta project lead	7 Sep 2026	Three test records and decisions documented.
Confirm next report scope	Client sponsor + Verta	8 Sep 2026	Channels, measures and cut-off agreed.

09 Method note

Source and status. Every figure is synthetic. This PDF was prepared from the structure in the supplied Verta Global Website Content and Implementation Pack, Appendix A. No live CRM, advertising account or client record was used.

Cohort and definitions. A valid enquiry is a deduplicated, non-test, non-spam enquiry created in the reporting month. A qualified lead meets the sample sales-approved fit and intent criteria. An opportunity has a named owner, expected value and next step.

Attribution. Each valid enquiry is assigned to one first recorded source channel. Repeat touches are not counted as additional enquiries. The eight missing labels in the source data are assigned in this sample after illustrative manual review.

Funnel calculation. 65 / 150 = 43.3%; 18 / 65 = 27.7%. The stages are a reporting cut-off snapshot for one cohort. Stage counts and channel totals reconcile; they do not measure causality or future sales.

Limits and exclusions. Pipeline is unweighted, illustrative and not booked revenue. Spend excludes staff time, agency fees, CRM licences and production costs. No ROI or ROAS claim is made. Source gaps, approvals and available fields would be documented in a live engagement.

Delivery and ownership. A live report uses the measures and systems agreed in the written scope. Client accounts and business data remain under client ownership and control. Format, reporting dates and recipients are confirmed for the engagement.