

Sales Performance Report

The Tailored Closet North San Diego

Q1 2026

Prepared by Business Succession Pros, Inc. — March 2026

Sales Goals & Targets

☐ **Monthly Revenue Target**

\$170,000

in closed projects per month

REVENUE TARGET

\$170K

Monthly Goal

DESIGNER PARTNERSHIPS

1/mo

New Designer Added

DEAL TRACKING

Weekly

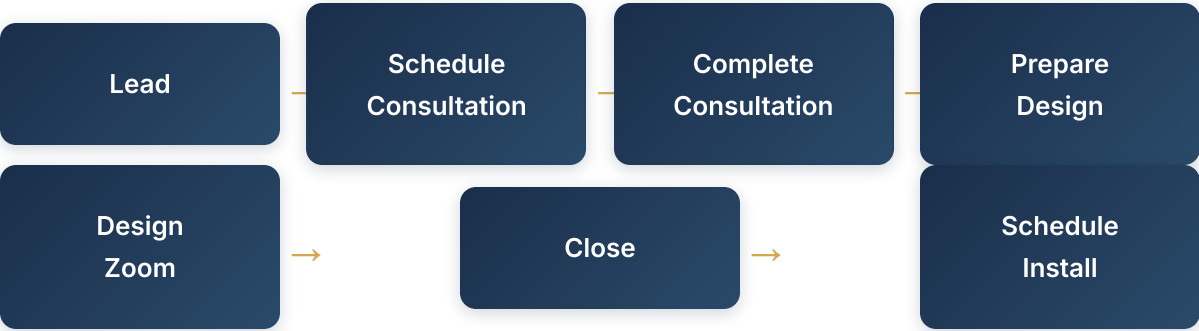
Via Portal Form

METRICS REVIEW

Friday

9 AM PST Email

Sales Process



End-to-end sales cycle from initial contact through installation scheduling

Sales Metrics (Q1 2026)

Metric	Current Status	Tracking Method
Average Job Size	TBD	Tracking started via portal forms
Close Rate	TBD	Proposals sent vs. deals signed
Pipeline Value	TBD	Total active opportunities
Leads This Month	TBD	Portal form submission
Appointments Scheduled	TBD	Portal form submission
Proposals Sent	TBD	Portal form submission
Deals Signed	TBD	Portal form submission (weekly)

Weekly Metrics Collection

Automated Friday Reports

☐ **Recipients:**

Dana & Erika

☐ **Time:**

Friday, 9:00 AM PST

☐ **Format:**

Portal form submission

☐ **Metrics:**

All KPIs + signed deals

Key Data Points:

- New leads received
- Consultations scheduled & completed
- Proposals sent
- Deals signed (with values)
- Average job size trending
- Close rate calculation
- Pipeline value snapshot

Strategic Recommendations

Sales Excellence Priorities

- **Track all metrics consistently via portal submission forms** — Establish baseline performance data for optimization
- **Focus on designer referral channel for highest ROI** — Leverage +\$13,860 per job returns identified in marketing analysis
- **Establish close rate benchmarks** — Set targets based on industry standards and historical data
- **Build pipeline visibility** — Real-time tracking of opportunities by stage and value

Action Items

HIGH

Implement Consistent Metrics Tracking

Ensure Dana & Erika submit all KPIs weekly via portal forms — establish accountability

HIGH

Designer Referral Channel Optimization

Prioritize leads from designer partnerships — highest ROI source at +\$13,860/job

MEDIUM

Establish Close Rate Benchmarks

Set targets based on 3-month historical average — track weekly progress against goal

MEDIUM

Build Real-Time Pipeline Dashboard

Visual tracking of opportunities by stage, value, and expected close date

MEDIUM

Average Job Size Analysis

Track trends by lead source and designer — identify upsell opportunities

Key Insights

❑ Clear Monthly Target: \$170,000

Revenue goal established — needs tracking infrastructure to measure progress

❑ Metrics Tracking Infrastructure Building

Portal forms + automated Friday reports — establishing data collection discipline

✓ Designer Referrals = Highest Priority Channel

Focus sales effort on best-performing lead source (+\$13,860 ROI/job)

⚡ Weekly Accountability via Portal Forms

Dana & Erika submit deals signed + KPIs every Friday 9 AM PST

→ Process Clarity Established

7-step sales cycle mapped — from lead to install scheduling

Business Succession Pros, Inc.

Strategic Business Advisory & Succession Planning

This report is confidential and prepared exclusively for The Tailored Closet North San Diego. Data and recommendations are based on information provided as of March 2026. Business Succession Pros, Inc. does not guarantee future performance or outcomes.