iProspect Summary Report

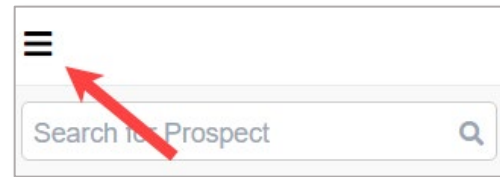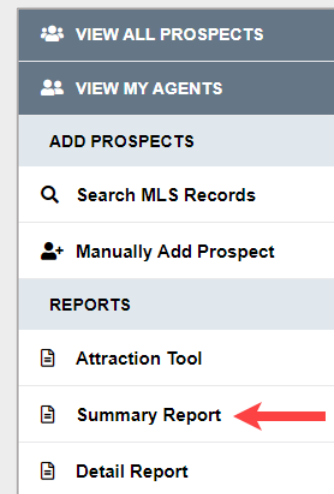|	
This report provides a recap of recruiting activities completed by an office within a specified period. This report is available to individuals with the Recruiter, Delegate and Executive roles in iProspect.	
• Click the **Menu** in the upper left corner.	
• Under **Reports**, click **Summary Report**.	
If you have access to multiple offices, your first step will be to select the office you wish to view. • Click in the **Select an Office** field to choose your office.	
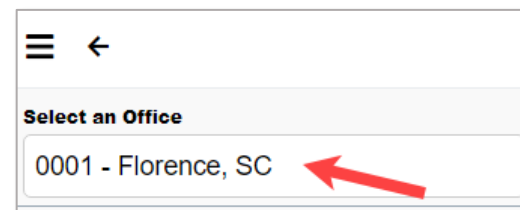
Enter the parameters for your report:
  a. **Start Date**
  b. **End Date**
  c. **Date Range Type:**
      • **Activity** – this is the date the activity **ACTUALLY** took place.
      • **Entry** – this is the date the activity was **ENTERED** into iProspect.
  d. Click **Go**.

The Summary Report is divided into three sections. The first section is **Prospect Activity.**

Here you see a summary of the different recruiting activities that were completed for the timeframe you specified.

Under each activity type you see the number of activities you completed as well as the percentage that represents for your entire company.

Office	Prospect Activity							
	New Prspts		Phone Calls		eComs Sent		Meetings	
	#	%	#	%	#	%	#	%
0001 - Florence, SC (ERA Leatherman Realty, Inc.)	7	100%	2	100%	0		1	100%
Totals	7		2		0		1	

The second section is **Activity Results**.

This section shows the success rate for the activities entered in the previous section, Prospect Activity. Under each activity type you see the number of specific results you have achieved as well as the percentage that represents for your entire company.

Activity Results					
Sched Appts		Sign Ons		Follow Ups	
#	%	#	%	#	%
3	100%	0		1	100%
3		0		1	

The third section is the **Prospect Pipeline**.

This section shows you the number of prospects broken down by the Lead Rating:

   1 – 30 days or less
   2 – 31 to 60 days
   3 – 61 to 90 days
   4 – 91 to 180 days
   5 – Prospect

Prospect Pipeline				
Lead Rating				
1	2	3	4	5
0	0	1	0	6
0	0	1	0	6

The last section is **Prospecting Success.**

This is divided into three sections to assess how well you are converting leads into affiliated agents

- **SO to New** – is your number of Sign-Ons divided by your number of New Prospects and is displayed as a percentage.

- **SO to Intw** – is your number of Sign-Ons divided by your number of Appointments and is displayed as a percentage.

- **P/E to SO** – is your number of phone calls plus your number of emails sent divided by Sign-Ons, displayed as a ratio.

Prospecting Success		
SO to New	SO to Intw	P/E to SO
0%	0%	
0%	0%	

To share the information contained in the Summary Report with someone without access to iProspect, click:

- **Download Excel** – to open an Excel sheet.
- **Download PDF** – to open a PDF sheet

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