Three hundred and forty records, one hundred and twelve over a year

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4,210 records · fictional document

Fictional document — demonstration example

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Fictional document, produced for demonstration. **Nobody is lying**: the counter adds up records whose follow-up has stopped, without telling the two apart.

Next action overdue by	Records
6 to 12 months	**228**
More than a year	**112**
Total	**340**

What the dashboard shows	What is actually followed
4,210 accounts in portfolio	**3,870**

An overdue action says nothing about the business — a customer can be excellent and their follow-up badly kept. That is why the agent closes, archives and

> marks "lost" none of these records.

Who they are reported to

Recipient	Receives?	Why
The salesperson concerned	**Yes, oldest first**	**They can act**
Their line manager	**No**	**340 overdue actions describe a workload**
The monthly summary	**As a count, without names**	**An arrangement, not people**

What is proposed for the dashboard

Today	Proposed
One figure: "accounts in portfolio"	**Two figures: "followed" and "in portfolio"**

They are two different pieces of information, and only one is shown. The gap of 340 then becomes visible without anyone having to look for it.

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