



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 nobody is working.

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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