

PlayMaker Standard Reports Defined

PlayMaker offers a variety of standard reports to analyze your individual and team performance, available in the *Reporting* section of the application. As a reminder, all information presented will be limited to the permissions granted to each individual. Reports can be configured to filter the data in the report, for more information on this feature see [this article](#).

The standard reports available include the following:

Contacts and Accounts

- Inactivity Report - Provides a real-time report outlining those contacts that have not had any activity within a pre-determined amount of time.

Conversion Ratio (Admits / Referrals)

- Conversion Ratio: by Primary Physician
- Conversion Ratio: by Referring Account
- Conversion Ratio: by User

Events

- Daily Visit Report - What are my open/completed daily sales activities?

Expenses

- Account Expenses - List of Accounts with total expenses
- Expenses: by Marketer/User - Total expenses by Marketer
- Itemized Expenses by User - View itemized expenses by user
- Total Expenses by User - View total expenditures summarized by user
- Stark II Budget - Tracks annual marketing spend against referral sources

Owner Change

- Approve Owner Change - A reporting tool designed for a sales manager to approve contact, account or referral owner change requests.

Referrals

- Admission Totals by User by Date Range
- Admits by Referral Owner by Primary Physician
- Admits by Referral Owner by Referring Facility
- Admits by Referral Owner by Referring Person
- Referral to Admission Times: By User - Provides AVG days from referral to admit by User
- Rolling Three Week Admissions by Referring Facility - A reporting tool for sales staff and managers that allows for the ability to trend admissions by Referring Facility across three weeks while monitoring positive and negative referral patterns
- Average Daily Census Budget - Report on actual ADC vs. budgeted ADC by territory or market

Sales Productivity

- Advanced AE Summary Report - A summary of account activity and referrals generated by the Account Executive.
- Detailed AE Account Activity Report - Provides a detailed overview of accounts by user.
- Detailed AE Contact Activity Report - Provides a detailed overview of contacts by user
- Detailed Sales Territory Activity Report - Provides a detailed overview of accounts by user.
- Sales Territory Summary Report - A summary of account activity and referrals generated by the assigned book of business.

PlayMaker Usage

- Trend and Rank Report - Trend admits over time and filter by sales rep tenure
- User Adoption and Usage Report - Designed to help managers evaluate end-user adoption and application usage.

User Management

- Users Not Assigned to a Sales Territory - List of all Users not assigned to an Office