

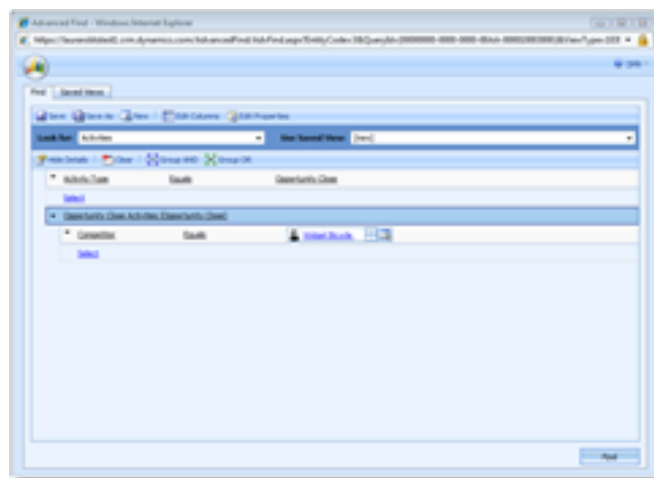
Report on Opportunities Lost to Competitors

There is an out-of-the box relationship between competitors and opportunities in CRM that allows you to track many competitors to any one opportunity. However, when you close an opportunity as lost to a competitor, you may select one specific competitor within the Close Opportunity window. This is a different relationship in CRM than competitor to opportunities.



What if you want an all-up view of all your lost opportunities showing the competitors that you lost to?

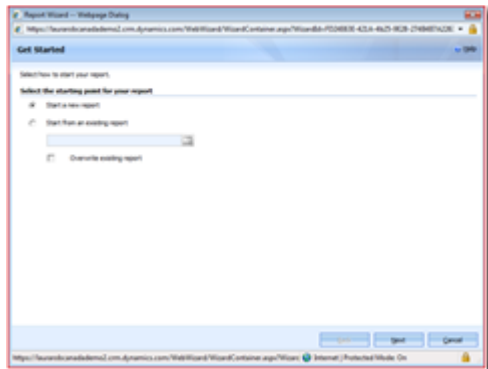
When trying to get this report, many people naturally turn to advanced find views to try to create a query for this data. This approach won't return all the data you need in an all-up Lost Opportunity report with Competitors because you cannot create an Advanced Find on the Opportunity Close Activity. The closest you can get with Advanced Find is to look for Activities, filter the Activity Type = Opportunity Close, and filter Competitor = [fill in the blank].



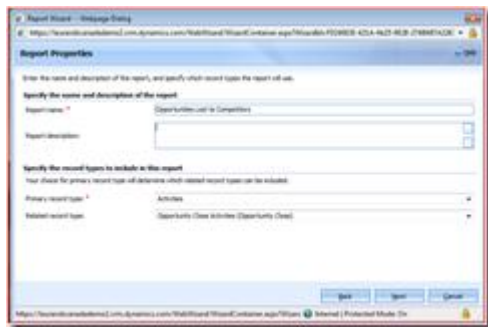
This only works when filtering **one competitor** because you cannot display a column for Competitor in this view – there is a 1:N relationship between Activity and Opportunity Close.

Therefore, the way to get this view of your data is to create a Report (Workplace -> Reports) using the report wizard. The report wizard differs from Advanced Find in that it allows you to **JOIN** data from different data tables (entities) rather than be restricted to lookup fields in 1:N relationships between data tables (entities). Here's how to do it:

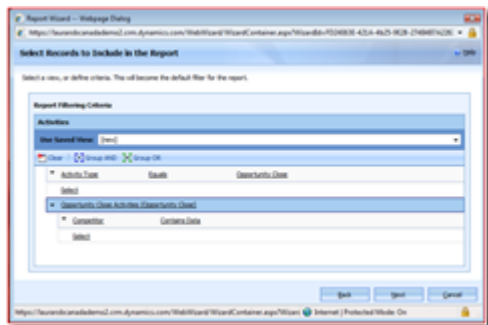
Go to Workplace -> Reports -> Report Wizard:



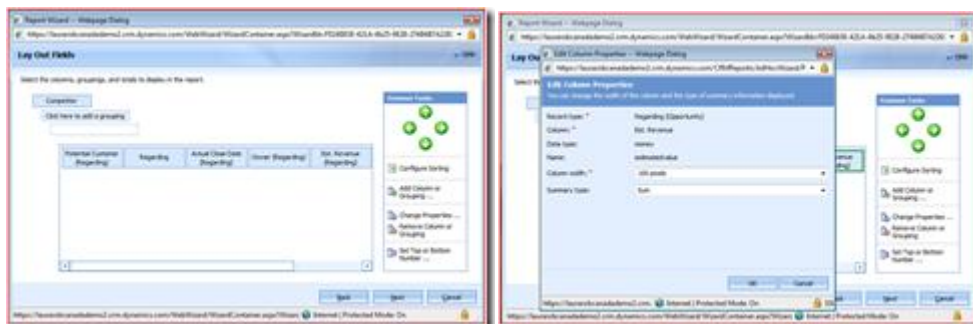
Name the report and specify primary and related record types:



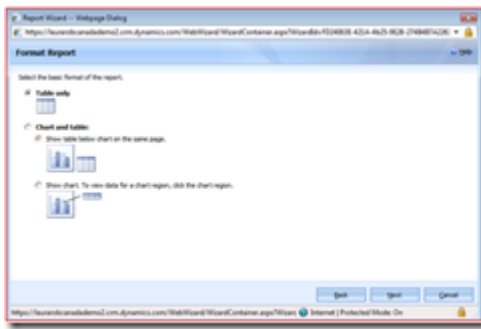
Set a filter to return all activities = opportunity close (like I mentioned with the Advanced Find), and Opportunity Close Competitor "contains data":



Lay out fields in your report. In this example I've included Est. Revenue on the related Opportunity so you can quantify exactly how much revenue was lost to the competitor. You can summarise by this amount in your report in order to create a chart in the next step:



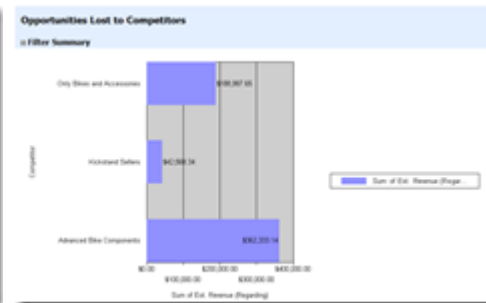
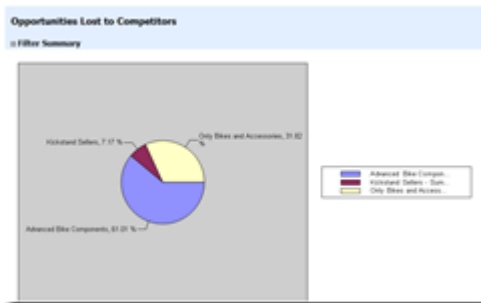
Add a chart if you want to:



Final Report:

Competitor	Potential Customer (Responding)	Responding	Actual Close Date (Responding)	Owner (Responding)	Est. Revenue (Responding)
Advanced Bike Components					
	Racing Bike Outlet	We high-end road bikes	1/15/2009 2:08 PM	Gal Erickson	\$87,289.47
	Planet Sporting Goods	Will be ordering about 10 bikes of all types	1/15/2009 2:08 PM	Jose Curry	\$275,049.67
Summary					\$362,339.14
Kinkaid Bikes					
	Bike Universe	Interested in Mountain Bikes, 14 of the new model.	1/15/2009 2:08 PM	Laura Robinson	\$42,568.24
Summary					\$42,568.24
Only Bikes and Accessories					
	World Bike Discount Store	Will be ordering about 75 bikes of various types.	1/15/2009 2:07 PM	Jose Curry	\$388,967.65
Summary					\$388,967.65
					\$751,875.03

With pie chart or bar chart:



Contact consultCRM on 0845 450 1427 for more information help on Microsoft Dynamics CRM.