

Quarter

All

Sales rep

All

Partner type

All

Sales Overview

Partner submissions

4,475

Approval rate

70.4%

Funded deals

2,016

Average deal: \$75,855

Funded volume

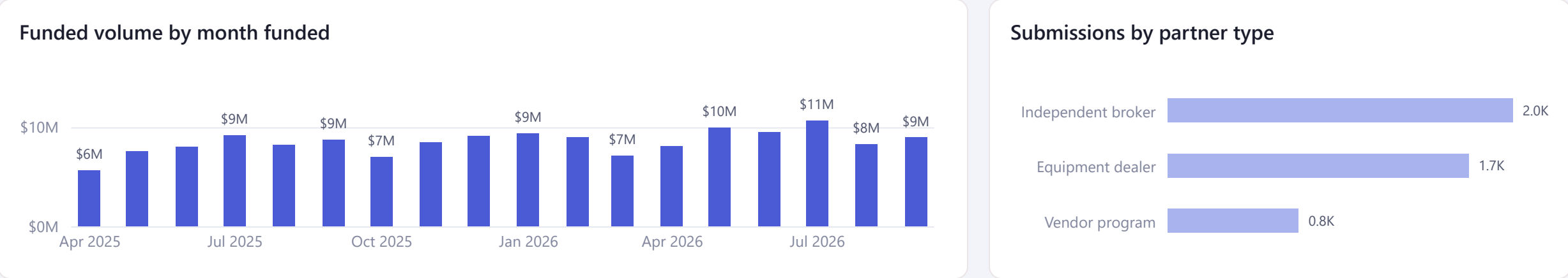
\$152.9M

Funding conversion

45.1%

Active partners

369



Partners by funded volume

Partner	Type	Rep	Applications	Funding Conversion	Funded Volume	Last Submission Date
Sumner Medical Equipment	Equipment dealer	Aisha Coleman	115	64.3%	\$6,018,250	Sep 2, 2026
Merritt Office Systems	Equipment dealer	Brent Dalton	92	57.6%	\$4,110,000	Sep 21, 2026
Alder Office Systems	Equipment dealer	Luis Ortega	81	70.4%	\$4,083,500	Sep 22, 2026
Elvmont Dental Systems	Vendor program	Rafael Mendes	85	62.4%	\$3,570,750	Sep 29, 2026
Total			4,475	45.1%	\$152,923,500	Sep 30, 2026

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Rep Performance

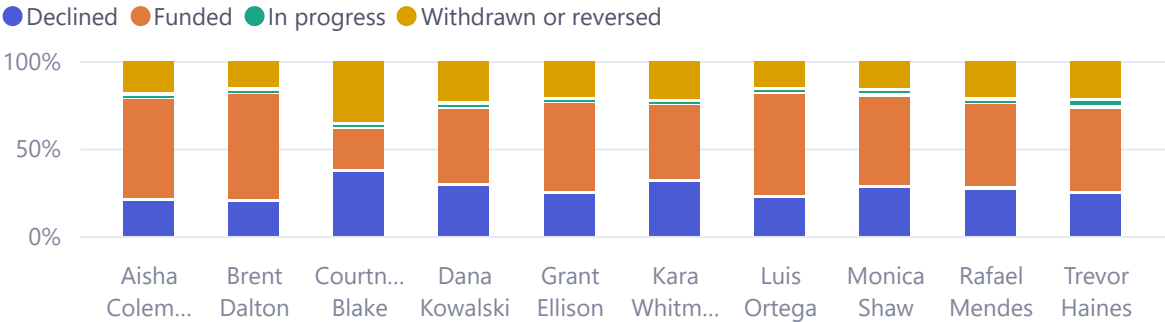
Rep scorecard

Rep	Territory	Partners Covered	Active Partners	New Partners	Applications	Approval Rate	Funding Conversion	Funded Deals	Funded Volume	Repeat Customer Share
Courtney Blake	National broker desk	85	81	15	1,297	60.3%	25.1%	325	\$26,094,750	10.1%
Aisha Coleman	FL	36	28	6	466	78.9%	58.6%	273	\$20,630,750	14.4%
Luis Ortega	TX	40	38	7	410	77.2%	59.5%	244	\$18,197,000	12.7%
Brent Dalton	NC	26	24	4	355	79.9%	62.3%	221	\$16,602,500	17.5%
Grant Ellison	VA, MD, PA	51	46	15	414	74.9%	52.2%	216	\$16,357,750	13.8%
Monica Shaw	GA	36	32	7	370	71.4%	52.4%	194	\$13,878,250	14.1%
Dana Kowalski	OH, IN, MO	39	38	6	406	69.9%	44.3%	180	\$13,823,250	13.5%
Rafael Mendes	AL, MS, LA, AR	37	33	7	389	71.5%	49.1%	191	\$13,773,250	13.9%
Total		404	369	76	4,475	70.4%	45.1%	2,016	\$152,923,500	13.1%

Funded volume by rep



Outcome of each rep's partner submissions



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Partner Health

Partners scored

253

At risk (under 45)

71

Watch (45 to 69)

56

Healthy (70 and up)

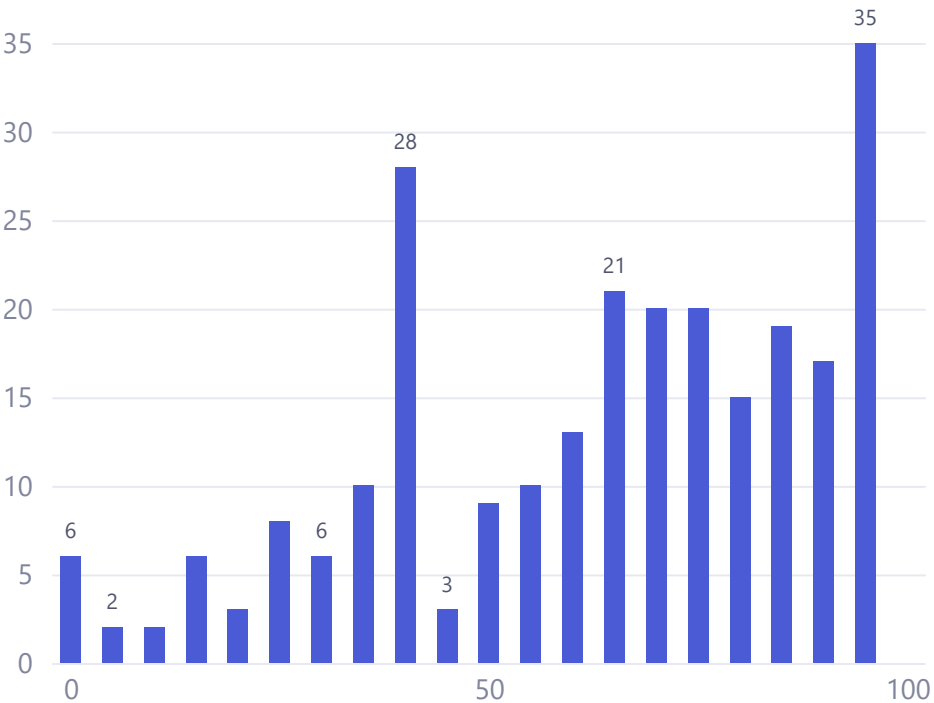
126

Funded volume from at-risk partners

\$12.1M

Partners by health score

Points for activity, conversion, recency, and approvals.



Partners with the lowest health scores

Scores count back from the latest submission date, so the date filter does not apply here.

Partner	Rep	Health Score	Main Issue	Funded Last 12 Months
Coldwater Equipment Sales	Monica Shaw	0	No submissions in 90 days	
Kendrick Lease Brokers	Courtney Blake	0	No submissions in 90 days	
Overby Lease Brokers	Courtney Blake	0	No submissions in 90 days	
Elkhorn Lease Brokers	Monica Shaw	2	No submissions in 90 days	
Southgate Equipment Sales	Grant Ellison	4	No submissions in 90 days	
Summit Ridge Business Capital	Kara Whitmore	4	No submissions in 90 days	
Flatrock Capital Solutions	Luis Ortega	6	No submissions in 90 days	
Lone Oak Capital Advisors	Courtney Blake	6	No submissions in 90 days	
Whitlock Capital Solutions	Rafael Mendes	11	No submissions in 90 days	\$78,000
Ashford Capital Solutions	Courtney Blake	14	No submissions in 90 days	\$66,500
Kendrick Finance Partners	Dana Kowalski	17	Activity down 87%	\$128,500
Quarry Road Finance Partners	Grant Ellison	17	No submissions in 90 days	\$115,500
Tanner Commercial Funding	Courtney Blake	17	No submissions in 90 days	\$52,250
Total		86	Funding conversion 45%	\$95,205,250

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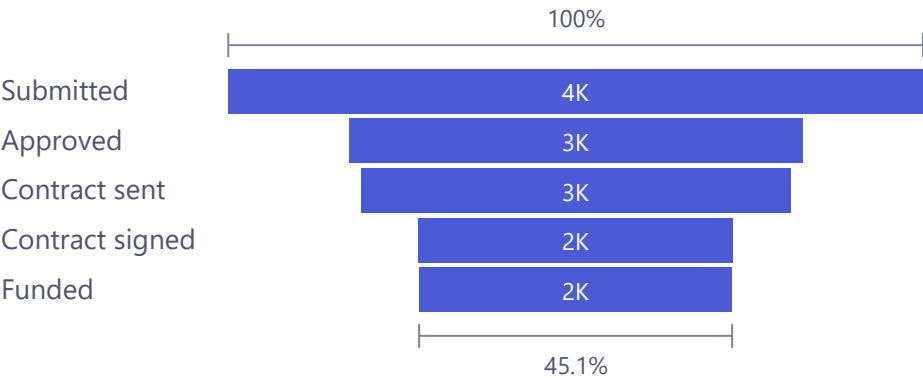
All

Partner type

All

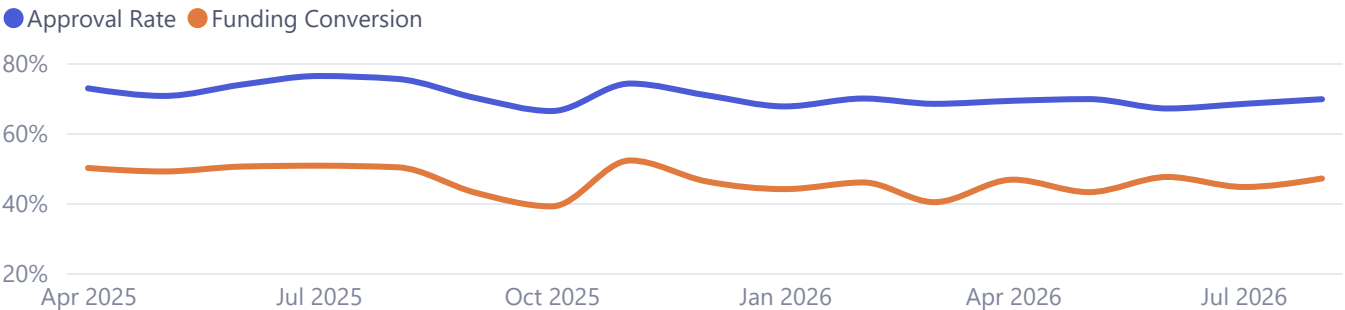
Pipeline

Partner pipeline



Approval and funding conversion by month

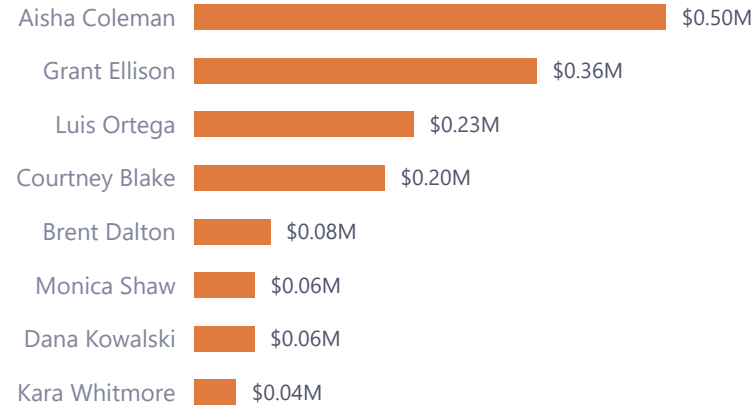
September 2026 is left out because many of its files are still open.



Pipeline by rep

Rep	Applications	Approved Applications	Contracts Sent	Contracts Signed	Funded Applications	Signed of Sent	Funding Conversion
Aisha Coleman	466	343	324	275	273	84.9%	58.6%
Brent Dalton	355	266	253	222	221	87.7%	62.3%
Courtney Blake	1,297	714	680	327	325	48.1%	25.1%
Dana Kowalski	406	265	247	180	180	72.9%	44.3%
Grant Ellison	414	290	279	217	216	77.8%	52.2%
Kara Whitmore	170	107	102	75	75	73.5%	44.1%
Luis Ortega	410	298	279	246	244	88.2%	59.5%
Monica Shaw	370	250	242	197	194	81.4%	52.4%
Rafael Mendes	389	256	242	192	191	79.3%	49.1%
Trevor Haines	198	133	121	97	97	80.2%	49.0%
Total	4,475	2,922	2,769	2,028	2,016	73.2%	45.1%

Contracts sent but not signed



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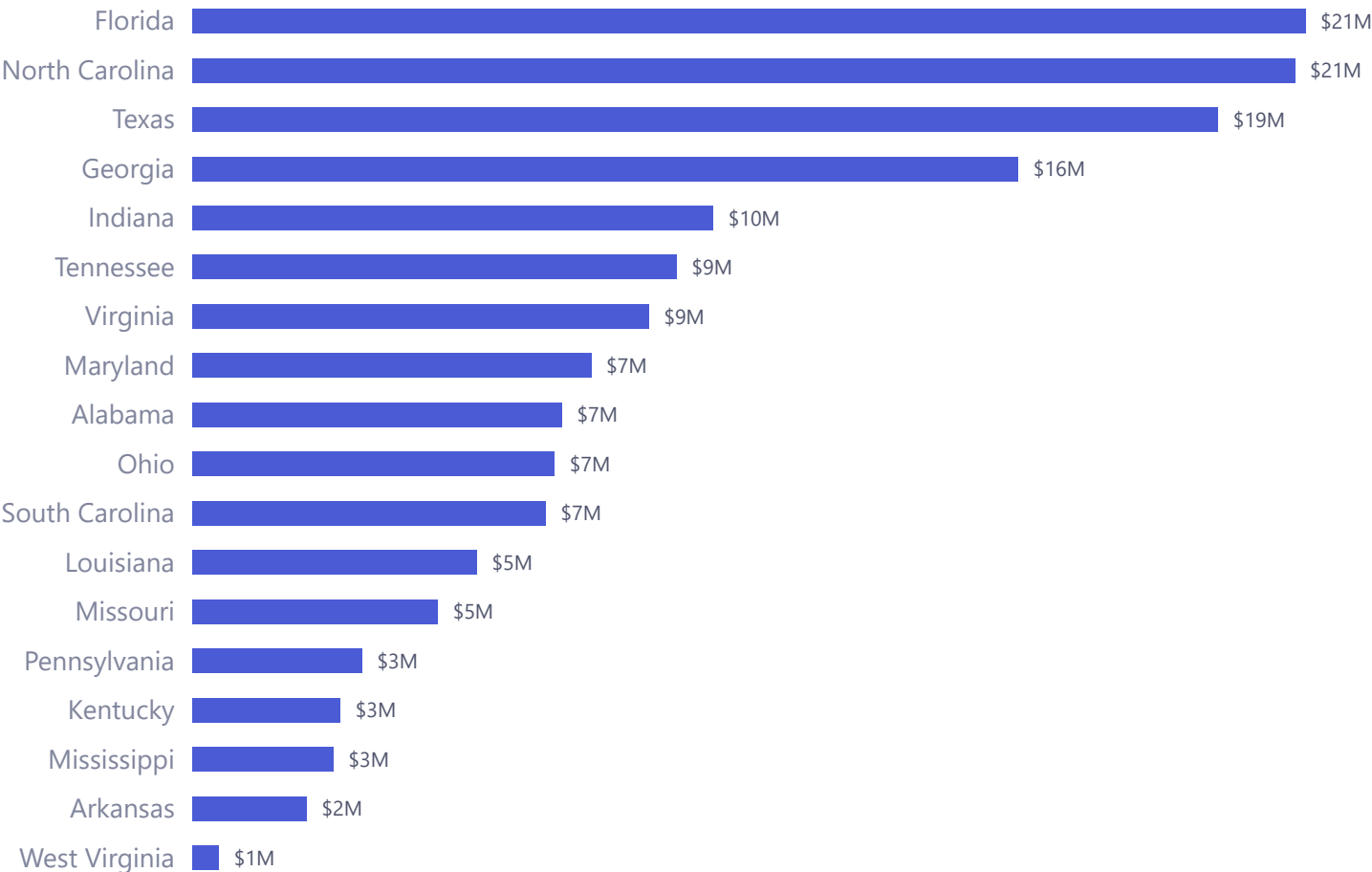
Partner type

All

Partners by State

Funded volume by state

Partners are spread across 18 states in the South, Midwest, and Mid-Atlantic.



States side by side

State	Applications	Funding Conversion	Funded Volume
Florida	503	56.3%	\$20,903,250
North Carolina	595	44.7%	\$20,706,250
Texas	471	54.8%	\$19,264,000
Georgia	468	45.1%	\$15,513,750
Indiana	367	36.0%	\$9,781,750
Tennessee	259	41.3%	\$9,094,250
Virginia	256	40.6%	\$8,572,000
Maryland	237	43.5%	\$7,493,500
Alabama	233	40.3%	\$6,940,500
Ohio	257	35.0%	\$6,801,500
South Carolina	201	42.3%	\$6,634,500
Louisiana	173	39.3%	\$5,344,750
Missouri	85	54.1%	\$4,609,250
Pennsylvania	123	47.2%	\$3,188,250
Kentucky	94	35.1%	\$2,778,750
Mississippi	80	51.3%	\$2,650,000
Arkansas	49	57.1%	\$2,147,000
West Virginia	24	37.5%	\$500,250
Total	4,475	45.1%	\$152,923,500

About This Report

About this report

This report follows submissions from referral partners at a fictional equipment finance company. Every name and figure is fictional sample data.

How the numbers are counted

Every page counts referral partner submissions only. Funded volume counts deals by the date they funded.

The partner health score counts back from the latest submission date and adds points for activity, conversion, recency, and approvals.

How it was built

The report is a Power BI model with ten tables from one Excel workbook, four small tables built in DAX, and an inactive relationship on funding date that specific measures switch on.

The same model feeds the Operations Workflow and Referral Partner Sales reports.