

# Dossier: Sample

## Sample Scouting Dossier

<b>Company Name</b>				
<b>Address</b>				
<b>City, State, Zip</b>				
<b>Main Phone</b>				
<b>URL</b>				
<b>Ticker Symbol</b>				
<b>Sector</b>				
<b>Contacts</b>				
<b>First</b>	<b>Last</b>	<b>Title</b>	<b>Position</b>	<b>Our Relationship with Contact</b>
<b>History</b>				
<b>Company Description</b>				
<b>Major Customers</b>				
<b>Trade Associations</b>				
<b>Market Position</b>				
<b>Key Competitors</b>				
<b>Industry</b>				
<b>General Information</b>				
<b>6 Degrees Map</b>				
<b>Number of Customers</b>				
<b>Key Products</b>				
<b>Fiscal Year End</b>				
<b>Summary Financial Data</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	
<b>Revenue</b>				
<b>Gross Margin</b>				
<b>Operating Margin</b>				
<b>Total Assets</b>				
<b>Total Debt</b>				
<b>Our Competitors</b>				
<b>Whale Signs</b>				

# Dossier: Complete

## A Whale Candidate

<b>Company Name</b>	Newco Technologies		
<b>Address</b>	123 Grand Vista Road		
<b>City, State, Zip</b>	Valley View, CA 94000		
<b>Main Phone</b>	(408) 123-4567		
<b>URL</b>	www.newco.com		
<b>Ticker Symbol</b>	NEWCO		
<b>Sector</b>	Computer Software		
<b>Description</b>	The company makes software to optimize the performance of enterprise systems. It is a B-to-B provider that targets its sales to senior IT executives. It also offers training and consulting services as well as selling software.		
<b>Key Products</b>	Business technology optimization products, consulting, training, and Maintenance.		
<b>Major Customers</b>	Cingular, WalMart, Dell		
<b>Market Position</b>	3 (1 in North American market)		
<b>Key Competitors</b>	BMS Software, OptiWare		
<b>Industry/Equity Analysts</b>	John Hickman, Goldman Sachs; Cheryl David, Morgan Stanley; Oliver Ornstein, JP Morgan		
<b>Fiscal Year End</b>	December		
<b>Our Competitors</b>	--unknown at this point--		
<b>History With Us</b>	No prior history with this company.		
<b>Messaging/areas of opportunity</b>	Their marketing materials and website do not reflect the quality of the service that they want to portray.		
<b>Financial Data</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year3</b>
<b>Revenue</b>	685.5	506.5	400.1
<b>Gross Margin</b>	85.8%	88.2%	88.7%
<b>Operating Margin</b>	14.1%	16%	16.8%
<b>EPS</b>	.83	.45	.74
<b>Assets</b>	\$2,020		
<b>Debt</b>	\$1,439		
<b>Equity</b>	581		

\*data contrived for this example