

Dossier: Sample

Sample Scouting Dossier

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

Dossier: Complete

A Whale Candidate

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

*data contrived for this example