Lead Tracker - working sample

Excel and Google Sheets. Enter leads and follow-ups, overdue follow-ups turn red, one-click links add a follow-up reminder to Google Calendar or Outlook, and the dashboard updates on its own. Sample data is made up.

Sample Plumbing Co. | Lead Dashboard

Total leads	6
Open leads	4
Open pipeline value	$9,700
Won value	$450
Win rate (won / decided)	50%
Follow-ups overdue	1
Follow-ups due today	0
Due in next 7 days	2

Status	Leads	Est. value
New	1	$5,200
Contacted	1	$300
Quoted	2	$4,200
Won	1	$450
Lost	1	$900

Source	Leads	Won	Won value
Website	2	0	$0
Google	1	0	$0
Referral	1	1	$450
Repeat customer	1	0	$0
Phone call	1	0	$0
Social media	0	0	$0



