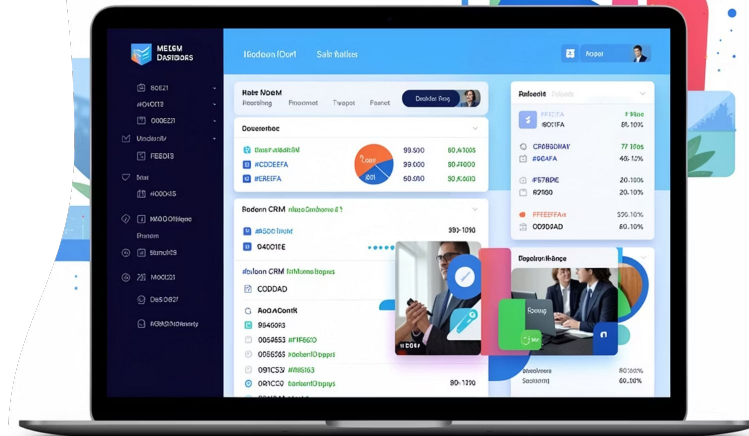


CRM Sales Pipeline Tracker for Lead Follow-up

Excel CRM Dashboard for Lead Management and Sales Follow-up

Designed by **Abdulrahman El-Saeed** · Sales Operations | CRM Support |
Excel Dashboard Design



Project Overview

This project presents a practical Excel CRM pipeline tracker designed to help businesses and freelancers manage leads, track follow-ups, monitor sales stages, and measure conversion performance — all in one organized workbook.



Lead Tracking

Centralized log of every prospect and deal



Follow-up Management

Schedule and track every touchpoint



Pipeline Monitoring

Visualize where each lead stands



Sales Dashboard

At-a-glance KPIs for quick decisions

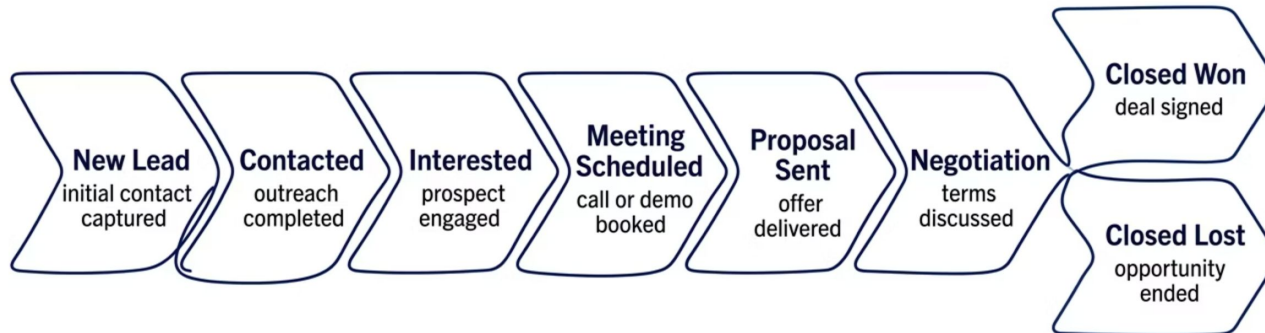


CRM-Ready Structure

Lightweight CRM before upgrading tools

Pipeline Workflow

Every lead moves through a clear, structured sales process. This tracker maps each stage so your team always knows exactly where a prospect stands — and what action to take next.



The workflow helps users understand where every lead stands in the sales process, reducing missed follow-ups and improving close rates.

CRM Pipeline Sheet Preview

Lead ID	Company / Client	Contact Person	Email	Phone	Status	Priority
LD-001	Acme Corp	John Smith	john@acme.com	+1-555-0101	Proposal Sent	High
LD-002	Bright Solutions	Sarah Lee	sarah@brighthouse.com	+1-555-0102	Meeting Scheduled	Medium
LD-003	NexaTech	Mike Chen	mike@nexa.com	+1-555-0103	Negotiation	High

Full Column Coverage

- Lead ID · Company / Client · Contact Person
- Email · Phone · Lead Source
- Status · Owner · Priority
- Lead Value · Probability %
- Last Contact · Next Follow-up
- Expected Close Date · Notes



Placeholder: Insert actual Excel screenshot here for your Upwork portfolio.

Dashboard KPIs

These KPIs help sales teams quickly measure lead progress and sales performance at a glance — no manual calculation required.

150

Total Leads

All active and historical prospects in the pipeline

68%

Contacted %

Leads reached out to vs. total in pipeline

42%

Interested %

Leads showing active buying signals

35

Meetings Booked

Calls and demos scheduled this period

18

Closed Deals

Won opportunities converted to revenue

12%

Conversion Rate

Overall lead-to-close rate across all stages



Placeholder: Insert actual dashboard screenshot here for your Upwork portfolio.

Lead Status Tracking

A color-coded status dropdown makes the tracker easy to update in real time — keeping every team member aligned on lead progress and next actions.

New Lead

Fresh prospect, not yet contacted

Contacted

Initial outreach completed

Interested

Prospect engaged and responding

Meeting Scheduled

Call or demo confirmed

Proposal Sent

Offer delivered to prospect

Negotiation

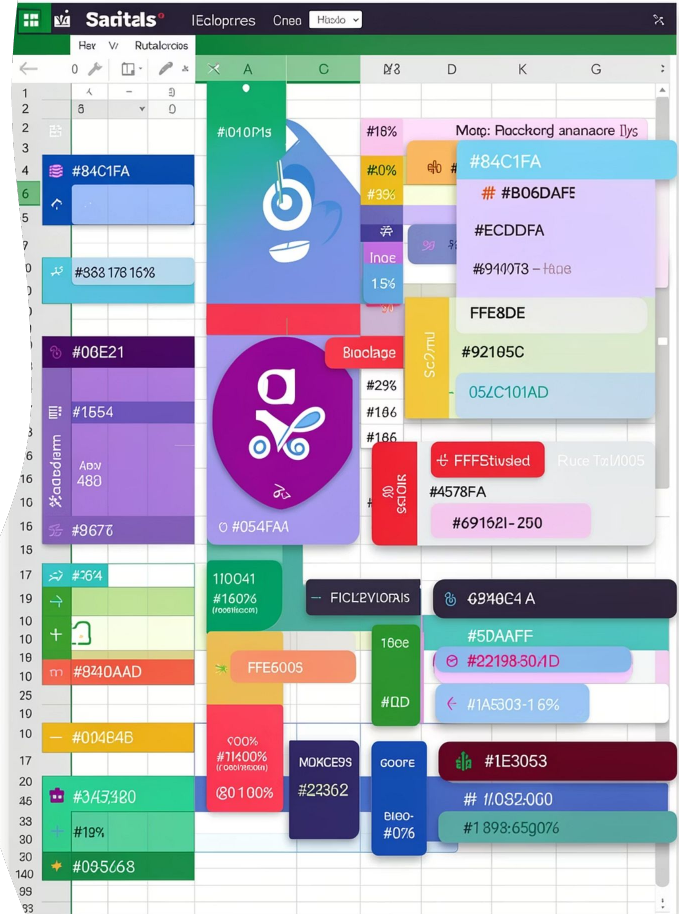
Terms and pricing in discussion

Closed Won

Deal signed and secured

Closed Lost

Opportunity ended — log reason



Sales Follow-up System

The tracker includes built-in fields to support organized, disciplined sales communication — so nothing falls through the cracks.



Follow-up Dates

Next action date tracked per lead for timely outreach



Priority Level

High / Medium / Low tags to focus effort where it counts



Probability %

Win likelihood score to weight pipeline projections



Lead Owner

Clear accountability — every lead has an assigned rep



Deal Value

Estimated revenue per opportunity for pipeline forecasting



Notes Field

Conversation history and context logged per lead

Business Value

This tracker delivers real operational value for freelancers, small sales teams, and growing businesses — before investing in expensive CRM software.

Keeps All Leads Organized

One workbook replaces scattered spreadsheets and sticky notes

Improves Follow-up Discipline

Scheduled dates and priority flags ensure no lead is forgotten

Shows Pipeline Performance

Visual KPIs reveal what's working and where deals stall

Monitors Conversion Rate

Track lead-to-close ratios to improve sales strategy over time

Supports Small Sales Teams

Lightweight and easy to adopt — no technical setup required

Simple CRM Alternative

Works as a practical CRM before upgrading to Zoho, HubSpot, or Salesforce

What This CRM Tracker Delivers

Clean Excel CRM Pipeline

Structured, professional, and ready to deploy

Lead Follow-up Tracking

Dates, owners, and priorities in one view

Sales Status Dropdowns

Easy updates keep the pipeline accurate

KPI Dashboard

Instant visibility into sales performance

Conversion Rate Tracking

Measure and improve close rates over time

Deal Progress Visibility

Know exactly where every opportunity stands

Ready-to-Use Template

Start managing leads from day one