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On average, it takes 18 calls to contact the buyer, and only 24% of email sales are open. And long time, the duration of the sales cycle can be months or even years. Needless to say, tracking all sales touches over a long period of time is challenging but important in securing transactions. In this article I've included three Excel and Google Sheet templates that cover the three most important things the sales team needs to do in order to close more trades in a shorter period of time: Track leads. Create insightful sales reports. Monitoring call sales. Salespeople often work on the fly and do not have access to their desktops. But on mobile devices, spreadsheets can be difficult to manipulate, especially in offline situations where there is no available WiFi or cellular network. So I also included two sales apps made on the development platform without AppSheet code because apps can be used on a mobile device, even if that device is offline and disconnected from the network. You can either adapt spreadsheet templates to meet your own business needs, or turn these tables into apps - it's up to you! Sales leads tracking pattern This lead tracking pattern does a very good job of recording every communication with leads and making sure that all follow-ups are timely and effective. The date and duration of the lead time record has been affected in the past, and help sales professionals decide when they should follow up. Lead status and progress provide a quick idea of where the lead is in the sales funnel and how far the lead is from near stage. Pay attention to and then make sure the wires are kept warm. The following table gives a bird's-eye view of all the leads-type and source leads, sales opportunities, and sales revenue forecast. This table helps salespeople prioritize their efforts and time. As I mentioned earlier, we've turned this template into an app. In addition to the ease of viewing and editing data, this app allows salespeople to do the following: 1) Add new leads and enter notes for each touch of sales. 2) Check out the latest progress leads and submission leads by priority. 3) See how each region performs, as well as the opportunities in the coming months. 4) Automate email follow-up leads. 5) Send SMS messages direct from the app. Feel free to copy the app and customize it to meet your needs. This template records car sales for each month and every quarter. It can be used by individual Sales or sales. To provide a better visualization of sales figures based on a variety of criteria, we've turned this template into a mobile sales report app that does: 1) Displays the total monthly and quarterly sales data and the contribution of each salesperson for that month or quarter. 2) Allows you to download data in CSV format. To do this, go to See By Make Make Click on the anchor icon. 3) Links to other views using Deck View as a content table. 4) Sends scheduled emails to quarterly sales data for the entire team and the performance of a particular sales representative. Feel free to copy the app and customize it to meet your needs. This template is designed for sales professionals to record sales calls and call attempts. The subject indicates the types of call. Sales Made labels every call with Yes or No. If so, lead can be removed from the list of sales professionals. If not, the sales professional might want to think about reaching out again and or considering dropping the lead. This template includes a monthly goal tracking sheet. Unlike the sheet above, this sheet is completely data-driven. It compares actual numbers with target numbers. All dedicated cells are those that did not meet the target, except for the actual sale cost. This column also highlights (green) the days when the target was exceeded. Bonus: We've just published a new app selling-quote and offer app. The app has the following features: Filtered customer data, pending quotes, rejected quotes, cost and offer. Automated workflows by email quotes or offers to customers. Group actions by updating the status of quotes. CSV selected materials used in the new service can be downloaded by clicking on the icon when using the app on your desktop. What's next? These are just some of my favorite Excel templates for sales management. You can use them like this or easily build your own apps. If you have other favorite Excel templates, let me know by sending a comment or tweet. I'm always looking for templates to add to this list! Related Stories: Ready to Take Your Sales Tracking to the Next Level? Copy the next app and set it up your own way! Sales tracking provides useful information about your company's activities. In addition, it can greatly improve your growing business and move down your sales funnel. What is sales tracking and activity? When we talk about sales, how can we approach the task with a lot of different directions. The main business goal is to track all activities and procedures that may affect sales. The analysis provides an overview of sales activity over a period of time to recognize trends and compare actual performance with target performance. We can create simple forecasts using sales forecasting graphs. But we're more likely to use more dynamic tracking patterns that demonstrate the development of KPI. Use our complete set of sales-related Excel templates and you can give an overview of sales activities to improve the sales process. It is important to set effective and achievable business goals. You can easily manipulate these patterns and convert them into reports available for action. Download the free template! We don't boring stuff, so hopefully this will be proven in this article too. Dynamic Sales Tracker Template Creating Excel Sales Tracker we would like to pay off our fees. In recent years, many and many different Excel reports and sensor templates have been submitted, although classic templates can never be enough. When building a sales pattern, our concept is to show sales data for seven products with the addition of that even 30-year period. In our case, you can study the period from 1985 to 2015. We display values in U.S. dollars and interest as well. In the next section we talk about the most important: design and how it works in action. The question always remains the same: Is it possible to press a huge amount of data in only one dashboard? Our answer is yes, although there are extreme cases where we have to use tricks. We'll show you a sales tracker that everyone understands. Using the scroll in Excel, we can step by step from year to year, as you can see on the left side of the image. At one time we can display data 8 years dynamically in one window and in the middle of the window we can see the associated current data with these years. When selecting one product, the sales tracker automatically allocates cells that match the selected product. Thus, our eyes cannot wander, but can immediately focus on key information. With the help of radio buttons, we can choose the format of the data displayed (USD or %) simple and easy. With this solution we have already accumulated some space for instead of two boards we need to use only one. You can also implement key performance metrics. The diagram is unique in that we automatically identified the top 5 with the green and the 5 lowest red values. With this method, we can send information to leaders even faster. How to visualize sales and profits by region? This section will step-by-step to figure out how to create an advanced sales tracker. We spent a lot of time planning; Fortunately, an earlier set of forms helped us that contain predetermined interface elements. We used this when we created the template below. Let's get in the middle of it! In the process, we divided the screen into four separate parts and put them in numbers so you can easily understand the connections and sales activity. The first section has three dropout lists. About the overall role of lists fall out you should know that they make grouping data, organizing and filtering much easier. There are two things in focus, sales and profits. In section (1) you can find the central element of the Excel sales tracking pattern, a menu system that coordinates data filtering; you've chosen the year of sales, country and sellers here. It is obvious that any change in the current values of the list That's why we can call this type of sales report dynamic. Let's see what explains chart 1 in the top left top left and its numbers! In our example, we chose 2016 sales, products sold in the U.S. by Jacob sellers. Profit in this case was \$82,419, profit \$49,257. The diagram here continues to display more details. This is product level resolution. The chart details the achievement of a responsible sales representative in relation to each product. Looking at the picture, we can conclude that the total sales products contributed as follows: Product 1 22%, Product 2 40%, and finally the product 3 38%. Under the percentage we have noted sales in U.S. dollars as well. Summary: On this screen we can see sales sales of the representative. Now let's look at the second part of the sales tracking pattern at the bottom left. The cost of net sales is the same as on the chart previously entered. The main difference in this case is that at the net cost of sales we also portrayed profits. The first is displayed on the column chart, the last on the line diagram combined on one joint screen. Net Sales and Country Profit Breakdown This combined chart represents an achievement in sales and profit-resolution product level resolution. Carefully study the use of the combined chart, because this can be a big advantage for us when we have to visualize different kinds of sales information using the sales funnel chart. The third part is a generalization of a combined chart similar to the one entered in the previous section. The difference can be found in the content of the information displayed. We can find summed up information about sales for this year / Profit. It is important to note that these figures contain the achievements of all trade representatives of all countries in this year, compared to countries. Product Level Resolution The fourth part of our sales tracking pattern chart represents a 1 percent section just like the product level breakdown analysis depicted at point 1 with the addition of the pie chart we used here. You should be aware of this kind of chart that use it wisely in the case of a maximum of 3 or 4 categories, if you have more than these becomes confusing, we recommend you keep this in mind. We've talked about a lot of things, discussed the details of the sales tracker template, but we haven't talked about formulas that help us generalize data. As usual, we put the calculations on a sheet called calculation, now let's look at them soon. Here's part of the basic chart from which the demonstration was made: The first of the Excel formulas is SUMIFS. The basic formula is that it sums up the values on several terms. For example, in the case of Product 1, we calculated the net cost of sales as follows. Formula amounts based on values cells on the drop-off list. So, in the baseline, he searches for dates for 2014 in the Dates column, then searches for the U.S. in the Country column, then searches for Jacob in the Name column. If these three conditions have been met together (as we mentioned, SUMIFS can be used in the case of multiple conditions), then it sums up the values from the Net Sales column. This may seem complicated at first, but you can explore the formula in the picture. Calculations for Product 2 and Product 3 are created in the same way. To calculate profits, we also use the SUMIFS formula only with a small difference, which is based on these criteria, now we will sum up the values in the Profit/loss column. By tracking sales activity with Gauge Charts Using Sales Activity Patterns, we'll create a good kind of sales presentation. In today's tutorial, we'll show you how to create a complex presentation. The main objects are the visualization of 4 products, 3 regions, a year and detailed data, and all this on one screen! The left section contains a column of the diagram. This shows the annual evolution of sales of the chosen product. On the right side there is a breakdown by region using three sensors. What tools should we use? First of all, advanced Excel formulas such as: MATCH, INDEX and VLOOKUP. We calculate partial results on an additional sheet. When we're done, we show results on a sales activity pattern. Recommended structure for effective analysis Let's see the starting (basic) data! The data sheet contains start-up data and all the calculations we need. The main information of speedometers (minimum, maximum and actual values) is stored on the sensor sheet. On the main sheet are operational elements and diagrams. Let's take a closer look at the tables found on the data sheet! In the first range you can see the matrix contains four products and three regions. In the second table we did not use the breakdown by region, here the emphasis is on the cost of sales by month. The third table shows the name of the chosen product on the dashboard sheet. With this value we will make further calculations. The fourth table contains years of sales of the selected product in the monthly breakdown. In the fifth table, we calculate the actual values of the sensors, which also depend on the chosen product. Prepare a chart for the sales activity pattern after this introduction let's look at all the calculation stages! We used percentages to break down by region. This is the easiest way to deploy the number of usable sales. First, let's look at the example of the product A / Region I combination. In the table, the value of 35% means that the share of sales for the year was 35%. You can interpret other elements of the matrix based on this logic We display the values of the second table on the column chart! These are fixed values that we should not make any calculations. And now the trick is coming! In the fourth table (calculation of monthly data charts) we must display the data for the chosen product. In the picture you can see that it is now a B product. Using the VLOOKUP formula, we calculated the values that belong to this product. The fifth table is interesting! Excel offers two search-type search solutions. The first is an old but widely used VLOOKUP. The other is a combination of INDEX and MATCH formulas. Advanced users prefer to use the latest solution. Using the MATCH formula, we calculate the relative position of the chosen product. Index will give the exact position of the found value. Finally, we link the sensor charts and the resulting cost. The interactive sales template will be truly impressive using calibration charts! Check the calculations after downloading! We've built formulas so that novice users can understand all the steps. By creating a cumulative sales dashboard while creating sales tracking patterns, we've made sure that even newbies don't have a problem understanding its work. We hope that after reading this tutorial you will handle it easily, whether you use it for work or study. Let's take a closer look at the figure below. We developed a simple list that allows us to be able to choose between months and we highlighted the drop down the list with green. Column B has place names that we'll make a comparison with. In the horizontal direction we have data on the city's income for this month. Because the data will be summarized in column P, this is the way if you choose the month of July, the period from January to July will be taken into account. Accordingly, if you choose December, in this case you will have full-year income data available. Sounds simple and simple? Let's take a look behind the scenes now, and we'll show you what gears we used to create a cumulative sales report. THE OFFSET and MATCH formulas will help you work again. The combination of these two formulas will produce the result we want. We will use these formulas afterwards, they are very useful in Excel, so we can improve our template. We put the sales panel under the main schedule, it is clear that when choosing a month from the list it changes dynamically. Of course, you can shape this the way you want (colors, patterns, shades, etc. using Form Filling, Outline Form or Shape Effects Tool.) Sales Distribution Chart Pattern - Pyramid Population In this lesson we'll show you how to create a great looking sales distribution chart in Excel to install customers by age and product type. Bad news... Excel doesn't have this style of diagram in the chart feed. However, we will create our own sales distribution chart using the pyramid chart. Another option: for example, you can use a pyramid diagram to show the age structure of the community. In our opinion, the daily bar chart is a very weak solution to show you the distribution of products by group buckets. Just a few words about the pyramid chart. Pyramid populations are an effective method for analyzing male and female populations in different age groups. Analysis of the sales campaign using cards How to create excel cards to track sales performance? From now on it's just, you only need 2 minutes to finish the procedure. Over the past few days, we have worked diligently on the Excel UK and US Dashboard prototyping phases. In various business sectors, mapping plays a valuable role in tracking sales, product analysis, market analysis, risk management, or decision-making in senior management. Download the sales templates Thank you for what we are! You can download a collection of sales tracker templates here. Recommended training materials

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