

Lead and conversion report

All records

CAPSULEM8

CM8-65 · Lead Tracker & Conversion Funnel
August 9, 2026

OPEN LEADS
5
11 logged · 6 closed

WIN RATE
50.0 %
3 won of 6 closed — open leads not counted

OPEN PIPELINE VALUE
\$12,400.00
estimated value of 5 open leads

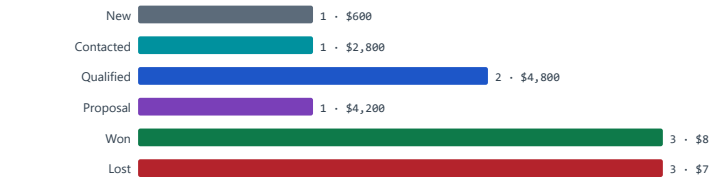
AVERAGE DAYS TO CLOSE
23.7
won leads only, received to closed : 3 leads

STALE LEADS
2
\$4,800.00 with no live next action

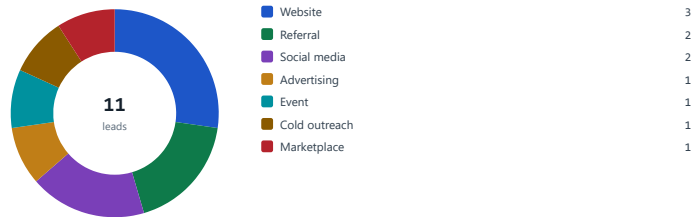
BLENDED COST PER LEAD
—
enter a monthly marketing spend on the Settings tab

11 of 11 record(s) included. All records. Amounts in USD.

Funnel by stage

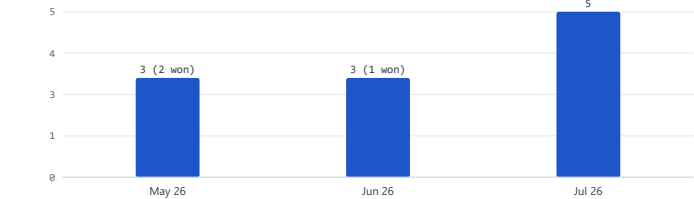


A count of leads at each stage right now, not a flow diagram — a lead moved straight from new to won never shows in the middle stages. Lost is drawn last, outside the funnel. A count of leads at each stage right now, not a flow diagram — a lead moved straight from new to won never shows in the middle stages. Lost is drawn last, outside the funnel.



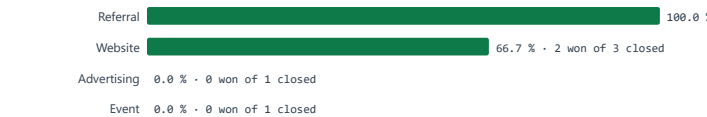
A source that produces many leads and few customers is a cost, not an asset. Read this donut together with the conversion chart below it. A source that produces many leads and few customers is a cost, not an asset. Read this donut together with the conversion chart below it.

Leads received per month



Counts by the date received, so a busy month shows even if its leads closed later. A partial current month always looks low — that is the calendar, not a collapse. Counts by the date received, so a busy month shows even if its leads closed later. A partial current month always looks low — that is the calendar, not a collapse.

Conversion by source



Each bar is won ÷ (won + lost) for that source, on that source's closed leads only. A source shown at 0 % or 100 % from one or two closed leads is a coin toss, not a verdict. Each bar is won ÷ (won + lost) for that source, on that source's closed leads only. A source shown at 0 % or 100 % from one or two closed leads is a coin toss, not a verdict.

Source summary

SOURCE	LEADS	WON	LOST	WIN RATE (CLOSED ONLY)	VALUE WON	RECORDED ACQ. COST
Website	3	2	1	66.7 %	\$3,350.00	\$105.00
Referral	2	1	0	100.0 %	\$5,200.00	—
Social media	2	0	0	—	\$0.00	\$36.00
Advertising	1	0	1	0.0 %	\$0.00	\$120.00
Event	1	0	1	0.0 %	\$0.00	\$60.00
Cold outreach	1	0	0	—	\$0.00	—
Marketplace	1	0	0	—	\$0.00	\$75.00
All sources	11	3	3	50.0 %	\$8,550.00	\$396.00

Stale and overdue leads

LEAD	STAGE	OWNER	VALUE	DAYS IN PIPELINE	NEXT ACTION	WHY FLAGGED
Nordvik Consulting	Qualified	unassigned	\$3,300.00	25	none set	No next action after 14 days
Harbour View B&B	Qualified	S. Mensah	\$1,500.00	36	2026-08-07	Next action date has passed

Lead register

RECEIVED	LEAD	SOURCE	CAMPAIGN	STAGE	VALUE	ACQ. COST	OWNER	REASON LOST	CLOSED	NEXT ACTION	DAYS IN PIPELINE	STATE
2026-05-16	Brightwell Dental	Website	spring-checkup	Won	\$2,400.00	\$35.00	S. Mensah	—	2026-06-06	—	21	Won
2026-05-21	Kestrel Plumbing	Referral	—	Won	\$5,200.00	\$0.00	S. Mensah	—	2026-07-02	—	42	Won
2026-05-29	Marlowe & Co Accountants	Advertising	search-ads-q2	Lost	\$3,600.00	\$120.00	J. Barrow	Price	2026-06-15	—	17	Lost
2026-06-04	Fenwick Catering	Event	trade-fair	Lost	\$1,800.00	\$60.00	J. Barrow	No response	2026-07-09	—	35	Lost
2026-06-12	Oakhill Landscaping	Website	spring-checkup	Won	\$950.00	\$35.00	S. Mensah	—	2026-06-20	—	8	Won

RECEIVED	LEAD	SOURCE	CAMPAIGN	STAGE	VALUE	ACQ. COST	OWNER	REASON LOST	CLOSED	NEXT ACTION	DAYS IN PIPELINE	STATE
2026-06-26	Delano Fitness Studio	Social	insta-reel	Proposal	\$4,200.00	\$18.00	J. Barrow	—	—	2026-08-14	44	Active
2026-07-04	Harbour View B&B	Marketplace	—	Qualified	\$1,500.00	\$75.00	S. Mensah	—	—	2026-08-07	36	Stale — action overdue
2026-07-10	Ashworth Joinery	Cold outreach	q3-callround	Contacted	\$2,800.00	\$0.00	J. Barrow	—	—	2026-08-11	30	Active
2026-07-15	Nordvik Consulting	Social	insta-reel	Qualified	\$3,300.00	\$18.00	—	—	—	—	25	Stale — no next action
2026-07-19	Linden Vet Clinic	Website	spring-checkup	Lost	\$2,100.00	\$35.00	S. Mensah	Competitor	2026-08-03	—	15	Lost
2026-07-31	Petra's Flowers	Referral	—	New	\$600.00	\$0.00	S. Mensah	—	—	2026-08-12	9	Active

Notes

Sample funnel — replace every lead with your own before relying on it or circulating it.

This is a record of your own leads and arithmetic on top of it. Every rate is only as sound as the data behind it: the win rate and the source conversion figures are calculated on closed leads only, and with a handful of closed leads they swing wildly with a single result. Estimated values are your own guesses, acquisition costs only count where you recorded them, and the blended cost per lead divides one month's spend by an average month's leads — it is a rough planning figure, not accounting. Nothing here is revenue, and nothing here is a forecast.