Cue sheet template prs

Customer Relationship Management Software (CRM) helps sales teams keep track of leads, contacts, and opportunities. While dedicated CRM software includes extra functionality, you can easily set up a Google Sheets CRM to keep track of the most important information if you are just starting out. We'll show you how in just seven easy steps. Of course, if you want to do more than track records in Google Sheets, Salesforce Essentials is a CRM with an easy-to-use interface, intuitive mobile app and a 360 display of every deal and contact. This small business-optimized CRM is $25 per user, per month, and you can try it for free for 14 days. Visit the Salesforce Free CRM spreadsheet template Setting up the Google Sheets CRM template to keep track of leads, contacts, and sales opportunities doesn't have to be complicated or scary. In addition to going through the steps to set up your own below, we've included a free template that you can use to get started managing contacts and offers. We created this template in Google Sheets, but you can easily follow the same steps to create one with similar functionality in Excel. Download the free CRM spreadsheet template Free CRM spreadsheet template To set up your CRM in a spreadsheet, follow these seven steps: 1. Define your sales process Before you start creating a CRM using a spreadsheet, take the time to define your sales process, including what you want to track, and decide what information is important to include about your offers and contacts. It will save you time and effort later if you have already defined your process and planned out how your contacts will move through your sales pipeline. Some aspects of the process you should consider include: Decide how Contacts should be tracked Create a sheet to track contacts, which can be either leads or customers. Some CRM software provides the ability to keep track of each of these separately, which can be helpful in sorting out who is a customer, who is a partner, and who is still in the lead process. For our Google Sheets CRM template, it's easier to simply use a column to specify the type of contact than to copy and paste. Keep in mind how offers will go through your process offers are the sales opportunities that you are trying to close. I recommend that you create a separate sheet within your worksheet workbook to track the progress of offers. Consider how to move offers through your sales process, and how to identify the different stages. A Google Sheets spreadsheet is helpful in tracking a deal's progress, but there are also several simple CRM systems that can save time and deterioration of setting up a system yourself. Setting your Pipeline Process stages for both leads and offers, you should consider the stages of your sales process that you will track in your CRM. These are the different steps in your pipeline that to move a lead from the first discovery through a deal closure. For example, you may use the following stages for your leads and Incoming request: This

is the stage at which you first receive a request from a potential customer. Maybe they filled out a form on a website or sent you an email. You don't yet know if they're a good fit, but they've shown some interest. Qualified lead: Use this stage to represent leads that best match your target customer, and are most likely to be customers. You have additional information, either from direct contact or because the customer has moved through your marketing funnel. Consultation: This represents the point when you have a sales-focused demand assessment to determine the specific needs that your lead has, and whether you will be able to meet them with your product or service offering. Suggestion: This is the stage where you created and presented a sales proposition to your potential customer, based on the needs assessment you have completed. Contract: Use this stage to indicate when your contacts have accepted your proposal and you are negotiating and preparing a contract for your business. Won or lost: This is usually the last step in a sales process, indicating whether a lead has become a customer or not. Identify potential lead sources You should also use the spreadsheet to keep track of where your leads come from so you can make informed decisions about where to invest your future marketing efforts. If you specify whether a lead or sales opportunity came from a personal referral, online ad, or lead generation campaign, you can get help tracking and monitoring your marketing efforts and evaluating which efforts are most effective at generating new business. 2. Choose Your Spreadsheet Software An important factor to consider is which spreadsheet software to use. It may not seem like a big deal, but the worksheet you're choosing is really questions, especially if you need to share features or advanced formatting. Two of the most popular spreadsheet offerings are Google Spreadsheets and Microsoft Excel, but there are also Apple's Numbers for Mac users. You can check out our article on G Suite vs Office 365 for more information on how the two compare. For this how-to guide, we use Google Sheets to represent each of the steps because it can be used for free by someone with a Gmail address. If you use Excel, the steps are the same and you can simply adjust them to suit minor Excel differences in the nomenclature. In addition, if you are an Excel user, you can simply click on the template link above and download it as an Excel file. Download the Google Sheets or Microsoft Excel Google Sheets Google Sheets template is part of the G Suite collection of browser-based productivity software, and is available for free for personal use by anyone with a Gmail account. One of the strongest features of Sheets is real-time collaboration and sharing functionality, allowing multiple users to view and edit the same document at the same time. This is ideal for teams that want to create a central CRM through a shared spreadsheet that is available to all users on all their devices. Microsoft Excel Excel is by far the most widely used enterprise spreadsheet software for everything from accounting reports to human resources management (HR). It is available as a desktop application for Windows and Mac computers, as well as on mobile devices. It is also available as a browser-based app called Microsoft Excel Online. Using Excel to build your spreadsheet allows you to take advantage of some of the advanced features like data visualization tools and 2D map charts. Numbers Another option for Mac users to consider is Numbers from Apple. Numbers are available as desktop, iPad and iPhone application as well as browser-based software, and it includes real-time cloud-based sharing capabilities via iCloud. This allows users to keep their spreadsheets in sync across devices and shared users. Speech is easy to use and has many of the same advanced calculations as Excel, but it's only available for MacOS and iOS. 3. Create your worksheet The next task is to get your worksheet set up and ready to configure for use as a CRM. We'll walk you through the steps that get you ready to start adding contact information in a minute, but before we do that, there are some housekeeping items that make it easier to use your spreadsheet. Deciding where to access data One of the first choices you need to make is whether you will primarily work with your file on your desktop or if you want to be able to access it anywhere, such as a remote office space or your smartphone. The choice of which one is best depends largely on whether you will share your CRM with other team members or work on it alone. Excel is offered as a standalone desktop application as well as a mobile and browser-based app through an Office 365 subscription. Google Sheets, on the other hand, is only available through the cloud. If you'll share access with others, you'll find that the online version of Excel or Google Sheets is a better choice. Create Your Sheets Most spreadsheet programs allow you to create multiple workbook sheets (not to be confused with Google Sheets, the program) within a file. This is especially useful for creating a CRM in a spreadsheet because you can utilize different sheets for tracking contacts and offers. We recommend that you set up two sheets in your workbook to keep track of your contacts and offers separately. Use multiple sheets to keep data separate Sheet Number 1: Contacts Your contacts are the people you interact and communicate with. They can be new leads, existing customers, partners, or even referral sources. You'll use this sheet to keep track of their information and take notes about your interactions and conversations. Sheet Number 2: Deals Your deals sheet is used to keep track of sales opportunities, representing specific deals you are trying to close and that move through your sales process. industries, such as cloud-based software as a (SaaS), may not necessarily track deals, but rather move leads through a lead nurturing process to close sales when they sign up. Many industries, however, either sell products or services (or both) and need a way to track their sales process. Set Sharing Settings Depending on whether you're working with this CRM only or using it with a team, you want to set sharing settings. One of the advantages of Google Sheets and Microsoft Excel Online is that multiple team members can work with the same file in real time, making collaboration easy and intuitive. This ensures that all your contact information is up to date, giving your sales team members the most up-to-date information to work with. You can either give specific individuals file access, or, if you're a corporate G Suite customer, you can allow all individuals in your organization to interact with the file provided they share the same domain on their email and user profile. Set sharing settings Set security and user permissions because you will store personal and business information about your contacts, security is an important factor. Both G Suite and Office 365 use 128-bit automatic encryption to securely store customer data and HTTPS to transfer data to and from the server. Both are also HIPAA-compatible when using browser-based or mobile app versions. In addition, sharing features in both of you can restrict access to specific individuals. 4. Name Your Column Headings Now that you have set up your worksheet file, you must create headings for each column. You'll use columns for the different types of information you want to keep track of for each contact and store. The lines in your spreadsheet will hold individual records. One of the reasons to consider the headings you should use is that each represents a data point that you will be able to use later to sort, search, and find specific records. Contact sheet headers We recommend using the following headings for your contact sheet, but you can change it to add any additional types of information you need to track. This list will help ensure that you capture the information you need to connect with your leads and customers and move them through your sales process. The headers we've used in our template are as follows: Contact: Each store should be associated with a person, whether it's a lead or an existing customer. E-mail: This should be the email for the primary contact. Phone: This should be the main number, or the primary phone number of the contact. Company: Use this field for the company or account that the store is associated with. Title: It's often good to know where your contact fits in their overall organization, especially you need to know if they are likely to be a decision maker or not. Address: This is where you should keep track of the postal address of your contact. Contact. Type: Because you can use this sheet to keep track of several different types of individuals that you communicate with, you want to be sure to indicate whether they are a lead, customer, or other type of contact. Stage: Depending on how you acquire new leads, you can use this field to keep track of where a contact is in your lead management process. Source: Knowing where your new customers come from helps you make better sales and marketing decisions, so use this field to keep track of where each contact came from. Last Contact: You want to keep track of when you last communicated with a contact, so use this field to update the date each time you send email or talk to a contact. Note: Take notes here about conversations or other communications you have with the contact, as well as any action steps you need. This ensures that you always have up-to-date information the next time you, or someone else on your team, communicates with them. Owner: Use this field to specify who is responsible for this deal. Name your contact sheet headers Deal Sheet Headers Similar to contact headers above, we recommend using the following headers for your deal sheet. As before, feel free to add additional headers based on the information you need to move offers through your sales process, but these should make sure you capture and track the most important information. We've used these in the template listed above: Deal Name: This is what you'll call the deal (for example, website for Bob's Cleaning Service). Use names that you will quickly be able to find and associate with specific sales opportunities. Deal Description: In addition to the name, it may be helpful to include a brief description of the deal so that you and your team will be able to reference the scope of the sale. Deal Value: This represents the estimated, or proposed, value of the deal. Depending on the types of products or services you sell, this may be the one-time cost, or it may represent the value of a contract that spreads over time. Deal Category: If you sell multiple types of products or services, you can use this to easily identify the type of sales opportunity. In the example I mentioned, the category might be site design. Deal-stage: Using the stages you defined earlier, you can use this field to easily specify and identify where each sales opportunity is in the sales process. Contact: Each store should be associated with a person, whether a lead or an existing customer. E-mail: This should be the email for the primary contact. Phone: This should be the phone number of the primary contact. Company: Use this field for the company or account that the store is associated with. Source: Knowing where your new customers come from helps you make better sales and marketing decisions, so this field to keep track of where each deal came from. Probability of closing: If you want to give yourself an idea of which trades are most likely to close, use this field to track the track probability that each sales opportunity will be closed. This allows you to calculate the current value for each trade. Last Contact: When you interact with a contact for a deal, update this field so that you can later see what offers need your attention based on how long it's been since you've been in contact. Notes: When talking to a contact about a deal, make notes here about the conversation, progress, and any actions needed. This ensures that you always have up-to-date information the next time you, or someone else on your team, communicates with them. Owner: Use this field to specify who is responsible for this deal. Name your deal sheet headers 5. Import Your existing data No matter what you've used to keep track of your contacts until now, you want to transfer all contact information to your new spreadsheet so you can start using it to close more trades and convert more leads to customers. There are several ways to do this depending on where your contact information is currently stored. Here are some of the most common ways to import your information: Manually enter data Depending on how many contacts you have, one of the easiest ways to fill out your new CRM spreadsheet is to enter your contact information in the worksheet manually. You will simply enter a contact record, or store, for each line on the worksheet. If you only have a few contacts so far, this is a manageable way to get your information into CRM with a minimal amount of work. Import from e-mail Most likely, you have so far kept track of all your contact communications using your email. This works well when you only have a small number of contacts or offers, but can be overwhelming as that number grows, which is probably why you are looking for a better solution. Many CRMs offer direct integrations in Outlook or Gmail, but for this guide we want to talk about how to get that information out of your inbox and in your brand new spreadsheet. If you're using Gmail, you can simply export your contacts to a CSV file, open that file in Excel or Google Sheets, and then copy the records to your new spreadsheet. For many users, this may be the easiest option, but if you have a large number of contacts, the good news is that there are ways to make the process more automated. For example, Mailparser allows you to export emails and it will translate them into your spreadsheet. It's a paid service, but they have a 14-day free trial, during which time you can export a batch of files and send them to your new spreadsheet. Import from other software If you've previously used some type of contact management tool such as an address book or outlook contact list, you can typically export your contacts as a CSV file that can be opened in Excel or in Google Sheets. This also applies if you use tools such as or Constant Contact and want to move your contacts to a CRM spreadsheet. Pro tip: If you are currently using one of the tools, it is sometimes easier to do this step first and export your contacts to a CSV. Then open that file in Google Sheets or Excel and change the resulting spreadsheet to match the format described above. This way, you already have the contact information in CRM, and you can then add and move columns as needed. 6. Creating Automations & Integrations One of the powerful advantages of spreadsheet software is that you can use it not only to store information, but also to interact with your data. This transforms your CRM from a list of names into a tool that you can use to keep track of your sales process and win more new business. Here are some of the ways you can set up your CRM spreadsheet to work for you: Add conditional formatting Conditional formatting allows you to create rules based on the data in a cell. For example, you can set a rule that makes the cell background red if the date in the Last Contact column is more than four weeks ago, which warns you that you need to reach that lead. In fact, we have set up the example template to do just that. Add conditional formatting to your sheets But if you want to know how to do it on your own, follow these simple steps: 1. Select the cell, row, or column you want to format. For your CRM, you will most likely want to select a column, because all the information in each column is a specific type of information. 2. Right-click your selection, or click the Format menu and select Conditional Formatting. 3. You will then receive a list of the rules applied to your selection, as well as the option to Add new rule. 4. Next, in the field called apply to range you should see your choice. If not, simply add the range of cells to which you want to add formatting. I Format Cells if ... field, select the condition that must be met for formatting to apply. This can be related to a date or other value. You can even add a condition to a field that is blank or if it contains a specific type of text. 6. Finally, select the formatting to apply if the condition you applied is met. You might change the color, font, or style of a cell. Use Data Validation Lists Another helpful type of automation is to add data validation, which means that only certain types of data can be added to a cell or range. In the sample template, we've used this feature in the Contact Type and Stage columns to limit the information to specific lists. The setup process is similar to adding conditional formatting and helps keep your CRM data clean and organized, so you can more easily sort and act on your contact information. Data validation in Google sheets To add data validation to Google sheets, simply follow these steps: 1. Select the cell, row, or column to which you want to add data validation. you will most likely want to select a column, because all the information in each column is a specific type of information. 2. Right-click your selection or click menu, and select Data Validation. 3. The selection you have selected should be entered in the Cell Range field. If not, you can add it manually. 4. Select the type of validation you want to use. We have selected a list of items. 5. Enter the list you want to use for your drop-down menu, with each term separated by a comma. 6. To ensure that only your list of terms can be used, select the Reject Input option in the On Invalid Data field. Save your changes. Integrate with other tools Once you have your CRM set up, you can use third-party automation tools to help you keep your CRM data up to date when generating new leads. For example, if you use a lead generation tool like Mailchimp, Zapier sends new subscribers filling out your subscription form on your site directly to your spreadsheet as new lines. Zapier actually does this easily, allowing you to map fields directly from the form to the appropriate fields in your CRM spreadsheet. Mailchimp to Google Sheets integration with Zapier 7. Generate reports Using a spreadsheet for a CRM, you can keep your information organized and allow you to create basic reporting using the features already mentioned as well as other functionality within Google Sheets and Excel. Let's talk about some of the ways you can use your data to make the sales process easier by giving you reporting and insights about your contacts. Sort by columns Your CRM data can be sorted by column, which allows you to keep data organized by all properties or type of contact information. For example, you can keep your business and contacts in alphabetical order, in order of contract value, or in the order of recent contacts. To sort the data, move the cursor over the top row and click the selection arrow that appears. Scroll down the menu and choose whether to sort the column in ascending or descending order. Using filter views in Google Sheets Create Filter Filtering is an extremely powerful tool that allows you to create individual views based on specific conditions or values. For example, you could create a view that shows you the leads you haven't communicated with in the last month, or a view that shows you all offers over $500 that have a probability of closing at least 80%. By using filtered views, you can generate reports that give you insight into your contacts that you can act on. Set filters by selecting > with Filter Views > Create a New Filter View. You can then select the columns you want to filter and how you want to view your data. Filtering will remove from display all records that do not match the criteria you have specified. FAQs (FREQUENTLY ASKED QUESTIONS) Which spreadsheet tool should I use? The specific worksheet that's best for your business depends on several factors. If real-time sharing and collaboration are most important, Google Sheets is the best choice. About PC compatibility and advanced matters most, Microsoft Excel is the best When should I move to a CRM? The decision to take the plunge and sign up for a full-fledged CRM depends on a lot of factors. However, generally speaking, if you manage more than 50 contacts or more than five offers at a time, it probably makes sense to start looking at a CRM-specific software. If you're on a tight budget, several CRMs offer eternally free plans. What is the difference between a spreadsheet & database software? A worksheet is a collection of records that are organized into rows and columns of cells that can be sorted and filtered. In addition, spreadsheets allow calculations and other formatting to be applied to either a single cell or a range of cells. Database software also maintains a collection of information, but the primary difference is that they are relational —means that you can connect different types of data to establish a relationship between them. For example, you can have a contact in your database and connect that record to a sales opportunity or account. The database keeps track of the relationship and keeps the data connected behind the scenes. Spreadsheets allow some ability to connect cells and sheets, but are limited in their ability to establish relationships between different types of records. Bottom Line: Google Sheets as a CRM For companies that want to take control of their contacts and close more businesses, creating a CRM in a spreadsheet can help streamline their sales communication efforts. While spreadsheet software like Google Sheets lacks the advanced features found in dedicated CRM software for small businesses, it can be a low cost, no frills way to move away from your inbox and toward a more productive sales process. For businesses ready to take the plunge to dedicated CRM software, we recommend Salesforce Essentials, as it offers contact and deal management, email tracking, and customer support features for just $25 per user, per month. Visit their website today to start your 14-day trial. Visit Salesforce Salesforce