

Company Performance

Lead Source Analysis

Rep Performance

Customer Timeline

Advertising Analysis

Time Period Overview



Apr 17, 2025 - May 16, 2025

Lead Captured

448

Converted to CRM

243

Lead to CRM %

54.24%

Converted to Job

218

CRM to Job %

89.71%

Appointment Booked

186

Job → Appointment %

85.32%

Estimate Provided

93

Job → Estimate %

42.66%

Presentation Delivered

67

Job → Presentation %

30.73%

Follow Up Completed

60

Job → Follow-Up %

27.52%

Estimate Value

\$1,532,274.89

WON Value

\$521,402.40

Job Won

37

Job → Won %

16.97%

Job to Appointment %

85.32%

Appointment to Estimate %

50.00%

Estimate to Presentation %

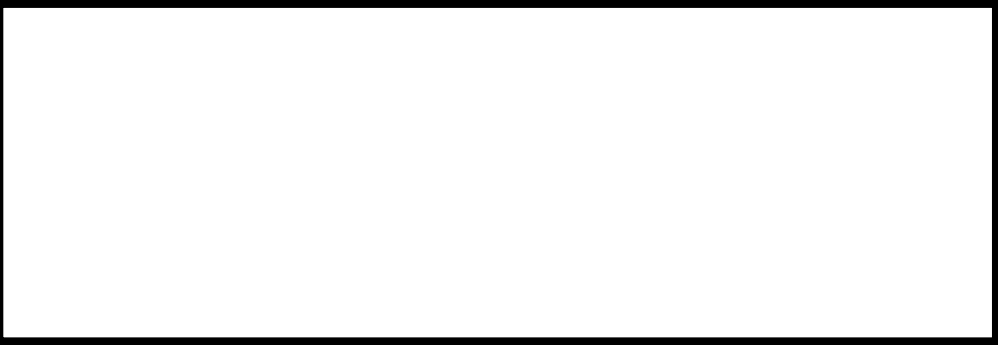
72.04%

Presentation to Follow-Up %

89.55%

Follow-Up to Won %

61.67%



Apr 17, 2025 - May 16, 2025



Lead Source



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Analysis by Source

	Lead Source	WON Value	Total Leads Captur...	Converted To CRM Prospect	Lead → CRM %	Job Won	Lead → Job Won %
1.	Networking	\$202,847.94	1	1	100%	1	100%
2.	Not Captured	\$121,351.49	42	41	98%	14	33%
3.	Google Cpc	\$43,716.01	138	23	17%	2	1%
4.	Google Organic	\$27,017.75	42	15	36%	1	2%
5.	Repeat Customer	\$26,723.21	2	2	100%	2	100%
6.	Customer Referral	\$25,817.28	4	4	100%	4	100%
7.	google / listing	\$25,000	0	1		1	
8.	Google Local Services- Google Guaranteed	\$15,589.07	18	18	100%	4	22%
9.	Self gen	\$15,124.06	1	1	100%	1	100%
1...	self gen	\$8,390.73	1	1	100%	1	100%
1...	Google Listing	\$4,572.72	30	14	47%	1	3%
1...	google / organic	\$2,346.58	34	34	100%	2	6%
1...	Self Gen	\$2,055.56	4	4	100%	1	25%
1...	Michelle Kim with Century 21	\$850	1	1	100%	1	100%
1...	(direct) (none)	\$0	20	3	15%	1	5%
1...	Referral - Coworker At Tampa General, Au...		1	1	100%	0	0%
1...			1	1	100%	0	0%
1...	Customer Referral - Gregory Jeffries		1	1	100%	0	0%
1...	Previous Company Client Referral		1	1	100%	0	0%
2...	Diego Stucco		1	1	100%	0	0%
2...	Canvassing		5	5	100%	0	0%
2...	Helpme.com Referral		1	0	0%	0	0%
2...	Melinda Cutler With Keller Wiiliams		1	1	100%	0	0%
-	Grand total	\$521,402.4	448	243	54%	37	8%





Apr 17, 2025 - May 16, 2025



Company Rep Name



Company Performance

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Company Rep Performance

	Company Rep Name	WON Value	Assigned Job	Appointment	Estimate	Presentation	Follow Up	Job Won	Job → Won %
1.	<div></div>	\$74,413.52	47	42	20	15	15	9	19.15%
2.		\$63,486.56	43	38	28	19	17	5	11.63%
3.		\$15,124.06	34	31	10	4	3	2	5.88%
4.		\$15,585.56	26	24	11	8	5	5	19.23%
5.		\$72,776.82	28	27	10	8	7	7	25%
6.		\$6,050	9	9	2	2	2	2	22.22%
7.		\$227,847.94	10	7	7	6	6	3	30%
8.			7	0	0	0	0	0	0%
9.		\$29,442.41	1	1	1	1	1	1	100%





Apr 17, 2025 - May 16, 2025



Company Rep Name



All DATA

Company Performance

Lead Source Analysis

Rep Performance

Customer Timeline

Advertising Analysis

Time Period Overview

Customer Name	CRM Job Number	Rep Name	Job Lead In CRM D...	Lead Captured Date	CRM Customer Date	Presentation Date	Follow Up Date	Appointment Book...
	2504-6283259-05		Apr 30, 2025	May 1, 2025	May 1, 2025	Apr 30, 2025	Apr 30, 2025	
	2505-6397570-04		May 12, 2025	May 13, 2025	May 13, 2025	May 12, 2025	May 12, 2025	May 12, 2025
	2504-6847181-01		May 1, 2025	May 1, 2025	May 1, 2025	May 1, 2025	May 5, 2025	May 1, 2025
	2501-6492624-01		May 7, 2025	May 7, 2025	May 7, 2025	May 7, 2025	May 7, 2025	May 7, 2025
	2505-6993658-01		May 13, 2025	Apr 24, 2025	May 13, 2025	May 16, 2025	May 16, 2025	May 13, 2025
	2411-6315543-02		May 16, 2025	May 16, 2025	May 16, 2025	May 16, 2025	May 16, 2025	May 16, 2025
	2505-6719549-03		May 6, 2025	May 6, 2025	May 6, 2025	May 6, 2025	May 6, 2025	May 6, 2025
	2504-6842216-01		Apr 18, 2025	Apr 18, 2025	Apr 18, 2025	Apr 18, 2025	Apr 18, 2025	Apr 18, 2025
	2504-6859425-01		Apr 24, 2025	Apr 24, 2025	Apr 24, 2025	May 12, 2025	May 12, 2025	Apr 24, 2025
	2504-6803996-01		Apr 21, 2025	Apr 15, 2025	Apr 15, 2025	Apr 21, 2025	Apr 21, 2025	Apr 21, 2025
	2503-3054131-03		May 8, 2025	May 8, 2025	May 8, 2025	May 8, 2025	May 8, 2025	May 8, 2025
	2205-3054131-02		May 8, 2025	May 8, 2025	May 8, 2025	May 8, 2025	May 8, 2025	May 8, 2025
	2504-6838002-0...		Apr 17, 2025	Apr 29, 2025	Apr 29, 2025	Apr 29, 2025	Apr 29, 2025	Apr 29, 2025
	2504-6838002-01		Apr 17, 2025	Apr 17, 2025	Apr 17, 2025	Apr 29, 2025	Apr 29, 2025	Apr 17, 2025
	2504-6873780-01		Apr 29, 2025	Apr 29, 2025	Apr 29, 2025	Apr 30, 2025	Apr 30, 2025	Apr 30, 2025
	2504-4140284-02		May 1, 2025	May 1, 2025	May 1, 2025	May 1, 2025	May 1, 2025	May 1, 2025
	2505-6719549-06		May 6, 2025	May 6, 2025	May 6, 2025	May 6, 2025	May 6, 2025	
	2504-4273901-02		Apr 24, 2025	Apr 24, 2025	Apr 24, 2025	May 12, 2025	May 12, 2025	May 12, 2025
	2505-6719549-04		May 6, 2025	May 6, 2025	May 6, 2025	May 6, 2025	May 6, 2025	May 6, 2025
	2504-6850346-01		Apr 22, 2025	Apr 22, 2025	Apr 22, 2025	May 10, 2025	May 10, 2025	Apr 22, 2025
	2504-6851958-01		Apr 22, 2025	Apr 22, 2025	Apr 22, 2025	Apr 24, 2025	May 9, 2025	Apr 22, 2025
	2504-6838002-02		Apr 29, 2025	May 1, 2025	May 1, 2025	Apr 29, 2025	Apr 29, 2025	Apr 29, 2025
	2504-6840723-01		Apr 18, 2025	Apr 18, 2025	Apr 18, 2025	May 7, 2025	May 7, 2025	Apr 18, 2025
	2505-6897441-01		May 5, 2025	May 5, 2025	May 5, 2025	May 5, 2025	May 5, 2025	May 5, 2025

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Apr 17, 2025 - May 16, 2025    Lead Source: Google Cpc    (1)

Lead Captured  
138

Converted to CRM  
23

Lead to CRM %  
16.67%

Converted to Job  
17

CRM to Job %  
73.91%

Appointment Booked  
16

Job → Appointment %  
94.12%

Estimate Provided  
7

Job → Estimate %  
41.18%

Presentation Delivered  
3

Job → Presentation %  
17.65%

Follow Up Completed  
3

Job → Follow-Up %  
17.65%

Estimate Value  
\$86,071.61

WON Value  
\$43,716.01

Job Won  
2

Job → Won %  
11.76%

Job to Appointment %  
94.12%

Appointment to Estimate %  
43.75%

Estimate to Presentation %  
42.86%

Presentation to Follow-Up %  
100.00%

Follow-Up to Won %  
66.67%



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CRM Customer  
243

	Customer Name	CRM Customer ID	Customer Phone	CRM Customer Date
1.		6839733		Apr 17, 2025
2.		6840031		Apr 17, 2025
3.		6838725		Apr 17, 2025
4.		6838002		Apr 17, 2025
5.		6838581		Apr 17, 2025
6.		6839979		Apr 17, 2025
7.		6839521		Apr 17, 2025
8.		6843123		Apr 18, 2025
9.		6842561		Apr 18, 2025
10.		6842903		Apr 18, 2025

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Job Added Into CRM  
205

Job Added (Unique -01)  
170

	Customer Name	CRM Job Number	Customer Phone	Job Lead In CRM Date
1.		2504-6839979-01		Apr 17, 2025
2.		2504-6839521-01		Apr 17, 2025
3.		2504-6838002-01)		Apr 17, 2025
4.		2504-6838834-01		Apr 17, 2025
5.		2504-6840031-01		Apr 17, 2025
6.		2504-6839733-01		Apr 17, 2025
7.		2504-6838581-01		Apr 17, 2025
8.		2504-6838725-01		Apr 17, 2025
9.		2504-6838002-01		Apr 17, 2025
10.		2504-6842561-01		Apr 18, 2025

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Appointment Booked  
199

Appointment Booked (Unique -01)  
168

	Customer Name	CRM Job Number	Customer Phone	Appointment Booked Date
1.		2504-6840031-01		Apr 17, 2025
2.		2504-6838834-01		Apr 17, 2025
3.		2504-6839521-01		Apr 17, 2025
4.		2504-6835581-01		Apr 17, 2025
5.		2504-6775589-01		Apr 17, 2025
6.		2504-6836475-01		Apr 17, 2025
7.		2504-6838581-01		Apr 17, 2025
8.		2504-6838725-01		Apr 17, 2025
9.		2504-6801431-01		Apr 17, 2025
10.		2504-6798608-01		Apr 17, 2025

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Estimate Provided  
118

Estimate Value  
\$2,079,750.37

Estimate Provided (Unique -01)  
93

	Customer Name	CRM Job Number	Customer Phone	Estimate Provided Date
1.		2504-6801431-01		Apr 17, 2025
2.		2504-6775589-01		Apr 17, 2025
3.		2504-6798608-01		Apr 17, 2025
4.		2504-6838581-01		Apr 17, 2025
5.		2504-6843123-01		Apr 18, 2025
6.		2504-6842894-01		Apr 18, 2025
7.		2504-6842216-01		Apr 18, 2025
8.		2504-6842503-01		Apr 18, 2025
9.		2504-6841935-01		Apr 21, 2025
10.		2504-6774789-01		Apr 21, 2025

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Presentation Delivered  
94

Presentation Delivered (Unique -01)  
71

	Customer Name	CRM Job Number	Customer Phone	Presentation Date
1.		2504-6759033-01		Apr 17, 2025
2.		2503-6705128-01		Apr 17, 2025
3.		2503-6705031-01		Apr 17, 2025
4.		2504-6763523-01		Apr 17, 2025
5.		2504-6842216-01		Apr 18, 2025
6.		2504-6843123-01		Apr 18, 2025
7.		2504-6769913-01		Apr 21, 2025
8.		2504-6751875-01		Apr 21, 2025
9.		2504-6803996-01		Apr 21, 2025
10.		2504-6772491-01		Apr 21, 2025

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Follow Up Completed  
85

Follow Up Completed (Unique -01)  
63

	Customer Name	CRM Job Number	Customer Phone	Follow Up Date
1.		2504-6763523-01		Apr 17, 2025
2.		2503-6705128-01		Apr 17, 2025
3.		2504-6759033-01		Apr 17, 2025
4.		2503-6705031-01		Apr 17, 2025
5.		2504-6843123-01		Apr 18, 2025
6.		2504-6842216-01		Apr 18, 2025
7.		2504-6772491-01		Apr 21, 2025
8.		2504-6751875-01		Apr 21, 2025
9.		2504-6803996-01		Apr 21, 2025
10.		2504-6769913-01		Apr 21, 2025

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WON Value  
\$599,188.45

Job Won  
48

Job Won (Unique -01)  
30

	Customer Name	CRM Job Number	Customer Phone	WON Date
1.		2504-6842216-01		Apr 18, 2025
2.		2504-6803996-01		Apr 21, 2025
3.		2503-6689959-01		Apr 21, 2025
4.		2503-6723891-01		Apr 22, 2025
5.		2504-6750521-01		Apr 24, 2025
6.		2503-6723932-01		Apr 24, 2025
7.		2504-6775252-01		Apr 25, 2025
8.		2504-6798671-01		Apr 27, 2025
9.		2504-6816492-01		Apr 28, 2025
10.		2504-6788942-01		Apr 29, 2025
11.		2504-6838002-01)		Apr 29, 2025
12.		2504-6838002-02		Apr 29, 2025
13.		2504-6838002-01		Apr 29, 2025
14.		2504-6873780-01		Apr 30, 2025
15.		2503-6719005-01		Apr 30, 2025
16.		2504-6283259-05		Apr 30, 2025
17.		2504-6799190-01		Apr 30, 2025

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