Real Estate Lead Tracker

SAMPLE PROJECT · Fictional business and people. All names, phone numbers, emails, and prices are made up.

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Report date	Mar 16, 2027
What it does	Keeps every buyer, seller, and renter lead in one place, shows where each one is in the process, and flags who needs a follow-up today so no lead goes cold.
Sheet: Leads	One row per lead. Fill in the blue cells. Grey cells (next follow-up, days since contact, follow-up due) calculate automatically.
Sheet: Dashboard	Live summary: leads by stage, which lead sources bring the most clients, active pipeline value, hot leads, and today's follow-ups.
Follow-up rules	Each stage has its own follow-up timing (see the yellow table below the settings). New leads get contacted fastest; past clients less often.
Colors	Blue text = you type it. Grey = formulas. Yellow = settings. Amber = follow-up due. Green = closed. Red = lost.
Example row	Row 2 on the Leads sheet (Maria Lopez) shows the expected format for every column.
Report date	Set to a fixed sample date (March 16, 2027) for this demo. In real use, change cell B5 to =TODAY().

Stage	Follow up every (days)
New	1
Contacted	3
Showing scheduled	2
Offer made	1
Under contract	3
Closed	30
Lost	0

Lead Pipeline Dashboard

As of March 16, 2027 · Sample project, fictional leads

Overview

Total leads	**12**
Active leads (not closed or lost)	**10**
Hot leads (active, 0–3 months)	**5**
Follow-ups due now	**4**
Sales pipeline value (buyers + sellers)	**$8,500,000**
Closed this period	**1**

Pipeline value excludes renters (monthly rent) and closed or lost leads.

Leads by stage

Stage	Leads
New	2
Contacted	4
Showing scheduled	2
Offer made	1
Under contract	1
Closed	1
Lost	1

Follow up with today

Lead	Stage
Robert Chen	Contacted
Angela Brooks	New
Samuel Okafor	Contacted
Priya Desai	Contacted

Lead sources

Source	Leads	Closed
Zillow	3	0
Website	2	0
Referral	3	0
Open house	2	0
Facebook	1	0
Sign call	1	1

ID	Lead name	Lead type	Source	Email	Area	Price / budget ($)	Timeline	Stage	Last contact	Next follow-up	Days since contact	Follow-up due?	Notes
L-201	Maria Lopez	Buyer	Zillow	maria.lopez@example.com	Astoria	$650,000	0–3 months	Showing scheduled	Mar 15, 2027	Mar 17, 2027	1	No	Wants 2BR condo near the N/W train
L-202	David & Rachel Kim	Buyer	Referral	kim.family@example.com	Bayside	$1,150,000	0–3 months	Offer made	Mar 16, 2027	Mar 17, 2027	0	No	Offer submitted on 41st Ave house
L-203	Robert Chen	Seller	Website	rchen.home@example.com	Flushing	$980,000	3–6 months	Contacted	Mar 9, 2027	Mar 12, 2027	7	Yes	Needs market analysis for 2-family
L-204	Angela Brooks	Renter	Facebook	angela.b@example.com	Forest Hills	$3,200	0–3 months	New	Mar 15, 2027	Mar 16, 2027	1	Yes	Monthly budget; moving April 1
L-205	Samuel Okafor	Investor	Open house	s.okafor@example.com	Jamaica	$820,000	6+ months	Contacted	Mar 2, 2027	Mar 5, 2027	14	Yes	Looking for multi-family with rental income
L-206	Linda Russo	Seller	Referral	linda.russo@example.com	Whitestone	$1,350,000	0–3 months	Under contract	Mar 14, 2027	Mar 17, 2027	2	No	Closing scheduled April 20
L-207	Kevin Patel	Buyer	Zillow	kpatel@example.com	Jackson Heights	$540,000	3–6 months	Contacted	Mar 14, 2027	Mar 17, 2027	2	No	Pre-approval pending
L-208	Grace Thompson	Buyer	Sign call	gthompson@example.com	Bayside	$890,000	0–3 months	Closed	Feb 26, 2027	Mar 28, 2027	18	No	Closed Feb 26; ask for review
L-209	Omar Haddad	Seller	Website	o.haddad@example.com	Astoria	$1,050,000	6+ months	New	Mar 16, 2027	Mar 17, 2027	0	No	Inherited home; not sure when to sell
L-210	Julia Santos	Renter	Zillow	julia.santos@example.com	Sunnyside	$2,600	0–3 months	Lost	Mar 1, 2027		15	No	Signed with another agent
L-211	Michael Ferrara	Buyer	Open house	mferrara@example.com	Whitestone	$1,200,000	0–3 months	Showing scheduled	Mar 16, 2027	Mar 18, 2027	0	No	Second showing Saturday
L-212	Priya Desai	Investor	Referral	pdesai.invest@example.com	Richmond Hill	$760,000	3–6 months	Contacted	Mar 5, 2027	Mar 8, 2027	11	Yes	Wants cash-flow numbers