



Client Tracking Worksheet Instructions

Hi! I'm Dana Corey from Dana Corey Coaching. You've made such a great decision for your business by committing to track your results!

I'm going to walk you through how to use the Client Tracking Worksheet.

Before we begin, it's important to note that this workbook requires that you enable macros, which you will be prompted to do.

Now, let's get started.

The top section of this worksheet is for you to enter information about your clients from last year who are still under contract. If you do not have any clients who are still under contract from 2016, hang tight. We'll cover how to enter new clients in a moment.

In column B, enter the general type of connection from which each client originated. For example, if your connection stemmed from a networking event, you would enter 'networking event', or something similar. Perhaps you connected at a Speaking Engagement, Online, or they were referred to you.

In column C, enter the specific connection from which you secured the client. In the case of a networking event, you would enter the name of that specific event. If it was a Speaking Engagement, you would enter the name of the event. If it was a referral, enter the name of the person who referred them.

In column D, enter the client's name.

In column E, enter the remaining [dollar] amount due on the contract.

In column F, enter the final month of the contract.

In columns G through R, enter the amount you have received each month from the client in 2017. If the amount for that month is zero, leave the cell blank.

Column S sums together the amounts entered in columns G through R and should match the amount in column E, once the contract is completed.

Column T is for you to record the date that the contract ended. Otherwise, select PIF for paid in full, or in the event that the contract was broken, choose "bailed". Note that if you enter a date, you will receive a warning. Please click 'OK'.

Repeat this process for each client who remains under contract from 2016.

If you need to insert additional rows, first, save your worksheet. Then, click inside column B in the cell above the location where you want to insert a new row. Click the 'insert row' plus sign button near the

top of column A. For example, click inside B12 to insert a new row immediately below it in row 13. This will shift all rows beneath the selected row down by one.

Now, let's move onto the next section, which is for clients you've acquired in 2017.

You will note that there are four sub-sections.

Each sub-section is designated for a specific program you offer your clients. If you offer more than four programs, you will want to insert additional sections.

To insert a section, first save your worksheet. Then, click in the pink cell located at the bottom of column B (if you have not yet inserted any rows, this will be cell B58). Then, click the 'insert section' plus sign button near the top of column A. Repeat this process if additional sections are needed. Please make sure that you always click inside the pink cell at the bottom of column B before inserting an additional section.

Now, in the first sub-section, replace the placeholder text with the name of your first program in the grey cell found in column D. If you did not already insert any rows, this will be cell D14.

In the next row, in column B, please enter the general type of connection from which your client originated, as you did when you were entering your holdover clients from 2016 above. Then in column C, enter the specific connection or event, and in column D, the client's name.

In column E, enter the total amount sold to the client, and in column F, choose the last month of the contract from the drop-down list.

In columns G through R, enter the amount you collect each month, once you have collected it. If the contract ends by Dec 31, 2017, column S should match the amount in column E at the end of the year. If the contract carries over into 2018, the difference will be entered in the top section of the 2018 spreadsheet.

Finally, enter the date the contract ends, or choose either paid in full or bailed, if the client broke the contract. Note that if you enter a date, you will receive a warning. Please click 'OK'.

Repeat this process for each client you have acquired in 2017 for this particular program. If you need to insert additional rows, first, save your worksheet. Then, click inside column B in the cell above the location where you want to insert a new row. Then, click the 'insert row' plus sign button in column A. This will shift all rows beneath it down by one.

Now, repeat this process for each of your programs.

That's it!

In the event that you run into any trouble using this spreadsheet, please let me know so that I can help you troubleshoot. Also, please note that some cells have a clarifying comment denoted by a red triangle in their upper right corners. To read the comment, just hover over that cell.

Finally, please be aware that once you insert a new row or section, you cannot undo it unless you close down the program without first saving it. If you do not follow the directions for inserting rows or sections, I'm afraid that your spreadsheet will look a bit weird. If that happens, you will have to close the

program down without saving it. In the event that this happens and you have done a bit of work since your last save, you may want to take a screenshot before closing the workbook down for ease of reentering the data once it's reopened.

Thank you!