

The only thing that you need to do is to download your Pipeline, from your CRM and get the following fields:

Opportunity created date
Opportunity Closed Date (Forecasted and Historical)
Stage
Opportunity Name
Amount

Then you will need to copy/paste this data after row 140 in the Source Data section of the template.

How to use videos:

<https://www.loom.com/share/a0641f98829b4366adcc5b387eb42087>

<https://www.loom.com/share/0fe897131df54f33a67162e8d67c9276?t=68>

Date 12/31/2020

of Opportunities (Count)

Table with 13 columns (0-12) showing monthly counts for 'Closed' and 'Open' opportunities from 12/1/2019 to 12/1/2020.

Summary table for # of Opportunities (Count) showing Total Closed Won, Closed Wony/Closed, and Live Pipeline values.

of Opportunities (%)

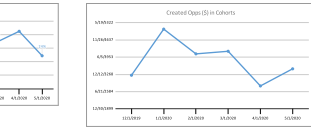
Table with 13 columns (0-12) showing monthly percentages for 'Closed' and 'Open' opportunities from 12/1/2019 to 12/1/2020.

Summary table for # of Opportunities (%) showing Total Closed Won, Closed Wony/Closed, and Live Pipeline values.

Amount of Opportunities (\$)

Table with 13 columns (0-12) showing monthly dollar amounts for 'Closed' and 'Open' opportunities from 12/1/2019 to 12/1/2020.

Summary table for Amount of Opportunities (\$) showing Total Closed Won, Closed Wony/Closed, and Average \$ Amount of Opportunity per Cohort.



Amount of Opportunities (K) All Opportunities

Summary table for Amount of Opportunities (K) All Opportunities showing Total Closed Won, Closed Wony/Closed, and Average \$ Amount of Opportunity per Cohort.

of Opportunities (Count) w/o Elephants

Summary table for # of Opportunities (Count) w/o Elephants showing Total Closed Won, Closed Wony/Closed, and Average \$ Amount of Opportunity per Cohort.

Amount of Opportunities (\$) All Opportunities w/o Elephants

Summary table for Amount of Opportunities (\$) All Opportunities w/o Elephants showing Total Closed Won, Closed Wony/Closed, and Average \$ Amount of Opportunity per Cohort.

Source Data

Main table listing individual opportunity records with columns for Opportunity Name, Amount, Cohort, Closed, and Lead Date.

5/30/2020	7/27/2020	Closed West	3133	5/3/2020	7/5/2020
5/30/2020	5/30/2020	Closed West	838.84	5/1/2020	5/1/2020
5/30/2020	5/18/2020	Closed West	1465	5/1/2020	5/1/2020
5/30/2020	6/8/2020	Closed West	501.54	5/1/2020	6/1/2020
5/30/2020	5/14/2021	Discovery	838.84	5/1/2020	5/1/2021
5/30/2020	10/15/2020	Closed West	109.5	5/1/2020	10/1/2020
5/31/2020	6/1/2020	Closed West	1300	5/1/2020	6/1/2020
6/1/2020	5/13/2020	Closed West	59.8	6/1/2020	5/1/2020
6/1/2020	6/29/2020	Closed East	1500	6/1/2020	6/1/2020
6/2/2020	6/1/2020	Closed West	1870.63	6/1/2020	6/1/2020
6/2/2020	6/8/2020	Closed West	3409.85	6/1/2020	6/1/2020
6/2/2020	7/5/2020	Closed West	2187.74	6/1/2020	7/1/2020
6/2/2020	6/7/2020	Closed West	206.39	6/1/2020	6/1/2020
6/2/2020	6/11/2020	Closed West	179.4	6/1/2020	6/1/2020
6/2/2020	6/2/2020	Closed West	3442.5	6/1/2020	6/1/2020
6/2/2020	6/9/2020	Closed West	12209.94	6/1/2020	6/1/2020
6/2/2020	6/9/2020	Closed West	0	6/1/2020	6/1/2020
6/2/2020	6/9/2020	Closed West	112.2	6/1/2020	6/1/2020
6/2/2020	6/9/2020	Closed West	1800	6/1/2020	6/1/2020
6/2/2020	5/28/2021	New	1200	6/1/2020	3/1/2021
6/2/2020	6/29/2020	New	255	6/1/2020	6/1/2020
6/2/2020	8/18/2020	Closed West	2960	6/1/2020	8/1/2020
6/2/2020	10/1/2020	Closed West	27.81	6/1/2020	10/1/2020
6/2/2020	10/29/2020	Closed East	1300	6/1/2020	10/1/2020
6/2/2020	6/1/2020	Closed West	312.89	6/1/2020	6/1/2020
6/2/2020	6/1/2020	Closed West	825.45	6/1/2020	6/1/2020
6/2/2020	6/9/2020	Closed West	82.28	6/1/2020	6/1/2020
6/2/2020	1/4/2021	Closed East	18000	6/1/2020	1/1/2021
6/2/2020	6/1/2020	Closed West	1878.85	6/1/2020	6/1/2020
6/2/2020	8/13/2020	Closed East	13200	6/1/2020	8/1/2020
6/2/2020	9/16/2020	Closed East	1205.4	6/1/2020	9/1/2020
6/2/2020	6/9/2020	Closed West	45	6/1/2020	6/1/2020
6/2/2020	3/18/2021	New	1109	6/1/2020	2/1/2021
6/2/2020	4/8/2021	New	202	6/1/2020	4/1/2021
6/2/2020	6/9/2020	Closed West	80	6/1/2020	6/1/2020
6/2/2020	7/9/2020	Closed West	1617.5	6/1/2020	7/1/2020
6/2/2020	6/18/2020	Closed West	1854.17	6/1/2020	6/1/2020
6/2/2020	6/8/2020	Closed West	11.63	6/1/2020	6/1/2020
6/2/2020	4/9/2021	New	4000	6/1/2020	4/1/2021
6/2/2020	7/9/2021	New	4000	6/1/2020	7/1/2021
6/2/2020	9/21/2020	Closed West	2418.03	6/1/2020	9/1/2020
6/2/2020	10/14/2020	Closed East	7503.51	6/1/2020	10/1/2020
6/2/2020	8/18/2021	New	2400	6/1/2020	8/1/2021
6/2/2020	10/12/2020	Closed West	209.75	6/1/2020	10/1/2020
6/2/2020	6/9/2020	Closed West	399.8	6/1/2020	6/1/2020
6/2/2020	6/29/2020	Closed West	1807.87	6/1/2020	6/1/2020
6/2/2020	6/18/2020	Closed West	251.7	6/1/2020	6/1/2020
6/2/2020	2/28/2021	New	207.5	6/1/2020	2/1/2021
6/2/2020	2/28/2021	New	416.5	6/1/2020	2/1/2021
6/2/2020	6/9/2020	Closed West	56.71	6/1/2020	6/1/2020
6/2/2020	6/9/2020	Closed West	511.48	6/1/2020	6/1/2020
6/2/2020	6/9/2020	Closed West	10.28	6/1/2020	6/1/2020
6/2/2020	6/9/2020	Closed West	27.95	6/1/2020	6/1/2020
6/2/2020	4/9/2021	New	3000	6/1/2020	4/1/2021
6/2/2020	6/21/2020	Closed West	1078.4	6/1/2020	6/1/2020
6/2/2020	7/12/2020	Closed West	8025	6/1/2020	7/1/2020
6/2/2020	9/22/2020	Closed East	3000	6/1/2020	7/1/2020
6/2/2020	12/28/2020	Discovery	500	6/1/2020	12/1/2020
6/2/2020	8/13/2020	Discovery	600	6/1/2020	3/1/2021
6/2/2020	6/11/2020	Closed West	75	6/1/2020	6/1/2020
6/2/2020	6/12/2020	Closed West	157.5	6/1/2020	6/1/2020
6/2/2020	2/12/2021	New	1274.43	6/1/2020	2/1/2021
6/2/2020	3/12/2021	New	794	6/1/2020	3/1/2021
6/2/2020	11/26/2020	Closed West	82.3	6/1/2020	11/1/2020
6/2/2020	6/11/2020	Closed West	216.65	6/1/2020	6/1/2020
6/2/2020	6/11/2020	Closed West	103.3	6/1/2020	6/1/2020
6/2/2020	6/11/2020	Closed West	294.41	6/1/2020	6/1/2020
6/2/2020	7/8/2020	Closed West	781.4	6/1/2020	7/1/2020
6/2/2020	6/12/2020	Closed West	887.28	6/1/2020	6/1/2020
6/2/2020	6/12/2020	Closed West	119.9	6/1/2020	6/1/2020
6/2/2020	6/18/2020	Closed West	476.8	6/1/2020	6/1/2020
6/2/2020	2/28/2021	New	416	6/1/2020	2/1/2021
6/2/2020	3/21/2021	New	416	6/1/2020	3/1/2021
6/2/2020	6/12/2020	Discovery	800	6/1/2020	6/1/2020
6/2/2020	6/12/2020	Closed West	1801.72	6/1/2020	6/1/2020
6/2/2020	6/13/2020	Closed West	870	6/1/2020	6/1/2020
6/2/2020	6/14/2020	Closed West	630	6/1/2020	6/1/2020
6/2/2020	6/18/2020	Closed West	2417.59	6/1/2020	6/1/2020
6/2/2020	6/15/2020	Closed West	645.58	6/1/2020	6/1/2020
6/2/2020	6/18/2020	Closed West	3070.35	6/1/2020	6/1/2020
6/2/2020	6/24/2020	Closed West	201.84	6/1/2020	6/1/2020
6/2/2020	7/17/2020	Closed West	1889.9	6/1/2020	7/1/2020
6/2/2020	6/18/2020	Discovery	8000	6/1/2020	6/1/2020
6/2/2020	6/18/2020	Closed West	210	6/1/2020	6/1/2020
6/2/2020	11/16/2020	Closed West	411.64	6/1/2020	11/1/2020
6/2/2020	6/1/2020	Closed West	484.67	6/1/2020	6/1/2020
6/2/2020	6/18/2020	Closed West	306.09	6/1/2020	6/1/2020
6/2/2020	6/18/2020	Closed West	75	6/1/2020	6/1/2020
6/2/2020	6/18/2020	Closed East	0	6/1/2020	6/1/2020
6/2/2020	6/18/2020	Closed West	325	6/1/2020	6/1/2020
6/2/2020	7/9/2020	Closed West	3287.79	6/1/2020	7/1/2020
6/2/2020	7/9/2020	Closed West	628.82	6/1/2020	7/1/2020
6/2/2020	12/13/2020	Closed West	28820.5	6/1/2020	12/1/2020
6/2/2020	1/8/2021	Discovery	3825	6/1/2020	1/1/2021
6/2/2020	6/19/2020	Closed West	599.95	6/1/2020	6/1/2020
6/2/2020	6/24/2020	Closed West	178.4	6/1/2020	6/1/2020
6/2/2020	7/2/2020	Closed West	631.48	6/1/2020	7/1/2020
6/2/2020	9/16/2020	Closed East	8700	6/1/2020	9/1/2020
6/2/2020	9/17/2020	Closed West	1684.7	6/1/2020	9/1/2020
6/2/2020	6/18/2020	Closed West	400	6/1/2020	6/1/2020
6/2/2020	10/7/2020	Closed East	1300	6/1/2020	10/1/2020
6/2/2020	9/14/2020	Discovery	2200	6/1/2020	5/1/2021
6/2/2020	6/22/2020	Closed West	279.77	6/1/2020	6/1/2020
6/2/2020	6/17/2020	Closed West	381.64	6/1/2020	6/1/2020
6/2/2020	6/17/2020	Closed West	1019	6/1/2020	6/1/2020
6/2/2020	6/18/2020	Closed West	111.66	6/1/2020	6/1/2020
6/2/2020	6/23/2020	Closed West	206.61	6/1/2020	6/1/2020
6/2/2020	4/8/2021	Discovery	800	6/1/2020	4/1/2021
6/2/2020	4/8/2021	Closed West	103.75	6/1/2020	4/1/2021
6/2/2020	1/28/2021	Discovery	800	6/1/2020	1/1/2021
6/2/2020	4/8/2021	New	300	6/1/2020	4/1/2021
6/2/2020	6/29/2020	Closed West	9.24	6/1/2020	6/1/2020
6/2/2020	6/22/2020	Closed West	701.11	6/1/2020	6/1/2020
6/2/2020	6/22/2020	Closed West	45	6/1/2020	6/1/2020
6/2/2020	6/22/2020	Closed West	204.14	6/1/2020	6/1/2020
6/2/2020	6/24/2020	Closed West	3227.65	6/1/2020	6/1/2020
6/2/2020	10/1/2020	Closed East	9900	6/1/2020	10/1/2020
6/2/2020	9/11/2020	Discovery	1300	6/1/2020	3/1/2021
6/2/2020	6/29/2020	Closed West	565.91	6/1/2020	6/1/2020
6/2/2020	6/29/2020	Closed West	4446.4	6/1/2020	6/1/2020
6/2/2020	6/29/2020	Closed West	411.89	6/1/2020	6/1/2020
6/2/2020	12/16/2020	Closed West	478.4	6/1/2020	12/1/2020
6/2/2020	1/28/2021	Discovery	1500	6/1/2020	1/1/2021
6/2/2020	3/29/2021	New	83	6/1/2020	2/1/2021
6/2/2020	6/29/2020	Closed West	1841.84	6/1/2020	6/1/2020
6/2/2020	6/18/2020	Discovery	18040.89	6/1/2020	6/1/2020
6/2/2020	7/17/2020	Closed West	565.54	6/1/2020	7/1/2020
6/2/2020	6/29/2020	Closed West	1291.14	6/1/2020	6/1/2020
6/2/2020	6/29/2020	Closed West	561.18	6/1/2020	6/1/2020
6/2/2020	10/29/2020	Closed East	293.27	6/1/2020	10/1/2020
6/2/2020	8/13/2020	Closed East	4800	6/1/2020	8/1/2020
6/2/2020	4/8/2021	Discovery	800	6/1/2020	4/1/2021
6/2/2020	5/28/2020	Closed West	-494.94	6/1/2020	5/1/2020
6/2/2020	6/24/2020	Closed West	65	6/1/2020	6/1/2020
6/2/2020	6/29/2020	Closed West	6020	6/1/2020	6/1/2020
6/2/2020	7/8/2020	Closed West	2225.59	6/1/2020	7/1/2020
6/2/2020	9/6/2020	Closed West	20113.52	6/1/2020	9/1/2020
6/2/2020	9/14/2020	Closed West	1081.05	6/1/2020	9/1/2020
6/2/2020	4/16/2021	New	288	6/1/2020	4/1/2021
6/2/2020	6/28/2020	Closed West	166.59	6/1/2020	6/1/2020
6/2/2020	6/8/2020	Closed West	1059.76	6/1/2020	6/1/2020
6/2/2020	7/2/2020	Closed West	219.14	6/1/2020	7/1/2020
6/2/2020	11/11/2020	Closed West	418.82	6/1/2020	11/1/2020
6/2/2020	7/11/2020	Closed West	1615.08	6/1/2020	7/1/2020
7/1/2020	7/11/2020	Closed West	465	7/1/2020	7/1/2020
7/2/2020	7/1/2020	Closed West	2047	7/1/2020	7/1/2020
7/2/2020	7/1/2020	Closed West	2301.25	7/1/2020	7/1/2020
7/2/2020	7/2/2020	Closed West	60	7/1/2020	7/1/2020
7/2/2020	7/2/2020	Closed West	4000	7/1/2020	7/1/2020
7/2/2020	8/11/2020	Discovery	600	7/1/2020	3/1/2021
7/2/2020	8/11/2020	Discovery	200	7/1/2020	5/1/2021
7/4/2020	7/3/2020	Closed West	10.22	7/1/2020	7/1/2020
7/4/2020	7/3/2020	Closed West	92.29	7/1/2020	7/1/2020
7/4/2020	7/3/2020	Closed West	61.56	7/1/2020	7/1/2020
7/6/2020	7/8/2020	Closed West	259.49	7/1/2020	7/1/2020
7/6/2020	6/18/2020	Discovery	7000	7/1/2020	6/1/2020
7/6/2020	8/11/2020	Closed West	587.3	7/1/2020	8/1/2020
7/7/2020	7/7/2020	Closed West	2881.72	7/1/2020	7/1/2020
7/8/2020	7/7/2020	Closed West	387.4	7/1/2020	7/1/2020
7/8/2020	7/7/2020	Closed West	2289.4	7/1/2020	7/1/2020
7/8/2020	7/16/2020	Closed West	3861.35	7/1/2020	7/1/2020
7/8/2020	7/18/2020	Closed West	1448.99	7/1/2020	7/1/2020
7/8/2020	10/2/2020	Closed West	409	7/1/2020	10/1/2020
7/8/2020	7/9/2020	Closed West	467.79	7/1/2020	7/1/2020
7/8/2020	4/8/2021	Discovery	1300	7/1/2020	4/1/2021
7/8/2020	8/13/2020	Discovery	500	7/1/	

