

YOUR SOURCE-TO-INQUIRY-TO-CLIENT TRACKER

Find where your coaching clients come from

See the known first sources of your inquiries, which became clients, and which sources are still unknown. Keep the same set of inquiries behind every count.

Who this is for

Coaches with inquiry history they can review, or coaches ready to start recording new inquiries. You need inquiry dates, current status and any first-source information the person actually supplied. With no inquiries yet, set up the blank file and begin from today.

A simple start

- 01.** Save a private copy of **04_find_coaching_client_sources.xlsx**. Open it in Excel or a compatible free spreadsheet app, such as LibreOffice Calc. No paid dashboard or connected account is needed.
- 02.** On **Summary**, enter the inquiry window start in **B5**, end in **D5** and actual status review date in **F5**. Start must be on or before end, and end on or before as-of.
- 03.** On **Inquiries**, enter known records in cream cells **A10:E209**. One anonymous Lead ID represents one prospective client for one engagement. Update the same row for repeat messages.
- 04.** Resolve Record check warnings in column J. Then read Summary counts. Keep Example separate; it never feeds the blank Summary.

Your finished result

A source count for a defined inquiry period, date-qualified client counts from those same inquiries, visible open records and an honest Unknown count. Choose one proportionate next action from that evidence.

Only anonymous IDs and operational dates/statuses belong here. Keep names, contact details, raw messages, session notes, revenue and sensitive personal information out of the tracker.

WHAT THE WORKBOOK COUNTS

Use consistent definitions

Field	Definition and entry rule
Lead ID	A unique anonymous ID. One person asking several questions about the same engagement is one inquiry, not several new leads.
Inquiry date	Date of the first direct question or request about your coaching service. A like, view or general newsletter signup is not an inquiry here.
First source	Their self-reported first source: Referral, LinkedIn, Instagram, Search, Event, Other or Unknown. Blank also becomes Unknown.
Status	Open, Booked call, Deferred, Client, Declined or Closed. It should reflect the actual as-of review date.
Client-start date	The date the agreed coaching engagement began. A discovery call alone is not Client. Use Client status only with a valid start date.

What each result means

Metric	Exact meaning
Unique valid inquiries	Unique IDs with a valid inquiry date inside the inclusive start/end window. All rows sharing a duplicate ID are excluded until resolved.
Clients so far	Included inquiries with Client status and a valid client-start date on or after the inquiry date and on or before as-of.
Still open	Included records marked Open, Booked call or Deferred. A deferred record is still unresolved, not permission to contact.
Other / needs review	Included inquiries not in Clients so far or Still open. Includes Declined, Closed, invalid statuses and unverified client dates.
Unknown share	Unknown inquiries divided by all unique valid inquiries in the window. Zero inquiries displays No data.
Rows to review	Rows anywhere in the input tab with a warning. This includes records outside your selected window.

Ask naturally: "Where did you first hear about my coaching?" Keep Unknown if they do not know or answer. Never infer first source from the app used to send the inquiry.

FICTIONAL FOUR-WEEK INQUIRY COHORT

Follow one complete example

The Example tab uses **01–28 Sep 2026** for inquiry dates and **30 Sep 2026** as-of. Every person and record below is fictional.

ID	Inquiry	First source	Status	Client start
EX-001	02 Sep	Referral	Client	15 Sep
EX-002	04 Sep	Referral	Open	
EX-003	08 Sep	Referral	Declined	
EX-004	10 Sep	LinkedIn	Client	25 Sep
EX-005	14 Sep	LinkedIn	Booked call	
EX-006	17 Sep	Event	Closed	
EX-007	21 Sep	Blank	Open	
EX-008	27 Sep	Unknown	Deferred	

Read the result

First source	Inquiries	Clients	Still open	Other
Referral	3	1	1	1
LinkedIn	2	1	1	0
Event	1	0	0	1
Unknown	2	0	2	0
TOTAL	8	2	4	2

Instagram, Search and Other each have zero records. The source counts reconcile: **3 + 2 + 1 + 2 = 8**. The outcomes also reconcile: **2 clients + 4 open + 2 other = 8**. Unknown share is **2 / 8 = 25%**.

A useful decision

Add the first-source question to the existing inquiry conversation. Keep recording it. There are only eight inquiries and four are still open, so this example does not justify declaring a winning channel or stopping another one.

If EX-001 had first inquired in August and begun coaching in September, it would stay in the August inquiry cohort. It would not become a new September inquiry.

INTERPRETATION AND SELF-CHECKS

Review the evidence honestly

Choose the next action that fits

What you observe	A proportionate next action
Several Unknown sources	Ask the first-source question consistently before changing marketing effort.
Several open inquiries	Update their current status at your next review. Outcomes are still incomplete.
An apparent source difference	Read the underlying records and keep collecting comparable cohorts. Small counts can change quickly.
No inquiries in the window	Display no-data context, verify dates, then begin recording. Do not invent a zero conversion rate.

Test before relying on it

Use a disposable workbook copy and the fictional Example tab. Restore each test before the next one.

- Clear EX-002's source. Unknown becomes 3 of 8, or 37.5% (displayed as 38%). Total inquiries stays 8.
- Give EX-002 the same ID as EX-001. Both duplicate rows are excluded: the total becomes 6 and Record check flags both.
- Clear EX-001's client-start date. Clients so far becomes 1. The record stays an inquiry and appears under Other / needs review.
- Move the start and end to a period with no example inquiries, keeping end no later than as-of. Counts become 0 and Unknown share says No data.

Fix warnings at the source

Check blank IDs, text dates, duplicates and mismatched status/client dates in Inquiries. An unrecognized source pasted over the dropdown groups as Unknown and is flagged. An invalid status is included in Other / needs review. Review these records before making comparisons.

What this does not establish

Self-reported first source is partial information. It does not capture every touchpoint, prove that a channel caused a client, or measure ROI. This file shows counts, not weekly conversion rates. Never divide this week's clients by an unrelated set of this week's inquiries.

Use the actual review date. Current statuses do not reconstruct a historical snapshot. Keep private dated copies if you need history. The file prepares 200 input rows; start a new copy when full rather than entering uncounted rows below 209.

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Your manual source record

Inquiry window: _____ to _____

Statuses reviewed as of: _____

Use unique IDs and one inquiry per engagement. Keep source Unknown unless it is known.

Lead ID	Inquiry date	First source	Status	Client start

Tally unique IDs in the window by first source. Count Client records with valid start dates by as-of. Unknown share = Unknown count ÷ included inquiries; with zero inquiries, write No data.

Optional bonus prompt

Paste `04_bonus_prompt.txt` into an AI chat for a guided snapshot. It asks for missing facts and anonymous records. Check its arithmetic. AI is optional and does not access accounts or update this workbook.

Want a connected reporting view?

Marketing PMP can help bring selected sources into a maintained marketing operations dashboard.

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To reset the workbook, save a private backup and clear Inquiries A10:E209 only. Preserve F:J formulas, Summary and the separate Example tab.