



Free Lead, Opportunity, and Sales Team Dashboards for Salesforce

One of the quickest ways to get value from Salesforce (and increase your sales) is to build dashboards, so you can see all of your company metrics in one place, and refresh data with the click of a button.

Downloaded thousands of times since their launch in 2014, the [CloudAmp FREE Lead and Opportunity Dashboards](#) have just been updated and refreshed for the 10th anniversary.

This free app on the Salesforce AppExchange contains multiple marketing and sales reports and dashboards -- all free to install and use in your Salesforce account. They are a great starting point and the quickest way to create your own dashboards. Just install and then customize to fit the needs of your organization.

- [Lead Management Dashboard](#)
- [Opportunity Management Dashboard](#)
- [Sales Team & Pipeline Dashboard](#)

So what is new in the 2024 update of the dashboards? Let's jump in and see.

Protip:

If you already have an older version of the CloudAmp dashboards installed, you can get the new dashboards simply by updating your AppExchange app.

Just [visit our AppExchange listing](#), click the "Get It Now" button, and follow the prompts. Updates work just like a fresh installation, but Salesforce detects a currently installed version and will add or update only the new components.

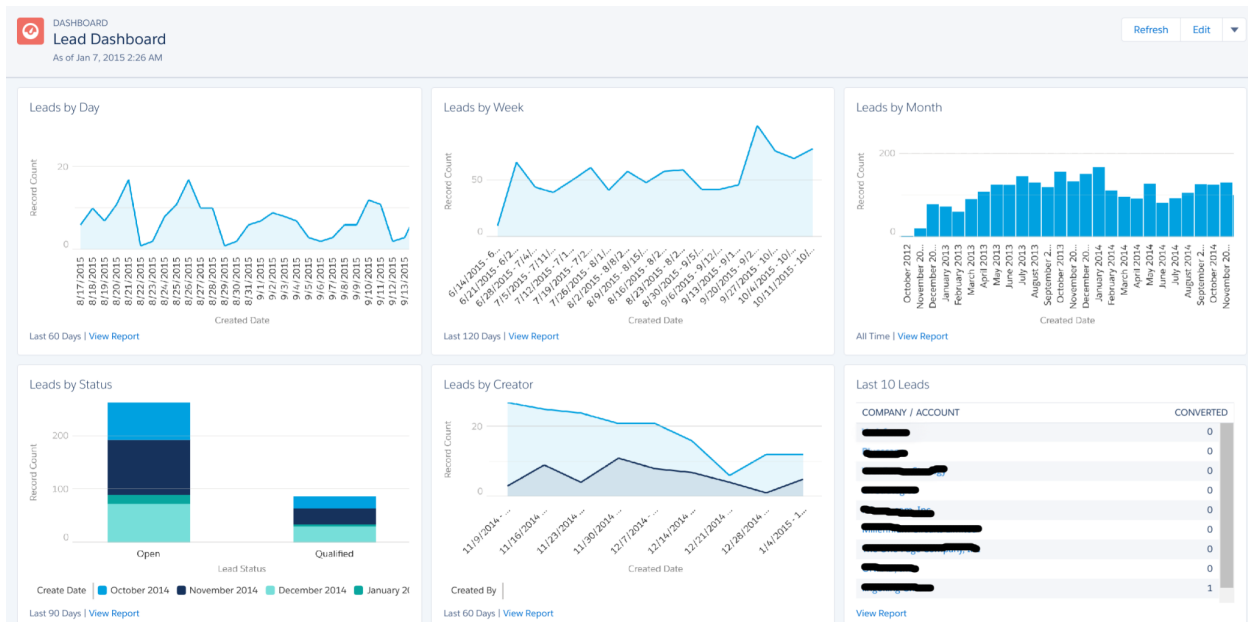
For reports and dashboards that are part of an app like CloudAmp, **Salesforce does not change your existing dashboards**, to avoid overwriting any customizations you have made. But we've packaged 3 additional, new dashboards in the '24 version, so these will install fresh when you update your app.



Lead Management Dashboard

For a Salesforce Sales Cloud quick start, understanding your leads is critical.

Hopefully you have implemented Salesforce web-to-lead forms on your website (see our [Ultimate Guide to Salesforce Web-to-Lead Forms](#) if not), and created some basic processes for importing and assigning other types of leads (such as those from tradeshow or partners).

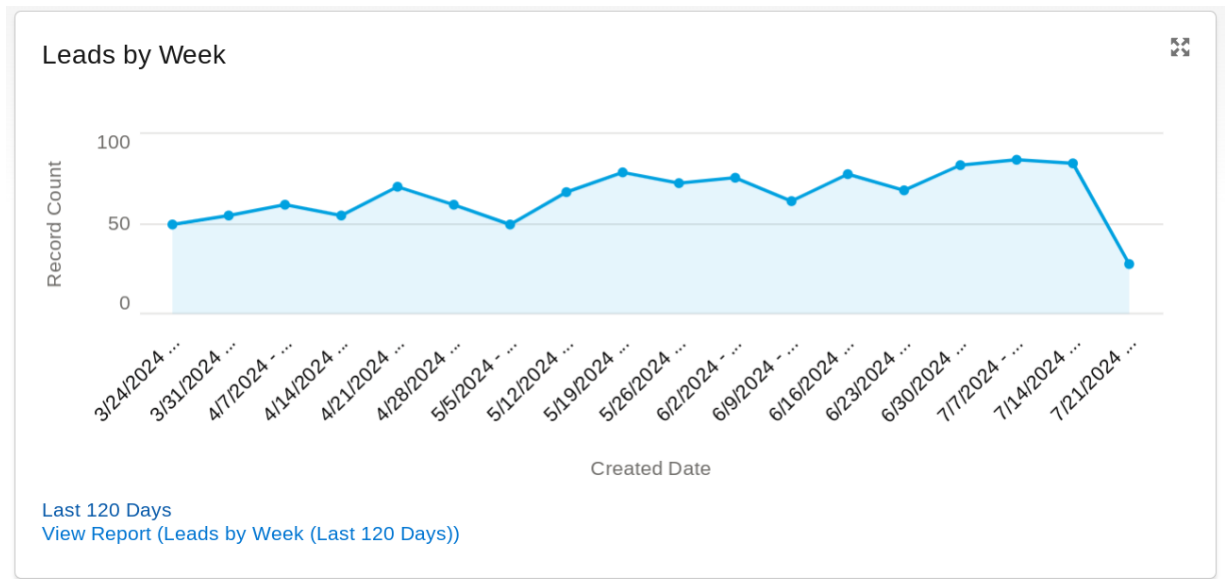


The free CloudAmp Lead Dashboard will give you a quick overview of lead volume, status, and who is creating leads in Salesforce. Plus important lead quality metrics such as who and how many leads are being converted to create Accounts with Contacts and Opportunities.

These dashboard graphs are essential not just to sales management, but for marketing to understand lead volume trends. And marketers can clone reports to add filters and see metrics by marketing channel or advertising network.

👉 Featured Graph: Leads by Week

This line graph tells you your lead volume trends at a glance. Add filters to create a version focused on certain lead sources, change the date range to shorter or longer than the Last 120 days default, or change the time grouping to months or years.



The following Salesforce reports are included as the data sources of the Lead Dashboard. Just Save as and add filters to drill down on data you want to see (and/or exclude data you don't want).

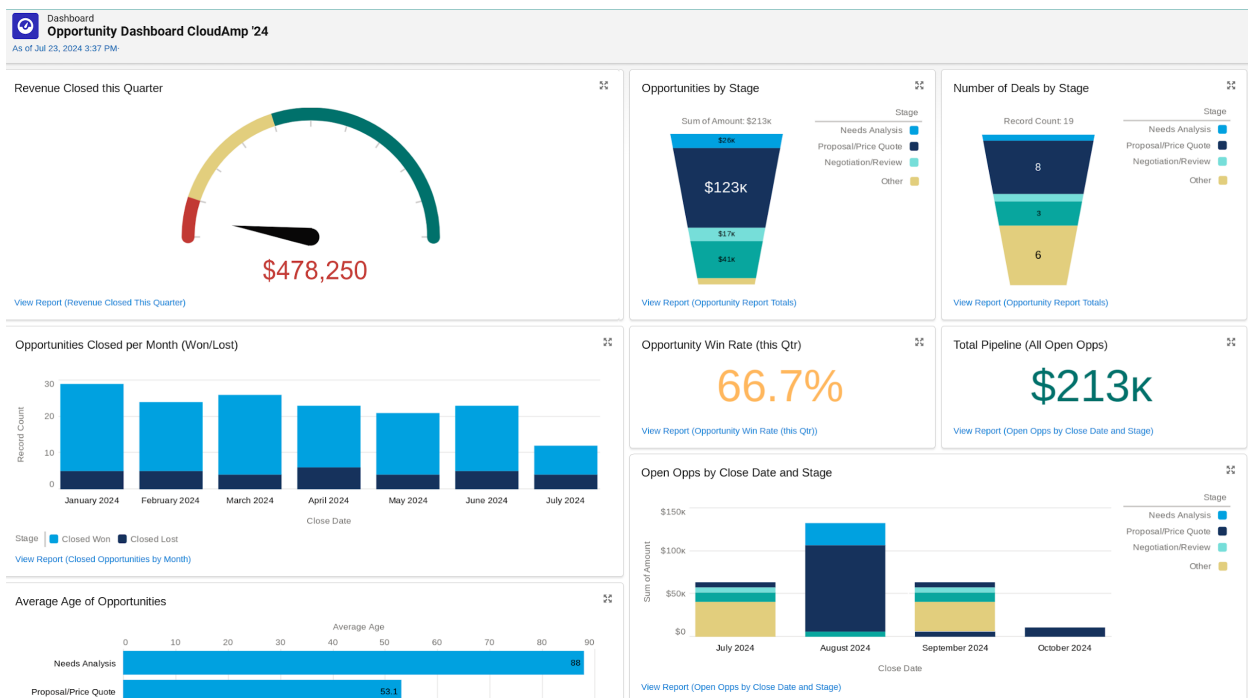
1. Leads by Day
2. Leads by Week
3. Leads by Month
4. Leads by Status
5. Last 10 Leads
6. Leads by Week by Creator
7. Leads Converted by Week
8. Lead Conversion Rate



Opportunity Management Dashboard

The Opportunity dashboard is the second included free dashboard, and gives you visibility into your sales pipeline within Salesforce.

With this Salesforce dashboard you can see your current open opportunities by stage, both by revenue value and number of deals (opps). Your total pipeline (open Opportunities in Salesforce) is shown as well. And of course you can see closed revenue this quarter, which can be easily updated with different sales targets or time periods like monthly or yearly.



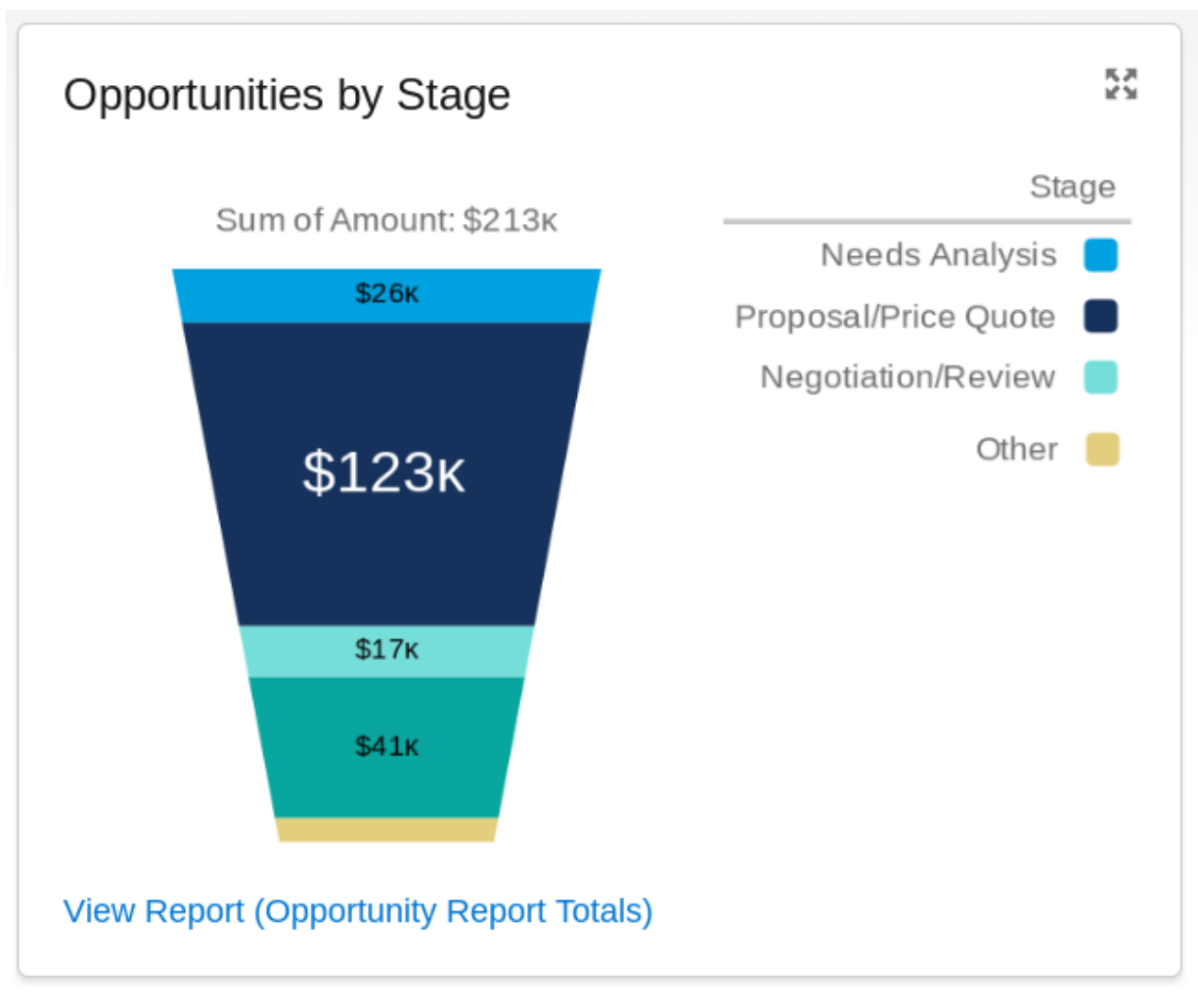
The free Opportunity Dashboard also shows you how many Salesforce Opportunities have been closed won or closed lost each month, as well as your win rate percentage.

Refresh the dashboard with a single click, no need to update complex spreadsheets that take a long time and introduces the possibility of data errors. You can also schedule Salesforce dashboards to refresh and be emailed to you, and click on any chart to see the underlying data in a Salesforce report. For more tips on Salesforce dashboards, see our post [5 Big Ways to Maximize Your Salesforce Dashboards](#).

👉 Featured Graph: Opportunities by Stage

This funnel graph is a quick way to understand the health of your sales funnel. Opportunities are broken out by stage, and shown with their total dollar amounts. A secondary funnel chart in the CloudAmp Opportunity Dashboard shows the same data by number of Opportunities at each stage (rather than Amount).

Add filters to create your own version focused on types of Opportunities, or focused on certain Opportunity owners like a sales team or the pipeline for a particular product group.





CloudAmp's free Opportunity Dashboard for Salesforce includes the following reports:

1. Opportunities by Stage
2. Revenue Closed this Quarter
3. Opportunities Closed per Month (Won/Lost)
4. Top 10 Open Opportunities
5. Last 10 Won Opportunities
6. Average Age of Opportunities
7. Open Opps by Close Date and Stage
8. Opportunity Win Rate

Sales Team & Pipeline Dashboard

The 3rd and entirely new dashboard in the free app [CloudAmp FREE Lead and Opportunity Dashboards](#) is the Sales Team & Pipeline dashboard.

Similar to the Lead and Opportunity Dashboard, the Sales Team dashboard shows leads and opportunities but broken down by Sales representative.

👍 Protip:

The Sales Team & Pipeline dashboard includes Salesforce users who have roles with the word Sales in them. If you have not assigned roles to users, or wish to filter further to certain individuals, you will need to update the report filters to include or exclude certain users.

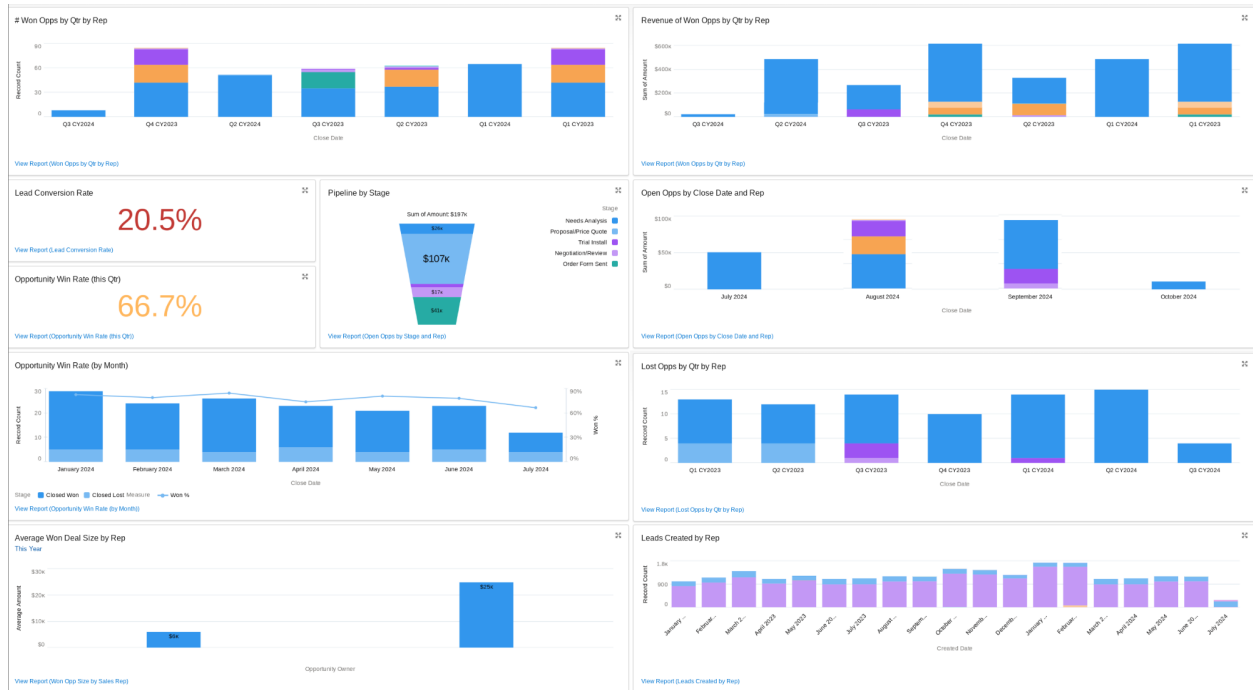
CloudAmp is happy to advise you on the easiest way to do this, as it is likely that most organizations will need to update the filters to show data for only the correct users.

If you have multiple sales teams, you can clone the dashboard to have multiple versions. Just be sure to **Save as** to the underlying reports, so you can easily create different reports for each team.

You can see closed won opportunities by rep by quarter, as well as open opportunities created by rep by month. Quarterly and monthly reports can easily have their date ranges updated to better match your business, of course.



There are also a number of charts to track sales user activity in Salesforce, such as the Activities on Leads and Completed Activities. If you have a common way of logging calls or emails, you can update reports or create duplicate reports to track calls or emails per rep as well.

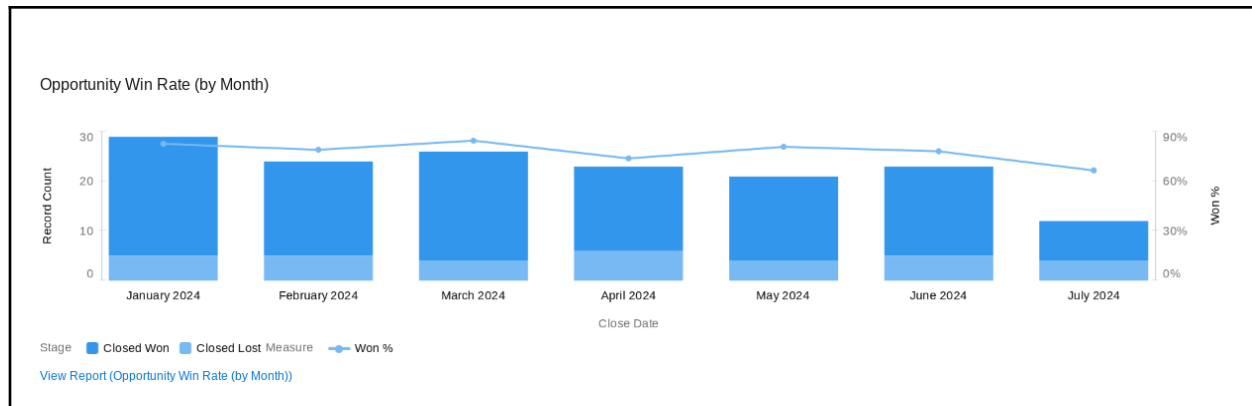


And you can always add selected reports from this free dashboard to other dashboards you may have created, or add your own reports to this dashboard. For more tips on Salesforce dashboards, see our article [How to Customize Salesforce Dashboards](#)

One graph that many organizations find useful is Opportunity Win Rate (the percentage of closed won versus closed lost opportunities each month). This report can be easily updated to different time ranges, or individualized to specific users to compare close rates across sales reps.

👉 Featured Graph: Opportunity Win Rate (by Month)

This stacked bar graph shows how many Opps were won and lost each month. A secondary X axis on the right shows the won percentage ratio. Add filters to create your own version focused on individual Opportunity owners in Salesforce, or types of Opportunities.



CloudAmp's free Sales Team & Pipeline Dashboard for Salesforce includes the following reports:

1. Lead Conversion Rate
2. Opportunity Win Rate
3. Opportunity Win Rate (by Month)
4. Open Opps by Close Date and Rep
5. Won Opps by Qtr. by Rep
6. Lost Opps by Qtr by Rep
7. Leads Created by Rep, Last 90 Days by Wk
8. Leads Created by Rep
9. Leads Converted by Rep, Last 90 Days by Wk
10. Leads Converted by Rep
11. Activities on Leads
12. Completed Activities
13. Won Opp Size by Sales Rep

Get Started Now

To get started, just install the [CloudAmp FREE Lead and Opportunity Dashboards](#) from the Salesforce AppExchange. Join the hundreds of organizations that have improved their sales management, lead management, and pipeline visibility by using the dashboards as an easy starting point.

Get insight on your Salesforce data, so you can get more value out of your Salesforce investment, and drive your business forward.



There are never any fees for using these dashboards -- you can fully use this solution without payment. Please [email us](#) with any questions or feedback about the dashboards, we're happy to help. Paid assistance configuring the dashboards is available if you need it, though if you are generally familiar with Salesforce reporting (or have done the Trailheads) you are unlikely to need it.

And if you want to have more data about your Leads in Salesforce, including full source and campaign attribution to prove ROI and improve your marketing, [contact us for more information](#) on our other app, the [CloudAmp Campaign Tracker](#).