Quote Log and Win Rate Tracker

How-to guide: what the workbook does, how to use it and what every number means. mfgcalcs.com

Quote Log and Win Rate Tracker

Log every quote you send and see your win rate, won and lost value, why quotes are lost, estimating hours per award and which open quotes to chase.

For: Owners, estimators and sales leads of job shops, machine shops and contract manufacturers.

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Quick start

1. On Setup, type your company name, currency, win-rate target, status date and follow-up days, then replace the example customers, estimators and loss reasons.
2. On Quote Log, add one row per quote sent: date, customer, value, estimating hours and estimator. Update the status to Won, Lost or Cancelled when the customer decides.
3. Give every lost quote a reason and every won quote its order value. Read the Check column: anything other than OK names the gap.
4. Open the Dashboard and filter by customer, estimator or dates; chase the oldest open quotes first.

What is in the workbook

Start Here	Read this first: what the workbook does and how to use it.
Setup	Your company, the targets and the lists the Quote Log dropdowns read.
Quote Log	One row per quote sent: who, how much, how long it took to estimate, and what the customer decided.
Dashboard	Win rate, won and lost value, why quotes are lost and what to chase, for the customer, estimator and dates you choose.
Method	How every number is calculated, with assumptions, limits and sources.
Verify	Self-check: the workbook's formulas recomputed on fixed inputs against an independent reference.
About MFG Calcs	Everything MFG Calcs offers, free: calculators, templates, tariff tools, data and the Calkee AI helper.

What each number means

Quantity	How it is calculated	Units
Win rate	Won / (won + lost) over the quotes in view. Open and cancelled quotes are left out: they have no decision yet, or none to win.	%

Quantity	How it is calculated	Units
Win rate, all quotes sent	Won / quotes sent, every status counted, as the live Quote Win Rate calculator defines it. Lower than the decided win rate while quotes are open.	%
Won, lost and open value	Order value of won quotes (the quote value when none is typed); quote value of lost and of open quotes.	currency
Estimating hours per award	Estimating hours of every quote in view / quotes won: the effort behind each order, losses included.	h
Days to decision	Decision date - date sent, for won, lost and cancelled quotes; the Dashboard averages it.	days
Age and follow-up	Status date - date sent for an open quote. Follow-up is Overdue after the Setup number of days, Due soon within 3 days of it, OK before.	days
Loss Pareto	Lost quotes per loss reason, ranked largest first by COUNTIF ranks (ties keep list order). Helper columns AO:AQ on the Dashboard are hidden.	quotes, %

Assumptions, limitations, sources and the self-check (the Verify sheet, which recomputes the workbook's formulas on fixed test inputs) are in the workbook. The last page shows the Dashboard with the example data for Ostley Sheet Metal, a fictional business.

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Engineering estimates for planning and improvement work. Verify the results against your own process, data and standards before you rely on them.

Quote Log and Win Rate Tracker

Win rate, won and lost value, why quotes are lost and what to chase, for the customer, estimator and dates you choose.

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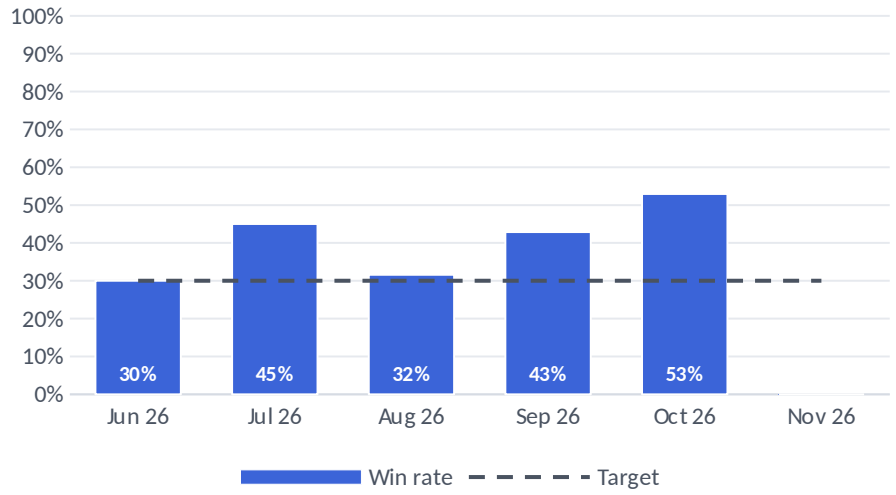
Customer		Sent from	
Estimator		Sent to	

Showing 120 quotes. Win rate = won / (won + lost); open and cancelled quotes are not decided. Values in USD.

WIN RATE	QUOTES SENT	WON VALUE (USD)	OPEN PIPELINE (USD)
39.8%	120	859,600	265,550
Target 30.0%	In view	Order value of won quotes	Quote value still undecided
On target			

Win rate by month sent



Quotes by outcome and month sent

