Fube

GUIDE

How to read the Fube CRM dashboard (and what to do with each figure)



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> A sales dashboard isn't there to be looked at: it's there to help you decide what you'll do on Monday. The Fube **CRM dashboard** brings together eight figures that answer three different questions (how much is coming in, how much is at stake and what's slipping away from you), and each one calls for a different response.

This guide goes through the indicators one by one: what exactly each one measures, what it means when it's high or low, and what to do about it. It also includes two reading tips that will stop you drawing the wrong conclusions.

Before you start: the CRM is available from Business

The dashboard is part of the **CRM** module, which is **not included in either the free plan or Pro**. On those two plans, when you open CRM you'll see a screen that explains the module and offers to upgrade your plan; from **Business** upwards you get the full dashboard. What it includes is described in **CRM and sales funnel**, and what each plan comes with is set out in **pricing**.

You also need something to measure: the dashboard is calculated from your **leads**, your **opportunities** and your **activities**. Without any of these, it's a perfectly healthy screen full of zeros.

The period selector, and the first reading tip

At the top left you choose the period: **Last 7, 30 or 90 days**, **Last 12 months**, **This month**, **This quarter** (the default) or **This year**. Fube remembers the one you choose in that browser, so it survives a page refresh.

Here's the first tip: not every figure changes when you change the period. And that isn't a bug.

Period figures	Right now figures
Leads in period · Conversion rate · Won in period · Win rate	Open opportunities · Pipeline value · Weighted pipeline · Pending activities

The ones on the right are a **snapshot of the current state**: how much you have open and how much you have left to do *today*. Asking 'how many opportunities did I have open in March?' has no answer on this dashboard, because being open is a state, not an event. The ones on the left do count events, which is why they're limited to the selected range.

How much is coming in: leads and conversion

Leads in period is simply how many new sales contacts you've created in the range. It's the thermometer for your lead generation.

Conversion rate is the percentage of those leads that ended up **won**, in other words converted into a customer. Out of every hundred that came in, how many ended up being invoiced.

You need to read the two together, because on their own they're misleading:

- **Lots of leads and low conversion**: you're bringing in a lot, but poorly. The problem lies in qualification, not in closing: cross-check the figure with the **Leads by status** breakdown to see at which stage they drop off, and with **Leads by source** to see which channel brings you people who don't buy.
- **Few leads and high conversion**: you close well but not many people are coming in. The bottleneck is further up: don't touch the sales process, open the tap.
- **Conversion at 0% with leads that did buy**: this almost always means nobody is marking the leads as **Won**, which is the status this figure counts. Converting them with convert a lead into a customer does this automatically; if your team creates the customer on their own and leaves the lead as it was, the figure doesn't pick it up.

And a clarification that avoids arguments: **both indicators are calculated on the leads created in the period**. A lead that came in in January and signed in March counts towards January's conversion, not March's. This is what makes the rate measure the quality of a batch of lead generation rather than the activity of a single month — but it also means that short, recent periods come out low, because those leads haven't had time yet.

How much is at stake: the three pipeline figures

Open opportunities is how many sales are still live. **Pipeline value** is what they would all add up to if you won absolutely every one of them. **Weighted pipeline** is what you can realistically expect: each opportunity counts as its value multiplied by its probability of closing.

All three count **only open opportunities**. Anything already won or lost isn't included, because this measures the business that's still at stake.

Of the three, **the one that's useful for making decisions is the weighted pipeline**. The gross value is a comfort figure: nobody wins one hundred per cent. Compare the weighted figure with your target for the month and you'll have an honest answer to 'will I make it?'.

And a warning that saves surprises: **the weighted figure moves on its own when you close a sale**. When you move an opportunity to a won stage, its probability is forced to 100% and it immediately leaves the open pipeline, so the weighted figure goes down precisely when you've won. That's correct. What you've won is measured in the next figure. The full mechanics are explained in manage your sales funnel.

How much you've closed: won and win rate

Won in period is the amount of the opportunities you closed **successfully** within the range. It's your scoreboard.

Win rate is your success rate: of the opportunities that were resolved in the period (won plus lost), how many you won. Be careful how you read it: **it doesn't count those that are still open**. A month in which you closed nothing, either well or badly, leaves the win rate at 0% without you having lost a single sale.

If the win rate drops, the answer isn't in this dashboard but in the **loss reasons** you recorded when moving cards to the lost column. That's where you can see whether you lose on price, on timescales or because nobody replies, and those are three different problems.

What's slipping through the cracks: pending activities

Pending activities counts your open follow-ups, and **in brackets, in red, the overdue ones**: those that had a date and that date has already passed. When there are any, the whole card is highlighted.

It's the only indicator on the dashboard that points to your own work, which is why it's the first one to check. **If the number of overdue activities grows, stop prospecting.** Putting more leads into a pipeline that's no longer being handled only worsens next month's conversion rate. Open the **activity calendar**, catch up and come back.

The breakdowns: where the business gets stuck

Below the figures there are four panels that help you diagnose what the KPIs only flag:

- **Funnel** — the open opportunities in a pipeline at each stage, with their value. The default pipeline is shown; if you have more than one, you choose which on the card itself. If everything piles up in an intermediate stage, that's your bottleneck.
- **Leads by status** — which qualification stage they get stuck at.
- **Leads by source** — which channels bring you people, so you know where to invest.
- **Activities by type** — what your month is made of: calls, meetings, tasks.

And at the bottom, a **recent activity** block with the pulse of the period (new leads, completed activities, closed opportunities and notes: those on your leads, your opportunities and your customers) and two alerts: **overdue activities** and **stalled opportunities**.

A word of warning about stalled opportunities. Fube considers an open opportunity stalled when it has gone more days untouched than the **Days to stall** set for its stage. These are set in the stage editor of each pipeline, and a stage without that number never stalls: the six that Fube creates by default come without it, so until you set it this figure will show zero even if you have deals that have stalled.

Edge cases and common mistakes

- **I change the period and some figures don't move.** That's expected. See the table at the beginning.
- **The dashboard doesn't reflect something I've just done.** The figures are calculated when you open the dashboard and when you change the period. Go back in, reload or change the period.
- **Win rate at 0% without having lost anything.** You didn't close any deals in the period. Widen the range.
- **Won in the period is blank but I know I sold.** The amount is attributed by the opportunity's **close date**, not the invoice date. If you closed it in the CRM last month, that's where it is.
- **The conversion rate doesn't go up even though I'm winning customers.** It only counts leads left in **Won** status. A customer created directly doesn't go through the pipeline, and a lead you won without changing its status doesn't count either.
- **'The metrics could not be loaded'.** Go back in; if it persists, it's our problem, not your data: get in touch.

Frequently asked questions

How exactly is the conversion rate calculated?

Leads **created** in the period whose status is **Won**, divided by the total number of leads created in that same period, as a percentage.

Are the weighted pipeline and the pipeline value the same thing?

No. The value is the gross sum of open opportunities; the weighted one applies the probability of each. The first is what you'd bring in if you won everything; the second, what you can expect.

What counts as an overdue activity?

A **pending** activity whose scheduled date has already passed. As soon as you complete or cancel it, it stops counting.

Does the dashboard data update on its own?

It's calculated when you open the screen and when you change the period. There's no automatic background refresh.

Can I see the dashboard for a specific salesperson?

The dashboard shows the company's figures. To look at one person's portfolio, filter by owner in the lead, opportunity and activity lists.

Check it on Monday, not at month end

The dashboard pays off with a short routine: overdue activities first, weighted pipeline against target next, and the breakdown by stage when something doesn't add up. Five minutes that save you discovering on the 30th that the month was lost from the 10th. The dashboard is available from the Business plan upwards: check it on **pricing** and, if it suits you, **create your account** and start filling it. Beforehand you can see what the **Fube CRM** measures.

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