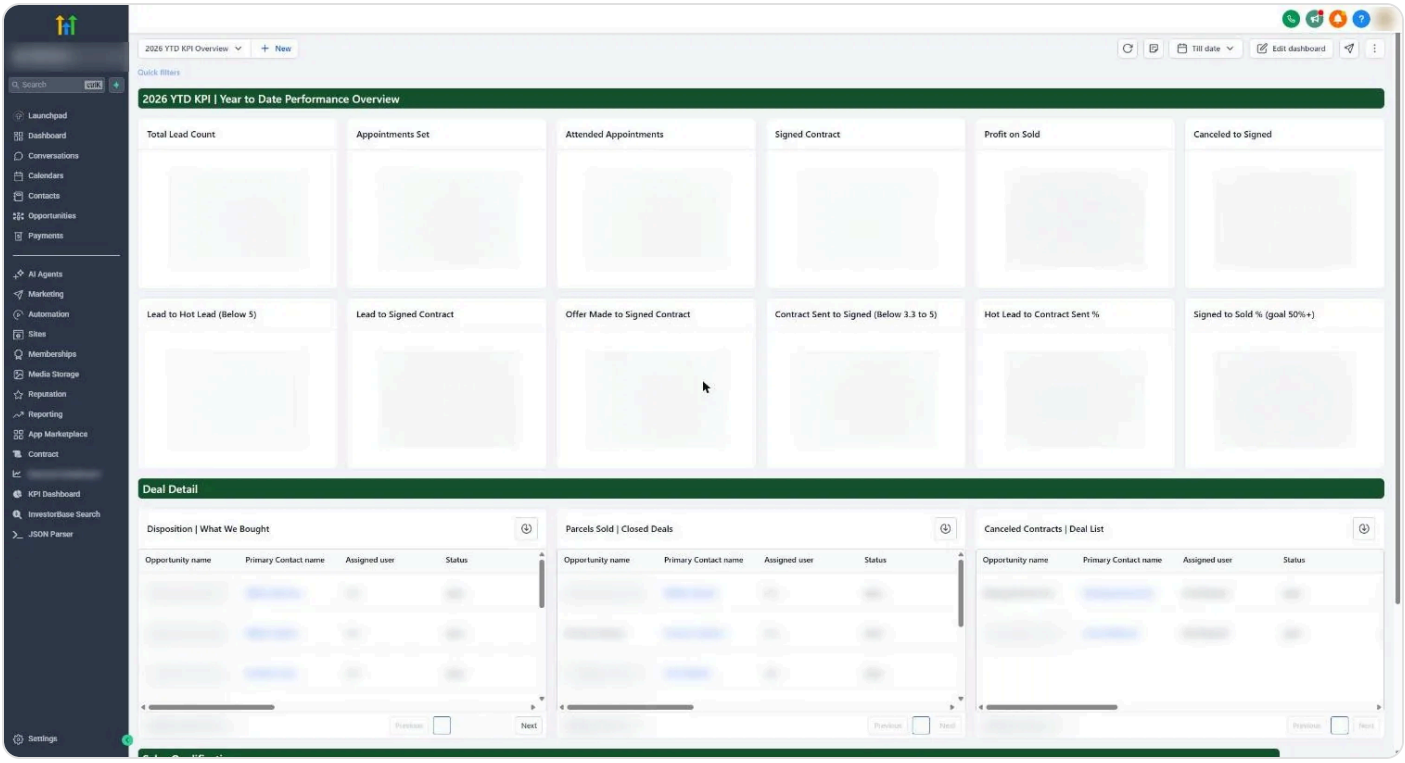
NEXCREST · SMS LAND ACQUISITION · CRM

GoHighLevel KPI Dashboards and Call Tracking

Owner and rep dashboards rebuilt from what actually happened, with workflows that record every call outcome automatically.

Built with Claude Code · GoHighLevel, workflows, custom metrics, Apps Script

2	3	10+	~93%
DASHBOARDS: OWNER AND REPS	CALL TRACKING WORKFLOWS	CUSTOM METRICS DEFINED	FASTER SHEET LOAD



Owner's year to date KPI overview (client figures blurred)

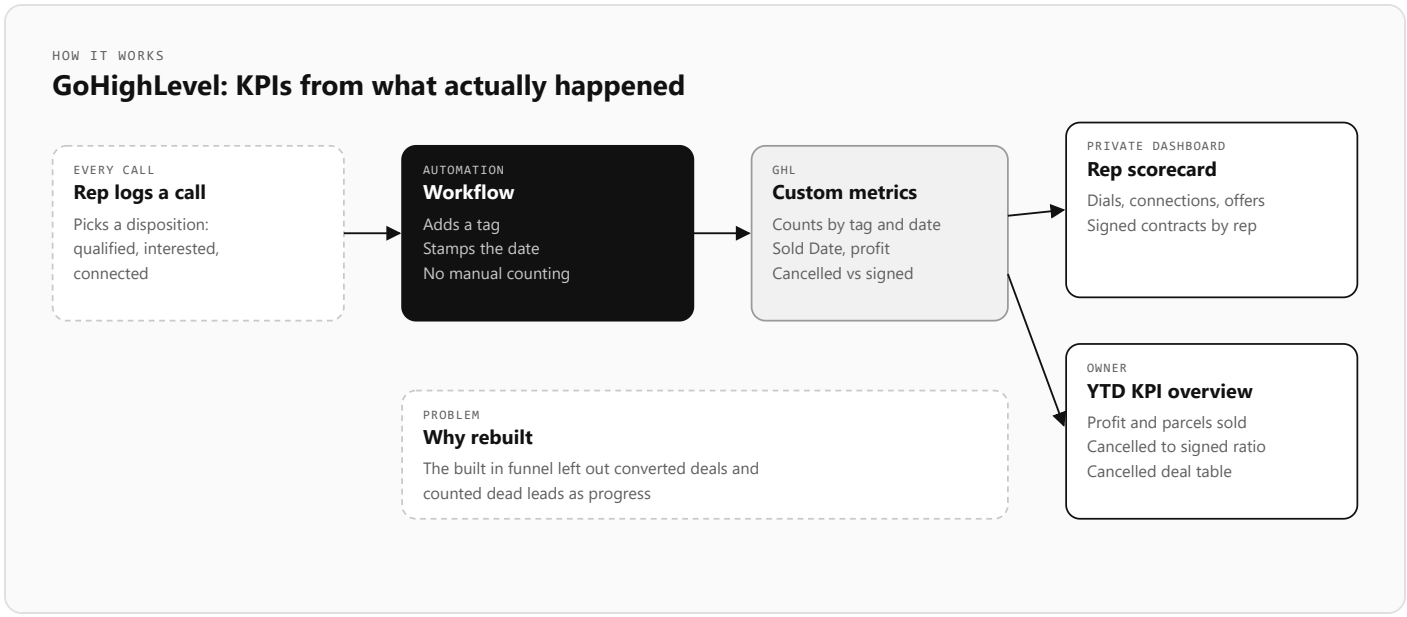
GoHighLevel · CRM automation · KPI design · Custom metrics · Google Apps Script · Data audit · Claude Code

01 Overview

The company runs SMS outreach to land owners and works every lead in GoHighLevel. The owner's dashboard was giving confident numbers that were wrong, and call outcomes were never captured in a

way reports could use.

I audited every tile, rebuilt the metrics from the pipelines' real board counts, created a private rep scorecard, and built workflows so each call outcome tags and dates the contact automatically.



02 What was wrong

Funnel widget

It only looked at open acquisition deals, but signed deals move to another pipeline. Rows were running remainders, and dead or on hold leads sorted below Under Contract, so its closing rate was really a death rate.

Signed contracts undercounted

The metric whitelisted six stages, some with stale names, so it missed about a third of signed deals.

Appointments

Appointments Set counted every calendar and status, and Attended filtered on Confirmed rather than Showed.

Answered calls

The CRM's Answered status includes voicemail and hang ups. The real connection rate was 46%, not the 92% the stock card showed.

Date range

The YTD dashboard's range was a live user setting, so year to date was not actually enforced.

Fix principle: never whitelist stages. Count by pipeline and exclude only Sold and Dead, so renamed or new stages can never silently drop out.

03 Owner dashboard: 2026 YTD KPI overview

Signed contracts (cumulative)
Every deal in the disposition pipeline, dated by the seller contract date.

Lead to signed contract
Signed deals as a share of all leads.

Offer made to signed
Signed deals against deals that reached Offer Made or later.

Contract sent to signed
Signed deals against deals that reached Contract Sent or later.

Under contract, not sold
Disposition deals that are neither Sold nor Dead.

Signed to sold %
Sold deals as a share of signed, flagged as rising over time because young deals sit in the denominator.

Profit on sold
Estimated profit dated by a new Sold Date field I added to every deal.

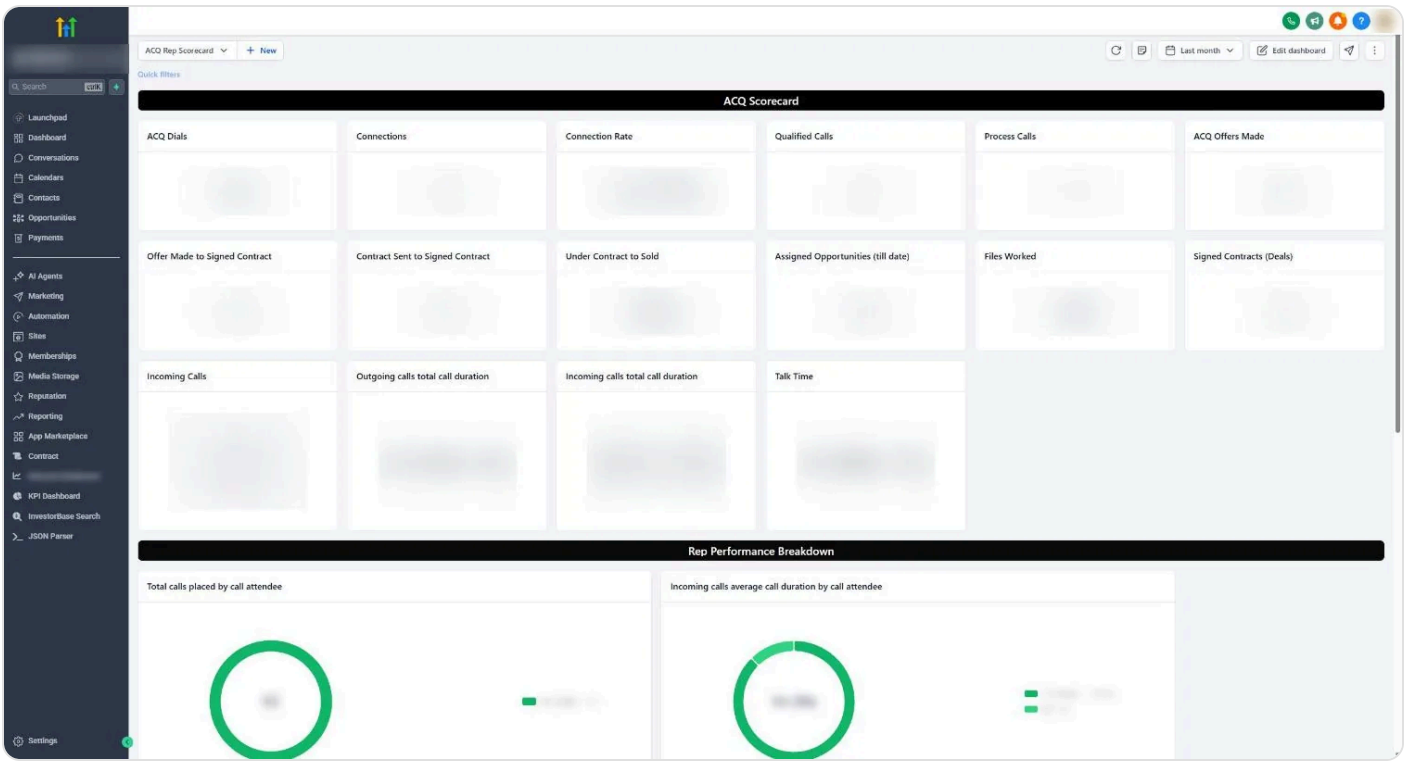
Cancelled to signed
Cancelled contracts by cancellation date against signed contracts by contract date, shown as a ratio, with test deals excluded.

Parcels sold table
Closed deals dated by Sold Date.

Cancelled contracts table
Every cancelled deal, dated by Cancellation Date.

The broken funnel was removed and conversions were rebuilt from board counts with a checksum: acquisition plus disposition must equal total leads.

04 Rep scorecard



Private ACQ rep scorecard (client figures blurred)

Activity
Dials, connections, qualified calls, process calls, incoming calls, talk time and call durations.

Pipeline
Offers made, assigned opportunities, files worked and signed contracts.

Conversion
Offer made to signed, contract sent to signed, under contract to sold.

Per rep breakdown
Calls placed and average call duration by rep, from the CRM's grouped widgets.

Kept as a separate private dashboard so the owner's overview and its metrics were never touched.

05 Call tracking workflows

Every tracker follows one pattern: the rep picks a call disposition, a published workflow fires on that disposition, adds a contact tag and stamps a date field. A count metric dated by that field feeds the scorecard card.

Qualified calls
Disposition Qualified Call, tag qualified call, date Qualified Call Date.

Interested calls
Disposition Interested, tag interested call, date Interested Call Date.

Connections
Any real conversation outcome (connected, interested, hot lead, qualified, contract sent, under contract, not interested, DNC) but never no answer or wrong number, with its own Connection Date.

New dispositions
Qualified Call and Connected were added so reps can record outcomes in one click.

This replaced the stock Answered card with a connection rate based on what the rep actually heard on the call.

06 Inside the CRM sidebar

- **Nexcrest Dashboard**, the team's own web app, embedded as a sidebar link. Making it work inside the CRM frame took a cross site session cookie, an origin check on every write and a policy that lets only the CRM embed it.
- **KPI Dashboard**, a one click link to the owner's overview.

07 Deal tracking sheet automation (Apps Script)

Add new deal
A form that copies the template tab, names it, fills the deal info and adds a linked row to the dashboard, with a lock so two people cannot collide.

Hide sold deals
Ticking Sold hides the deal's row on both dashboards and hides its tab. Show and hide from a custom menu.

Dashboards stay in sync
Sold status syncs between the raw land and new construction dashboards.

Duplicate agent sync
The same agent on several deals is matched by phone, so SMS sent, called and talked to follow them everywhere.

Fast on open
Sheet open time cut from 63 seconds to about 4.6 by reading once and writing in bulk, under Google's 30 second limit.

Visual status
Rows highlight by contact progress: talked, called, or SMS only.

08 Results

> The owner reads KPIs built from what actually happened, with definitions written down for every metric.
>
> Reps record outcomes in one click and the scorecard updates itself.
>
> The connection rate reflects real conversations, not voicemails.

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All client figures in screenshots are blurred.