

Your Free Customer Tracker

Google Sheets & Docs as a CRM — for people who have never done this before.

“Own your work. Own your life.”

Scrappy Stacks

Introduction

Most small business owners don't lose customers because they're bad at the work — they lose track of them. A quote you meant to follow up on, a customer who asked a question three weeks ago that never got answered, a lead that went quiet because nobody circled back. None of that requires a CRM subscription to fix. It requires a place to write it down and a habit of checking it.

This guide walks through building that place using tools you already have — a free Google account. It's the same tracker included with this download, already built and ready to copy. This just explains why each part exists, so you actually use it.

Chapter One: Setting Up Your Google Account

If you don't already use Google for the business, start here. A free Google account gets you Sheets (for the tracker itself) and Docs (for anything too long to fit in a spreadsheet cell) with no subscription and no card required. Use a dedicated business email if you can — even a free Gmail address — rather than mixing this with a personal account. It keeps client information separate from your own inbox, and makes it easy to hand off later if you ever need to.

Chapter Two: Building Your Customer Tracker

The tracker included with this guide is ready to copy as-is, but here's what makes it work: one row per customer, and columns for the handful of things you actually need to see at a glance — name, contact info, status, the date you last talked to them, and the date you're supposed to follow up next. Resist the urge to add more columns than that at first. A tracker with twenty fields is one people stop updating within a week.

Chapter Three: Making It Easier to Scan at a Glance

Two small things turn a plain list into something you'll actually use. First, a dropdown for the status column, so every row says exactly one of a few consistent options instead of five different versions of "maybe." Second, conditional formatting that highlights a row when the follow-up date has passed — so overdue customers turn red instead of quietly scrolling off your screen. Both are already built into the included template; you don't have to set either one up yourself.

Chapter Four: Using Google Docs for Deeper Notes

A spreadsheet cell is the wrong place for a long conversation history or detailed job notes — it turns into a wall of text nobody rereads. When a customer needs more than a line or two, give them their own Google Doc instead, and drop a link to it in the tracker's notes column. You get the quick-scan view in the sheet and the full story one click away, without either one getting cluttered by the other.

Chapter Five: Keeping It Simple

The tracker only works if updating it takes less time than the thing it's replacing — sticky notes, a notebook, or just trying to remember. Build a two-minute habit around it: after every call, quote, or job, update the row before you move on to the next thing. Don't batch it for "later," because later is exactly when the details get fuzzy and the tracker stops being trustworthy.

Chapter Six: Knowing When You've Outgrown It

A spreadsheet handles dozens of customers without much strain. It starts to strain once you've got a team logging into the same sheet at once, you need automatic reminders instead of a color turning red, or you're duplicating the same information across three different tabs. None of that means you did anything wrong — it means the business grew past what a free tool was built for. That's the point where it's worth handing the whole system to someone else to rebuild properly, instead of patching the spreadsheet further.

Where to Go From Here

The template built for this guide is included as its own file — open it in Google Sheets or Excel, make a copy, and it's ready to use today. If tracking customers is the least of what's eating your time, that's exactly the kind of thing Build It For Me is built to take off your plate — a real website, hosting, and the ongoing maintenance, handled for you.