



STRIVE

FREELANCING AGENCY

Precision Planning, Measurable Growth.

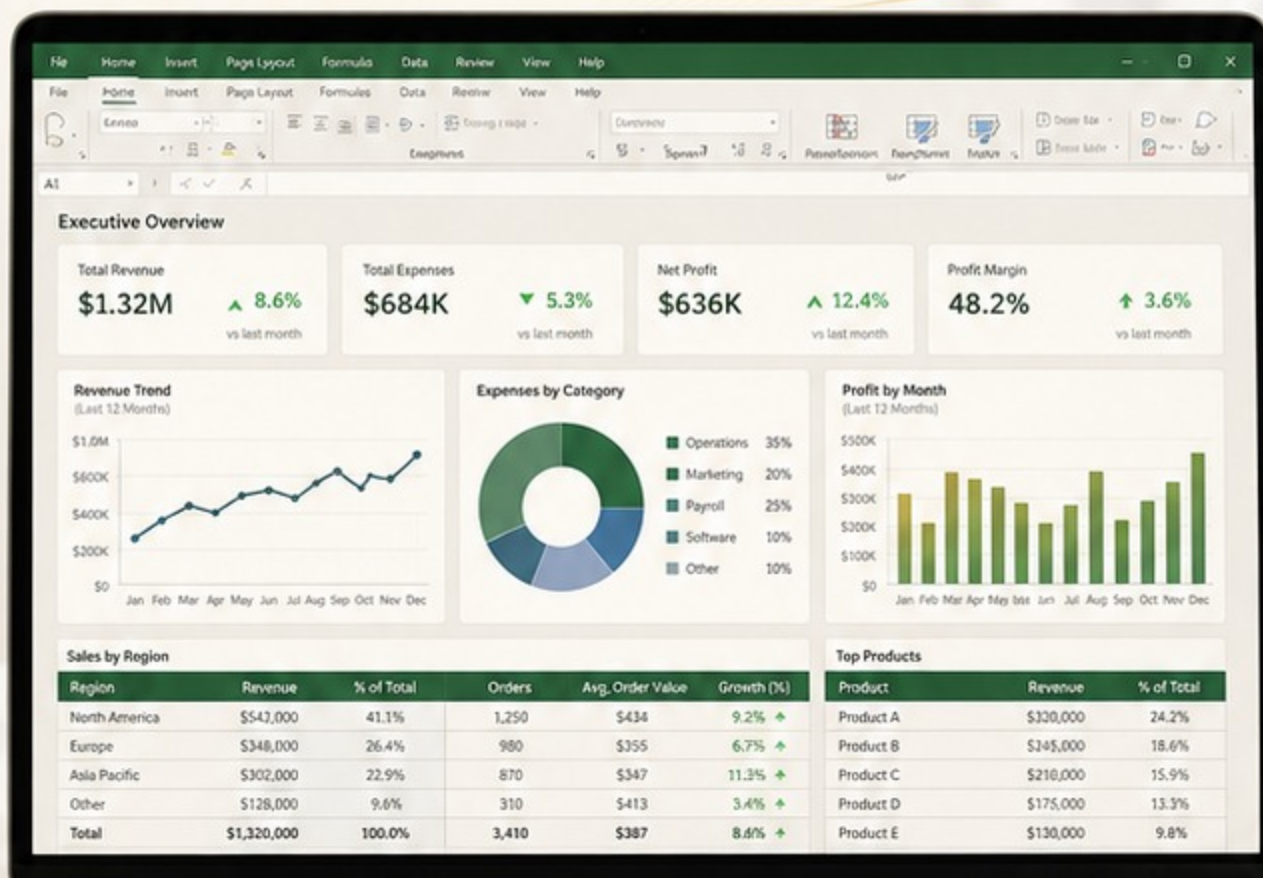
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EXCEL & DATA MANAGEMENT PORTFOLIO



Clean data. Smart reporting.
Better business decisions.



DATA CLEANING
Accurate, consistent
& ready to use.



EXCEL REPORTING
Professional reports
that drive clarity.



DASHBOARD SETUP
Interactive dashboards
for real-time insights.



DATA ACCURACY
Reliable data for
confident decisions.





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Precision Planning, Measurable Growth.

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ABOUT STRIVE

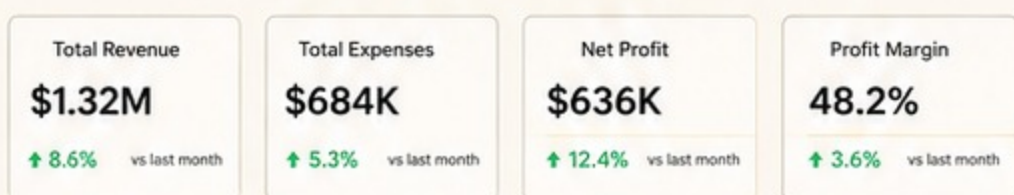
EXCEL & DATA MANAGEMENT SUPPORT

STRIVE helps businesses organize, clean, structure, analyze, and report data with clarity using Excel. From spreadsheets to dashboards, trackers, summaries, and business reports — we turn raw data into meaningful insights that save time, improve accuracy, and support better decisions.

OUR 5-STEP PROCESS



DASHBOARD PREVIEW



Date	Category	Revenue	Expenses	Net Profit	Profit Margin
01-May-24	Product Sales	\$120,000	\$56,200	\$63,800	53.2%
01-May-24	Services	\$65,000	\$28,400	\$36,600	56.3%
01-May-24	Other Income	\$12,500	\$4,800	\$7,700	61.6%
Total		\$197,500	\$89,400	\$108,100	54.8%

WHY CLIENTS CHOOSE STRIVE

- ACCURACY**
We ensure clean, consistent, and error-free data you can trust.
- ORGANIZED DATA**
Well-structured spreadsheets make data easy to use and update.
- FASTER REPORTING**
Save time with automated reports, dashboards, and trackers.
- CUSTOM SHEETS**
Tailored Excel solutions built around your unique needs.
- BUSINESS CLARITY**
Clear insights and visuals help you make confident, data-driven decisions.

Better data. Better insights. Better business.



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EXCEL & DATA MANAGEMENT SERVICES OVERVIEW



DATA ENTRY

Accurate and efficient data entry tailored to your needs.



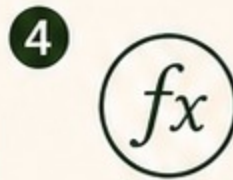
DATA CLEANING

Remove duplicates, fix errors, and ensure data accuracy.



EXCEL FORMATTING

Professional formatting for clarity, consistency, and better readability.



FORMULA SETUP

Custom formulas and functions to automate and simplify tasks.



PIVOT TABLES

Dynamic pivot tables for powerful data analysis and summaries.



DASHBOARD REPORTING

Interactive dashboards for real-time insights and performance.



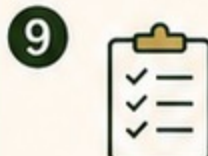
MIS REPORTS

Management reports that present key metrics clearly.



DATA CONSOLIDATION

Combine data from multiple sources into one clean view.



TRACKER MANAGEMENT

Smart trackers to monitor goals, tasks, and performance.



WEEKLY REPORTING

Consistent weekly reports to track progress and drive decisions.



WORK SAMPLES



SALES TRACKER					EXPENSE SHEET				DASHBOARD SAMPLE				SUMMARY REPORT			
Date	Product	Category	Units	Revenue	Date	Category	Description	Amount	Total Revenue	Total Expenses	Net Profit	Profit Margin	Metric	This Month	Last Month	Change
01-Apr	Product A	Electronics	15	\$1,500	01-Apr	Office Supplies	Stationery	\$120	\$128,450	\$82,630	\$45,820	35.7%	Total Revenue	\$128,450	\$110,230	▲ 16.5%
02-Apr	Product B	Home	21	\$2,205	02-Apr	Travel	Client Visit	\$450	Revenue Trend  Expenses by Category 				Total Expenses	\$82,630	\$70,150	▲ 17.8%
03-Apr	Product C	Office	18	\$1,620	03-Apr	Utilities	Internet	\$80					Net Profit	\$45,820	\$40,080	▲ 14.3%
04-Apr	Product A	Electronics	24	\$2,400	04-Apr	Marketing	Social Media	\$200					Profit Margin	35.7%	36.4%	▼ -0.7%
05-Apr	Product D	Accessories	17	\$1,360	05-Apr	Software	Excel Add-in	\$150					Total Orders	354	298	▲ 18.8%
06-Apr	Product B	Home	22	\$2,310	06-Apr	Miscellaneous	Other Expenses	\$75					Avg. Order Value	\$362	\$370	▼ -2.2%
07-Apr	Product C	Office	20	\$1,800	07-Apr	Travel	Local Transport	\$60								
Total			137	\$13,195	Total			\$1,135								



CLEAN DATA

Accurate, organized, and error-free data.



SMART REPORTS

Professional reports that drive clarity.



BETTER TRACKING

Track performance and stay on top of goals.



CLEAR INSIGHTS

Actionable insights for smarter decisions.





Precision Planning.
Measurable Growth.

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Problems We Solve



01

Low-Quality Leads

Irrelevant or unqualified leads waste your time and hurt your pipeline.



02

Wrong or Outdated Contact Data

Incorrect or outdated emails and phone numbers lead to bounces and missed opportunities.



03

Time Wasted on Manual Prospecting

Hours spent searching, filtering, and validating data take focus away from closing deals.



04

Leads Scattered Across Sheets

Unorganized data across multiple files makes follow-ups difficult and unreliable.



05

No Filtering by Niche or Role

Lack of targeted filters results in generic lists that don't match your ideal clients.



06

Slow Outreach Preparation

Manually collecting and organizing data delays campaigns and reduces outreach consistency.



07

Inconsistent CRM Data

Duplicate entries and missing fields create reporting errors and poor decision-making.



08

Missed Growth Opportunities

Poor data visibility and incomplete outreach mean fewer meetings and slower growth.



Disorganized lead research slows sales, wastes time, and reduces conversions.



Before

How most teams manage leads without a system.

Messy Lead Sheet

Name	Company	Email	Phone
S. Jhonson	Markting...	sarah.j@gop...	(555) 02...
James Carter	Sales Mana...	james.c@g...	555-0188
M. Lee	CEO	mlee@ex...	—
Emily Davis	Operators...	emily@p...	555 0133
Daniel Kim	Bus. Dev...	daniel.k@...	N/A
...	...	...	...

Cluttered and hard to filter or track.

Unverified Contact List

john@company.com	Invalid
info@business.com	Unknown
alex@domain.net	Risky
anna@brand.io	Valid
hello@startup.com	Invalid

High bounce rates and low deliverability.

Manual Company Search

Company A

Company B

Company C

Too much manual effort, too little time.

Incomplete Follow-Up Tracker

Name	Status
Sarah Johnson	● Contacted
James Carter	● No Reply
Michael Lee	● Follow Up
Emily Davis	● Pending
Daniel Kim	● —

Follow-ups fall through and opportunities get lost.





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Precision Planning, Measurable Growth.

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OUR PROCESS

A systematic workflow for clean data and clear reporting.



CLEAR COMMUNICATION

We keep you informed at every step.



ACCURACY

Clean, validated data you can trust.



CONFIDENTIALITY

Your data is safe, private, and secure.



MEASURABLE RESULTS

Insights that drive growth and better decisions.



TASK PLANNING BOARD

PROJECT ROADMAP			
TO DO	IN PROGRESS	REVIEW	DONE
Collect Required Files	Data Cleaning & Structuring	Dashboard Design	Client Feedback
Review Data Structure	Setup Formulas & Trackers	Report Review	Final Delivery
Define KPIs			

- ✓ Plan tasks and milestones clearly
- ✓ Track progress at every stage
- ✓ Stay organized and on schedule

DAILY CHECKLIST

DAILY CHECKLIST	
☒	Review new data / files
☒	Validate & clean data
☒	Update formulas / trackers
☒	Cross-check accuracy
☐	Prepare dashboard updates
☐	Client update / notes

- ✓ Daily focus, clear priorities
- ✓ Consistent quality checks
- ✓ No detail left behind

WEEKLY DELIVERY SNAPSHOT

WEEKLY SNAPSHOT	
Reports Delivered	Dashboards Updated
6	4
Data Points Processed	Accuracy Rate
12,540	99,5%
TOP INSIGHTS	
• Sales increased by 12% vs last week	
• Top performing product: Product C	
• Marketing spend optimized by 8%	

- ✓ Track performance weekly
- ✓ Highlight key insights
- ✓ Measure real impact

PROCESS IN ACTION



- ✓ Tools. Focus. Precision.
- ✓ Data turned into clarity
- ✓ Helping you grow smarter





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Precision Planning. Measurable Growth.

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CLIENT CASE STUDY 1

RETAIL BUSINESS

Sales data cleanup. Inventory reporting.
Faster monthly insights.



CLIENT PROBLEM

- Disorganized sales and inventory data across multiple files.
- Inconsistent product names, duplicates, and missing values.
- Reports took too long to prepare and lacked clear insights.



SERVICES PROVIDED

- Data cleaning & standardization
- Sales data consolidation
- Inventory tracking system setup
- Automated reporting & dashboards
- KPI analysis & insights



PROCESS

- Collected & reviewed raw data
- Cleaned, validated & structured data
- Built relational data model
- Created dynamic Excel dashboards
- Delivered easy-to-use reports



RESULT

- Accurate and consistent data.
- Clear visibility into sales & inventory.
- Faster monthly reporting.
- Better decisions, improved profit margins.

SALES TRACKER

Date	Category	Product	Sales (USD)	Units Sold	Region
1-May-24	Electronics	Wireless Headphones	\$2,450	45	North
2-May-24	Home Appliances	Air Fryer	\$1,870	22	South
3-May-24	Electronics	Smart Watch	\$3,150	30	East
4-May-24	Accessories	Phone Case	\$620	120	West
5-May-24	Home Appliances	Blender	\$1,240	18	North
TOTAL			\$9,330	235	

INVENTORY SUMMARY

Product	Category	Stock On Hand	Reorder Level	Status
Wireless Headphones	Electronics	120	50	In Stock
Air Fryer	Home Appliances	35	20	In Stock
Smart Watch	Electronics	18	25	Low Stock
Phone Case	Accessories	250	100	In Stock
Blender	Home Appliances	15	20	Low Stock

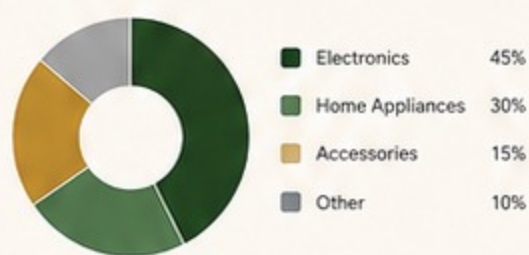
MONTHLY KPI DASHBOARD

Total Sales	Total Orders	Avg. Order Value	Gross Profit
\$98,750	412	\$239.68	\$32,640
↑ 12.5%	↑ 8.2%	↑ 4.7%	↑ 15.3%
vs last month	vs last month	vs last month	vs last month

SALES TREND



SALES BY CATEGORY



CLIENT FEEDBACK



“

The dashboards and reports created by STRIVE Freelancing Agency helped us save hours of manual work every week. The insights are clear, accurate, and easy to understand.

– Operations Manager, Retail Business



3,000+
ROWS ORGANIZED



95%
DATA ACCURACY



35%
FASTER REPORTING



10+
HOURS SAVED WEEKLY



CLIENT CASE STUDY 2

SERVICE AGENCY

Client tracker setup. Expense sheet management. Weekly MIS reporting.



CLIENT PROBLEM

- Scattered client data across files
- Manual tracking of payments & follow-ups
- No proper visibility into expenses
- Delayed reports and unclear insights



SERVICES PROVIDED

- Client & payment tracker setup
- Expense sheet management
- Weekly MIS dashboard & reporting
- Follow-up tracker for pending tasks



PROCESS

- Understood workflow & requirements
- Designed structured trackers in Excel
- Automated reports & summaries
- Delivered weekly MIS & follow-ups



RESULT

- Better organization of client & payment data
- Reduced manual work & errors
- Timely weekly reports with key insights
- Improved visibility & decision-making

CLIENT PAYMENT TRACKER

Client Name	Project	Total Amount	Paid Amount	Due Amount	Status	Last Payment
ABC Solutions	Branding	\$ 3,000	\$ 2,000	\$ 1,000	Partial	12-May-25
NextGen Media	Website	\$ 4,500	\$ 4,500	\$ -	Paid	18-May-25
Bright Ideas	Marketing	\$ 2,500	\$ 1,500	\$ 1,000	Partial	20-May-25
Creative Minds	Social Media	\$ 1,800	\$ 900	\$ 900	Partial	22-May-25
TechNova	SEO	\$ 3,500	\$ 3,500	\$ -	Paid	25-May-25

EXPENSE SUMMARY

Category	This Month	Last Month	% Change
Tools & Software	\$350	\$280	+25.0%
Marketing	\$600	\$450	+33.3%
Travel	\$450	\$300	+50.0%
Office Supplies	\$180	\$150	+20.0%
Others	\$220	\$190	+15.8%
Total	\$1,800	\$1,370	+31.4%



WEEKLY MIS DASHBOARD



FOLLOW-UP TRACKER

Client	Task	Due Date	Status	Next Follow-up
ABC Solutions	Payment Reminder	28-May-25	Pending	27-May-25
Bright Ideas	Project Update	29-May-25	In Progress	28-May-25
Creative Minds	Feedback Call	30-May-25	Pending	29-May-25
NextGen Media	Final Invoice	31-May-25	Pending	30-May-25

“The trackers and reports have completely streamlined our workflow. We now have clear visibility, timely updates, and peace of mind every week.”



– Operations Head
Service Agency



1,500+
RECORDS MANAGED
Clients, payments & expenses tracked



92%
REPORT ACCURACY
Reliable data for better decisions



40%
TIME SAVED
Reduced manual work & faster reporting



100%
ORGANIZED FILES
Structured & easy to access



Client Case Study 3

Marketing & Consulting Agency



Niche research. Contact discovery. Outreach-ready data.



CLIENT PROBLEM

The client needed high-quality leads in the marketing & consulting space to expand outreach and build a strong sales pipeline.



SERVICES PROVIDED

- ✓ Niche & segment research
- ✓ Contact discovery
- ✓ Email & data enrichment
- ✓ CRM-ready lead lists



PROCESS

- 01 Defined ideal client profile
- 02 Researched & segmented niches
- 03 Discovered & verified contacts
- 04 Enriched data & prepared for outreach
- 05 Delivered structured, actionable list



RESULT

- ✓ Highly targeted list of decision makers
- ✓ Clean, verified & enriched data
- ✓ Outreach-ready information
- ✓ Stronger pipeline & higher response rate



SEGMENT / NICHE LIST

Niche / Segment	Target Market	Opportunity Score
Digital Marketing Agencies	SMB Brands	9.2
Branding & Creative Studios	Startups	8.7
SEO & Content Consultants	E-commerce	8.5
Growth Marketing Firms	SaaS	8.3
Marketing Automation Experts	B2B Services	7.9



CONTACT ENRICHMENT TRACKER

Name	Title	Email	Company	Email Status
Jessica Allen	CEO	jessica@brightpath.com	BrightPath Marketing	Verified
Daniel Carter	Founder	daniel@elevatebrand.co	Elevate Brand Co.	Verified
Sophia Wright	Head of SEO	sophia@contentpeak.io	Content Peak Solutions	Verified
Ethan Brooks	Growth Lead	ethan@growthcraft.io	GrowthCraft Agency	Verified
Olivia Morgan	Consultant	olivia@marketflow.co	MarketFlow Consulting	Verified



CLIENT FEEDBACK

“STRIVE delivered exactly what we needed — high-quality leads with verified contacts. Outreach is smoother and responses have improved significantly.”



Marketing Director
Marketing & Consulting Agency



LEAD RESEARCH SHEET

Company	Industry	Employees	Location
BrightPath Marketing	Digital Marketing	11-50	Austin, USA
Elevate Brand Co.	Branding	11-50	Denver, USA
Content Peak Solutions	SEO / Content	1-10	London, UK
GrowthCraft Agency	Growth Marketing	51-200	New York, USA
MarketFlow Consulting	Marketing Consulting	11-50	Toronto, CA



CRM / FOLLOW-UP TRACKER

Lead Name	Company	Stage	Last Contact	Next Step
Jessica Allen	BrightPath Marketing	Contacted	Jun 02, 2025	Follow-up Email
Daniel Carter	Elevate Brand Co.	In Progress	Jun 01, 2025	Send Proposal
Sophia Wright	Content Peak Solutions	New Lead	May 30, 2025	Intro Email
Ethan Brooks	GrowthCraft Agency	In Progress	Jun 03, 2025	Follow-up Email
Olivia Morgan	MarketFlow Consulting	Contacted	Jun 02, 2025	Schedule Call



DELIVERY SUMMARY

	Total Leads Delivered	2,500+
	Verified Contacts	98.4%
	Email Found	1,969
	Data Accuracy	97.6%
	Turnaround Time	5 Days

“Great data drives great outreach. We deliver the precision, so you can focus on building relationships that grow.”



PRECISION PLANNING

Target the right leads with accurate data.



MEASURABLE GROWTH

Build a stronger pipeline with quality outreach.



GREAT RESULTS

Better connections. Better conversions.





WORK SAMPLES / SCREENSHOTS

Real examples. Real clarity.



SALES TRACKER

Date	Product	Category	Sales Rep	Qty	Unit Price	Total Sales	Status
1-Apr-24	Product A	Electronics	John	10	\$50.00	\$500.00	Completed
2-Apr-24	Product B	Furniture	Sarah	5	\$120.00	\$600.00	Completed
3-Apr-24	Product C	Clothing	Mike	8	\$30.00	\$240.00	Completed
4-Apr-24	Product D	Electronics	John	12	\$45.00	\$540.00	Completed
5-Apr-24	Product E	Furniture	Sarah	7	\$150.00	\$1,050.00	Pending
6-Apr-24	Product F	Clothing	Mike	9	\$25.00	\$225.00	Completed
7-Apr-24	Product G	Electronics	John	6	\$60.00	\$360.00	Pending
8-Apr-24	Product A	Furniture	Sarah	4	\$110.00	\$440.00	Completed
TOTAL				61		\$3,955.00	

1

SALES TRACKER

Track daily sales, products, reps, and performance with ease.

EXPENSE REPORT - APRIL 2024

Date	Category	Description	Amount	Payment Method
2-Apr-24	Office Supplies	Stationery & Paper	\$120.00	Cash
3-Apr-24	Travel	Taxi to Client Meeting	\$45.00	Card
4-Apr-24	Software	Excel Subscription	\$99.00	Card
5-Apr-24	Meals	Team Lunch	\$80.00	Cash
6-Apr-24	Marketing	Facebook Ads	\$150.00	Card
7-Apr-24	Utilities	Internet Bill	\$60.00	Bank Transfer
8-Apr-24	Office Supplies	Printer Ink	\$35.00	Cash
TOTAL EXPENSES			\$589.00	

2

EXPENSE REPORT SHEET

Organize and monitor business expenses in one place.

DATA CLEANING SHEET

Raw Data			Cleaned Data		
Name	Email	Phone	Name	Email	Phone
John Doe	john@example.com	555-123-4567	John Doe	john@example.com	555-123-4567
Jane Smith	JANE@EXAMPLE.COM	(555) 987 6543	Jane Smith	jane@example.com	555-987-6543
Bob Johnson	bob.j@example.com	555-987-1111	Bob Johnson	bob.j@example.com	555-987-1111
Alice Brown	ALICE@EXAMPLE.COM	555-222-3333	Alice Brown	alice@example.com	555-222-3333
Mike Davis	mike.d@example.com	555-444-5555	Mike Davis	mike.d@example.com	555-444-5555
Sarah Wilson	Sarah@example.com	555-666-7777	Sarah Wilson	sarah@example.com	555-666-7777

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DATA CLEANING SHEET

Clean, format, and standardize raw data for accuracy and analysis.

CRM / CLIENT TRACKER

Client Name	Company	Contact Email	Status	Last Contact	Next Follow Up
Acme Corp	Acme Ltd.	info@acme.com	Active	5-Apr-24	15-Apr-24
Beta Solutions	Beta LLC	contact@beta.com	Prospect	3-Apr-24	12-Apr-24
Gamma Group	Gamma Inc.	hello@gamma.com	Active	6-Apr-24	16-Apr-24
Delta Partners	Delta Co.	reach@delta.com	Inactive	1-Apr-24	—
Epsilon Tech	Epsilon Ltd.	support@epsilon.com	Active	7-Apr-24	20-Apr-24
Zeta Services	Zeta LLC	connect@zeta.com	Prospect	2-Apr-24	10-Apr-24

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CRM / CLIENT TRACKER

Manage client details, communication, and follow-ups efficiently.

MONTHLY DASHBOARD REPORT



5

MONTHLY DASHBOARD REPORT

Interactive report with key metrics and visual insights.

CLIENT FEEDBACK

Client	Rating (1-5)	Feedback	Date
Acme Corp	5	Excellent work and on time delivery!	5-Apr-24
Beta Solutions	4	Great communication and quality.	4-Apr-24
Gamma Group	5	Very professional and detail-oriented.	6-Apr-24
Epsilon Tech	4	Good support and quick response.	7-Apr-24
Zeta Services	5	Exceeded our expectations.	8-Apr-24

Average Rating

4.6 / 5



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CLIENT FEEDBACK

Collect and track client feedback to ensure continuous improvement.

TOOLS WE USE



Microsoft
Excel



Google
Sheets



Google
Drive



Gmail



Trello



Notion



Zoom /
Google Meet



CRM
Tools



Canva



Reporting
Tools



Results & Testimonials

Real support. Real results.



✗ BEFORE

-  Delayed replies
-  Missed leads
-  Unorganized records
-  Weak follow-up
-  Low customer clarity



✓ AFTER

-  Faster responses
-  Organized communication
-  Better lead handling
-  Stronger follow-up
-  Measurable growth

IMPACT AT A GLANCE



12+

Hours Saved
Per Week



3x

Better
Follow-Up



70%

Faster
Workflow



100%

Organized
Communication Plan



45%

Better Customer
Response Efficiency



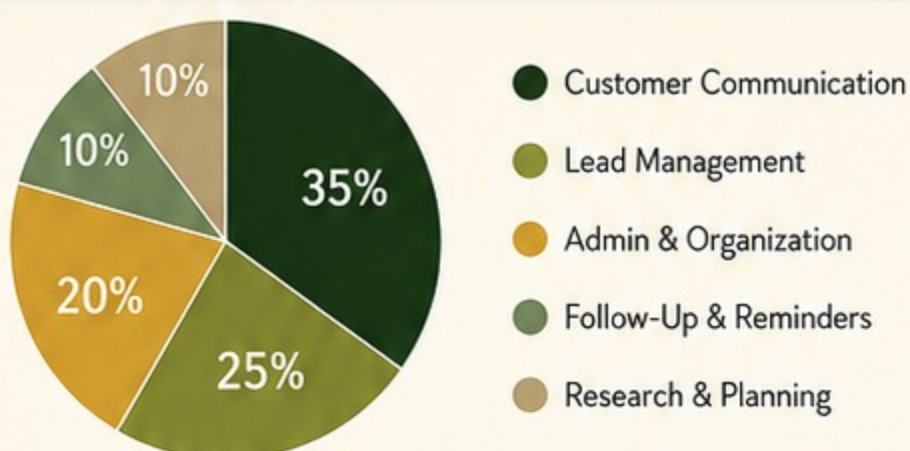
GROWTH OVER 8 WEEKS



Consistent support. Steady growth.



SUPPORT MIX BY CATEGORY



Balanced support across key areas.



CLIENT CHAT



"STRIVE has completely changed the way I handle my business. Responses are faster, leads don't slip through, and everything is so much more organized now!"

Happy Client
Business Owner



CLIENT EMAIL



"The support I received was beyond expectations. Professional, reliable, and always one step ahead. I can focus on growth while STRIVE handles the rest."

Satisfied Client
Entrepreneur



PROFESSIONAL REVIEW



"Highly recommend STRIVE for any business looking to scale efficiently. Their communication, follow-up, and organization are top-notch."

Verified Reviewer
Industry Professional



Thank you for trusting STRIVE.



10/10