COMBINED REVIEW

Lead Record Completeness & Contactability Review

Fixed price: $119 **Format: 5-page sample written report** **Delivery: asynchronous**

FICTIONAL SAMPLE - NOT A REAL CLIENT

Executive snapshot

Northstar HVAC & Mechanical, a fictional HVAC service company, is used to demonstrate how this service is delivered. Measure whether lead records contain enough consistent information to be worked and contacted reliably.

Primary risk

Source is the weakest required field

Best next move

Set a minimum record standard before a lead enters the active pipeline.

Evidence reviewed

Lead export with identity/contact fields; duplicate indicators; invalid/bounced contacts; source/status.

What this report does

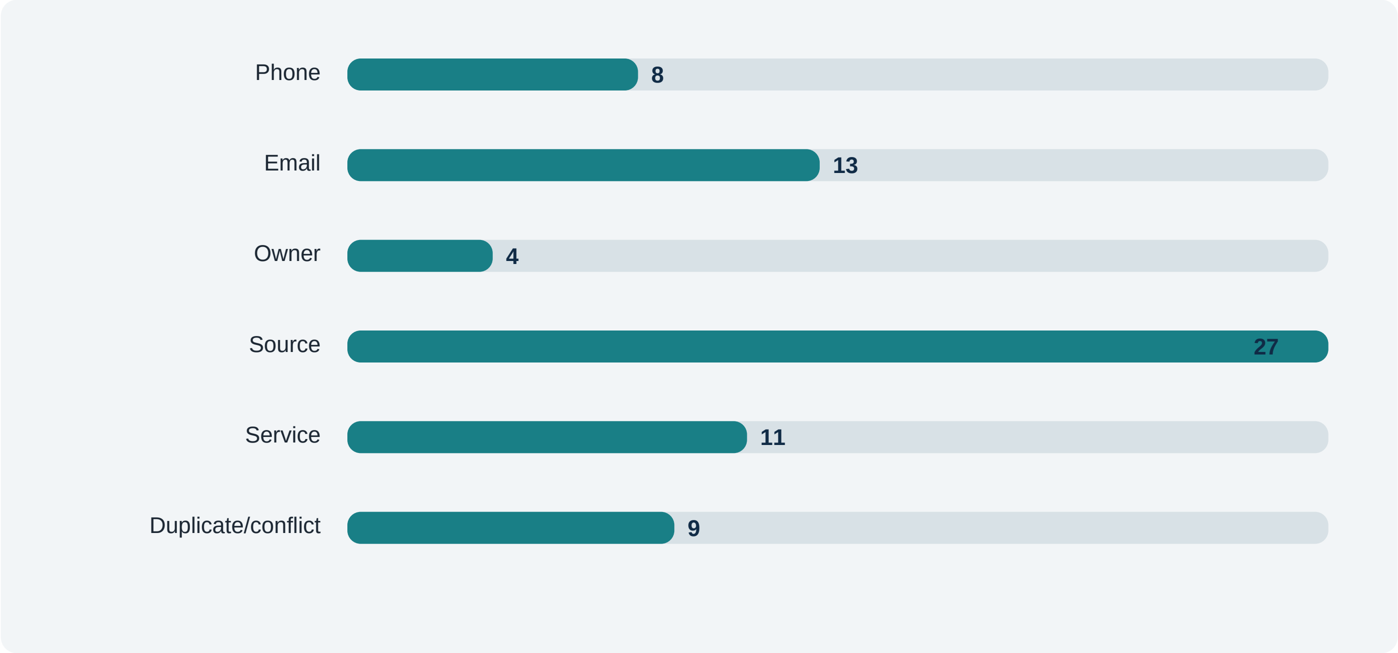
Converts the supplied evidence into prioritized operational actions without inventing ROI or revenue-loss claims.

SERVICE-SPECIFIC ANALYSIS

Current-state review

The sample analysis below uses synthetic records to show the type of evidence this service would evaluate for a real client. The numbers are illustrative, not benchmarks.

Illustrative operating data



Interpretation

More than one-quarter of records cannot support attribution analysis. Invalid or missing email affects follow-up options. The same person can appear under multiple records with different status.

PRIORITY FINDINGS

What deserves attention first

Priority reflects operational risk and controllability, not a claim about financial impact.

HIGH **Source is the weakest required field**

More than one-quarter of records cannot support attribution analysis.

HIGH **Email quality is a meaningful contactability issue**

Invalid or missing email affects follow-up options.

MEDIUM **Duplicate/conflicting records create hidden ownership risk**

The same person can appear under multiple records with different status.

Control implication

The immediate objective is not to add complexity. It is to make the smallest number of controls visible, owned, and repeatable enough that the process can be managed consistently.

RECOMMENDED ACTIONS

30-day implementation rhythm

The sequence below is intentionally limited. Complete the control work in order, confirm adoption, and only then expand the process.

0-7 days	Set a minimum record standard before a lead enters the active pipeline.	Owner / manager
8-21 days	Run duplicate/contact validation before reactivation campaigns.	Process owner
22-30 days	Treat missing source and contact fields as visible exceptions, not silent blanks.	Manager review

Operating rules

- Assign one accountable owner for each action.
- Use a dated next action or review date.
- Measure only fields the team can maintain consistently.
- Do not add software or process complexity unless the current controls are actually being used.

NEXT-STEP ROADMAP

What to maintain, what to revisit

MAINTAIN	Keep the controls that are already producing reliable visibility. Do not change a working control simply to make the process look more sophisticated.
REVISIT	Review the high-priority finding after 30 days with the same evidence definition used in this report.
STOP / CLOSE	If the control is stable and the underlying question is answered, no additional paid service is required.
ESCALATE ONLY IF EVIDENCE SUPPORTS IT	A different service is appropriate only when a separate operational problem becomes visible outside this report's scope.

Limitations

This sample is illustrative. A real report would use only client-supplied or client-approved evidence, state any missing fields, and avoid unsupported conclusions.