COMBINED REVIEW

Lead Source Capture & Attribution Review

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

FICTIONAL SAMPLE - NOT A REAL CLIENT

Executive snapshot

Harborview Restoration, a fictional property restoration contractor, is used to demonstrate how this service is delivered. Determine whether source is captured accurately at intake and retained through reporting.

Primary risk

Source capture is incomplete at intake

Best next move

Use a controlled source list plus a separate detail field.

Evidence reviewed

Intake source fields; CRM export; source values; campaign tags; reporting screenshots.

What this report does

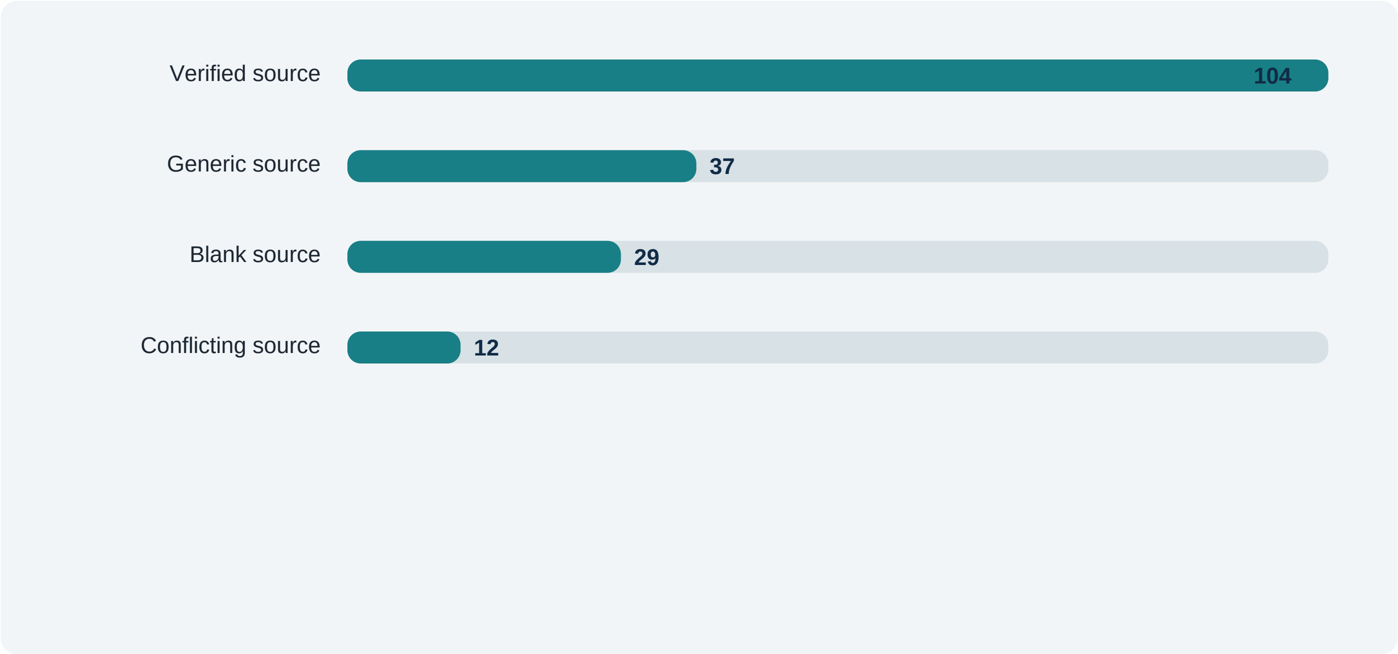
Converts the supplied evidence into prioritized operational actions without inventing ROI or revenue-loss claims.

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

Blank and generic values prevent reliable channel comparison. Manual edits and imports create conflicting attribution. Useful partner/referral information is not reportable.

PRIORITY FINDINGS

What deserves attention first

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

HIGH **Source capture is incomplete at intake**

Blank and generic values prevent reliable channel comparison.

HIGH **Source values change as leads move through the CRM**

Manual edits and imports create conflicting attribution.

MEDIUM **Referral source detail is often buried in notes**

Useful partner/referral information is not reportable.

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	Use a controlled source list plus a separate detail field.	Owner / manager
8-21 days	Lock original source after intake except for documented corrections.	Process owner
22-30 days	Track referral detail in a dedicated field instead of notes.	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.