CRM & PIPELINE

Lost Lead Reason Analysis

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

FICTIONAL SAMPLE - NOT A REAL CLIENT

Executive snapshot

ClearPath Garage Doors, a fictional garage door service company, is used to demonstrate how this service is delivered. Separate real loss reasons from catch-all statuses and identify process-caused losses.

Primary risk

No response is overused as a terminal loss reason

Best next move

Split No response from confirmed lost outcomes.

Evidence reviewed

Closed-lost/dead export; loss reasons; notes; source; owner; service; dates.

What this report does

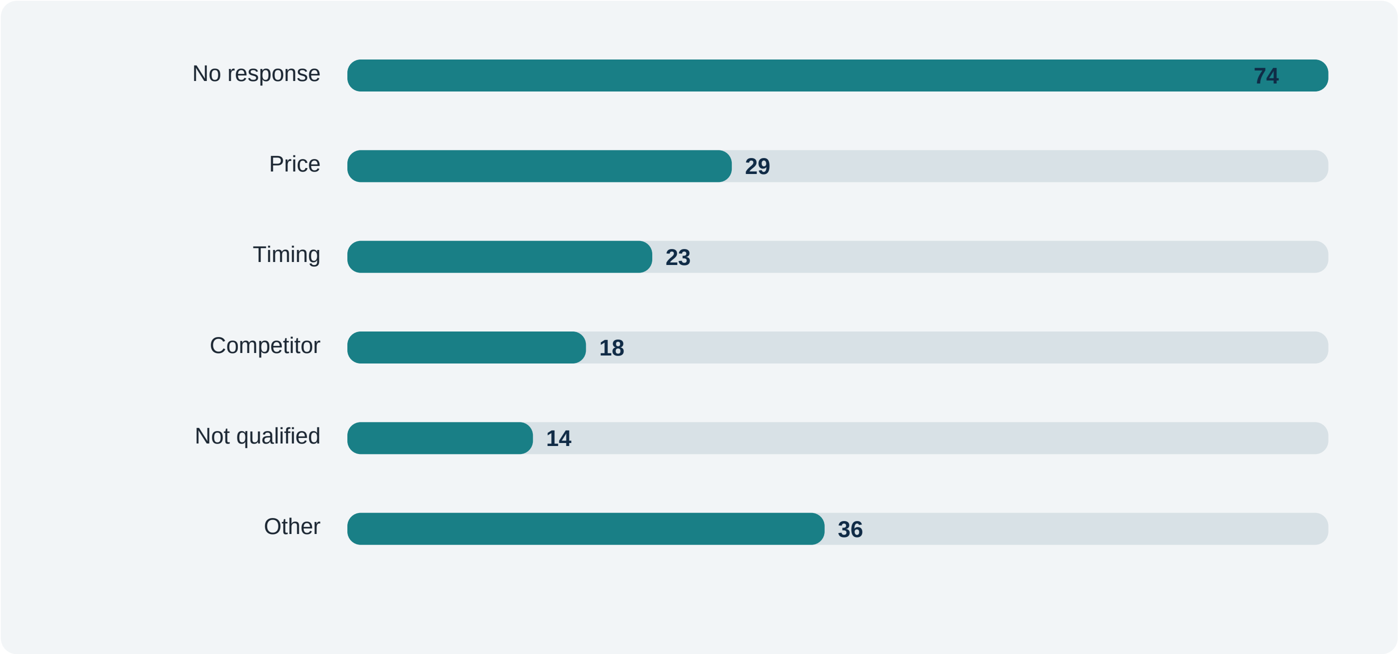
Converts the supplied evidence into prioritized operational actions without inventing ROI or revenue-loss claims.

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

Many records were closed without enough attempts or a clear decision. It contains budget, scope mismatch, service-area, and duplicate records. The pattern may reflect positioning or qualification rather than price alone.

PRIORITY FINDINGS

What deserves attention first

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

HIGH **No response is overused as a terminal loss reason**

Many records were closed without enough attempts or a clear decision.

HIGH **Other is too broad for management learning**

It contains budget, scope mismatch, service-area, and duplicate records.

MEDIUM **Price losses cluster in one service line**

The pattern may reflect positioning or qualification rather than price alone.

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	Split No response from confirmed lost outcomes.	Owner / manager
8-21 days	Replace Other with a short controlled reason list.	Process owner
22-30 days	Review price-loss notes by service before changing pricing.	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.