CRM & PIPELINE

Tracker & Process Tune-Up

Fixed price: $129 **Format: 5-page sample written report** **Delivery: asynchronous**

FICTIONAL SAMPLE - NOT A REAL CLIENT

Executive snapshot

Redwood Home Remodeling, a fictional residential remodeling company, is used to demonstrate how this service is delivered. Improve the working tracker so each live opportunity has a clear status, owner, next action, and management signal.

Primary risk

The tracker cannot reliably drive next actions

Best next move

Make Owner, Stage, Next Action, Last Contact, and Source required working fields.

Evidence reviewed

Current tracker/CRM export; stage definitions; sample records; reporting screenshots.

What this report does

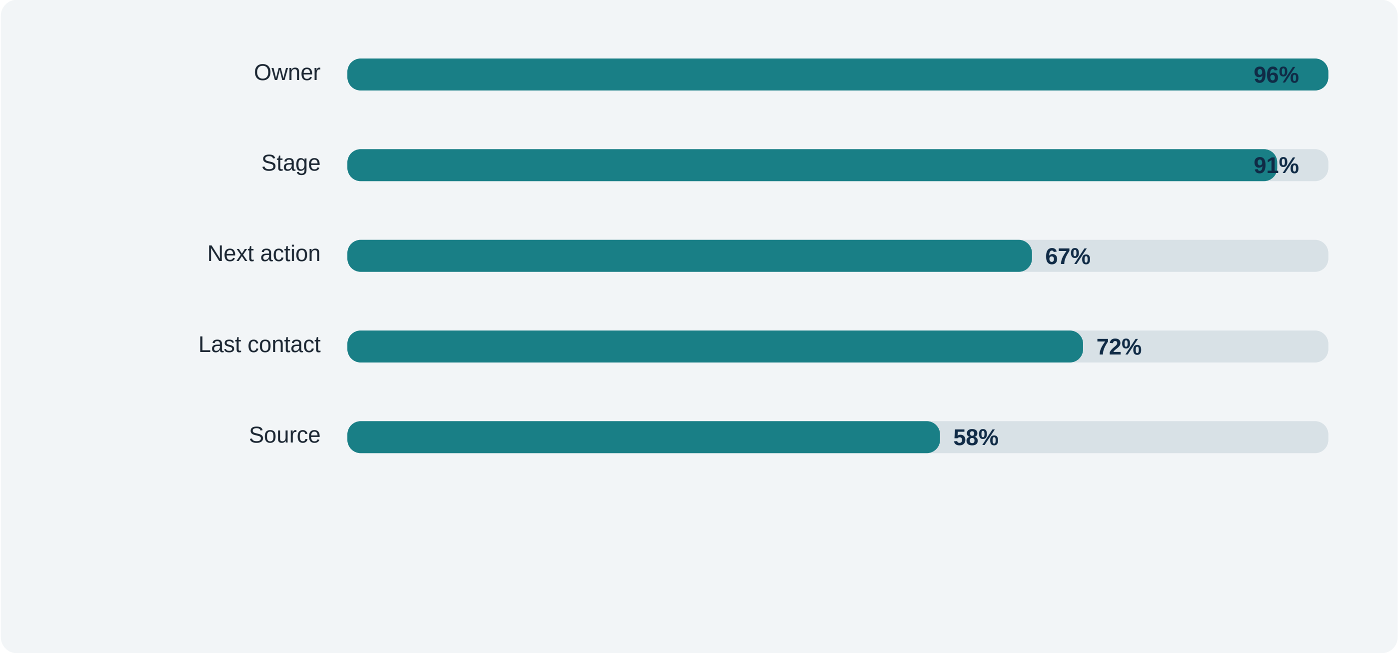
Converts the supplied evidence into prioritized operational actions without inventing ROI or revenue-loss claims.

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

One-third of active records lack a future action date. 42% of sampled records have blank or generic source values. Several records labeled Active have had no activity for more than 30 days.

PRIORITY FINDINGS

What deserves attention first

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

HIGH **The tracker cannot reliably drive next actions**

One-third of active records lack a future action date.

HIGH **Lead source data is too incomplete for useful attribution**

42% of sampled records have blank or generic source values.

MEDIUM **Stage names are usable but inconsistent with actual activity**

Several records labeled Active have had no activity for more than 30 days.

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	Make Owner, Stage, Next Action, Last Contact, and Source required working fields.	Owner / manager
8-21 days	Create an exception view for records missing next action or last contact.	Process owner
22-30 days	Retire generic source values such as Other when a real source is known.	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.