The Owner's Visibility Kit

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The Owner’s Visibility Kit

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The Promise

After working through this Kit, you will be able to answer three questions that most owners paying for marketing cannot:

1. Where exactly is revenue leaving your business before it ever reaches you?
2. Which source is actually booking jobs, not just generating traffic?
3. What numbers should your agency hand you every week, and which “metrics” are noise?

This takes about 45 minutes if you do it in one sitting. You do not need a developer. You do not need new software. You need your CRM, a spreadsheet, and this document.

Who this is for: Any business owner spending money on ads, an agency, or a marketing stack, who cannot clearly trace a booked job back to its source and cannot name the three biggest places revenue slips out before it closes.

Part 1: The 5-Point Revenue Leak Audit

Run this in your CRM today. Each check takes 5-10 minutes.

CHECK 1: LEAD-TO-FIRST-CONTACT TIME (THE SPEED LEAK)

What to pull: In your CRM, filter leads from the last 30 days. Sort by date/time created. For each lead, find the timestamp of the first outbound contact (call attempt, text sent, or email). Calculate the gap in minutes.

If your CRM does not log this automatically, pull your last 20 leads and check the call logs or activity history manually for each one.

The red-flag threshold: More than 5 minutes average first-contact time.

What it means: Studies of B2C and service-business lead data consistently show that contact rates drop by 80-90% after the first 5 minutes. After 30 minutes, you are essentially calling a cold lead. After an hour, most buyers have moved on or filled out a competitor’s form.

Do the math on your own numbers: Take your average lead cost (total ad spend divided by leads in the last 30 days). Now apply the industry contact-rate curve: if you are averaging 25 minutes to first contact, you are likely reaching 20-30% of leads that a 5-minute response would have reached. That gap, multiplied by your average job value and close rate, is the dollar amount sitting in this one leak.

Fix direction: A missed-call text-back automation fires within 60 seconds of a form fill or missed call. It does not close the deal. It says “Got your message, we will call you in the next few minutes” and keeps the buyer on the line. This is not a chatbot replacing your team. It is a bridge that keeps the lead warm until a human picks up.

CHECK 2: AFTER-HOURS COVERAGE (THE GAP LEAK)

What to pull: Export your leads from the last 60 days. Add a column for the hour the lead came in (most CRMs show this in the lead timestamp). Group by hour. Count how many leads arrived between 5pm and 9am, and on weekends.

If you cannot export by hour, do a spot check: scroll through your last 50 leads and flag any that came in outside business hours.

The red-flag threshold: More than 25% of leads arriving outside business hours with no same-night response.

What it means: For most service businesses, after-hours is when buyers have time to actually reach out. They finish work, sit down at the kitchen table, and fill out a form or call. If your response waits until 8am, that lead has had 12 hours to cool off, go to sleep, and start their Tuesday thinking about other priorities.

Do the math on your own numbers: What percentage of your leads come in after 5pm? Multiply that by your monthly lead volume, your close rate, and your average job value. That is the revenue in the overnight gap.

Fix direction: An after-hours text sequence does not require a human. It acknowledges the inquiry, sets an expectation (“We will call you first thing at 8am”), and optionally asks a qualifying question. Most buyers respond. When your rep calls at 8am, it is not a cold call - it is a scheduled follow-up.

CHECK 3: DEAD-QUOTE RATE (THE FOLLOW-UP LEAK)

What to pull: In your CRM or job management software, find all quotes or estimates sent in the last 90 days. Filter for status “no response,” “no decision,” or the equivalent in your system. Count them. Divide by total quotes sent to get a percentage.

If you do not track quote status in software, pull your sales rep’s last 30 sent proposals and ask them to mark which ones never replied.

The red-flag threshold: More than 40% of quotes with zero follow-up activity after the initial send.

What it means: Most owners send a quote, wait a few days, and if they hear nothing, mentally mark it “lost” and move on. The industry average for quote follow-up is 1.3 touches. The industry average for closing a deal from a quote is 5-7 touches. The math does not work.

Do the math on your own numbers: How many quotes did you send last month? What is your average job value? If 40% of those quotes have gone cold and even 15% of them would have said yes with 3 more touches, that is real closed revenue sitting in your sent folder.

Fix direction: A dead-quote sequence sends 3-5 messages over 10-14 days after the quote goes quiet. Each message is short, specific to the proposal, and ends with a question (“Did anything change on your timeline?” or “Is the project still on the table?”). This does not require a rep. It requires one automated sequence and the discipline to tag quotes correctly when they go out.

CHECK 4: SECOND-TOUCH RATE (THE NURTURE LEAK)

What to pull: In your CRM, filter leads from the last 30 days that did not book or convert on first contact. For each one, check the activity log. How many received a second outbound contact (call, text, or email) within 72 hours of the first attempt?

The red-flag threshold: Fewer than 60% of leads receiving a documented second touch within 72 hours.

What it means: Most buyers are not ready to book on the first contact. They need to ask a spouse, check their schedule, compare one more option. If your follow-up depends entirely on a rep remembering to call back, you are leaving it to chance. Reps are busy. They forget. They prioritize leads that felt warm. Cold leads sit.

Do the math on your own numbers: How many new leads came in last month? What percentage got only one attempt? Multiply that by your close rate and average job value. That is the number sitting in the “I meant to call back” pile.

Fix direction: A follow-up sequence does not replace the rep call. It runs between rep calls. It is a text or email sent automatically 24-48 hours after the first attempt if no response is logged. It keeps the lead on the hook without a human having to remember.

CHECK 5: SOURCE ATTRIBUTION (THE VISIBILITY LEAK)

What to pull: In your CRM, look at the last 20 jobs you booked. For each one, find the “lead source” field. What does it say? If it says “web,” “other,” “none,” or is blank, that is a red flag. If it says the specific campaign, ad, or channel, that is not a red flag.

Then cross-check: open your ad platform (Google Ads, Meta, or both). Find the last 5 campaigns that were running. Can you tie a specific campaign to a specific booked job in your CRM?

The red-flag threshold: If you cannot name the source of at least 70% of your booked jobs by channel, and cannot name even 2 specific ad campaigns that produced booked clients in the last 30 days, attribution is broken.

What it means: If you cannot see what is working, you cannot make good decisions about where to spend money. Every budget decision is a guess. Your agency may be showing you click and impression data that has no connection to revenue because they cannot see what happens after the lead fills out a form.

Do the math on your own numbers: Add up what you spent on marketing last month. Now ask yourself: what percentage of that spend can you trace to a booked job? The gap between “total spend” and “traceable spend” is the black box. That is the amount you are managing on faith.

Fix direction: Source attribution requires three things connected: the ad platform (Google or Meta), the landing page (UTM parameters on every URL), and the CRM (lead source field populated automatically from the form). When all three talk to each other, you can see “this Google Search campaign produced 4 booked jobs at $X cost each.” When they do not talk, you get impressions and clicks with no revenue attached.

YOUR AUDIT SCORE

After running all 5 checks, count how many red flags you hit.

- **0-1 red flags:** Your intake is tighter than most. The opportunity is in attribution and source-level visibility.

- **2-3 red flags:** You have at least one defined leak costing you real revenue this month. The fix for each is a 1-2 week build.
- **4-5 red flags:** Revenue is bleeding at every seam. The good news: fixing 2 of these typically produces visible results within 30 days.

Part 2: The Lead-to-Revenue Tracker

This is the simplest version of a tracking sheet that finally ties a booked job to a source. You can rebuild this in Google Sheets in 10 minutes.

THE COLUMNS

Build a sheet with one row per lead. Columns left to right:

Column	What Goes Here
Date In	The date/time the lead came in (pull from your CRM)
Source	The specific source: “Google Search,” “Meta Feed Ad,” “Referral - John H,” “Instagram Bio Link,” “Google LSA”
Campaign Name	The campaign or ad set name from the ad platform (if paid)
First Contact Time	How many minutes from lead creation to first outbound touch
Contact Made	Yes or No (did a human actually reach them?)
Touches	Total number of outbound attempts before close or drop
Quote Sent	Yes or No
Quote Amount	Dollar value of the estimate sent
Status	Booked / Lost / No Response / In Progress
Booked Revenue	Dollar value if booked (leave blank until closed)
Notes	One line: why they booked or why they did not (objection, price, timing, went with competitor)

HOW TO READ IT (3 LINES)

1. **Source column tells you where to spend.** Sort by “Booked Revenue” descending. The sources in the top rows are where your next dollar should go. The sources producing leads but showing $0 in booked revenue are costing you money.

2. **First Contact Time vs. Contact Made tells you where the intake leak is.** If Contact Made = “No” correlates with leads that came in after 5pm or over weekends, that is the after-hours gap from Check 2 above.

3. **Touches vs. Status tells you the follow-up story.** If most “Lost” rows show 1 touch, the rep gave up too early. If “Booked” rows average 5 touches, that is the real close pattern, and anything cutting the sequence short is cutting revenue.

HOW TO POPULATE IT

Two ways to build this:

Manual (start this week): Pull your last 30 leads from the CRM. Fill in every column by hand. This takes 2-3 hours one time and shows you the pattern immediately. It is also how you confirm what the numbers actually look like before you automate anything.

Automated (once you see the pattern): Connect your CRM to a Google Sheet via a direct integration or an automation tool. Every new lead creates a new row with Source, Date, and Campaign pre-filled. Your team updates Status and Booked Revenue as deals move. The sheet stays live.

Most CRMs (GoHighLevel, HubSpot, Salesforce, Pipedrive, Jobber) have native Google Sheets integrations or Zapier connections that make this a 30-minute setup.

Part 3: The 5 Numbers to Demand From Your Agency

These are the 5 questions to put in writing to your marketing agency or vendor. Each one has a red-flag answer pattern below it.

QUESTION 1: "WHICH SPECIFIC CAMPAIGN OR AD PRODUCED MY LAST 5 BOOKED CLIENTS?"

The answer should be: the exact campaign name, the channel, and the approximate spend attributed to each client.

Red flag: "We will have to pull that report" or "our system does not track to revenue" or a vague answer about which ad set or channel produced the lead but no connection to whether that lead actually booked.

What it means: If they cannot connect their ad spend to your booked revenue, they are optimizing for leads and clicks, not for jobs. They will keep spending money on whatever produces the most form fills, even if those leads never close.

QUESTION 2: "WHAT IS OUR COST PER BOOKED JOB, BY CHANNEL, FOR LAST MONTH?"

The answer should be: a specific dollar amount per booked job for Google, for Meta, and for any other channel separately.

Red flag: A cost-per-lead number with no follow-through to closed revenue. "Our CPL is $47" is not the answer. "Your cost per booked job on Google Search was $310 last month" is the answer.

What it means: Cost per lead is easy to game. A low CPL with a 0% close rate is expensive. If your agency only reports CPL and not cost per booked job, they are showing you the number they can control, not the number that matters to you.

QUESTION 3: "IF I CANCEL TODAY, WHAT DO I OWN AND WHAT DO I LOSE?"

The answer should be: a clear list of what assets are yours (the CRM contacts, the automations, the landing pages, the ad creative, the data), and what stays with the agency (their proprietary tools, their reporting logins, their platforms).

Red flag: Hesitation, deflection, or "well, the account is technically in our system." If they cannot hand you a list on the spot, you do not own the assets.

What it means: Many owners discover when they go to leave an agency that the leads, the audiences, the page build, and the attribution data were all inside the agency's accounts, not theirs. You get the raw contact list, if you are lucky. Everything else disappears.

QUESTION 4: "CAN YOU SHOW ME THE REAL-TIME DASHBOARD WHERE I CAN CHECK OUR CAMPAIGN PERFORMANCE MYSELF, ANY TIME?"

The answer should be: a login or a live link you can check without asking anyone.

Red flag: "We send a monthly report" or "just reach out and we will pull it" or a PDF sent on the 1st of each month.

What it means: If visibility into your own marketing spend requires a request to a third party, you are renting access to your own data. A monthly report is a curated story. A live dashboard is the truth.

QUESTION 5: "WHAT HAPPENED TO THE LEADS WE GENERATED 90 DAYS AGO THAT DID NOT BOOK IMMEDIATELY?"

The answer should be: a description of a specific re-engagement sequence, with how many of those leads were contacted, how many responded, and how many converted.

Red flag: "We generated the leads, follow-up is your team's job" or silence. Also a red flag: the agency runs follow-up but cannot tell you the result.

What it means: Most lead-generation agencies stop at the lead. The leads that do not book immediately sit in a list and go cold. 90-day-old leads that went cold are still real buyers. A re-engagement campaign on 6-month-old dead leads routinely turns 10-20% of them into conversations. If nobody is running that sequence, that revenue is gone.

How to Read Your Results

IF YOU HIT 2 OR MORE RED FLAGS IN PART 1:

The leaks are structural, not effort problems. Your team is not the issue. The issue is that the handoffs between your marketing stack and your sales process are manual, slow, or invisible. Automating those handoffs is a build, not a subscription. It takes 2-6 weeks to install, and then it runs without you.

Prioritize in this order: speed-to-lead first (fastest revenue impact), dead-quote follow-up second, source attribution third. Do not try to fix all five at once.

IF YOU HIT 3 OR MORE RED FLAGS IN PART 3:

Your agency relationship has a visibility problem. That does not automatically mean you should fire them. It means you need to make the conversation direct: give them these 5 questions in writing and ask for written answers within one week. Their response tells you whether the relationship is worth continuing.

IF YOUR SOURCE ATTRIBUTION (CHECK 5) IS BROKEN:

Nothing else is fixable in a durable way until you can see what is working. Fixing attribution is the prerequisite to every other decision. If you do not know which ad booked which job, every budget conversation is a guess.

The One Next Step

If you ran this and found leaks, you have two paths.

Path 1: Fix it yourself. You now have the exact checks, the thresholds, and the fix directions. The tracker template in Part 2 takes 10 minutes to build. The questions in Part 3 take 20 minutes to write and send. You can start today.

Path 2: Have us run it with you. AMW does a free Revenue Leak Audit where we run these same 5 checks inside your actual CRM, pull the real numbers, and show you exactly where you are bleeding and what the fix looks like. No pitch in the call. You get a document at the end whether you work with us or not.

If you want the audit, comment AUDIT on any of our posts and we will reach out to schedule it. Or go directly to amwstrategies.ai and book a time there.

The only reason to do it with us rather than solo: we have done this across enough businesses to know what the numbers look like when they are healthy and when they are not, and we can show you what the automated version of each fix looks like running in production. You do not have to take our word for anything. The numbers in your own CRM will tell the story.

AMW Strategies - AI Automation Studio amwstrategies.ai

This Kit is yours. Share it with any owner who is paying for marketing they cannot see into. The only ask: if you use it and it helps, tell us what you found.