

Lead quality reporting worksheet

Agree what a result means before judging performance. Complete one sheet for one defined outcome and comparison. Use evidence references; keep personal customer details in authorised systems.

Business or project / reviewer / review date

1 Define the outcome

Choose the exact stage being assessed. An accepted enquiry is not automatically qualified; a booking is not attendance; a sale agreed is not a funded or completed sale. Revenue and profit are different measures.

- ☐ Enquiry accepted ☐ Qualified lead ☐ Call booked ☐ Call attended ☐ Sale agreed
☐ Completed or funded sale ☐ Revenue ☐ Profit

Exact definition and evidence that this stage has happened

- ☐ Unique people ☐ Unique organisations ☐ Event or transaction count ☐ Counting basis unknown
☐ Reporting only ☐ Imported to Ads ☐ Used for bidding ☐ Use unknown

2 Agree qualification and ownership

Qualification criteria / who decides / where the decision is recorded

Owner and expected review time / exclusions such as tests, spam or duplicates

Retain disqualified and unknown outcomes separately. A form answer alone does not establish a completed sales-team assessment.

3 Trace one journey

Keep each proof separate. A success screen or queued analytics event does not establish receipt. Record the source, landing page and receipt reference without copying personal details.

- ☐ Accepted by the form ☐ Received in the destination ☐ Recorded in analytics
☐ Qualification checked

Non-identifying reference / source and landing page / receipt and event evidence

Check consent and permitted use before recording or importing data. Keep names, email addresses, phone numbers and questionnaire answers off this sheet. Mark missing evidence as unknown.

Compare the evidence and decide

Use the definitions agreed on page 1. Record reporting limitations before choosing a campaign or website change.

4 Compare cohorts at similar maturity

Group outcomes by the same starting event, such as lead creation. Record the extraction date and allow comparable time for later outcomes to arrive. Keep platform attribution separate from unique CRM records.

Record	Current cohort	Comparison cohort
Cohort dates and starting event	-----	-----
Extraction date / time allowed	-----	-----
Spend / defined outcomes	-----	-----
Cost per outcome / value basis	-----	-----

- ☐ Same channel and scope ☐ Same definition ☐ Similar maturity ☐ Duplicates reconciled
☐ Unknowns remain

Value basis and assumptions / missing records / overlapping periods or changes

Label value as actual revenue, gross profit or an estimate. Media cost per outcome excludes fees unless stated. Do not compare an immature cohort with a mature one as if both were final.

5 Choose the next decision and review

- ☐ No change yet ☐ Fix measurement ☐ Check sales handling ☐ Run one limited test

Decision / supporting evidence / what remains unknown

One next action / owner / success measure and review date

Confirm any proposed bidding input separately. Reporting a CRM outcome does not prove it was imported, selected as a goal or used by the campaign.

A worked reporting check

In an anonymised account review, a later extract added attributed sales-stage conversions to the same historical dates. Reported media cost per outcome fell. Record that as a reporting revision; it does not establish that the campaign improved. Reconcile the definitions and unique CRM records, compare similarly mature cohorts, then consider one limited allocation test. Higher click costs and lower traffic still need their own investigation.

Supporting reading: [Conversion value guide](#) | [An anonymised account review](#) | [Google on conversion delay](#)