HISPI

HOME IMPROVEMENT SALES PIPELINE INTELLIGENCE

Revenue Leak Audit

Alek Roofing — South Florida

Audit Window: Apr 1 – Jun 29, 2026 · Outcomes tracked through July 10, 2026

SAMPLE REPORT — SYNTHETIC DEMONSTRATION DATA

“Alek Roofing” is a fictional company. Its problems were planted by code, made deliberately subtle, and hidden from the analyst. The audit below found them blind.

1. Executive Summary

Alek Roofing is a well-run pipeline, and this report says so before it says anything else. Over 90 days: 1,138 leads on $131,385 of spend, 280 completed demos, a 36.8% close rate, and $1,528,473 in net revenue — plus a DNS recovery program that actually works, following up 61.6% of lost demos and pulling $190,322 back. The confirmation process (91.3%) and discounting discipline (2–5% across the team) are where most competitors bleed; here they are strengths.

Because the operation is tight, the leaks that remain are quiet ones — the kind that hide inside otherwise good numbers. The audit found three, worth a conservative combined floor of roughly $100,000 per 90 days (~6.5% of net revenue). A smaller number than a leaky company would show, for the best possible reason.

#	Finding	90-Day Opportunity	Confidence
1	Facebook leads reach the phones ~5 hours slower than every other source; contact rate 67% vs 74–85%	$38,000 – $63,000	High
2	One rep's contracts cancel at 28% — and 6 of his 7 cancels are buyer's remorse, vs 1 remorse cancel across the other four reps combined	$51,000 – $67,000	Medium-High
3	One-leg exposure is elevated in part of the sales team (13–16% vs 3–6% for the best half)	~$11,000 – $18,000	Medium-Low
4	Monitors (no dollar claims): HomePro Marketplace closes at 22%; one setter's sets become demos at 62% vs ~75%	Re-measure	—

Certified NOT leaking: appointment confirmation (91.3%), DNS follow-up coverage (61.6%, 12 recovered sales), discounting, financing funnel (56% offered / 72% applied / 70% approved), lead validity on every source, and setter scheduling stability. An audit that can only find problems is a sales pitch; this one certifies strengths with the same rigor.

2. Scope, Data Received, and Data Quality

Level 3 visibility (funnel + segmented + causal). No recordings or manager scorecards, so no PROCESS-class data; behavioral explanations below are hypotheses pending process evidence.

Check / Dataset	Result	Notes
Reconciliation (§16)	Passed	0 orphan records, 0 duplicate IDs, funnel directions valid, date sequences valid.
Appointments, Demos, Contracts	Reliable	IDs tie across the full pipeline; 103 contracts give real statistical footing.
Contact attempts	Usable	11.7% of attempt timestamps missing.
Sales process execution	Absent	Objection data reflects stated objections only.
Trailing cohorts (§17)	Applied	Late-June contracts remain inside the 30-day retention maturity window; cancellation rates for that cohort are provisional.

NSLI basis: issued-appointment basis, $4,418 per issued appointment ($1,528,473 ÷ 346). Demo basis: $5,459.

3. Master Revenue Funnel

Stage	Count	Conversion	Notes
Leads created	1,138	—	$131,385 spend, 5 sources
Valid leads	1,040	91.4%	Invalid mix normal on every source (7–12%)
Contacted	801	77.0% of valid	One source drags the average — see Finding 1
Appointments set	393	49.1% of contacted	Setting consistent across CSRs (46–53%)
Issued to reps	346	88.0% of sets	91.3% confirmation rate doing its job
Demos completed	280	80.9% of issued	Strong fulfillment
Sales	103	36.8% close	Gross $1,838,908 · avg ticket $17,853
Net sales	86	17 cancels (16.5%)	Net $1,528,473 · plus $190,322 recovered from DNS

4. Findings

Finding 1 — Facebook leads sit for five hours while everything else gets called in two · Confidence: HIGH

Measure: Median speed-to-lead: Storm Canvassing 1.4 hrs, HomePro 2.0, Adjuster Referral 2.9, Google LSA 3.0 — Facebook 7.25 hrs. Facebook contact rate: 67% vs 74–85% everywhere else.

Compare: The lag appears for three of the four CSRs on Facebook specifically, and for none of them on any other source — this is the source's delivery path, not a person.

Diagnose: Causal-level: Facebook leads are not arriving in real time. And the leads are worth chasing — Facebook demos close at 39% (16 of 41), above the company average. This is a handling loss on a healthy source.

Quantify: Facebook currently yields $1,492 of net revenue per contacted lead. Lifting contact from 67% to the 78–85% the other sources prove is achievable ≈ 26–42 additional contacts ≈ $38,000–$63,000 per 90 days.

Correct: Real-time delivery (native integration or webhook) plus the same response SLA the other sources already effectively meet. Days to implement.

Finding 2 — One rep's cancellations carry a signature · Confidence: MEDIUM-HIGH

Measure: Jamal: 7 of 25 contracts cancelled (28%) vs 5.9–17.6% for peers. Company cancellation overall: 16.5%, $310,435 in gross value lost.

Compare: The rate alone is only suggestive at these counts. The reason distribution is not: 6 of Jamal's 7 cancels are recorded as buyer's remorse, versus 1 remorse cancel in the other four reps' 10 cancellations combined. Random chance does not sort reasons that cleanly.

Diagnose: High close rate (39.7%) plus remorse-concentrated fallout is the classic signature of pressure-heavy closing: deals that sign in the kitchen and unravel in the driveway. HISPI flags the pattern, not the technique — confirming the behavior requires a ride-along or recordings, which this dataset does not include.

Quantify: Bringing Jamal's cancellation to the peer range retains roughly $51,000–$67,000 per 90 days at his current volume. He is also the team's #2 net producer — the goal is keeping his volume and keeping his deals.

Correct: 72-hour post-sale protection on his contracts specifically (welcome call, scope re-confirmation, financing confirmation inside the rescission window), a manager ride-along cycle, and re-measure next quarter.

Finding 3 — Decision-makers are missing from too many demos on half the team · Confidence: MEDIUM-LOW

Measure: One-leg rate (homeowner present, decision partner absent): Erica 15.6%, Cole 13.0%, Vic 12.3% — versus Sam 2.9% and Jamal 6.1%.

Compare: The split is real but individual attribution is not statistically safe at 46–68 arrived appointments per rep; any one of the three elevated reps could be a normal quarter away from the pack.

Diagnose: Per HISPI's attribution rule, this is reported as a cohort finding, not a person finding: something in how appointments are set or framed for part of the team is letting single-leg sits through. Naming one rep on this evidence would be guessing with someone's reputation.

Quantify: Bringing the elevated cohort to the team's demonstrated 6% ≈ 8–10 additional two-leg demos ≈ $11,000–$18,000 per 90 days.

Correct: Team-wide fix, individually re-measured: add a both-decision-makers confirmation line to the setting and confirmation scripts, and track one-leg rate per rep on the monthly scorecard. The re-audit will show whether it was one person or a script gap.

Finding 4 — Monitors — flagged, not diagnosed · Confidence: RE-MEASURE ONLY

HomePro Marketplace: Closes at 22% (15 of 68) with the lowest NSLI per valid lead ($959). Contact, validity, and speed all check out, so the gap is at the close on a modest sample. Route evenly across reps for one quarter, then decide. Its $94 CPL means even a mediocre close rate may pencil — the re-measure settles it.

Setter demo-through: One setter's appointments become demos at 62% vs ~72–77% for peers, with normal cancel and reschedule rates — no mechanism visible in the data. Multiple comparisons across four setters and a dozen metrics will produce one outlier by chance; this one is watched, not acted on.

Retention maturity: Cancellation rates for contracts signed in the final weeks of the window are provisional until the 30-day rescission/financing window closes — the re-measure trues them up.

5. Prioritized Correction Plan

Priority	Correction	Type	Effort	90-Day Value
1	Real-time Facebook lead delivery + response SLA	Lead handling	Days	$38K – $63K
2	72-hr post-sale protection on Jamal's deals + ride-along cycle	Retention / management	1–2 weeks	$51K – $67K
3	Both-decision-makers line in setting & confirmation scripts	Appointment process	Days	$11K – $18K
4	Even rep routing on HomePro + per-rep one-leg tracking	Measurement	Ongoing	Decisions in 90 days
5	Process visibility: recordings where lawful (FL two-party consent) or ride-along scorecards	Data / management	Next quarter	Unlocks Level 4

Method notes

- All lift targets are the company's own demonstrated performance — other sources' contact rates, peer cancellation rates, the best half's one-leg rate. No industry numbers appear in this report.
- The ~$100K combined floor sums conservative low ends only.
- Finding 3 deliberately declines person-level attribution: the effect is real at cohort level but underpowered at individual level. HISPI names metrics and cohorts when the data cannot safely name people.
- This company's strengths (confirmation, DNS recovery, discount discipline) are certified with the same evidence standard as its leaks. Findings totaling 6.5% of net revenue reflect a tight operation — not a light audit.

Appendix A — Lead Source Economics

Source	Spend	Leads	Contact	Demos	Close	Net Revenue	CPL	NSLI / Valid Lead
Storm Canvassing	$17,775	262	85.4%	54	51.9%	$453,744	$68	$1,899
Adjuster Referral	$28,622	124	83.9%	42	50.0%	$263,048	$231	$2,349
Google LSA	$27,295	234	79.7%	75	30.7%	$341,541	$117	$1,650
Facebook Ads	$32,805	253	66.5%	41	39.0%	$234,277	$130	$993
HomePro Marketplace	$24,888	265	74.0%	68	22.1%	$235,863	$94	$959

Facebook's weak NSLI is a handling artifact (Finding 1), not a quality problem — its close rate is above company average. Storm Canvassing is the standout: $68 CPL, 52% close, highest net revenue. Worth a discovery question on how storm-season dependent that pipeline is before scaling it.

Appendix B — Rep Performance (Normalized View)

Rep	Demos	Sales	Close	Avg Discount	Cancels	Cancel Rate	Net Revenue	Net $/Demo
Vic	53	23	43.4%	3.7%	3	13.0%	$332,185	$6,268
Jamal	63	25	39.7%	4.7%	7	28.0%	$367,543	$5,834
Cole	43	17	39.5%	2.2%	3	17.6%	$245,837	$5,717
Erica	59	21	35.6%	3.3%	3	14.3%	$323,176	$5,478
Sam	62	17	27.4%	5.2%	1	5.9%	$259,732	$4,189
One-leg rate	—	—	—	—	—	—	Erica 15.6% · Cole 13.0% · Vic 12.3%	Sam 2.9% · Jamal 6.1%

Appendix C — DNS Intelligence (n = 177)

Stated objections: Decision Process 30.5% (dominated by "waiting on insurance" and "getting multiple bids" — structural to roofing), Price 30.5%, Authority 13.6%, Competition 10.7%, Financing 5.6%, Urgency 5.1%, Trust 4.0%.

Recovery program performance: 61.6% follow-up coverage → 63% recontact → 36 rehash sets → 28 rehash demos → 12 recovered sales, $190,322. Rehash close rate: 42.9%. This program is a strength; the only recommendation is objection-matched timing — "waiting on insurance" DNS should be sequenced to adjuster-decision windows rather than a fixed cadence.