HISPI

HOME IMPROVEMENT SALES PIPELINE INTELLIGENCE

Revenue Leak Audit

Lissette’s Solar — South Florida

Audit Window: Mar 1 – May 29, 2026 · Outcomes tracked through July 10, 2026

SAMPLE REPORT — SYNTHETIC DEMONSTRATION DATA

“Lissette’s Solar” is a fictional company. This dataset was generated by code that hid its problems from the analyst; the audit below found them blind.

1. Executive Summary

Over the 90-day window, Lissette's Solar generated 590 leads on $150,319 of marketing spend and retained $950,457 in net revenue (26 net sales, average gross ticket $36,712). The front of this pipeline is genuinely strong: an 83.6% contact rate and sub-3-hour speed-to-lead on every source would embarrass most competitors. The losses are concentrated in two places — what happens between booking an appointment and sitting it, and what happens after a homeowner says no.

At solar ticket sizes, each completed demo carries $8,563 of net value. That single number is why the confirmation finding below dwarfs everything else: every appointment that silently dies is worth roughly a used car.

Conservative combined opportunity: approximately $212,000 per 90 days (~22% of current net revenue), summing only the low end of each finding's range, with lift capped at the company's own internally proven performance. Opportunity sizing, not a forecast.

#	Finding	90-Day Opportunity	Confidence
1	Only 59% of appointments confirmed; unconfirmed sets no-show at 46% and demo at 37% vs 71%	$145,000 – $175,000	High
2	80% of lost demos (~$2.9M in presented volume) never receive any follow-up	$40,000 – $80,000	Medium
3	One rep discounts 14.4% on average vs 2.4–5.3% for peers — and it isn't buying conversions	~$27,000	Medium-High
4	Door Knocking and purchased leads close at 12–13% vs 30–46% elsewhere	Monitor — no $ claimed yet	Medium
5	Retention cannot be certified on 28 contracts — flagged for re-measurement, not action	—	See §5

What is NOT leaking: speed-to-lead (all sources under 3.1 hrs median), contact rate (83.6%), one-leg rates (3–9%), and the financing funnel (86.5% offered / 74% applied / 70.4% approved) are all healthy. This audit will not invent problems where the data shows none.

2. Scope, Data Received, and Data Quality

Level 3 visibility (funnel + segmented + causal). No demo recordings or manager scorecards were provided, so no PROCESS-class data exists; behavioral causes below are flagged as hypotheses, not diagnoses.

Check / Dataset	Result	Notes
Reconciliation (§16)	Passed	0 orphan appointments, demos, or contracts; no duplicate IDs; funnel counts consistent; date sequences valid.
Appointments, Demos, Contracts	Reliable	Consistently tracked, IDs tie across the pipeline.
Contact attempts	Usable	12.4% of attempt timestamps missing; speed-to-lead medians computed on available records.
Sales process execution	Absent	No recordings. Objection data reflects stated objections only.
Trailing cohorts (§17)	Applied	Production/collection KPIs excluded; contracts signed late in the window are still inside retention maturity — see §5.

NSLI basis: issued-appointment basis, $5,903 per issued appointment ($950,457 ÷ 161). Demo basis: $8,563. The issued basis is reported as primary because it keeps appointment fallout — this company's largest leak — visible in the headline number.

3. Master Revenue Funnel

Stage	Count	Conversion	Where the volume went
Leads created	590	—	$150,319 spend across 5 sources
Valid leads	536	90.8%	54 invalid: renters, bad info, unsuitable roofs, duplicates
Contacted	448	83.6% of valid	Strong. Speed-to-lead healthy on every source
Appointments set	194	43.3% of contacted	Setting consistent across CSRs (41–45%)
Issued to reps	161	83.0% of sets	Pre-issue cancels concentrate in unconfirmed sets (27% vs 8%)
Demos completed	111	68.9% of issued	Unconfirmed no-show rate: 45.6%
Sales	28	25.2% close	Gross $1,027,938
Net sales	26	2 cancels	Net $950,457 · plus $26,875 recovered from one rehash

4. Findings

Finding 1 — Two of every five appointments are set and then abandoned · Confidence: HIGH

Measure: 59.3% of sets are confirmed. Unconfirmed appointments: 26.6% cancel before issue (vs 7.8%), 45.6% no-show once issued (vs 13.5%), and only 36.7% ever become a demo (vs 71.3%).

Compare: Internal cohort comparison — confirmed vs unconfirmed, same period, same setters. The gap holds across all three setters.

Diagnose: Causal-level: there is no enforced confirmation workflow. In solar, an unconfirmed appointment is uniquely fragile — homeowners book impulsively, get cold feet about a $35,000 decision, and simply don’t answer the door.

Quantify: Confirming 85–90% of sets at the confirmed cohort’s demo rate ≈ 17–21 additional demos ≈ $145,000–$175,000 net per 90 days. This is the entire audit’s center of gravity.

Correct: Mandatory two-touch confirmation (call T-48h, SMS T-24h) with a solar-specific upgrade: collect the utility bill at confirmation. A homeowner who has sent their bill has invested in the appointment — and the rep walks in with a real proposal instead of a cold pitch.

Finding 2 — The lost-demo pile holds $2.9M and nobody is working it · Confidence: HIGH on the gap · MEDIUM on the projection

Measure: 83 demos ended without a sale (74.8% DNS rate — normal for solar, where decisions are slow). Only 17 (20.5%) received any follow-up: 7 recontacts, 3 rehash appointments, 2 rehash demos, 1 recovered sale worth $26,875.

Compare: Recovery among followed-up DNS: 5.9%. Among the 66 untouched: 0%, by definition. Top stated objections — Price 32.5%, Roof/Utility confusion 16.9%, Decision Process 15.7% — are exactly the objections that soften with time and information.

Diagnose: No DNS ownership exists. Solar DNS is unusually recoverable: rate changes, new financing products, and neighbors’ installations all re-open closed doors. The single recovered sale proves the mechanism works.

Quantify: 80% follow-up coverage at the observed recovery rate ≈ $40,000–$80,000 per 90 days. MEDIUM confidence: the projection rests on one observed recovery, and one quarter of real coverage will firm the rate up quickly.

Correct: Every DNS assigned an owner within 24 hours; first follow-up inside 48 hours; objection-matched sequences (a financing decline gets a new-lender touch, a “thinking about it” gets a 30-day utility-rate check-in); full recovery funnel tracked.

Finding 3 — One rep is paying for closes that aren’t closing · Confidence: MEDIUM-HIGH (6 sales — small sample)

Measure: Nadia’s average discount is 14.4% vs 2.4–5.3% for all three peers. Her close rate is 21.4% — the lowest on the team.

Compare: Normalized check: her demo mix (4 referral demos, balanced sources) does not explain it. The peer with the highest close rate (Lissette, 30.3%) discounts 3.2%.

Diagnose: The discounts are not converting hesitant buyers — they are being given away inside deals that were closing or dying anyway. Without recordings, HISPI cannot say whether this is a value-build gap or a price-presentation habit; that requires process-level data.

Quantify: Bringing her discounting to the peer norm ≈ $27,000 per 90 days in retained margin, at her current volume.

Correct: Discount authority policy: anything beyond a set threshold requires manager sign-off in the moment. Pair with a ride-along or recording review (where lawful) before drawing any conclusion about her selling.

Finding 4 — Door Knocking and purchased leads are underperforming — but don’t cut them yet · Confidence: MEDIUM

Measure: Close rate by source: Referral 46%, Facebook 36%, Google 30% — Door Knocking 13% (3 of 23), SolarLeadsCo 12.5% (3 of 24). Door Knocking’s cost per sale is ~$11,000 on a $343 CPL.

Compare: Contact rates, speed-to-lead, and validity are normal on both sources — the handling checks pass. The gap appears at the close, on samples of 23–24 demos each.

Diagnose: Per the HISPI lead-source language rule, these are lower-converting pending review — not “bad.” At this sample size the gap is suggestive, not proven, and solar door-knock leads routinely close lower but carry no acquisition risk. What the data cannot yet separate: source quality vs rep skill on colder audiences.

Quantify: No dollar claim yet. If the gap persists at re-measurement with 40+ demos per source, reallocating half of Door Knocking’s spend to Google (NSLI $2,190/valid lead vs $1,285) becomes a defensible move.

Correct: For one quarter: route these sources evenly across reps, tag them for close-rate tracking, and revisit with real sample sizes.

Finding 5 — Retention: 7.1% cancellation looks excellent — and cannot be certified · Confidence: SEE BELOW

Measure: 2 of 28 contracts cancelled ($77,481), both recorded as buyer’s remorse, spread across two reps.

Compare: Nothing meaningful can be compared on 28 contracts. A rep with a genuine 30% cancellation tendency who signed 6 contracts this quarter would be expected to show roughly two cancels — and could easily show one, or zero.

Diagnose: Per Standing Decision 6 and the sample-size rule, HISPI issues no retention finding — in either direction. This is not a hedge; it is the difference between measurement and guessing. Solar cancellation risk (financing fallout, NEM confusion, HOA issues) typically surfaces in the 30–60 day window, which the trailing-cohort rule keeps partially open for the newest contracts.

Correct: Retention becomes a monitored metric: cancellation by rep and by reason is re-measured at the 90-day re-audit, when contract counts double and the maturity window closes. Interim protection at zero cost: a structured post-sale touch inside the rescission window and lender funding confirmation within 72 hours.

5. Prioritized Correction Plan

Priority	Correction	Type	Effort	90-Day Value
1	Mandatory 2-touch confirmation + utility bill collected at confirmation	Appointment process	1–2 weeks	$145K – $175K
2	DNS ownership + 48-hour objection-matched follow-up program	DNS recovery	2–4 weeks	$40K – $80K
3	Discount authority threshold + manager sign-off	Sales management	Days	~$27K
4	Post-sale touch in rescission window + 72-hr funding confirmation	Retention (preventive)	1 week	Protective
5	Source close-rate tracking with even rep routing	Lead source	Ongoing	Decision in 90 days
6	Process visibility: recordings where lawful (FL: two-party consent) or ride-along scorecards	Data / management	Next quarter	Unlocks Level 4

Method notes

- All projections use Lissette's Solar's own internal-best cohorts as the ceiling. No industry benchmarks appear anywhere in this report.
- The $212K combined figure sums conservative floors only; high ends are not additive because corrections interact.
- Findings 3–5 rest on small event counts and carry reduced confidence by rule; each is scheduled for re-measurement rather than escalation.
- Quarterly figures must not be annualized without seasonality adjustment; South Florida solar demand shifts with rate news and storm season.

Appendix A — Lead Source Economics

Source	Spend	Leads	Contact	Demos	Close	Net Revenue	CPL	NSLI / Valid Lead
Referral	$39,195	62	86.7%	13	46.2%	$192,124	$632	$3,202
Google Ads	$38,050	210	83.0%	37	29.7%	$411,629	$181	$2,190
Facebook Ads	$24,862	112	84.0%	14	35.7%	$124,890	$222	$1,249
Door Knocking	$32,968	96	81.4%	23	13.0%	$110,474	$343	$1,285
SolarLeadsCo (purchased)	$15,244	110	83.5%	24	12.5%	$111,340	$139	$1,092

Referral carries an unusually high recorded spend for a referral program ($632 CPL) — worth a discovery question: if that line includes referral bonuses paid on closed jobs, the true CPL is overstated and the source is even stronger than shown.

Appendix B — Rep Performance (Normalized View)

Rep	Demos	Sales	Close	Avg Discount	Cancels	Net Revenue	Net $/Demo
Lissette	33	10	30.3%	3.2%	0	$383,550	$11,623
Nadia	28	6	21.4%	14.4%	0	$221,910	$7,925
Trevor	24	6	25.0%	2.4%	1	$172,180	$7,174
Omar	26	6	23.1%	5.3%	1	$172,817	$6,647

Appendix C — DNS Stated-Objection Distribution (n = 83)

Objection Category	Share
Price	32.5%
Product (roof condition / utility & NEM confusion)	16.9%
Decision Process	15.7%
Authority / Decision Maker	9.6%
Competition	8.4%
Financing	7.2%
Trust	4.8%
Urgency	4.8%

Stated objections only. Note the solar-specific pattern: one in six lost deals cites roof or utility/NEM confusion — an education gap, not a price gap, and directly addressable in the DNS follow-up sequences (Finding 2).