HISPI

HOME IMPROVEMENT SALES PIPELINE INTELLIGENCE

Revenue Leak Audit

Summit View Windows & Doors — Central Florida

Audit Window: Q1 2026 (Jan 1 – Mar 31) · Outcomes tracked through June 30, 2026

SAMPLE REPORT — SYNTHETIC DEMONSTRATION DATA

"Summit View Windows & Doors" is a fictional company. All data in this report was generated to demonstrate the HISPI audit methodology.

1. Executive Summary

Over the 90-day audit window, Summit View generated 735 leads on $87,800 of marketing spend and retained $620,197 in net revenue (42 net sales, average gross ticket $14,793). The pipeline is not failing — it is leaking at four specific, correctable points, all of them upstream or downstream of the sales presentation itself.

The single largest pattern in this audit: opportunities are being lost before a salesperson ever enters the home, and abandoned after the homeowner says no. The sales team converts 37.9% of completed demos, which is healthy. The problem is how few opportunities survive long enough to become demos, and how little is recovered afterward.

Conservative combined opportunity: approximately $169,000 per 90 days (~27% of current net revenue), built from the low end of each finding's range using Summit View's own internal-best performance as the ceiling — not industry theory. This is opportunity sizing, not a forecast; it assumes corrections are executed and reach internally proven levels.

#	Finding	90-Day Opportunity	Confidence
1	Facebook leads reach CSRs ~24 hours late; contact rate 47% vs 80% on other sources	$58,000 – $84,000	High
2	Contact cadence varies by CSR: 1.9 vs 4.7 attempts per lead (overlaps #1 on Facebook leads)	~$46,000 (non-FB portion)	High
3	Only 63% of appointments are confirmed; unconfirmed sets demo at 49% vs 65%	~$43,000	High
4	79% of DNS opportunities receive zero follow-up; followed-up DNS recover at 11.8%	$46,000 – $77,000	Medium
5	16% of signed contracts cancel; financing fallout and buyer's remorse lead the recorded reasons	~$22,000	Medium

Finding 6 (informational): the close-rate spread between reps (25.8% – 58.8%) is real but partly explained by lead-mix and a 10.3% average discount by the top closer. HISPI will not assert a behavioral cause without process-level data; a recording/scorecard upgrade is recommended for next quarter.

2. Scope, Data Received, and Data Quality

This audit was conducted at Level 3 visibility (funnel + segmented + causal data). No demo recordings or manager scorecards were provided, so no PROCESS-class data exists in this dataset. Per the HISPI diagnostic rule, findings in this report identify where losses occur, where they concentrate, and why they appear to occur — behavioral causes are flagged as hypotheses, not diagnoses.

Dataset	Rating	Notes
Appointments, Demos, Contracts	Reliable	Consistently tracked, IDs tie across the full pipeline.
Contact attempts	Usable	13.8% of attempt timestamps missing; speed-to-lead medians computed on available records.
Marketing spend	Usable / Limited	Canvassing spend is an estimated labor allocation, not an invoiced figure; treat canvassing CPL as directional.
Sales process execution	Absent	No recordings or scorecards. Objection data reflects stated objections only.

Right-censoring note: contracts signed late in Q1 have production and collection outcomes still maturing as of June 30. Cancellation figures are stable; completion and collection KPIs are excluded from findings for this reason.

NSLI definition: per discovery, calculated on the issued-appointment basis (NSLI = $3,334 per issued appointment). Demo-basis NSLI ($4,698) is shown in the KPI workbook for comparison; the issued basis is stricter because it keeps appointment fallout visible.

3. Master Revenue Funnel — Q1 2026

Stage	Count	Conversion	Where the volume went
Leads created	735	—	$87,800 total spend, 4 sources
Valid leads	674	91.7%	61 invalid (duplicates, out of area, bad info, renters)
Contacted	456	67.7% of valid	218 valid leads never reached — the largest raw loss in the funnel
Appointments set	224	49.1% of contacted	Setting skill is consistent across CSRs
Issued to sales	186	83.0% of sets	Pre-issue cancels concentrated in unconfirmed sets
Demos completed	132	71.0% of issued	No-shows double on unconfirmed appointments
Sales	50	37.9% close	Gross $739,645
Net sales (after cancels)	42	84.0% retained	8 cancels, $119,448 gross value lost
Net revenue	$620,197	—	Plus $27,096 recovered from DNS rehash

4. Findings

Finding 1 — Facebook leads are reaching the phones a day late · Confidence: HIGH

Measure: Median speed-to-lead: Google LSA 0.7 hrs, Referral 2.3 hrs, Canvassing 3.1 hrs — Facebook 24.5 hrs. Facebook contact rate: 47.4% vs 79–80% on every other source.

Compare: Internal cross-source comparison. The delay appears for both CSRs (Dana 51.4%, Brittany 43.8% on Facebook), so this is not a CSR behavior issue.

Diagnose: Causal-level: Facebook leads are not arriving in the CRM in real time. By the time the first attempt is made, the homeowner has cooled or been reached by a competitor. Critically, the leads themselves are fine — Facebook demos close at 37.0% (10 of 27), right at the company average. The source is being blamed for a handling problem.

Quantify: Lifting Facebook contact from 47% to 70% (still below the company's own 80% norm) is worth ≈ $58,000 net per 90 days at Facebook's current downstream rates; reaching 80% is worth ≈ $84,000.

Correct: Real-time lead delivery (native CRM integration or webhook), a 5-minute first-response SLA on all web leads, and an unworked-lead alert after 30 minutes. This is a days-not-months fix.

Finding 2 — Half the lead file is being worked at 40% of the effort · Confidence: HIGH

Measure: Dana averages 4.7 contact attempts per lead and reaches 75.1% of her valid leads. Brittany averages 1.9 attempts and reaches 59.5%.

Compare: The gap holds inside every lead source (Canvassing 89% vs 67%, Referral 83% vs 56%, Google 84% vs 76%, Facebook 51% vs 44%) — so it is not lead mix. Once a homeowner is reached, both CSRs set at an identical rate (49.4% vs 48.7%).

Diagnose: This is a cadence problem, not a skill problem. Leads assigned to one CSR are effectively abandoned after one or two attempts. Phone performance when connected is equal.

Quantify: Bringing the lower cadence to the internally proven level on non-Facebook sources ≈ +34 contacts ≈ $46,000 net per 90 days. (The Facebook portion of this gap is already counted in Finding 1 — do not sum the two fully.)

Correct: A written minimum-cadence standard (e.g., 6 attempts across 5 days, mixed call/SMS), attempts-per-lead on the daily dashboard, and lead-aging alerts. Coach to the standard, not the person.

Finding 3 — A third of appointments are never confirmed — and it shows · Confidence: HIGH

Measure: 62.9% of sets are confirmed. Unconfirmed appointments cancel before issue at 20.5% (vs 12.1%), no-show at 25.4% once issued (vs 13.0%), and produce a demo only 49.4% of the time (vs 64.5%).

Compare: Internal cohort comparison, confirmed vs unconfirmed, same period, same setters.

Diagnose: Causal-level: there is no enforced confirmation workflow; whether an appointment gets confirmed is currently discretionary.

Quantify: Confirming 90% of sets at the confirmed cohort's demo rate ≈ +9 demos ≈ $43,000 net per 90 days.

Correct: Mandatory two-touch confirmation (call at T-48h, SMS at T-24h), confirmation ownership assigned per appointment, and confirmation rate tracked per setter weekly.

Finding 4 — The DNS pile is a $1.2M file cabinet nobody opens · Confidence: HIGH on coverage · MEDIUM on projection

Measure: 82 demos ended in DNS (62.1% DNS rate) — roughly $1.2M in presented-price volume. Only 17 (20.7%) received any follow-up. Those 17 produced 9 recontacts, 3 rehash appointments, 3 rehash demos, and 2 recovered sales worth $27,096.

Compare: Recovery among followed-up DNS: 11.8%. Recovery among the 65 untouched DNS: 0%, by definition.

Diagnose: There is no DNS ownership. Follow-up currently depends on whoever feels like it. The recovered dollars that do exist prove the mechanism works when attempted.

Quantify: 80% follow-up coverage at the observed 11.8% recovery rate ≈ $46,000–$77,000 per 90 days. Confidence is MEDIUM because the projection rests on only 2 observed recoveries — a thin base rate that one quarter of real coverage will firm up quickly.

Correct: Assign every DNS an owner within 24 hours, first follow-up inside 48 hours, follow-up matched to the recorded objection, and track the full recovery funnel (FU → recontact → rehash set → rehash demo → recovered).

Finding 5 — One in six signed contracts dies before production · Confidence: MEDIUM

Measure: 8 of 50 contracts cancelled (16.0%), $119,448 in gross value. Recorded reasons: buyer's remorse 3 ($47.4K), financing fallout 3 ($44.6K), found lower price 1, production delay 1.

Compare: Cancellations concentrate on two reps (4 of 20 and 3 of 13 contracts) — but at these contract counts the difference between reps is not statistically meaningful. HISPI will not name a rep-level problem on 8 events; this moves to a monitored metric next quarter.

Diagnose: The actionable thread today is financing fallout and early remorse: sales are closing without financing being fully secured, and the rescission window is unmanaged.

Quantify: Halving financing-related fallout ≈ $22,000 retained per 90 days (conservative).

Correct: Lender pre-qualification in the home before contract, funding-status follow-through within 72 hours of signing, and a structured post-sale touch inside the rescission window (welcome call, install scheduling contact).

Finding 6 — Rep variance is real — but don't buy the raw close rates (informational) · Confidence: MEDIUM, capped by missing process data

Measure: Close rates range from 25.8% (Marcus, 31 demos) to 58.8% (Derek, 34 demos). Net-$-per-demo: Derek $6,714, Tony $4,722, Sarah $3,849, Marcus $3,423.

Compare: Normalized check before crediting skill: Derek received 7 referral demos (the highest-closing source) vs 2–3 for peers, and his average discount is 10.3% vs 2.4–5.5% for the rest of the team — part of his close rate is purchased with mix and margin. He also carries the highest one-leg exposure (14.7%) and still leads, which is genuinely notable.

Diagnose: Without recordings or manager scorecards, HISPI cannot say what Derek does differently or why Marcus trails — any behavioral claim here would exceed the evidence. Stated objections (Price 35% of DNS) are recorded, but per the HISPI objection rule a stated price objection is not accepted as root cause.

Correct: Two actions: (1) review discount authority and require manager approval beyond a set threshold; (2) add process visibility next quarter — demo recordings where lawful (Florida is a two-party-consent state) or structured manager ride-along scorecards — so rep variance can be diagnosed instead of guessed at.

5. Prioritized Correction Plan

Ranked by financial impact × confidence × speed of implementation.

Priority	Correction	Type	Effort	90-Day Value
1	Real-time Facebook lead delivery + 5-minute response SLA	Lead handling	Days	$58K – $84K
2	Minimum contact-cadence standard + attempts dashboard	Lead handling / mgmt	1–2 weeks	~$46K (partial overlap w/ #1)
3	Mandatory 2-touch appointment confirmation workflow	Appointment process	1–2 weeks	~$43K
4	DNS ownership + 48-hour follow-up program	DNS recovery	2–4 weeks	$46K – $77K
5	Financing pre-qual + 72-hour funding follow-through + rescission-window touch	Retention / financing	2–4 weeks	~$22K
6	Process-visibility upgrade: recordings (where lawful) or ride-along scorecards	Data / management	Next quarter	Unlocks Level 4 diagnosis

Method notes

- All projections use Summit View’s own internal-best cohorts as the ceiling. No external or industry benchmarks were used anywhere in this report.
- Ranges are per-finding; the high ends are not additive because Findings 1–2 overlap on Facebook leads and corrections interact. The $169K combined figure is the sum of conservative floors only.
- Quarterly figures should not be multiplied by four without seasonality adjustment; Q1 demand patterns in Central Florida differ from storm-season quarters.
- Rep-level and cancellation-reason findings rest on small event counts (fewer than 30 observations); these carry Medium/Low confidence by rule and are flagged for next-quarter re-measurement rather than immediate personnel action.

Appendix A — Lead Source Economics

Source	Spend	Leads	Contact	Demos	Close	Net Revenue	CPL	Cost / Sale	NSLI / Valid Lead
Google LSA	$27,500	195	80.3%	45	44.4%	$260,842	$141	$1,375	$1,425
Referral	$4,500	75	70.7%	15	60.0%	$99,726	$60	$500	$1,330
Canvassing	$21,000	200	79.3%	45	24.4%	$137,972	$105	$1,909	$750
Facebook Ads	$34,800	265	47.4%	27	37.0%	$121,657	$131	$3,480	$524

Per the HISPI lead-source language rule: Facebook is currently the lowest-performing source per dollar, but it should not be labeled a weak source — its demos close at the company average, and its economics are suppressed by the handling failure in Finding 1. Re-evaluate the source after lead delivery is fixed. Referral is the highest-efficiency source and is under-invested at 10% of lead volume.

Appendix B — Rep Performance (Normalized View)

Rep	Demos	Sales	Close	Avg Discount	Cancels	Net Revenue	Net $/Demo
Derek	34	20	58.8%	10.3%	4	$228,260	$6,714
Tony	32	13	40.6%	5.5%	3	$151,115	$4,722
Sarah	35	9	25.7%	4.2%	0	$134,720	$3,849
Marcus	31	8	25.8%	2.4%	1	$106,102	$3,423

Appendix C — DNS Stated-Objection Distribution (n = 82)

Objection Category	Count	Share
Price	29	35.4%
Authority / Decision Maker	14	17.1%
Decision Process	14	17.1%
Trust	6	7.3%
Financing	6	7.3%
Competition	6	7.3%
Product	5	6.1%
Urgency	2	2.4%

Stated objections only. Per the HISPI objection-diagnosis rule, a stated “price” objection frequently masks trust, discovery, or value-build gaps; verification requires process-level data (see Finding 6 correction).