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2026 Lead Source Decision Scorecard

Compare channels by qualified opportunities, signed jobs and contribution instead of rewarding raw lead volume.

Start with consistent definitions

- Inquiry: any contact. Qualified lead: in service area, relevant service and a feasible project. Appointment: a confirmed visit or consultation. Won: a signed agreement.
- Record the same definitions every month and identify the source captured at first contact; avoid assigning every sale to “website” when another channel created the demand.

Use the five numbers that matter

- Qualified rate = qualified leads ÷ inquiries. Appointment rate = appointments ÷ qualified leads. Win rate = wins ÷ proposals.
- Cost per signed job = channel spend ÷ wins. Revenue per signed job = signed contract value ÷ wins. A channel with cheap inquiries can still be expensive per job.

Example: select for quality

- Source A: \$1,200 spend, 40 inquiries, 20 qualified, 10 appointments, 8 proposals, 2 wins. Cost per win: \$600.
- Source B: \$900 spend, 18 inquiries, 15 qualified, 12 appointments, 10 proposals, 3 wins. Cost per win: \$300. Source B is stronger on this measure, but check job margin and capacity before increasing spend.

Decision rule

Keep, improve or pause one channel for the next 30 days. Set a target and review date. Do not scale from a single small sample without checking project value and margin.



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Monthly tracking grid

- Use one row per source. Include paid spend, staff time and vendor fees in cost where practical.
- Track response time and service-area fit beside conversion; these operational factors can explain a poor result.

Source / period	Spend	Inquiries	Qualified	Visits	Proposals	Wins
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

Decision record

- Best current source / why: _____
- One experiment / owner / 30-day review date: _____

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Further reading: SBA marketing and sales planning —
<https://www.sba.gov/business-guide/manage-your-business/marketing-sales>

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