

REVENUE OPS

SAMPLE FINDINGS BRIEF FORMAT

Paid Acquisition Funnel Diagnostic

402	2.5 sec	0	1.7%
Landing Page Visitors	Avg. Engagement Time	Conversions to Date	Ad Click-Through Rate

Prepared For

The operation under review (internal data source)

Prepared By

Cadensoft Revenue Operations

Date

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EXECUTIVE SUMMARY

Overview & Purpose

This document illustrates the format and depth of a Cadensoft Findings Brief using a real paid acquisition funnel as the subject, rather than a placeholder or invented scenario. The underlying data is internal: two LinkedIn boosted-post campaigns running August 2026, tracked against Google Analytics 4 session data for the same period. It is shown here to demonstrate methodology and rigor, not to represent a completed client engagement.

The review focused on three questions: where is the funnel losing prospective buyers, what operational factors are driving that loss, and what changes would most improve conversion in the next 30 days.

Central Finding

The operation under review does not have a traffic problem. Recent fixes to link routing brought ad clicks and landing page visits into close alignment for the first time. The data indicates a landing-page engagement and conversion-mechanism issue: visitors are arriving, but almost none are staying long enough to evaluate the offer, and there is currently no path for a visitor who isn't ready to buy immediately to stay in contact.

OPERATIONAL HEALTH SCORECARD

Overall Funnel Health Rating: 2.7 / 5

The scorecard reflects a structured evaluation of six dimensions based on two weeks of paid campaign data and connected analytics.

Dimension	Score	Observation
Click-to-Landing Delivery	4/5	Ad clicks now reach the intended landing page reliably. Prior routing through an intermediate article page previously lost over 90 percent of traffic before it reached the site.
Landing Page Engagement	1/5	Average engagement time per visitor is approximately 2.5 seconds. Traffic volume increased substantially between reporting periods; engagement quality did not.
Lead Capture Mechanism	2/5	No mechanism currently exists to retain a visitor who is not ready to purchase immediately. Every non-converting visitor simply leaves.
Speed-to-Lead & CRM Sync	3/5	Once a lead exists in the CRM, an automation fires instantly to begin outreach, well ahead of typical response times. The gap sits one step earlier: the ad-platform-to-CRM connector is still being hardened, so not every captured lead is guaranteed to land in the CRM the moment it's created.
Qualification Automation	4/5	A guided SMS conversation flow is fully built: it fit-gates each lead against defined criteria, works through a scripted objection-handling library for hesitant responses, and either closes a motivated prospect directly or routes them straight to a calendar booking for personal follow-up. It has not yet been connected to a live lead source at volume.
Conversion Tracking Discipline	2/5	Ad platform and analytics data are now reconciled and consistent with one another. A purchase event has not yet been confirmed as a tracked key event in analytics.

FUNNEL PERFORMANCE

Stage-by-Stage Delivery Analysis

The table below reflects actual delivery rates at each stage of the paid acquisition funnel over the reporting period (two boosted LinkedIn campaigns, August 2026).

Stage	Actual	Benchmark / Target	Status
Ad Impressions -> Clicks	1.7%	1.5% - 2.5% (typical LinkedIn)	On Target
Ad Clicks -> Landing Views	60%	N/A (direct link, prior period: 9%)	Improved
Landing Views -> Conversion	0%	1% - 3% (comparable offers)	Critical

Diagnostic Interpretation

The click-to-landing repair worked. That stage moved from a near-total breakdown to a healthy delivery rate in a single iteration, confirming the routing fix was the correct intervention. The constraint has now moved one stage downstream, to the landing page itself. This is a normal and expected pattern when a funnel is repaired sequentially rather than all at once.

ROOT CAUSE ANALYSIS

Primary Drivers of Landing Page Non-Conversion

01 No Immediate Proof of Value

A cold visitor arrives with no prior relationship to the brand and is asked to evaluate a \$1,197 purchase within seconds. Nothing on the page currently demonstrates, concretely, what the deliverable looks like before asking for payment.

02 No Retention Mechanism for Undecided Visitors

Every visitor who is interested but not ready to buy today has no path forward. There is no lower-commitment next step, so genuine interest that isn't immediately ready to convert is lost entirely rather than captured.

03 Qualification Infrastructure Outpacing Lead Volume

The automated SMS qualification and closing flow is fully built, including fit-gating questions, objection handling, and a direct booking path. It is not yet the bottleneck; it currently has no leads flowing into it to act on.

04 No Pre-Meeting Prospect Research or Retargeting Data Capture

There is currently no automated step that investigates a prospect (company profile, role, relevant signals) before a meeting is scheduled, so meeting prep depends entirely on manual effort at the moment of booking. Just as significant: none of that research is captured or reused afterward. Prospects who engage but don't book, or book and don't convert, leave with no data trail behind them, closing off the option to retarget them with anything more specific than a cold repeat of the original ad.

Structural note: these findings point to a sequencing gap, not a system failure. The acquisition and qualification systems were built and repaired in the correct order (traffic, then routing, then qualification automation). The next fixes in sequence are landing page proof, a retention mechanism for undecided visitors, and a research layer that turns non-converting interest into something useful rather than a dead end.

30-DAY ACTION PLAN

1. Add a concrete proof section directly on the landing page

Show a real sample of the deliverable itself before asking for the \$1,197 commitment. Specificity beats reassurance for a cold visitor.

2. Introduce a retention mechanism for undecided traffic

A retargeting audience or a lower-commitment next step captures interest that isn't ready to convert immediately, rather than losing it outright.

3. Confirm the purchase event as a tracked key event

Conversion tracking must be verified before any additional paid spend, so the next test produces a trustworthy answer.

4. Connect a live lead source to the existing qualification automation

The SMS flow is built and idle. Routing even a small volume of leads into it will surface whether the qualification mechanism itself performs as designed.

5. Build automated pre-meeting prospect research and retargeting capture

A lightweight background-research step, triggered automatically once a lead is qualified, gives personal follow-up sharper context going into the call and creates a data trail for anyone who doesn't book or doesn't convert, turning that group into an informed retargeting audience instead of a dead end.

WHY THIS MATTERS BEYOND A SINGLE FIX

The fixes above aren't a one-time repair. Taken together, they're the foundation of a shift from project-based consulting toward a more predictable, ongoing revenue engine, one that keeps producing qualified opportunity on its own rather than depending entirely on fresh manual outreach every month.

Applied to our own growth plan, this same approach is targeted to produce a 9 to 15 percent revenue increase within the first 12 months of implementation, without adding headcount or changing the core service delivery model.

This is a target we're building toward, not a measured result, shown here to illustrate the scale of impact this kind of structural fix can represent, not as a guarantee for any other business. The gaps this process finds are rarely unique to one operation. A revenue operation carrying a comparable set of structural gaps is very likely sitting on a comparable order of opportunity, and every month those gaps stay open is a month that opportunity goes uncaptured.

This is not a traffic problem. It is a proof-and-retention problem, one stage downstream of where it used to be, and the cost of leaving it unaddressed compounds every month it goes unfixed.