

Five numbers to see *before the week starts*

Every Monday your team decides where money goes. These five numbers turn those decisions from memory into data. Read them in five minutes, without asking anyone for a report.

1

Cost per appointment, by campaign

Which channel is actually worth the money?

FORMULA

Campaign spend ÷ appointments set from that campaign's leads.

LOOK FOR

Compare channels side by side (mail, PPC, cold calling, texting). Lead volume alone hides the real price.

IN SALESFORCE

Campaign cost on the campaign, appointments counted from lead and opportunity records by source.

2

Contracts per campaign

Where do signed deals really come from?

FORMULA

Signed contracts traced back to the original lead source and campaign.

LOOK FOR

Channels with fewer leads but more contracts. Make sure repeat sellers keep their first source.

IN SALESFORCE

Source carried from lead to opportunity to transaction, and locked so it can't be changed by accident.

3

Contract to first seller call

Are we keeping deals warm until closing?

FORMULA

Hours between "under contract" and the first logged call to the seller.

LOOK FOR

Deals where nobody called the seller for days. That's where cancellations start.

IN SALESFORCE

A date stamp at contract, the first logged call after it, and a scorecard by rep.

4

Booked revenue, forecast vs. actual

What did we book, and how close was the forecast?

FORMULA

Expected profit when a deal goes under contract, compared with what it actually closed for.

LOOK FOR

A gap that grows over time means underwriting or renegotiation needs attention.

IN SALESFORCE

Booked revenue by week and month, plus the original contract price locked at signing.

5

ROI that counts the deals you keep

Is our best channel being undercounted?

FORMULA

(Profit from closed deals + value of kept properties – campaign spend) ÷ campaign spend.

LOOK FOR

Rentals and deals closed outside the usual flow. Leave them out and your best channel looks average.

IN SALESFORCE

A flag for kept or off-book deals with a profit value, included in campaign ROI.

30-second self-check: can you pull each one in under a minute? Every "no" is a decision made without data.

1 • Cost / appt

☐ Yes ☐ No

2 • Contracts

☐ Yes ☐ No

3 • Seller call

☐ Yes ☐ No

4 • Booked rev.

☐ Yes ☐ No

5 • Full ROI

☐ Yes ☐ No



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