

Before moving CAD \$5,000 a month, check what the customer records say.

An illustrative executive diagnostic for a fictional B2B technical-services company with conflicting CRM and marketing reports. All example records are synthetic.

EXECUTIVE DECISION

Do not move CAD \$5,000/month from Meta to Google solely because the CRM shows one Meta-sourced win. In this fictional sample, four of ten closed-won customers originally entered through Meta, but only one retained Meta as its current CRM source. Validate the full chain and repair source persistence before drawing a channel-ROI conclusion.

Finding	Quantified evidence	Management implication
Misleading channel label	4 Meta-origin wins vs 1 Meta-labeled CRM win.	Current-source reporting undercounts original Meta source in the example.
Source quality exception	8 of 24 leads have source conflict or blank; 4 of 10 wins affected.	A budget ranking based on the mutable CRM label is unreliable.
Wrong unit of analysis	32 CRM history rows describe 24 unique leads.	Count unique leads/opportunities, not change-history events.
What remains unknown	The example does not include revenue, contribution margin or a comparable control group.	Do not call Meta profitable or advise permanent budget increases.

LEADERSHIP DECISION RECORD

Owner: CEO / marketing director. Proposed decision: hold reallocation for a time-limited evidence-quality fix; approve lead-source data standards and a subsequent channel review. Revisit after: test leads trace from entry to won opportunity, exceptions are measured, and commercial values can be joined reliably.

All company details, 24-lead records, 32 history events, figures and management decisions are entirely fictional. CAD \$5,000/month is proposed budget direction, not claimed waste or savings.

The numbers can all be real and still answer different questions

A lead is not always a person; a CRM contact is not always an opportunity; a closed sale is not always a sourced campaign conversion.

Stage	System / team	Failure or ambiguity to test	Owner
Advertising / enquiry	Google, Meta; marketing	Campaign lead ID and original UTMs missing at handoff.	Marketing
Website & calls	Forms, calls; web owner	No original-source persistence or call origin capture.	Web / IT
Lead / nurture	CRM; sales team	Original source overwritten; duplicates / inconsistent definitions.	Sales ops
Opportunity / quote	CRM; account owner	Stage convention and unique opportunity ID vary.	Sales lead
Closed sale	Finance / billing	Invoice not joined to CRM opportunity; revenue unknown by origin.	Finance
Decision view	Analytics/reporting	Platform leads compared to CRM contacts vs invoice counts.	Executive sponsor

Shared definitions to approve before comparing conversion

Metric	Recommended unit and definition	Approval
Enquiry	Unique enquiry event with time, channel and stable submission / call ID.	Marketing
Qualified lead	Enquiry meeting written fit and interest criteria, logged with qualification timestamp.	Sales + marketing
Opportunity	Unique commercial pursuit / quote record linked to contact/account; may be many per account.	Sales ops
Closed won	Accepted opportunity or booked sale under agreed finance rule; unique opportunity ID.	Finance + sales
Original source	Earliest known valid acquisition source, immutable after initial capture.	Marketing + CRM owner
Latest source	Most recent identified touch separately tracked; unknown remains unknown.	Analytics owner

Definitions are a proposed design for the fictional business. Real implementations may use lead/contact/account/opportunity grains differently; never assume one contact can have only one opportunity.

Four Meta-origin wins. One current Meta label.

The analysis matches unique fictional lead IDs rather than counting multiple status updates as separate customers.

ID	Original capture	CRM current	Won	Interpretation
EX-001	Meta	Meta	Yes	Aligned
EX-002	Meta	Google	Yes	Source conflict
EX-003	Meta	Direct	Yes	Source conflict
EX-004	Meta	Google	Yes	Source conflict
EX-011	Google	Google	Yes	Aligned
EX-012	Google	Google	Yes	Aligned
EX-013	Google	Google	Yes	Aligned
EX-014	Google	(blank)	Yes	Missing source
EX-019	Organic	Organic	Yes	Aligned
EX-023	Referral	Referral	Yes	Aligned

What changed between first captured source and current CRM label?

Among the ten fictional wins, three originally Meta leads now appear as Google or Direct; one originally Google win has a blank CRM source. This explains why the original-source count and current CRM report tell different stories. It does not show incremental conversion value or lift.

Check	Observed result	Supporting data
Identity	24 unique lead IDs; 32 status-event rows; 8 IDs with an additional event.	Raw_CRM_History.csv
Source agreement	8 source exceptions across 24 leads; 4 among ten wins.	Validation_Records.csv
Won-source comparison	First source: Meta 4, Google 4, Organic 1, Referral 1.	Validation_Records.csv
CRM won label	Meta 1, Google 5, Direct 1, blank 1, Organic 1, Referral 1.	Validation_Records.csv

WHAT THE SAMPLE EVIDENCE SUPPORTS

The example records establish: ID deduplication, observed source discrepancy, and original-vs-current distribution. NOT established: channel profitability, causal attribution, customer revenue, cost per acquisition or correct budget size.

Fix identity and definitions before polishing dashboards

Separate directly observed sample exceptions from issues that require live system or staff validation.

Priority / evidence	What is wrong or needs checking	Business implication	Next action / owner
High priority / confirmed	Original source differs from mutable CRM label (8/24).	Misleading source report.	Immutable origin + separate latest fields; CRM owner / marketing.
High priority / confirmed	History export contains 32 rows for 24 leads.	Potential double count.	Standardize metric grain and ID logic; analyst.
High priority / confirmed	4/10 wins have missing or conflicting CRM source.	Reported wins by origin unreliable.	Exception register + ownership; sales ops.
Next priority / to verify	Ad-to-form and form-to-CRM metadata transfer.	Capture failure is possible, not established.	Run controlled submission QA; web/CRM specialist.
Next priority / to verify	Finance revenue to won opportunity join.	Revenue-at-source cannot be certified.	Check identifiers and finance privacy; finance/sales ops.
Next priority / to verify	Phone enquiries, manual follow-up and stage definitions.	Qualification and coverage may differ.	Stakeholder interviews / journey walkthrough; sales/marketing.

Prioritization logic

First establish what each record represents, preserve both original and latest sources, verify how sales records connect, then build reporting. Implementation feasibility and precise tool configuration need specialist review. A polished dashboard on top of overwritten source fields would conceal, not solve, the management problem.

IMPLEMENTATION REQUIREMENTS

Recommended fixes, acceptance tests and accountable teams

Proposed requirements for specialist review against the client's CRM configuration, analytics systems, data access and privacy constraints.

Ticket	Required behaviour	Acceptance test	Reviewer
T01	Capture original_source, medium, campaign, timestamp and external lead ID; prevent overwrite.	Known Meta-origin test lead remains Meta after later Google return.	CRM + web
T02	Latest-touch source is stored separately with change history.	Latest changes but original source stays stable.	CRM owner
T03	Document entity grains, stable IDs and dedup rules for lead, contact and opportunity.	32 status events count as 24 sample leads; opportunities have unique IDs.	Data analyst
T04	Carry opportunity ID into booked sale or a controlled, consent-aware finance join.	Sample closed-won opportunity reconciles to approved invoice record.	Finance + IT
T05	Dashboard exposes unknowns and reconciles to distinct records.	Won totals tie to finance / CRM, by agreed date and ID definitions.	Marketing + finance

ACCEPTANCE CRITERIA FOR FUTURE IMPLEMENTATION

An authorized test enquiry can be traced through original capture, CRM progression, unique opportunity and a test closed-sale record, with source fields intact, exceptions visible and conversion definitions approved by accountable owners.

90-day implementation roadmap

Phase	Accountable owner	Milestone
Days 1-15	Leadership + marketing / sales	Agree glossary, exceptions, data-processing and priority technical tickets.
Days 16-30	CRM / web implementer	Deploy approved source persistence; pass controlled lead tests.
Days 31-60	Sales ops + finance	Implement ID linkage and reconciled reporting layer; test invoice totals.
Days 61-90	Marketing + executive sponsor	Monitor source completeness and make the first qualified channel decision.

The sprint specifies these actions; client or separately engaged implementers execute them. Specialist review is a prerequisite for estimating technical effort and describing any ticket as ready for deployment.

Three-week diagnostic: scope and handover

A bounded diagnostic is not a historical data repair project or an implementation retainer.

When	Consultant will	Client will	Tangible output
Week 1	Confirm decision question, map systems, agree key definitions and access; check sample viability.	Provide data permissions, 1 CRM, website journey, analytics, up to 2 ad channels.	Journey map + scope / access / measurement glossary.
Week 2	Review bounded sample of up to 25 unique lead IDs and available associated status records, where accessible.	Validate record meanings; supply read-only exports and identifier rules.	Record-level exception sample + confidence summary.
Week 3	Rank verified gaps, propose logical technical and process fixes, run decision meeting.	Have a decision-maker and implementation owner attend review.	Executive memo, gap register, acceptance criteria and 90-day roadmap.

Outside the diagnostic scope

Full historical reconstruction; rebuilding months of lost source information; adding CRM fields; building dashboards; installing tracking; managing consent tooling; integrating finance; changing live advertising budgets; implementing the ninety-day roadmap. Each requires separate estimation and authorization.

When source records are incomplete

We document what could and could not be verified, perform feasible controlled tests, and return an evidence-quality decision rather than manufacture a percentage. The sample validation depth is conditional on lawful access and reliable join identifiers.

EXECUTIVE HANDOVER

A fixed-scope evidence-based diagnosis, limited record validation where feasible, executive decision memo, priority-ranked issues, specialist-reviewable requirements with acceptance tests, accountable owners and a 90-day implementation sequence.

How to check the findings

The supporting example datasets allow readers to verify the reported counts and source classifications.

Validation question	Method	Expected value
How many unique leads?	COUNT DISTINCT synthetic_lead_id in validation file.	24
How many history events?	Count rows in raw CRM history file.	32
How many wins?	Count validation rows where is_closed_won = 1.	10
How many original Meta wins?	Closed-won rows where original_source = Meta.	4
How many current CRM Meta wins?	Closed-won rows where crm_current_source = Meta.	1
How many source exceptions?	Rows where source_status is not Aligned.	8 (4 among closed won)

Interpretation and limitations

- A first captured source is an acquisition label, not a proof of incrementality.
 - A CRM “current source” could deliberately represent latest touch; inconsistency must be diagnosed in context.
 - A 24-record demonstration is not a statistically powered budget optimization study.
 - No real business information, customer data, revenue or testimonial appears in this sample.
- Supporting files: Validation_Records.csv and Raw_CRM_History.csv. All records and results are fictional and illustrate the reconciliation method.