SIMULATED PROJECT / DECISION SUMMARY

Home Shield Insulation

Lead quality and creative decisions

Independent case study by Marianne Jaen | Revised October 13, 2026

Complete the evidence before judging creative or changing spend.

The fictional cohort contains 14 opportunities: 8 Qualified, 3 Disqualified and 3 Pending. Two distinct new customers are verified. The useful next step is to resolve assessment and sales evidence, then connect reliable feedback to a focused creative question.

THE THREE DECISIONS

Priority	Why it comes first
Resolve the unknowns	Three inquiries still need assessment; one recorded win needs new-customer verification.
Keep suitability and progress separate	A lost quote can remain Qualified. Missing contact or authority evidence stays Pending.
Prepare a source-linked test	Inspect the ads and sales context, agree the economics, then define a comparison and review conditions.

Scope and contribution

This is a proposed attic-insulation scenario in the Charlotte area. Public research supplied business context; an AI-assisted mock client interview supplied the operational scenario. Manual logging, delayed sales updates and inconsistent labels are exercise assumptions, not findings about the company.

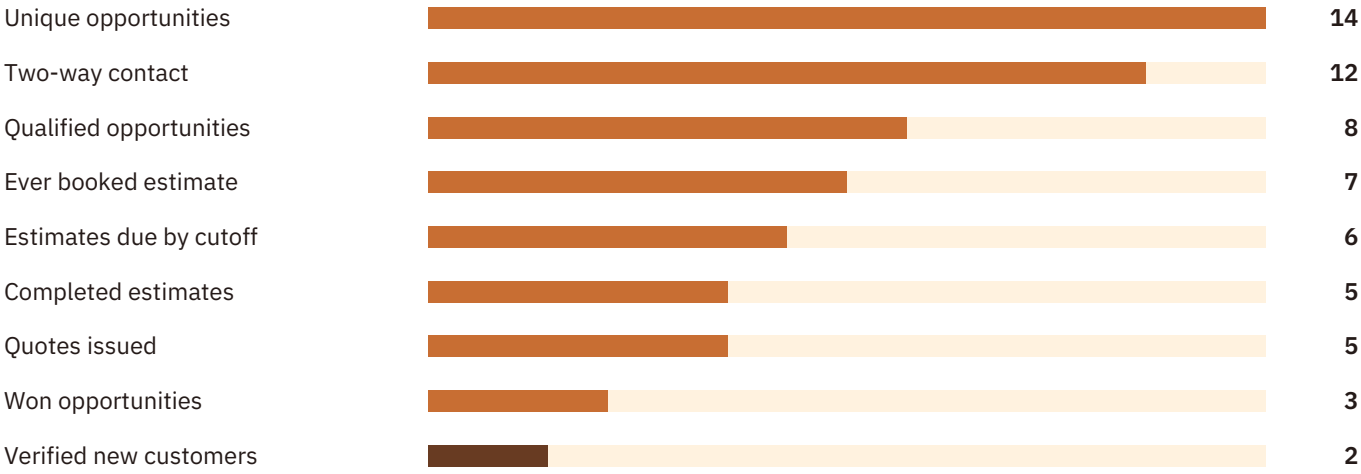
I developed onboarding questions, qualification rules, measurement definitions and a fictional tracker, then translated the evidence into proposed priorities and creative hypotheses. The completed materials are an account measurement brief, qualification and measurement plan, and fictional lead tracker.

Boundary: No private ad account or CRM access, campaign launch, integration, inspected ad assets or measured performance improvement is claimed. Not commissioned, endorsed or approved by Home Shield Insulation.

THE EVIDENCE / FIXED FICTIONAL SNAPSHOT

One cohort, different measures

Acquired September 14-20, 2026; outcomes recorded through October 3, 2026. USD and Charlotte local reporting time are demonstration assumptions. Advertising spend: **$700**. No comparable prior-period baseline is supplied.



Bars start at zero; full width = 14. Booking, due date and completion are separate measures. Verified customers use a different counting unit. Records need not follow an identical path.

Cost measure	Calculation	USD result
Unique-opportunity CPL	$700 / 14 opportunities	$50.00
Cost per qualified lead (CPQL)	$700 / 8 qualified	$87.50
Cost per completed estimate	$700 / 5 completed	$140.00
Verified-only advertising CAC	$700 / 2 verified new customers	$350.00 provisional

$350 is a snapshot, not mature-cohort CAC. One of three wins has unknown new-customer status, and other opportunities remain open. Acquisition was 13-19 calendar days before the cutoff; the normal sales lag is unknown. Later outcomes could change the denominator. Only advertising spend is included.

Read the rates with their denominators. Confirmed qualification yield is 8/14 = 57.1%; assessment coverage is 11/14 = 78.6%; assessed-only qualification is 8/11 = 72.7%. Estimate completion is 5/6 = 83.3% among estimates due under the latest schedule. DEMO-08 moved to October 8 and is excluded from that due count.

Counting: The 14 opportunities include poor-fit inquiries and exclude repeats, one older Meta acquisition and one organic acquisition. The separate 16 platform-reported leads give $43.75 platform CPL. Different counting bases do not establish that the gap is solely duplicates. An estimate is not a completed installation; a win is not collected revenue.

Source: numerical and record excerpts reproduced in the existing case, attributed to Fictional Lead Tracker, Summary A11:C35, Leads and Submissions. The Oct 3 snapshot is unchanged.

PRIORITIZED RECOMMENDATIONS / PROPOSED

Give each gap a next action

Implementation owners and dates are unassigned. These recommendations do not describe account or process changes already made.

1 Complete assessment

Evidence: 3 of 14 opportunities remain Pending. Follow up with DEMO-05 and DEMO-13; verify authority for DEMO-12.
Review when: each record has a dated decision or a pending reason, owner and next action. Show assessment coverage alongside any qualification-rate comparison.

2 Reconcile sales and customer evidence

Evidence: 7 estimates were ever booked, 6 are due and 5 completed. Preserve DEMO-08's reschedule and distinguish DEMO-10's no-show. Verify DEMO-11's new-customer status and deduplicate buying entities.
Review when: appointment and customer evidence reconcile to the same cohort and cutoff. Revisit CAC after an agreed sales-cycle window; disclose unresolved outcomes rather than assuming they disappeared.

3 Agree the economic decision

Evidence: no approved comparable target, collected-revenue data or supported profitability model is available. Confirm margins, cost coverage, capacity and the target's owner, scope and effective date.
Review when: a business-approved target matches the metric and cost basis. Until then, no affordability, profitability or budget recommendation is supported.

Preserve the classification rule

Fictional record	Qualification	Sales / contact status
DEMO-03: project planned later	Qualified	Nurture
DEMO-04: quote declined	Qualified	Lost
DEMO-05: intent unconfirmed	Pending	New / attempted, no response
DEMO-12: owner permission unconfirmed	Pending	New / connected

All four proposed fit criteria must be confirmed: service-property territory, accepted work, authority, and genuine intent/contact. A confirmed failure means Disqualified; incomplete evidence means Pending. Loss or delayed readiness does not retroactively undo fit. Client approval is required before live use.

Sources retained from the existing case: Qualification & Measurement Plan v1, section 2; displayed fictional records DEMO-01-14.

CREATIVE FEEDBACK / HYPOTHESES ONLY

Turn feedback into a testable brief

Record a fit reason and date, connect it to the source and ad version, inspect the ad/form/sales context, then choose one message question. No actual ads were inspected; the records establish no creative cause or winner.

Fictional signal	Proposed message question	Dependency
DEMO-07: unsupported roof repair	Could explicit attic-insulation wording and relevant visuals help people recognize service fit?	Verify accepted services and inspect the current ad, form and delivery.
DEMO-06: out-of-area property; DEMO-09: traveler with in-area property	Could clear service-area wording reduce property-eligibility confusion?	Verify service ZIP codes, delivery geography and the captured service address.
DEMO-03: later readiness; DEMO-12: pending authority	Could explaining the estimate and authorization process clarify the next step?	Confirm offer terms, real sales questions and authorization/nurture rules.

A practical comparison to agree before launch

Proposed first candidate: a service-specific opening versus the existing opening. Keep the remaining execution comparable where feasible. Document audience, placements, objective, offer, form, dates, allocation and sales handling. Shared ad-set delivery does not guarantee equal spend or a controlled comparison.

Primary read: qualified lead volume and CPQL from matched spend and source-linked opportunities. Read them with assessment/contact coverage, pending share and coded fit reasons. Add completed estimates and verified-new-customer CAC with an appropriate outcome window. Attention and click metrics are diagnostic, not sufficient winner criteria.

Decision condition: approve budget, sample sufficiency, duration and thresholds using the business economics and actual sales lag. Keep results inconclusive when linkage, assessment or delivery is incomplete. An apparent CPQL improvement could still produce fewer customers. No numeric benchmark or expected uplift is assumed.

SOURCE AND REVIEW BOUNDARY

This revision recalculates the figures displayed in the existing portfolio case and reconciles the PDF with that case. Original source references are retained: Account Pack v1, sections 1-3 and 6-9; Qualification & Measurement Plan v1, sections 1-11; Fictional Lead Tracker, Summary A11:C35 and displayed Leads records. These sources are dated October 3, 2026. The original source files were not re-opened for this revision, so workbook formulas, deduplication logic and source timestamps were not independently re-audited. Public statements and the mock interview do not verify real company results.