

CHAPTER 9 / PROVE

CRM Reporting, ROI and Case Study System

Turn CRM activity into management evidence, calculate commercial impact honestly, and publish proof only when the numbers and permissions are real.

75% CRM execution	25% growth support
Workflow, data, follow-up, reporting and adoption.	Ads, recruiting, AI, training and templates.

Outcome

This chapter turns CRM activity into trustworthy management evidence. It shows how to define metrics, establish a baseline, reconcile data, calculate commercial impact, diagnose change, and convert verified results into case studies or reviews only after permission.

Conquest should make the operational chain visible: source, owner, response, stage, next action, sale, client, renewal, commission, and report. The goal is not to make every number look positive. The goal is to know what happened, why it may have happened, and what the agency will do next.

Evidence rule: never publish a customer name, quote, screenshot, metric, comparison, or identifying detail without the source evidence and written permission covering the exact use.

1. Create a metric dictionary

Reports are unreliable when people use the same word differently. Define each metric once.

Every metric needs:

- Name.
- Business question.
- Formula.
- Included records.
- Excluded records.
- Time basis.
- Data source.
- Owner.

- Known limitation.

Example:

METRIC: Lead contact rate
QUESTION: What proportion of valid new leads reached a two-way conversation?
FORMULA: Connected leads / valid leads received
INCLUDE: Leads received during the selected period
EXCLUDE: Confirmed duplicates, test records and invalid records under the agreed rule
TIME BASIS: Cohort by received date with a defined follow-up window
SOURCE: Conquest CRM stage and activity history
OWNER: Sales Operations Manager
LIMITATION: Recent cohorts may not have completed the follow-up window

2. Use cohort logic

Do not divide this month's sales by this month's leads when the sales came from earlier months. Choose a method and state it.

- Cohort reporting: follow leads received in a period through later outcomes.
- Activity reporting: report what happened during a period, regardless of lead origin.
- Snapshot reporting: show the current state at a moment in time.

Use cohort reporting for campaign quality. Use activity reporting for daily workload. Use snapshots for current pipeline and renewal risk.

3. Build the management dashboard

CRM adoption

- Active users by role.
- Active leads with owner.
- Active leads with next action.
- Overdue actions.
- Closed records with outcome reason.
- Won records converted to client.
- Renewals with owner and dated action.

Lead and pipeline

- Valid leads by source.
- Speed to first attempt.
- Contact rate.
- Qualification rate.
- Appointment rate and show rate.
- Stage aging.

- Win rate and value.
- Loss reasons.

Client and renewal

- New clients.
- Client handoff completion.
- Renewals entering the window.
- Reviews completed.
- Retained, lost, pending, and unowned renewals.
- Documented reason for loss or non-renewal.

Recruiting and training

- Applicants by source.
- Qualified candidates.
- Interviews, offers, acceptances, starts.
- Training completion.
- Time to first productive activity.
- 30-day and 90-day retention.

4. Establish the baseline

Before claiming improvement, record the starting position.

Baseline requirements:

- Exact start and end dates.
- Team, product, market and channel scope.
- Metric definitions.
- Source exports or report references.
- Record count.
- Known data gaps.
- Other changes happening at the same time.

If the old system cannot produce reliable data, state that the baseline is incomplete. A measurement-quality improvement can be valuable, but it is different from a sales-performance improvement.

5. Reconcile the data

Before presenting a report:

- 1 Remove test and duplicate records under the documented rule.
- 2 Check every included record has the required timestamp and category.
- 3 Compare totals with source-system exports where available.
- 4 Review unexplained changes in owner, source, stage, value or date.
- 5 Verify a sample back to underlying records.
- 6 Record the query or filter used.
- 7 Have a second person review important public metrics.

Do not manually change a number because it "looks wrong." Correct the source record or document the adjustment and reason.

6. Diagnose before explaining

A changed metric does not prove a cause. Separate facts, hypotheses, and decisions.

Facts

What the agreed report shows: contact rate rose, overdue actions fell, renewal coverage increased, or lead volume changed.

Hypotheses

Possible explanations: faster assignment, new source mix, staffing change, seasonal demand, pricing, training, or data cleanup.

Evidence needed

What would support the explanation: assignment timestamps, source cohorts, call samples, staffing records, training completion, or comparable periods.

Decision

What the agency will test or change next, with owner and date.

7. Calculate ROI honestly

Implementation cost

Include:

- Software fees.
- Setup or migration cost.
- Internal implementation hours.
- Training time.
- Integration or data work.
- Ongoing administration.
- Advertising spend where the analysis concerns campaigns.

Benefit categories

Count only supported changes:

- Additional retained contribution from incremental sales.
- Retained contribution from protected renewals.
- Verified administrative hours saved times appropriate loaded labor cost.
- Avoided duplicate software cost after cancellation.
- Reduced leakage or error with documented financial effect.

Core formulas

Net benefit = verified gross benefit - implementation and operating cost

ROI percentage = net benefit / implementation and operating cost x 100

Payback period = implementation and operating cost / monthly verified net benefit

Campaign retained ROAS = retained contribution attributed under the agreed method / ad spend

Do not count the same benefit twice. If improved follow-up produced more sales, do not also count the full value as "time saved" without a separate supported calculation.

Confidence levels

- High: source evidence, stable definition, comparable period, sufficient sample, independent review.
- Medium: source evidence exists but sample, timing, or comparison has limitations.
- Low: directional estimate, incomplete baseline, or material confounding factors.

Public claims should normally use high-confidence evidence and clear limitations.

8. Case study structure

1. Context

Describe the organization type, team size range, market, and period without revealing more than permitted.

2. Baseline

State the process and measured starting condition. Identify missing or unreliable data.

3. Intervention

Describe specific actions: centralized leads, ownership rule, next-action requirement, stage definitions, role training, renewal workflow, or campaign feedback loop.

4. Result

Use the same metric definition and comparable period. Show absolute numbers with rates where possible.

5. Limitations

State seasonality, staffing, source mix, pricing, simultaneous changes, small sample, or incomplete data.

6. Evidence

Reference CRM report, export, approved calculation, survey, or permission record.

7. Permission

Record exactly which name, role, organization, quote, metrics, screenshot, channels, geographic use, and duration are approved.

9. Illustrative examples - not customer claims

The following are fictional examples showing how to structure analysis. They must never be presented as Conquest customer results.

Example A - faster response

Baseline: fictional agency records show a median first-attempt time of 190 minutes for 240 valid leads over eight weeks. Intervention: automated queue alert plus daily unassigned-lead review. After period: median of 42 minutes for 255 valid leads over eight comparable weeks.

Responsible wording: "In this fictional example, median first-attempt time decreased from 190 to 42 minutes after the agency introduced an assignment alert and daily queue review. Other process changes may have contributed."

Irresponsible wording: "Conquest increases sales by responding 4.5 times faster." The example did not prove sales impact or causation.

Example B - next-action completeness

Baseline: 54% of 310 open fictional opportunities had a dated next action. Intervention: stage-exit rules plus a 10-minute daily CRM huddle. After period: 91% of 295 open opportunities had a dated next action.

Responsible wording: report the definition, counts, dates, and process change. Do not call the remaining 9% "lost revenue" without evidence.

Example C - renewal coverage

Baseline: a fictional team could not identify a consistent renewal action for 38% of records entering a 60-day review window. Intervention: renewal-date cleanup, owner assignment and weekly review. After period: 94% of in-scope records had an owner and dated action.

Responsible wording: "renewal action coverage improved." Do not claim retention improved unless retained outcomes were measured.

10. Testimonial and review system

Ask neutrally

Invite honest feedback, not only positive feedback. Do not provide a prewritten statement for the person to pretend is theirs.

Preserve exact wording

Store the original feedback, date, channel, and context. If editing for length or grammar, obtain approval for the edited version.

Permission scope

Permission should cover:

- Exact quote.
- Name or anonymous label.
- Role and organization.
- Photo or logo.
- Metrics or screenshots.
- Website, Skool, social media, ads, presentations, or other channels.
- Territory and duration.
- Process to withdraw future use.

Review before publication

Verify the quote, attribution, evidence, disclosure, and current accuracy. A true statement can become misleading when context changes.

11. Monthly reporting rhythm

Before the meeting

- Freeze the reporting period.
- Run saved reports using the metric dictionary.
- Reconcile key totals.
- Compare with prior period and target.
- Separate facts from hypotheses.
- Prepare exceptions and decisions needed.

During the meeting

- 1 CRM adoption and data quality.
- 2 Lead and pipeline outcomes.
- 3 Client and renewal outcomes.
- 4 Campaign economics.
- 5 Recruiting and onboarding.
- 6 Risks, decisions, owners and dates.

After the meeting

- Record decisions in the CRM or approved management system.
- Assign owners and due dates.
- Preserve the report version used.
- Correct source data through an auditable process.
- Schedule the next review.

12. Chapter assignment

- 1 Complete the metric dictionary for ten core measures.
- 2 Create the baseline register with source evidence and limitations.
- 3 Reconcile one monthly report.
- 4 Complete one ROI calculation using conservative, supported values.
- 5 Draft one internal case study from verified data.
- 6 Classify every statement as fact, hypothesis, calculation, estimate or opinion.
- 7 Complete the evidence and permission checklist before any public use.

The chapter is complete when another reviewer can reproduce the number from the documented source and understand exactly what can and cannot be concluded.

EDITABLE TEMPLATE PACK

Copy these into your working documents. Replace bracketed placeholders, obtain the required approval, and connect every live process to a CRM owner and field.

Template 1 - Metric dictionary

Metric	Business question	Formula	Included	Excluded	Time basis	Source	Owner	Limitation
[Name]	[Question]	[Formula]	[Scope]	[Exclusions]	Cohort/activity/snapshot	[Report]	[Name]	[Limit]

Template 2 - Baseline register

Measure	Start	End	Scope	Value	Record count	Source evidence	Data gaps	Reviewer
[Metric]	[Date]	[Date]	[Team/source]	[Value]	[#]	[File/report]	[Gap]	[Name]

Template 3 - Report reconciliation

REPORT: [Name/version]
 PERIOD: [Start/end]
 FILTERS: [Exact filters]
 GENERATED: [Date/time/user]
 SOURCE COUNT: [#]
 REPORT COUNT: [#]
 TEST RECORDS REMOVED: [#]
 DUPLICATES REMOVED: [#]
 MANUAL ADJUSTMENTS: [Amount/reason/approver]
 SAMPLE CHECKED: [# and selection method]
 DIFFERENCE: [# and explanation]
 REVIEWER: [Name/date]
 STATUS: [Approved / revise]

Template 4 - CRM adoption dashboard

Measure	Current	Standard	Difference	Owner	Action	Due
Active leads with owner	[%]	100%	[#]	[Name]	[Action]	[Date]
Active leads with next action	[%]	[Standard]	[#]	[Name]	[Action]	[Date]
Closed with outcome reason	[%]	100%	[#]	[Name]	[Action]	[Date]
Won converted to client	[%]	100%	[#]	[Name]	[Action]	[Date]
Renewals with owner/action	[%]	[Standard]	[#]	[Name]	[Action]	[Date]

Template 5 - Funnel report

Source	Valid leads	Connected	Qualified	Meetings	Sales	Retained	Spend	Retained contribution
[Source]	[#]	[#]	[#]	[#]	[#]	[#]	[Amount]	[Amount]

CONTACT RATE = connected / valid leads
 QUALIFICATION RATE = qualified / connected
 MEETING RATE = meetings / qualified
 CLOSE RATE = sales / completed meetings or agreed denominator
 COST PER SALE = spend / sales
 RETAINED ROAS = retained contribution / spend

Template 6 - Stage aging report

Stage	Open records	Median age	Maximum standard	Over standard	Primary owner	Action
[Stage]	[#]	[Days]	[Days]	[#]	[Name]	[Action]

Template 7 - Renewal coverage

Window	Records	Owner assigned	Action dated	Review complete	Retained	Lost	Pending
0-30 days	[#]	[#/%]	[#/%]	[#/%]	[#]	[#]	[#]
31-60 days	[#]	[#/%]	[#/%]	[#/%]	[#]	[#]	[#]
61-90 days	[#]	[#/%]	[#/%]	[#/%]	[#]	[#]	[#]

Template 8 - Fact, hypothesis and decision

OBSERVED FACT:

[What the agreed report shows]

HYPOTHESIS:

[Possible explanation - clearly not proven]

EVIDENCE NEEDED:

[Data, sample or comparison]

DECISION OR TEST:

[Action]

OWNER / DUE / REVIEW:

[Name / date / metric]

Template 9 - ROI calculator

Cost	Amount	Evidence
Software	[Amount]	[Invoice]
Setup/migration	[Amount]	[Invoice/time record]
Internal implementation time	[Amount]	[Hours x loaded cost]
Training	[Amount]	[Hours x loaded cost]
Ongoing administration	[Amount]	[Documented]
Advertising	[Amount]	[Platform invoice]

Benefit	Amount	Confidence	Evidence
Incremental retained contribution	[Amount]	High/medium/low	[Source]
Renewal contribution protected	[Amount]	High/medium/low	[Source]
Verified time saving	[Amount]	High/medium/low	[Source]
Cancelled duplicate software	[Amount]	High/medium/low	[Source]

TOTAL COST = [Amount]

VERIFIED GROSS BENEFIT = [Amount]

NET BENEFIT = gross benefit - total cost = [Amount]

ROI = net benefit / total cost x 100 = [%]
 MONTHLY VERIFIED NET BENEFIT = [Amount]
 PAYBACK = total cost / monthly verified net benefit = [Months]
 LIMITATIONS = [List]
 REVIEWER = [Name/date]

Template 10 - Case study evidence register

Statement	Type	Source	Date	Definition	Reviewer	Publish?	Limitation
[Statement]	Fact/calculation/estimate/opinion	[Evidence]	[Date]	[Definition]	[Name]	Yes/No	[Limit]

Template 11 - Internal case study

TITLE: [Specific operational change]
 STATUS: INTERNAL - NOT APPROVED FOR PUBLICATION

CONTEXT:
 [Organization type, team range, market and period]

BASELINE:
 [Process, metric, definition, dates, source and limitation]

INTERVENTION:
 [Specific CRM configuration, ownership rule, training or routine]

RESULT:
 [Comparable metric, counts, dates and confidence]

OTHER CHANGES:
 [Staffing, source mix, pricing, seasonality or other factors]

WHAT CAN BE CONCLUDED:
 [Narrow supported conclusion]

WHAT CANNOT BE CONCLUDED:
 [Unsupported causation or outcome]

EVIDENCE:
 [Report/export/calculation references]

PERMISSION STATUS:
 [Not requested / requested / approved with scope]

Template 12 - Public case study approval

☐ Exact organization name approved
☐ Exact person name and role approved
☐ Exact quote approved
☐ Metrics reproduced from evidence
☐ Screenshots contain no unauthorized information
☐ Limitations included
☐ Product and market context accurate
☐ Website use approved
☐ Skool use approved
☐ Social-media use approved
☐ Paid-ad use approved
☐ Geographic scope approved
☐ Start and end date approved
☐ Withdrawal contact recorded

APPROVING PERSON: [Name/authority]

APPROVED WORDING: [Attach exact version]

DATE: [Date]

REVIEW/EXPIRY: [Date]

Template 13 - Neutral feedback request

Subject: Feedback on your experience

Hi [First name],

Would you be willing to share honest feedback about [specific process]? Positive, neutral and critical feedback are all useful. Please focus on your real experience and do not include private account, policy or financial information.

Questions:

1. What problem were you trying to solve?
2. What changed in the process?
3. What was useful or difficult?
4. What would you improve?

Thank you,

[Name/signature]

Template 14 - Quote permission

You provided this feedback on [date/channel]:

"[EXACT QUOTE]"

May [Organization] publish this exact quote with the attribution "[NAME / ROLE / COMPANY OR ANONYMOUS LABEL]" on [CHANNELS] from [START] until [END]? Associated image/logo: [YES/NO and exact file]. Metrics or screenshots: [YES/NO and exact items].

You may decline. To request removal from future use, contact [CONTACT]. Please confirm the exact scope you approve.

APPROVED BY: [Name/date]

Template 15 - Monthly operating report

PERIOD: [Dates]

1. CRM ADOPTION

[Metrics, exceptions and owners]

2. LEADS AND PIPELINE

[Sources, response, conversion, aging and loss]

3. CLIENTS AND RENEWALS

[Handoffs, coverage, retained/lost/pending]

4. CAMPAIGN ECONOMICS

[Spend through retained contribution]

5. RECRUITING AND TRAINING

[Funnel, completion, productivity and retention]

6. FACTS

[Verified observations]

7. HYPOTHESES

[Explanations to test]

8. DECISIONS

[Scale / repair / pause]

9. ACTIONS

[Owner / due / review metric]

PREPARED BY: [Name/date]

REVIEWED BY: [Name/date]

Template 16 - Reporting QA checklist

- [] Metric definitions match the dictionary
- [] Period and cohort logic are stated
- [] Test and duplicate records handled consistently
- [] Filters and query are preserved
- [] Totals reconcile
- [] A record sample was checked
- [] Manual adjustments are documented
- [] Facts and hypotheses are separated
- [] Small samples and limitations are visible
- [] Public statements have evidence and permission
- [] Reviewer signed and dated the report