

Lead Leak Audit

Demonstration Report

Example Legal Firm

example.com

Prepared July 2026

LEAD LEAK SCORE

58

/ 100

AT RISK

Executive Summary

Example Legal Firm has a functional website and visible contact options, but the complete lead path is not reliable. The most serious issue is a silent disconnect between the primary website form and the firm's intake system. A visitor can receive a successful submission message while no CRM record is created and no follow-up is triggered.

Overall status Material lead-flow risk	Lead Leak Score 58 / 100	Priority findings 3 critical · 2 high · 4 medium
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Immediate business risk

Potential clients may believe their inquiry was received when the firm has no verified record of it. This creates a direct risk of delayed response, lost consultations and misleading marketing reports.

What is working

The primary landing pages load successfully, telephone numbers are visible, the booking tool is reachable, and core analytics are installed. The problems are concentrated in routing, confirmation and attribution.

First actions recommended

1. Repair form-to-CRM delivery and add server-side failure logging.
2. Restore a visible mobile call action above the cookie layer.
3. Add immediate confirmation and missed-call follow-up.
4. Correct duplicate conversion events before campaign decisions are made.

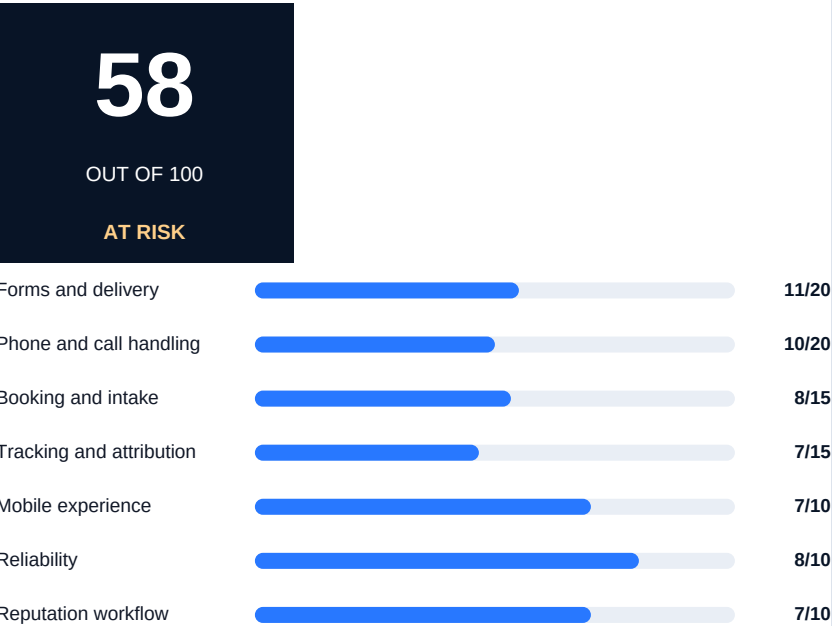
Management conclusion

The current website can generate inquiries, but the intake chain is not dependable.

Recommended decision: complete the critical repairs before increasing paid media spend. More traffic will not solve a broken lead-delivery process; it may only increase the number of lost or unverified inquiries.

A Clear Score for the Health of the Lead Flow

The score combines manual testing, workflow verification and technical review. It is not generated by a generic automated website scanner.



Critical findings

1. Contact form does not create a CRM record.
2. Mobile call button is partially obscured.
3. No verified confirmation or automated follow-up.

High-priority findings

4. Google Ads conversion is duplicated.
5. Missed calls have no immediate SMS workflow.

Interpretation

The firm has enough working infrastructure to recover quickly, but the current failure points affect the exact moments when a potential client expects confirmation and a fast response.

Scoring methodology

Weighted review of seven areas across the complete visitor-to-intake path.

Scores reflect observed behavior at the time of testing. A higher score indicates stronger reliability, not guaranteed business performance. The score should be repeated after implementation and during ongoing monitoring.

Issues Requiring Immediate Attention

Critical findings represent failures that can directly prevent an inquiry from reaching the intake team or receiving the expected response.

01 Primary form does not create a CRM record

Evidence	The website displays a successful submission state, but no corresponding record appears in the intake pipeline during testing.
Potential impact	The firm may not know the inquiry exists. Marketing reports can count a conversion that never entered the operational workflow.
Recommended action	Repair the integration, add server-side delivery logging, create a fallback email alert and verify the full path with a test lead.

02 Mobile call action is partially obscured

Evidence	On a common mobile viewport, the cookie layer overlaps the lower call action and reduces the available tap area.
Potential impact	Urgent callers may leave or scroll without noticing the primary contact action.
Recommended action	Adjust stacking, spacing and safe-area behavior; keep the call action visible without covering consent controls.

03 No verified confirmation or automated follow-up

Evidence	The visitor receives no immediate email or SMS confirming that the inquiry was received and explaining the next step.
Potential impact	The lead has no confidence that the firm received the request and may contact a competitor.
Recommended action	Send an immediate confirmation, define response expectations and trigger an internal escalation when no staff action occurs.

High- and Medium-Priority Findings

These findings do not currently block every lead, but they reduce confidence in attribution, response speed or operational consistency.

High	Duplicate paid-search conversion	One form event is recorded through both direct GA4 code and GTM.	Use one controlled implementation and validate against test submissions.
High	No missed-call SMS workflow	Calls outside intake coverage receive voicemail only.	Send an immediate compliant text with a clear callback and booking path.
Medium	Booking confirmation lacks intake instructions	The confirmation provides time and date but no preparation steps.	Add document, timing and contact expectations.
Medium	UTM values are not preserved	Campaign data is lost when the visitor crosses into the booking flow.	Persist first-touch and last-touch values into CRM fields.
Medium	No integration failure alert	The firm is not notified when the CRM endpoint rejects a submission.	Add monitored error logging and an internal fallback notification.
Medium	Backup restore not verified	Backups exist, but no recent restoration test is documented.	Perform and document a controlled restore test.

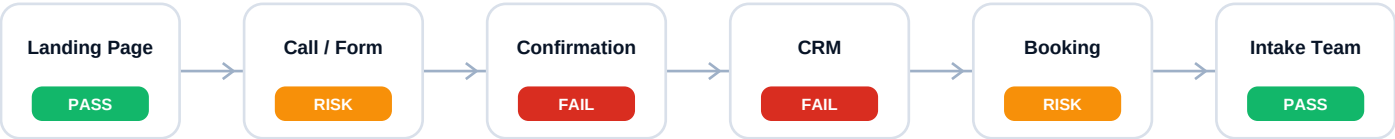
Positive controls observed

Several foundations are already in place and can support a fast repair sprint.

Website availability Primary pages loaded successfully during testing.	Visible contact routes Phone and form options are present on primary pages.	Booking access The consultation scheduler is reachable.
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Where the Current Workflow Breaks

A conversion should not be considered complete when a visitor merely clicks a button or sees a success message. The entire path must be verified through operational receipt and follow-up.



Observed failure path: **Form submission -> no CRM record -> no intake follow-up**

The visitor sees success, but the firm has no verified record of the inquiry.

Expected verified path

1	Visitor action The visitor calls, submits a form or books a consultation.
2	Immediate confirmation The visitor receives a clear acknowledgment and response expectation.
3	Internal notification The correct intake team receives a verified alert.
4	CRM creation A record is created with source, campaign and contact data.
5	Follow-up and booking The lead enters the correct response and reminder workflow.
6	Analytics verification The conversion is recorded once and linked to the correct source.

Verification standard: a test lead must be traceable from the original page through confirmation, notification, CRM record, booking status and analytics event. Screenshots, timestamps and test identifiers should be retained.

Recommended Implementation Sequence

The proposed work is organized to restore lead reliability first, then correct attribution and establish ongoing controls.

1. Stabilize	0-48 hours	Repair form delivery, add fallback alerts, restore visible mobile call action and enable immediate visitor confirmation.	Verified test submissions, CRM records, screenshots and notification logs.
2. Connect	Days 3-5	Correct analytics, preserve attribution, configure missed-call SMS and improve booking instructions.	Single conversion events, retained source fields and tested follow-up workflows.
3. Protect	Ongoing	Monitor forms, CRM delivery, booking, tracking, backups and integration errors.	Scheduled test records, alerts and monthly operating summary.

Lead Rescue Sprint

\$2,250

Fixed-scope implementation for the findings listed in this demonstration report.

Demonstration fixed-price proposal

Typical delivery: five business days

Payment: according to approved statement of work

Included in the example scope

Form and CRM repair · Fallback lead alerts · Mobile call-action correction · Visitor confirmation · Missed-call workflow · GA4/GTM correction · Attribution preservation · Booking instruction update · End-to-end QA · Documentation

Not included: new website design, advertising management, full CRM migration, content production, legal advice or guaranteed revenue outcomes.

NEXT STEPS

From Diagnosis to Verified Repair

A Lead Leak Audit is a diagnostic service. Implementation begins only after the client approves a separate scope, price and delivery schedule.

1	Review the findings Confirm that the observed workflows and business priorities are accurately understood.
2	Approve the repair scope Select the items to implement and confirm responsibilities, access and timing.
3	Provide secure access Use temporary named accounts, two-factor authentication and secure credential sharing.
4	Implement and test Complete controlled changes, verify the full lead path and document the outcome.
5	Monitor the system Repeat critical-path tests so future updates or expired integrations do not silently recreate the problem.

Important demonstration notice

This sample is designed to show format, depth and methodology.

All names, domains, findings, scores and prices in this document are fictional examples. A real audit is based on observed systems, access provided by the client and tests performed at a specific point in time.

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