

# Revenue Leakage & Commercial Risk - Executive Report

## Recorded execution evidence

### Objective

Revenue Leakage & Commercial Risk - Executive Report

### Completion assessment

Automation report requested; step outcomes are included in the evidence.

## Recorded task results

### 1. step\_1791656623650\_bjqaq

Status: recorded

- Ok: true
- Data / Generated At: 2026-10-10T19:54:51.484Z
- Data / Period / Days: 30
- Data / Period / From: 2026-09-10T19:54:51.181Z
- Data / Period / To: 2026-10-10T19:54:51.181Z
- Data / Category: sales
- Data / Employee Id: Not available
- Data / Employee: Not available
- Data / Currency: GBP
- Data / Kpis / 1 / Key: leads
- Data / Kpis / 1 / Label: Leads
- Data / Kpis / 1 / Value: 0
- Data / Kpis / 2 / Key: qualified
- Data / Kpis / 2 / Label: Qualified / won
- Data / Kpis / 2 / Value: 0
- Data / Kpis / 3 / Key: win\_rate
- Data / Kpis / 3 / Label: Lead win rate
- Data / Kpis / 3 / Value: 0
- Data / Kpis / 3 / Format: percent
- Data / Kpis / 4 / Key: conversations
- Data / Kpis / 4 / Label: Conversations
- Data / Kpis / 4 / Value: 4
- Data / Series / 1 / Key: 2026-09-10

- Data / Series / 1 / Label: 10 Sept
- Data / Series / 1 / Value: 0
- Data / Series / 2 / Key: 2026-09-15
- Data / Series / 2 / Label: 15 Sept
- Data / Series / 2 / Value: 0
- Data / Series / 3 / Key: 2026-09-20
- Data / Series / 3 / Label: 20 Sept
- Data / Series / 3 / Value: 0
- Data / Series / 4 / Key: 2026-09-25
- Data / Series / 4 / Label: 25 Sept
- Data / Series / 4 / Value: 0
- Data / Series / 5 / Key: 2026-09-30
- Data / Series / 5 / Label: 30 Sept
- Data / Series / 5 / Value: 0
- Data / Series / 6 / Key: 2026-10-05
- Data / Series / 6 / Label: 05 Oct
- Data / Series / 6 / Value: 0
- Data / Breakdowns / 1 / Key: new
- Data / Breakdowns / 1 / Label: New
- Data / Breakdowns / 1 / Value: 0
- Data / Breakdowns / 2 / Key: contacted
- Data / Breakdowns / 2 / Label: Contacted
- Data / Breakdowns / 2 / Value: 0
- Data / Breakdowns / 3 / Key: qualified
- Data / Breakdowns / 3 / Label: Qualified
- Data / Breakdowns / 3 / Value: 0
- Data / Breakdowns / 4 / Key: won
- Data / Breakdowns / 4 / Label: Won
- Data / Breakdowns / 4 / Value: 0
- Data / Breakdowns / 5 / Key: lost
- Data / Breakdowns / 5 / Label: Lost
- Data / Breakdowns / 5 / Value: 0
- Data / Insights: None recorded
- Data / Data Sources / 1 / Key: polyosync
- Data / Data Sources / 1 / Label: Polyosync workspace
- Data / Data Sources / 1 / Connected: true
- Data / Data Sources / 2 / Key: google\_analytics
- Data / Data Sources / 2 / Label: Google Analytics 4
- Data / Data Sources / 2 / Connected: false
- Data / Data Sources / 2 / Note: Connect GA4 to retrieve website traffic metrics.
- Data / Data Sources / 3 / Key: google\_search\_console
- Data / Data Sources / 3 / Label: Google Search Console
- Data / Data Sources / 3 / Connected: false
- Data / Data Sources / 3 / Note: Connect Search Console for search performance metrics.
- Data / Data Sources / 4 / Key: shopify

- Data / Data Sources / 4 / Label: Shopify
- Data / Data Sources / 4 / Connected: false
- Data / Data Sources / 4 / Note: Connect Shopify for orders, revenue and product metrics.
- Data / Data Sources / 5 / Key: meta\_ads
- Data / Data Sources / 5 / Label: Meta Ads
- Data / Data Sources / 5 / Connected: false
- Data / Data Sources / 5 / Note: Connect Meta Ads for campaign metrics.
- Data / Data Sources / 6 / Key: linkedin
- Data / Data Sources / 6 / Label: LinkedIn
- Data / Data Sources / 6 / Connected: true
- Data / Data Sources / 6 / Note: Not available
- Data / Limitations / 1: No leads were recorded in the selected period.
- Status: success
- Action Id: 2c11568e-b687-4a7f-abd3-a55962b4c123

## 2. step\_1791656683183\_z2qdv

Status: recorded

### Verified findings (10 Sept-10 Oct 2026)

1. No recorded commercial pipeline: 0 leads, 0 qualified/won opportunities, and GBP0-equivalent recorded sales activity; all pipeline stages are zero.
2. No measurable conversion: Lead win rate is 0%, but this is based on zero leads and therefore does not demonstrate actual sales performance.
3. Limited recorded engagement: 4 conversations were recorded, with no associated lead or opportunity stages.
4. Data visibility is incomplete: Only Polyosync and LinkedIn are connected. GA4, Search Console, Shopify, Meta Ads, and other revenue/traffic sources are unavailable.

### Top three priorities

#### 1. Pipeline capture failure - highest urgency

- Impact: Potentially all commercial opportunities are absent from reporting or not being captured.
- Verified evidence: Zero leads across the full 30-day period; 4 conversations are not linked to pipeline stages.
- Action: Audit conversation-to-lead creation, forms, inboxes, CRM imports, and stage updates. Manually reconcile the 4 conversations and enforce required lead-source and pipeline fields.

## 2. Revenue attribution and leakage risk - high urgency

- Impact: Revenue, orders, or commercially valuable activity may be occurring outside the workspace and remaining unreported.
- Verified evidence: Shopify and analytics integrations are disconnected; no sales or revenue metrics are available.
- Action: Connect the relevant revenue and acquisition systems, validate tracking end-to-end, and reconcile workspace records against actual orders/invoices before making performance decisions.

## 3. Inability to assess conversion decline - high priority

- Impact: Management cannot determine whether conversion is declining, stable, or simply unmeasured.
- Verified evidence: Win rate is reported as 0% with zero leads; no historical comparison or funnel progression exists.
- Action: Establish weekly funnel reporting for leads, contacted, qualified, won, lost, response time, and source. Set minimum data-quality checks and investigate any future zero-lead period immediately.

## Assumptions requiring validation

- The zero counts may reflect missing integration, tracking, or process data rather than zero real-world demand.
- The 4 conversations may represent prospects, existing customers, or non-commercial interactions.
- Actual revenue leakage cannot be quantified from the supplied data.

## 3. step\_1791656698969\_51yf2

Status: recorded

- Ok: true
- Data / Leads: None recorded
- Data / Count: 0
- Status: success
- Action Id: dfb880e5-5438-47f2-bfa8-79bcdb4fd498

## AI synthesis status

Executive synthesis unavailable: Request timed out.