TRAN GROWTH PARTNERS FREE RESOURCE

The Appointment Engine Scorecard

Five numbers that tell you whether to scale, hold, fix or pause your ad spend

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Purpose

This scorecard is for businesses that sell a $10,000+ offer through a booked appointment: a consultation, estimate, inspection, assessment or tour. It rolls the five numbers that decide whether paid acquisition is working into one weekly call: scale, hold, fix or pause. Fifteen minutes a week, from counts you already have.

Who this is for

The owner or operator who decides the ad budget and can see the calendar and the CRM. If you can only see the ad platform, start with the reconciliation on the last page.

What you need before you start

- Ad spend for the period, from Ads Manager, plus any vendor fee
- Leads, booked, attended, qualified and closed for the same period, from your CRM, by source
- Revenue per new client and gross margin before marketing, from your books and payment processor
- Booking and appointment timestamps and available selling slots, from your calendar tool

Stop here if: booking, attendance, qualification and sale cannot be tied back to the same appointment. Repair measurement before scoring anything.

The five metrics

#	Metric	Formula	Green	Yellow	Red
1	Cost per attended appointment vs allowable	cost per attended ÷ (gross profit per new client × close rate on attended)	under 50%	50% to 80%	over 80%; at 100% or more, stop
2	Show rate	attended ÷ booked	at or above your target	within 15 points under target	more than 15 points under
3	Qualified rate	qualified ÷ attended	at or above your target	within 15 points under target	more than 15 points under
4	Booking lag	median days from booking to appointment	2 days or less	3 days	over 3 days
5	Calendar utilisation	booked ÷ available selling slots	60% to 90%	40% to 60%, or 90% to 100%	under 40%, or over 100%

Metric 1: Cost per attended appointment vs allowable

The economics gate. Gross profit per new client is revenue per client multiplied by your gross margin before marketing. Multiply it by your close rate on attended appointments and you have what an attended appointment is worth at breakeven. The metric is your actual cost per attended appointment as a share of that line. Scaling correctly means this share stays flat while spend rises. If it climbs as you scale, the scale is fake, whatever the lead count says.

Metric 2: Show rate

The attendance gate. It falls first when bookings are set too far out, confirmation is weak, or the calendar is overbooked. Segment it by source and by booking lag before you blame the ads.

Metric 3: Qualified rate

The targeting gate. A cheap appointment with the wrong person still costs a selling slot. If you do not record qualification, use close rate and treat the answer as a floor.

Metric 4: Booking lag

The earliest warning. Show rate declines as booking lag grows. The standard is same-day to two-day booking, with three days as the normal upper bound. A booking window that only shows the next two days of availability keeps this green on its own.

Metric 5: Calendar utilisation

The capacity gate. Under 40% means most selling time is unfilled. Over 100% means appointments are being bought that nobody can attend; show rate and booking lag deteriorate from there, and the ad account gets blamed.

Where the bands come from

Metric 1 is derived from your own economics. The booking-lag bands follow Tran Growth Partners' show-rate operating procedure. The show-rate and qualified-rate targets are planning defaults of 70% and 60%; overwrite them with your own best quarter. The utilisation bands are planning defaults. None of these are benchmarks from other businesses, and a threshold not derived from your own account should stay labelled as imported.

The decision matrix

Read the five bands in this order and stop at the first rule that applies.

1. **Metric 1 red or stop: pause the scale.** Appointments cost too much of what they return. More budget buys more of the same loss. Fix the economics first: the offer, the close rate, or the cost of the route.
2. **Utilisation over 100%: hold.** The calendar is overbooked. Add selling capacity or cut spend to the ceiling. Nothing else works until the calendar can.
3. **Any other red, or two yellows: fix before adding spend.** Fix the flagged stage, give it a full judging window, re-run the scorecard.
4. **One yellow: scale cautiously** in steps of about 10%, watching the yellow metric. If it turns red, stop and fix it before the next step.
5. **All green: scale** in steps of about 20%, watching metric 1 and show rate as spend climbs.

Where each number lives

Number	Source	Never use
Spend	Ads Manager, exact date range, plus vendor fee	An estimate from memory
Leads, booked, attended, qualified, closed	Your CRM, by source	The platform's lead column
Revenue per client	Payment processor	The CRM's deal value
Booking lag, available slots	Calendar tool export	A guess from the front desk

Weekly worksheet

Week of	Metric 1 (% of allowable)	Show rate	Qualified rate	Booking lag	Utilisation	Verdict

Reconcile the counts first

The verdict is only as good as the inputs. Once a month, line up platform leads, CRM contacts, booked, attended, qualified, closed and revenue in one table, one row per source. Divide each column by the one before it for your stage conversion rates. The smallest one is the stage to fix first. Divide spend by each column for your cost at every stage.

The free calculators behind this scorecard run at trangrowthpartners.com/resources/. Tran Growth Partners builds and operates the route after the click for established businesses selling a $10,000+ offer through a booked appointment.

- The Appointment Engine Scorecard calculator Score all five on the page
- Allowable Cost per Appointment Calculator Derive the line for metric 1
- Cost per Appointment Calculator Cost at every stage
- Appointment Capacity Ceiling Calculator The budget the calendar can absorb