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The Lead-Gen Vendor Audit Checklist

Twenty questions to ask whoever runs your ads, your lead generation or your appointment setting

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Purpose

A vendor paid to deliver leads reports leads. The numbers that decide whether your ads work, booked, attended, qualified and closed, live in your calendar and your CRM, and the vendor's contract usually stops one stage before them. This checklist turns that problem into twenty questions you can ask on the next vendor call, grouped into the four places it shows up.

Who this is for

The owner of a business that sells a $10,000+ offer through a booked appointment and pays someone else to run the ads, the lead generation or the appointment setting.

How to score it

Tick the box when the answer you get, or the answer you already know, sounds like the red flag. Book thirty minutes with the vendor, or pull up the last three monthly reports; for most of these you already know the answer. One red flag is a conversation. A pattern is a diagnosis. Most of what this surfaces is not bad people. It is the model working exactly as designed.

Part 1 of 4: Reporting and numbers

Question	Good answer	Red flag
☐ 1. Do they report booked and attended appointments, or leads?	Leads, booked, attended, qualified and closed, split by source, every month without being asked.	A lead count and a cost per lead, and "what happens after that is up to your sales team."
☐ 2. Where do the numbers in the monthly report actually come from?	Your CRM and your calendar, reconciled against the platform, with the gap explained.	Screenshots of Ads Manager. The platform grades its own homework.
☐ 3. Can they tell you last month's show rate?	The number, by source, and whether it moved.	A pause, then "we don't control what happens after the lead comes in."
☐ 4. Do they know what an attended appointment is worth to you?	They asked for your revenue per client, margin, close rate and show rate in the first month, and the target is built from them.	The target is a cost per lead borrowed from another account.
☐ 5. When their report and your calendar disagree, what happens?	The calendar and CRM are ground truth and the gap gets investigated until explained.	The dashboard gets defended; the calendar is "attribution being hard."

Part 2 of 4: Incentives and ownership

Question	Good answer	Red flag
☐ 6. Which number does your agreement define success on?	A number you can verify in your own calendar and CRM: attended appointments, qualified appointments, cost per attended against a target.	Leads delivered, or a platform result.
☐ 7. Who owns the ad account, the pixel, the landing page, the CRM and the booking calendar, and what do you keep if you leave tomorrow?	Everything is yours. Leaving costs nothing but the relationship.	Any of it sits in their Business Manager, CRM or booking tool "for convenience."
☐ 8. Have they ever recommended you cut or pause spend?	Yes, and they can name the month and the reason.	Never. The answer has always been more budget.
☐ 9. When the problem lives outside the ad account, do they say so?	They have flagged problems they do not get paid to fix, in writing.	Everything gets solved with a new campaign.
☐ 10. When they propose a budget increase, what is it based on?	Cost per attended appointment against your allowable, and the calendar's open capacity.	"Cost per lead is down, so there's room."

Part 3 of 4: Strategy and ownership

Question	Good answer	Red flag
☐ 11. Can they name the single stage where your route loses the most?	A specific call with the number that points to it.	"We need to test more creative," for the third quarter running.
☐ 12. What changed in their plan after your last flat month?	A diagnosis and a different plan you can compare against the old one.	Nothing. It was seasonality, the algorithm or a platform change.
☐ 13. If the vendor disappeared tomorrow, could your team run the follow-up, the booking path and the reporting?	Everything lives in your accounts and your team could operate it by Friday.	It lives in their logins and their slide deck.
☐ 14. Do they know how fast your team follows up a new lead, and measure it?	Yes, in minutes, by hour of day, and it is in the report.	They have never asked.
☐ 15. What is the plan beyond "more of what's working"?	A sequence: what gets fixed next, why, and which number proves it.	Duplicate campaigns and raise budgets until it stops working.

Part 4 of 4: Communication and accountability

Question	Good answer	Red flag
☐ 16. When performance breaks, who tells whom?	They flag the bad week first, with a cause and a fix moving.	You find the empty calendar and open the conversation.
☐ 17. Can the person actually running your account explain the strategy?	The operator can defend every decision.	Strategy lives with the person who sold you.
☐ 18. Ask what didn't work last month. What comes back?	A straight list of failed tests and what each taught.	A highlight reel. Nothing has ever failed.
☐ 19. Do action items get done without you chasing?	Promised, then delivered or flagged, in writing, before the next call.	You keep a list of things asked for twice.
☐ 20. Do they put recommendations in writing before the results are in?	A written call with an expected outcome you can check later.	The story arrives after the numbers, and it always fits.

The verdict

Count the boxes you ticked.

- **Zero to three: a conversation.** Raise what you found on the next call, ask for the missing number in the next report, and re-run the checklist in thirty days.
- **Four to eight: a pattern.** Most of the flags trace back to one cause: the vendor is measured on leads and you are measured on appointments. Fix the measurement before you shop for a replacement. Get booked, attended and closed by source into your own CRM and calendar, own every account, and re-read the report against those numbers.
- **Nine or more: a diagnosis.** The relationship is running on numbers that do not describe your business. Act, in order: take ownership of the accounts and the data, reconcile the calendar and CRM counts, derive your allowable, then decide who runs the route against the real numbers. Switching first hands the next vendor a fresh honeymoon on the same broken scoreboard.

The interactive version of this checklist, and the calculators that derive your allowable cost per appointment, run free 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.

[Interactive checklist]() Count on the page
[The Lead Vendor Incentive Problem]() Why this keeps happening
[Allowable Cost per Appointment Calculator]() Question 4, answered