



ADVANCED ANALYTICS · PROFESSIONAL & PREMIUM

# Revenue Attribution & Your **Reporting** Dashboard

How to read dAIsy's reporting dashboard, understand your key metrics, and use the numbers to make decisions that grow your business. No spreadsheets. No guesswork.

## Your 5 Most Important Numbers

Start here. These five metrics tell you everything you need to know about how your business is performing. Check them weekly.

Metric	Where to Find It	Target	What It Means
<b>Lead-to-booking rate</b>	Pipelines → Reports	25%+	Of every 100 new leads, how many became bookings? Below 25% usually means your follow-up sequence needs improving.
<b>Email open rate</b>	Marketing → Reports → Email	30%+	How many people open your automated emails? Below 25% usually means your subject lines need work.
<b>SMS response rate</b>	Conversations (manual count)	15–25%	How many people reply to your automated texts? Below 10% means your message tone or timing needs adjusting.
<b>Cost per lead by source</b>	Contacts → Source filter	Track & compare	Which lead source produces the cheapest leads? Double down on that channel.
<b>Revenue per lead source</b>	Contacts → Source + won deals	Track & compare	Which source produces the highest-value clients? This is more important than cheapest leads.

## Understanding Your Reporting Dashboard

[Reporting → Overview](#)

### Total Leads

Every new contact added in the selected period. This is your top-of-funnel number. If it's falling, your marketing needs attention.

### Appointments

Total bookings in the period. The ratio of leads to appointments is your conversion rate — the most important number in the dashboard.

### Revenue

Total value of won deals. Requires you to add a monetary value to opportunities in your pipeline.

### Opportunities by Stage

A visual breakdown of where leads are in your pipeline. If most leads are stuck in one stage, that stage is your bottleneck.

## Marketing → Reports → Email

Metric	Good	Needs Work	Fix
Open rate	30%+	Below 20%	Improve subject lines. Use the contact's first name. Make it sound like a personal email, not a newsletter.
Click rate	3%+	Below 1%	Your CTA isn't compelling or clear. One CTA per email. Use a button, not a text link.
Unsubscribe rate	Below 0.5%	Above 1%	Sending too frequently or content isn't relevant. Segment your list more precisely.
Bounce rate	Below 2%	Above 5%	Your contact list has bad email data. Clean it: remove addresses that have bounced twice.

# Revenue Attribution: Which Channels Are Actually Working?

Revenue attribution answers the question: of all the money my business made this month, where did those clients come from? This is the report that tells you where to spend your marketing budget.

## How to Run It in dAIsy

1. Ensure every contact has a Source custom field populated (Website, Facebook, Google, Referral, etc.)
2. Go to [Contacts](#) → [filter by Source](#)
3. For each source, note: total leads, total converted, total revenue (if you've logged deal values)
4. Calculate: Conversion Rate =  $\text{Converted} / \text{Total Leads}$ . Revenue per Lead =  $\text{Total Revenue} / \text{Total Leads}$
5. Compare across sources. The winner is the source with the highest revenue per lead — not just the most leads.

### WORKED EXAMPLE

Facebook generates 50 leads per month at £10 per lead. Google generates 20 leads at £25 per lead. At first glance Facebook looks better — more leads, lower cost. But if Facebook leads convert at 15% and Google leads convert at 40%, Google produces 8 paying clients vs Facebook's 7.5 — at better profit margins. Revenue attribution tells you this. Gut feel doesn't.

**The takeaway:** the cheapest lead source isn't always the best one. Revenue per lead — not cost per lead — is the number that should guide your marketing spend.

# The Weekly 20-Minute Dashboard Review

Block 20 minutes every Monday morning. Same time, every week. This is the habit that separates businesses that grow from businesses that guess.

## 1 Check the Pipeline

Pipelines → your pipeline. Any lead stuck in a stage for more than 3 days? Create a task to follow up personally today.

## 2 Review Automation Logs

Automations → Execution Logs. Any failed messages? Fix the data (usually a bad phone number) and re-send manually. These are real lost opportunities.

## 3 Check Email Performance

Marketing → Reports. Is open rate holding above 30%? Is any particular email underperforming? Note it for this week's A/B test.

## 4 Count Reviews

How many new Google reviews this week? Is the review request automation firing? Check 1–2 recent 'Won' contacts to verify.

## 5 One Improvement

Pick one thing to test or improve this week. Change one subject line. Adjust one SMS timing. Add one new contact tag. Compounded over 52 weeks, this is how significant growth happens.

## Setting Up Pipeline Revenue Tracking

To unlock revenue reporting in dAIsy, you need to attach a monetary value to opportunities. Here's how.

1. Go to [Pipelines → your pipeline](#)
2. Click on any opportunity card → you'll see a 'Value' field
3. Enter the estimated or confirmed job value
4. For automations: add a 'Update Opportunity Value' action in your New Lead Workflow if you know the average value at enquiry stage
5. Once values are logged: [Reporting → Pipeline](#) → shows total pipeline value, won revenue, and average deal size by stage

### Advanced Tip

Create a custom field called 'Job Value' on your contact record as well as the opportunity. This lets you filter your entire contact database by value — so you can identify your highest-value clients and make sure they're getting your best service.