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You Can't Fix What You Can't See

Data & Visibility Self-Diagnosis

For online coaches, consultants, and agencies **making decisions off “vibes”**: use this 7-day data sprint to install a simple weekly scoreboard so you always know if your real problem is leads, sales, or churn.

Most owners are flying blind. They feel stuck, but can't tell you last month's leads, calls, new clients, or cancels without digging through five tools. That means every move is a guess. This self-diagnosis shows you exactly how blind you are right now, then walks you through installing a dead-simple weekly scorecard (5–8 numbers, one owner, 10–15 minutes) so you can finally see where the real bottleneck is and stop “optimizing” the wrong thing. This is you building the front end of your own marketing machine: a tiny system that tells you which lever to pull next.

GOAL: Stop guessing. Build a basic scoreboard in 7 days.

INSTRUCTIONS:

- Answer the questions.
- Mark what applies.
- Then install the simple tracking system at the end.

SECTION 1 – Do you even have numbers?

For the **last full month**, can you quickly find (without digging for 30 minutes):

Q1. Total revenue for the month?

- Yes, within 60 seconds
- Kinda, after downloading / guessing → **Mark “REV DATA = WEAK”**
- No idea → **Mark “REV DATA = WEAK”**

Q2. Profit for the month (revenue minus *all* expenses, including your pay)?

- Yes, I know it
- Rough idea → **Mark “PROFIT DATA = WEAK”**
- No idea → **Mark “PROFIT DATA = WEAK”**

Q3. Number of *new leads* generated last month (opt-ins, inquiries, form fills, inbound DMs, etc.)?

- Yes
- Rough guess → **Mark “LEAD DATA = WEAK”**
- No idea → **Mark “LEAD DATA = WEAK”**

Q4. Number of *sales calls / demos / proposals* given last month?

- Yes
- Rough guess → Mark **“SALES DATA = WEAK”**
- No idea → Mark **“SALES DATA = WEAK”**

Q5. Number of *new clients / customers* who actually paid last month?

- Yes, instantly
- Rough guess → Mark **“NEW CLIENT DATA = WEAK”**
- No idea → Mark **“NEW CLIENT DATA = WEAK”**

Q6. Number of *clients who cancelled or stopped* last month?

- Yes
- Rough guess → Mark **“CHURN DATA = WEAK”**
- No idea → Mark **“CHURN DATA = WEAK”**

If you marked 3+ of these as WEAK, you are in **Data Blindness**. Keep going.

SECTION 2 – Can you see the funnel?

Now, for that same month, answer honestly:

Q7. Can you tell what % of leads turned into sales calls?

(Calls ÷ Leads)

- Yes, easily
- Only by serious digging → Mark **“LEAD→CALL CONV = UNKNOWN”**
- No → Mark **“LEAD→CALL CONV = UNKNOWN”**

Q8. Can you tell what % of sales calls became paying clients?

(Clients ÷ Calls)

- Yes, easily
- Only by digging → Mark **“CALL→SALE CONV = UNKNOWN”**

- No → Mark **“CALL→SALE CONV = UNKNOWN”**

Q9. Can you tell if your active client count is *growing, flat, or shrinking* over the last 3–6 months?

- Growing (and I can show it on a chart)
- Flat
- Shrinking
- Honestly, I don't know → Mark **“GROWTH TREND = UNKNOWN”**

SECTION 3 – Ownership & Habit

Q10. Is there one person explicitly responsible for updating the core numbers every week (even if it's you)?

- Yes, and it happens
- Named, but inconsistent → Mark **“NO DATA OWNER”**
- No one owns it → Mark **“NO DATA OWNER”**

Q11. Do you have a recurring weekly meeting (even 10 minutes solo) where you look at: revenue, leads, calls, new clients, cancels?

- Every week
- Sometimes → Mark **“NO DATA CADENCE”**
- Almost never → Mark **“NO DATA CADENCE”**

SECTION 4 – Your Data Type

(Match your marks)

Type 1 – Totally Blind

You marked things like:

- REV DATA = WEAK
- PROFIT DATA = WEAK
- LEAD DATA = WEAK
- SALES DATA = WEAK
- NEW CLIENT DATA = WEAK
- NO DATA OWNER, NO DATA CADENCE

What this means:

You are making strategic decisions off feelings. You literally can't know where the constraint is.

Your immediate job (next 7 days):

1. Pick your 5 core weekly numbers:

- Revenue collected last week
- New leads
- Sales calls / demos
- New clients
- Cancels

2. Choose where to track them:

- Google Sheet, Excel, or the reporting tab of your CRM.
- One simple table: rows = weeks, columns = those 5 numbers.

3. Assign an owner:

- Write: "From now on, [NAME] updates these numbers every Monday by 12 pm."

4. Set the weekly appointment:

- 10–15 minutes, same time each week, to look at nothing but this sheet.

Until this is installed, you don't have a marketing or operations problem. You have a *measurement* problem.

Type 2 – Half-Blind

You might have:

- You know revenue and profit (maybe)
- But LEAD DATA or SALES DATA or CHURN DATA = WEAK
- LEAD→CALL CONV or CALL→SALE CONV = UNKNOWN

What this means:

You can see the bank account, but not *why* it's moving. You can't reliably point to leads, sales, or retention.

Your immediate job (next 7 days):

1. **Add acquisition & churn tracking to your existing numbers:**
 - For each week, log:
 - Leads
 - Calls / demos
 - New clients
 - Cancels
2. **Backfill the last 1-3 months as best you can:**
 - Dig through your CRM, calendar, Stripe, email, etc.
 - “Good enough” beats “nothing at all.” Write in estimates if needed.
3. **Compute 2 simple conversion rates monthly:**
 - $\text{Calls} \div \text{Leads} = \text{Lead} \rightarrow \text{Call} \%$
 - $\text{Clients} \div \text{Calls} = \text{Call} \rightarrow \text{Sale} \%$
4. **Circle the ugliest number:**
 - Lowest conversion or fastest worsening trend = your *likely* constraint.
 - That's the step you work on next.

Type 3 – Data, No Decisions

You might say:

- “We track a lot of stuff, but I still don’t know what to focus on.”

You probably have:

- Most basic numbers, but
- GROWTH TREND = UNKNOWN (you don’t look at it together)
- NO DATA CADENCE (no weekly review habit)

What this means:

You have *information*, not insight. The constraint is your operating rhythm, not the dashboard.

Your immediate job (next 7 days):

1. **Shrink your dashboard to 5–8 numbers max.**
 - Revenue, Profit, Leads, Calls, New Clients, Active Clients, Cancels.
2. **Create a weekly “scorecard ritual”:**
 - Same 15-minute slot every week.
 - Answer 3 questions:
 1. Up, flat, or down vs last 4 weeks?
 2. Which number looks worst?
 3. What is ONE thing we’ll test this week to improve that number?
3. **Write the answer and keep a log.**
 - So you don’t re-learn the same lesson every month.

SECTION 5 – Your 7-Day Data Install Plan

Have them write it:

1. **My current type is:**
 - Type 1 – Totally Blind
 - Type 2 – Half-Blind
 - Type 3 – Data, No Decisions
2. **Tool I will use to track (circle one):**

- Google Sheet / Excel / Notion / CRM reports
3. **Person who owns updating it weekly:**
- Name: _____
4. **Day & time of my weekly 10–15 minute scoreboard review:**
- _____ at _____
5. **Start date (within the next 7 days):**
- ___ / ___ / _____

YOUR NEXT MOVE:

Once You Can See The Game, You Need To Know Where To Swing.

*Within 4 weeks of tracking these 5–8 numbers (revenue, leads, calls, new clients, churn, etc.), your real constraint won't be a guess anymore. You'll see if the problem is **traffic, lead→call, call→sale, early churn, or economics**. That's when the right playbook actually matters.*

*On a free 45-minute **Scoreboard & Strategy Deep-Dive**, here's what we'll do:*

- *Review your new scoreboard together (or set it up live if you haven't started yet)*
- *Identify which number is obviously weakest or getting worse*
- *Map a focused 12-week plan to attack that one constraint instead of randomly "doing more marketing"*

👉 [Click HERE to book your free 45-minute Scoreboard & Strategy Deep-Dive Call:](#)

You'll leave with a clear view of your funnel, one ugly number circled, and a simple testing plan for the next 12 weeks. If you want help implementing it, I'll show you how we'd do that together. If not, you still walk away knowing exactly where to swing first.