

Weekly Campaign Review Worksheet

90-Day Seller Appointment Implementation Kit

Version 1.1 | Last Updated October 2, 2026

Purpose: Choose the next meaningful action using reconciled campaign data.

Requires: 90-Day Seller Campaign Tracker Updated tracker; Seller Campaign Economics Calculator
Written economic limits; Seller Ad Testing Tracker Test log

When to use: Weekly and Days 30, 60, and 90

Estimated time: 45–60 minutes

[Open the Resource Hub](#)

Customize before using

Replace the fields used in your selected template. Use [AGENT NAME], [BROKERAGE], [CITY], [COUNTY] or [NEIGHBORHOOD], [SELLER OFFER], verified [LOCAL MARKET DATA], [BOOKING LINK], [PHONE] and [EMAIL] consistently. Complete any additional bracketed delivery, privacy, property or review fields that apply. Delete instructions and unused alternatives before sending.

Review record

Review date [DATE] Reviewer [NAME] Activity period [FROM–TO] Lead cohort [FROM–TO] As-of date [DATE]

Expected follow-up/appointment maturation time [DAYS, CHOSEN FROM YOUR PROCESS]

What changed [DETAILS] What stayed constant [DETAILS]

Tracking or handling problems [ISSUES / NONE VERIFIED]

Reconcile first

Compare paid spend, link clicks, accepted form submits, deduplicated CRM raw leads, qualified dates, first booking dates, first held dates, and signed listings. Explain platform versus CRM differences. Separate test/spam exclusions and attribution differences. An unreported day is missing data; do not enter zero merely to complete the table.

Read counts and rates together

Write campaign spend [USD], cohort raw leads [N], qualified [N], first booked [N], first held [N], and listing won [N]. For attendance, write resolved held attempts [N], no-show attempts [N], pending [N], cancelled [N], and rescheduled [N].

Which stage is below your own planning target? [STAGE / RATE / DENOMINATOR]

Is the cohort mature enough for that outcome? [WHY]

Is the apparent largest drop-off economically important or expected? [REASON]

What evidence identifies the cause rather than just the symptom? [EVIDENCE]

Choose one experiment

Hypothesis: [IF WE CHANGE X, Y WILL IMPROVE BECAUSE Z]

One variable changing: [VARIABLE]

Baseline: [COUNT / RATE / PERIOD / COHORT]

Primary metric: [DEFINED METRIC AND DENOMINATOR]

Secondary safeguard: [QUALITY / COST / SERVICE CAPACITY]

Sample requirement: [OBSERVATIONS NEEDED AND RATIONALE]

Maturation window: [TIME FOR THE OUTCOME TO OCCUR]

Success threshold: [PRACTICALLY MEANINGFUL CHANGE]

Risk and spend cap: [USD / TIME]

Kept constant: [OFFER / GEO / BUDGET / PAGE / NURTURE AS APPLICABLE]

Owner: [NAME] Review date: [DATE]

Decision at review: Keep / Iterate / Stop / Inconclusive

Worked illustration

Planning illustration only: 100 mature raw leads, 40 qualified, 8 first booked, and 4 first held. Separately, eight appointment attempts have resolved: four Held and four No-show. Show rate is 50%; raw-lead-to-first-held rate is 4%. Pending future appointments are not failures.

If appointment time confusion is documented, test adding the clear local timezone and location to the confirmation. Keep acquisition and nurture stable. Set the desired practical attendance improvement, sample, maturation, and cap before the test. Eight outcomes are a small sample; do not call a modest difference conclusive.

When there is too little evidence

Write Inconclusive and name the missing observations. Wait only within the agreed risk cap, or fix operational defects without making a performance claim. Do not average weekly percentages; compute ratios from the underlying counts.

You are done when

One constraint, one action, one owner, one spend cap, and one review point are written down.