

Recover the lead. Make the next failure visible.

Sales said some leads weren't getting contacted. Operations suspected the dialer. A partner heard from customers who said no one had called. **Before choosing a fix, I wanted to find out what had actually happened to those leads.**

THREE PATTERNS IN THE SUPPLIED RECORDS

OFFERNEST · NO OUTREACH

18 / 52

Over a third of OfferNest leads received no call or text.

LEADBRIDGE · LONG WAITS

20 / 45

First attempts took almost 3–6 hours for this group.

FAILED TEXTS · NO CALL

12

Repeated landline-labeled failures and no recorded calls.

THE QUESTION UNDERNEATH THE COMPLAINTS

How could everything look green while customers were missed?

TECHNICAL HEALTH

The backend responds, the dialer runs, and jobs finish. Those checks can all be true.

CUSTOMER HEALTH

But did an eligible lead get its next action? If it didn't, who knew and who owned the recovery?

WHAT I WOULD ASK ENGINEERING

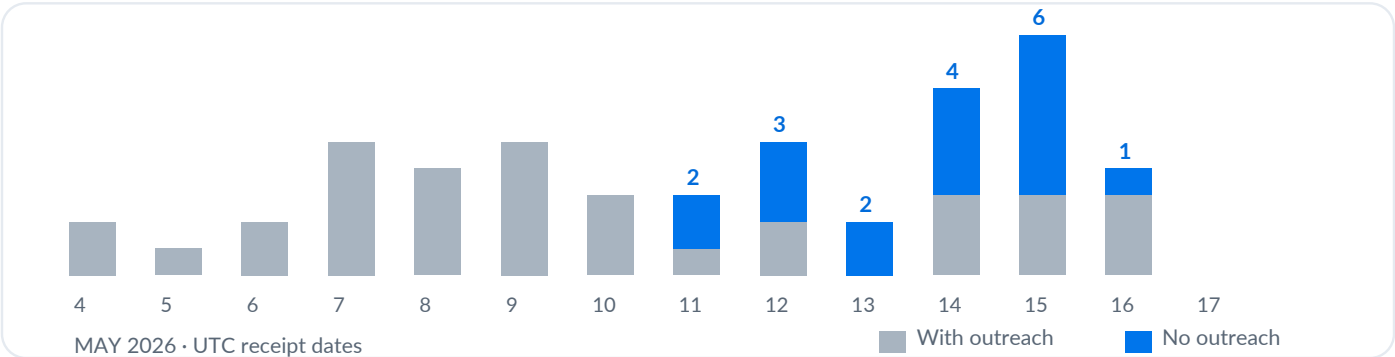
What exactly were the green checks measuring, what makes them go red? And why didn't they flag these leads when something appeared to be going wrong?

Three patterns. Different problems.

I looked at the individual lead histories and compared sources before assuming a common cause. Here's what I found and where I'd investigate.

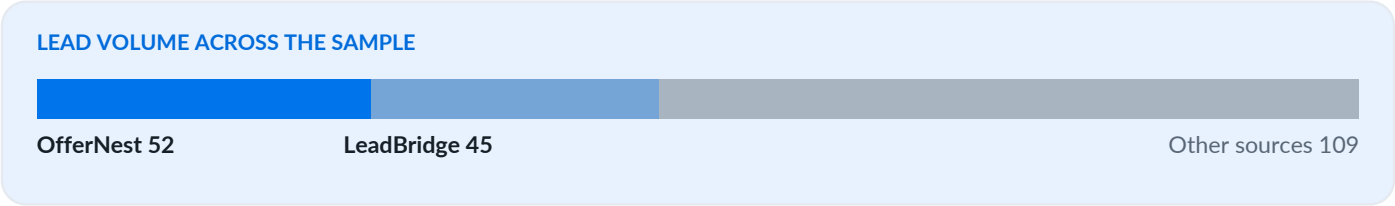
OFFERNEST	18 of 52 leads show no calls or texts.	Trace backend rules, dialer decisions and who should have noticed.
FAILED TEXTS	12 leads had 32 landline-labeled SMS failures and no calls.	Find out why failed texts did not produce an eligible, permitted call.
LEADBRIDGE	20 of 45 leads waited 170–361 minutes; 25 waited 2–12.	Find where the extra wait occurred after Clever received the leads.

OFFERNEST: WHEN NO-OUTREACH CASES APPEARED



THE FINDING THAT CHANGED MY PRIORITIES

OfferNest and LeadBridge were also the **two largest lead sources in the extract**: 97 of 206 leads (47.1%). I stopped thinking only about individual missed calls and started thinking about the partner relationships behind them.



Protect the business. Fix what I can prove.

Once I saw that the two sources with the biggest problems also sent almost half the leads, I changed my priorities. I would protect those relationships while fixing the specific failures.

01

OfferNest · Recover leads with no outreach

Have Sales/Ops attempt eligible recovery now. Compare affected and working leads; trace backend and dialer rules to the confirmed break.

02

LeadBridge · Find out where the hours went

Check new arrivals while tracing the delay after receipt. Agree on the partner's response expectation and fix the measured bottleneck.

03

Failed texts · Restore a permitted way to call

Stop ineffective SMS retries once a failure is actionable. Return call-eligible leads to the dialer queue and verify a rep calls.

PROTECT PARTNER RELATIONSHIPS — NOT JUST INDIVIDUAL LEADS

I would compare leads **Clever received** with leads that received the expected follow-up—by source, every day at first. A growing pattern should alert Operations and Partnerships before the partner discovers it.

Comparing **partner sent** against **Clever received** is a later safeguard that needs partner-side delivery data.

WHAT COULD IT COST?

We have **30 distinct leads** to review, not 30 proven lost customers. Luke offered **\$500 per converted lead**.

If recovery added 3 conversions, that's **\$1,500** in a hypothetical scenario—not a loss estimate.

WHAT I WOULD LEAVE ALONE

No dialer rebuild, new CRM, blanket retry rule, or automatic duplicate merge.

For the “contacted twice” complaint, I’d inspect the actual customer history before changing a broad policy.

Separate immediate review: Check the SMS events with missing or negative consent snapshots against send-time authorization. Escalate confirmed issues.

Stop the damage now. Prove it stays fixed.

I would not ask the business to wait 90 days. Customer and partner protection starts immediately; the next three months are for fixing the causes and proving the safeguards work.

24–48 HOURS

Protect customers and partners

Recover eligible leads, check new arrivals from affected sources, assign owners and escalate partner risk.

FIRST 7 DAYS

Find and contain the causes

Trace backend and dialer decisions; pinpoint LeadBridge delays; use manual call recovery for failed texts.

FIRST 30 DAYS

Ship targeted fixes and alerts

Deploy confirmed corrections, route eligible failed texts to the dialer and alert teams on overdue next steps.

BY DAY 90

Prove it stays reliable

Improve the checks and show progress on timely outreach, real conversations and partner-level recovery.

WHAT I CAN DRIVE VS. WHAT ENGINEERING NEEDS TO BUILD

Product + Operations

Recover affected customers. Set partner-specific expectations, define eligibility and ownership, run manual daily checks, prototype the recovery process, and write acceptance tests.

Engineering

Trace backend/dialer decisions, correct the confirmed logic, add missing event timestamps, connect permitted dialer recovery, and automate alerts and escalation.

TWO CHECKS THAT MAKE THE NEXT FAILURE VISIBLE

Received → followed up: For OfferNest, 52 leads came in; 34 got outreach and 18 did not. Match every eligible lead to an expected next action and owner; flag anything late or missing.

Partner sent → Clever received: Match delivery receipts when source-side data becomes available; a lead never received will never show up in Clever's outreach log.

FAILED-TEXT RECOVERY

Actionable landline error → check call eligibility → dialer call queue → recorded rep attempt **or** alert Operations if overdue.