

Live-session discussion agenda

Al Romero | Proposed 60-minute working session | October 2026

My goal Pressure-test the assumptions, agree on the first actions that protect customers and partners, and identify what we would need to learn before committing Engineering resources.

How I would use the hour

TIME	DISCUSSION	WHAT I WANT TO GET OUT OF IT
0–10 min	Agree on the stakes	Which problem is most urgent for customers and partners? Are these two sources typical of our lead mix?
10–25 min	Challenge the diagnosis	Trace OfferNest and LeadBridge through backend and dialer decisions; challenge what Engineering’s green checks measured and why affected leads were not flagged. Revisit failed texts and the double-contact complaint.
25–40 min	Decide what to do first	Review the first 48 hours, targeted recovery actions, and the trade-offs. What can Operations contain before code changes ship?
40–50 min	Define the smallest production fix	Agree on the smallest recovery and alert rules: received vs. followed up, accountable ownership, partner-level escalation, and what needs Engineering versus Operations.
50–60 min	Agree on measures and open questions	Pick three headline outcomes, identify gaps in event tracking, and confirm which assumptions we should resolve next.

Questions I would put on the table

- 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?
- Where did the 18 OfferNest leads stop—backend rules, dialer decisions, or ownership? What does agent_id actually tell us?
- What response time should each partner expect, and where did LeadBridge’s hours-long waits begin?
- When is a failed text known to the system, and can an eligible lead return to the dialer’s calling queue?
- Who compares leads received with leads followed up, and what triggers a bigger alert when one partner’s leads fall behind? Can we also check partner-sent versus Clever-received counts?
- What counts as a converted lead for the \$500 assumption, and which three measures best reflect customer and partner outcomes?

I would leave the session with

An agreed first-week response, a named owner for lead and partner exceptions, a testable first engineering change, and three measures we can use to tell whether customers are actually being served.