ADTECHLO

LEAD & DEAL TRACKING GUIDE

A clear framework for lead attribution, closed deals and performance-based commission tracking.

CLIENT RESOURCE • 2026

1. Purpose of this guide

Adtechlo operates on a performance-based model. Clear tracking is therefore essential for both Adtechlo and the client. This guide defines the operational framework we use to identify Adtechlo-generated leads, record sales outcomes and calculate commission consistently.

Core principle: every Adtechlo-generated opportunity should have a traceable source, a documented sales status and a recorded deal value.

2. What counts as an Adtechlo lead?

An Adtechlo lead is a prospect generated through a campaign, landing page, form, WhatsApp flow or other acquisition channel operated or tracked by Adtechlo for the client.

Normally attributed to Adtechlo	Normally not attributed to Adtechlo
New inquiry generated through an Adtechlo campaign or funnel.	Existing customer already recorded by the client before the Adtechlo inquiry.
Prospect enters through an Adtechlo-tracked landing page, form, call or messaging flow.	Lead independently sourced by the client's own sales team with documented prior contact.
Lead is passed to the client with a timestamp or unique record.	Duplicate record where the client can demonstrate the same prospect was already active in its pipeline.

3. Recommended lead record

Each lead should be stored in a shared CRM, lead portal or agreed tracking system. At minimum, keep the following information:

Field	Example
Lead ID	AD-2026-00481
Date / time received	12 Sep 2026, 14:32
Contact	Name, phone, email
Source	Meta - Roofing Campaign
Service requested	Residential roof replacement
Sales status	New / Contacted / Qualified / Won / Lost
Deal value	$12,500
Commission status	Pending / Due / Paid

4. Sales pipeline statuses

NEW

Lead received by the client but not yet contacted.

CONTACTED

The client has attempted or established contact.

QUALIFIED

The prospect fits the agreed customer criteria and has genuine buying potential.

APPOINTMENT / PROPOSAL

A meeting, consultation, quote or proposal has been scheduled or delivered.

CLOSED - WON

The prospect has purchased or signed the agreed commercial commitment.

CLOSED - LOST

The opportunity did not convert. A loss reason should be recorded where possible.

5. When is a deal considered Closed - Won?

For operational tracking, a deal should only be marked Closed - Won when the client's agreed sales event has occurred. Depending on the business, this may be a signed contract, accepted proposal, confirmed order or received customer payment. The exact trigger should be agreed with the client before campaigns launch.

Important: the definition of a commissionable sale, the commission base, payment timing, cancellations, refunds and any exclusions must be defined in the signed client agreement. This guide is an operational tracking document and does not replace that agreement.

6. Commission calculation

Where the signed client agreement specifies a 20% success commission on the applicable deal value, the operational calculation is:

Commission = applicable deal value × 20%

Example: $10,000 applicable deal value × 20% = $2,000 commission

7. Duplicate and pre-existing leads

If the client believes a submitted lead already existed in its database or active pipeline, the duplicate should be flagged promptly and supported by a dated CRM record, email, quote or other verifiable prior activity. The goal is to maintain a clean attribution trail.

8. Sales outcome updates

The client should keep lead statuses current so both parties can see what happened after handoff. A simple weekly update cadence is recommended for active campaigns. Closed deals should include the closing date and applicable deal value used for commission tracking.

9. Recommended tracking workflow

#	Stage	What happens
1	Lead generated	Adtechlo captures the inquiry and source.
2	Lead handed off	Client receives the prospect with a timestamp / lead record.
3	Sales follow-up	Client contacts the prospect and updates the pipeline status.
4	Outcome recorded	Won or lost outcome and relevant notes are entered.
5	Deal verified	Closed-Won deal value and closing date are recorded.
6	Commission tracked	Applicable commission is marked pending, due and paid according to the agreement.

10. What we need from the client

• Use the agreed CRM, portal or tracking method consistently.

• Update lead statuses and sales outcomes accurately.

• Record Closed-Won dates and applicable deal values.

• Flag duplicates or pre-existing opportunities with supporting records.

• Keep attribution and commission information transparent so both parties work from the same data.

11. Recommended source of truth

Before launch, Adtechlo and the client should agree on one primary source of truth - for example the client's CRM, an Adtechlo lead portal or another shared tracking system. Using one agreed system prevents conflicting spreadsheets, missing outcomes and uncertainty about attribution.

ADTECHLO
Performance-based lead generation.

Questions about tracking or attribution should be raised as soon as possible so records can be reviewed while the underlying data is still available.