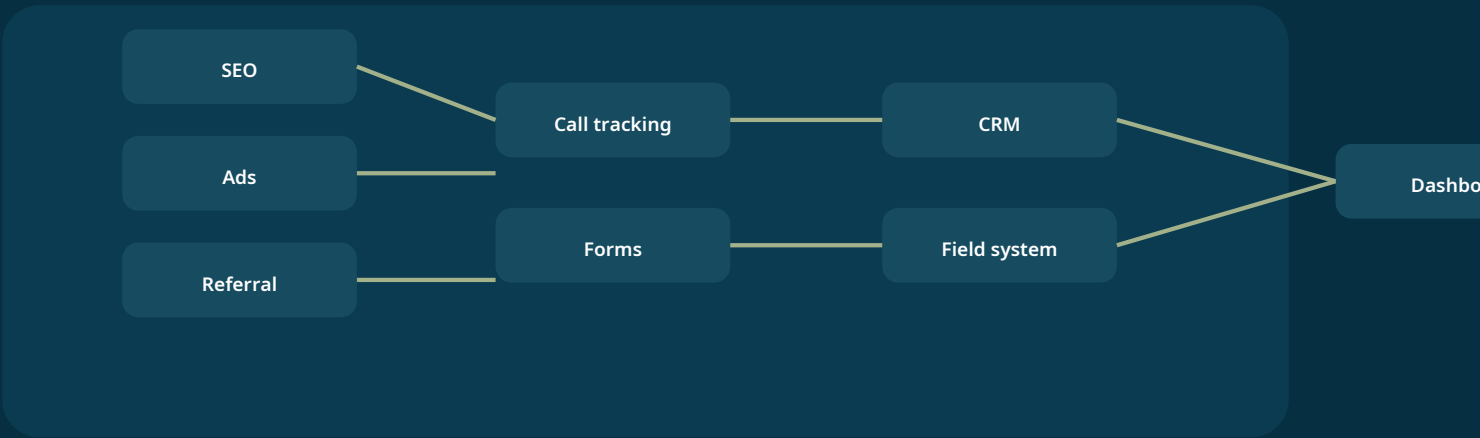


VORTOX LAB WHITEPAPER

Multi-Branch Attribution Without a Data Team

A practical reporting model for landscaping operators running several locations, service lines, and field systems.



Built for landscaping and green-industry companies running crews, estimates, contracts, and seasonal demand.

HOW TO USE THIS PAPER

Read the constraint before the channel

Multi-branch attribution works when every lead carries a standard source, branch, service line, owner, and final status from first contact through booked work. You do not need a data warehouse to enforce those five fields.

EVIDENCE NOTE

This paper is an operating framework. It does not claim an unpublished client dataset or client result. Worked examples and diagrams are illustrative until replaced with your verified data.

Built for

Multi-branch owners and marketing managers who cannot compare locations because source names, phone numbers, forms, and booked jobs do not match.

Three decisions this paper should change

Each branch names the same source differently.

Call tracking stops before the estimate and job record.

Marketing reports spend and leads while operations reports revenue with no shared key.

Use the method, then audit the full system.

A written growth audit identifies the constraint, account gaps, and first ninety-day priorities.

[Book a growth audit](#)[Growth packages from \\$2,000/mo](#)

THE OPERATING PROBLEM

More activity does not fix the wrong constraint

Multi-branch attribution works when every lead carries a standard source, branch, service line, owner, and final status from first contact through booked work. You do not need a data warehouse to enforce those five fields.

01	Each branch names the same source differently.
02	Call tracking stops before the estimate and job record.
03	Marketing reports spend and leads while operations reports revenue with no shared key.

OWNER TEST

Can you name the point where a new enquiry becomes booked work, profitable crew time, and retained revenue? If not, the report stops too early.

DIAGNOSTIC

Find the weak layer before changing spend

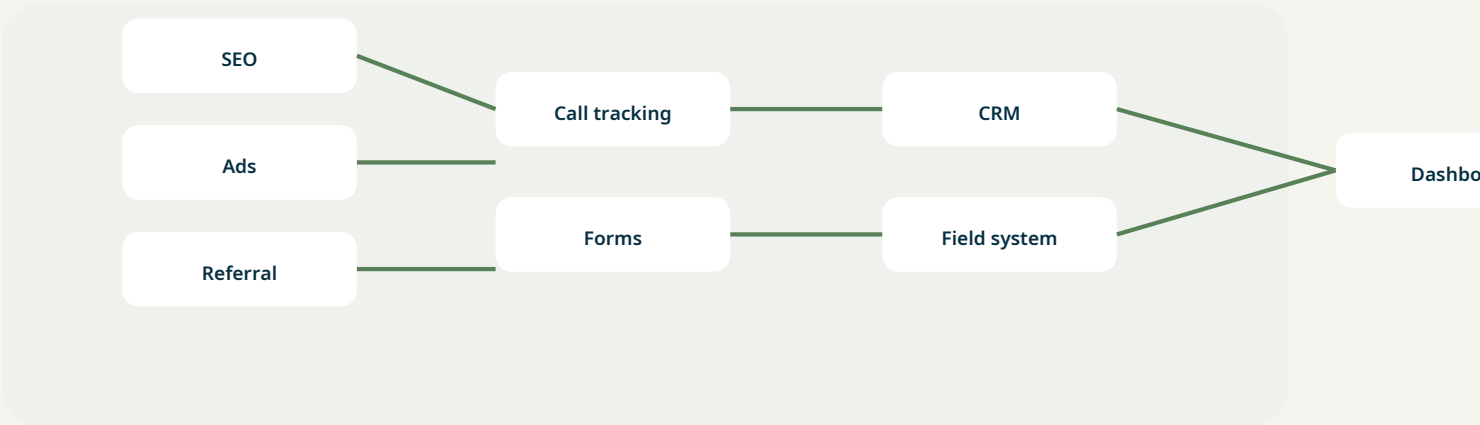
Layer	Question	Failure signal
Demand	Are enquiries for the work and territory you want?	Price shoppers, wrong services, out-of-zone requests
Response	Does one person or system own the first action?	Voicemail, slow forms, duplicate follow-up
Sales	Do qualified leads book, attend, and close?	Proposal ageing, no-shows, weak handoff
Delivery	Can crews service the work at the planned margin?	Overtime, drive time, backlog, rework
Retention	Does recurring or contract work renew?	Late renewal, complaints, price-only conversations

- ☐ One source name per channel
- ☐ One booked-estimate definition
- ☐ One renewal date per contract or programme
- ☐ One owner per lead
- ☐ One capacity view by week
- ☐ One exception list for missing data

THE MODEL

The minimum reporting architecture

Keep the source chain simple enough to audit. The goal is a monthly operating report, not a data project that only one analyst understands.



- Channel: campaign, source, medium, and landing page.
- Intake: call or form ID, timestamp, service, and territory.
- CRM: lead owner, branch, qualification, estimate, and status.
- Field system: job, invoice, service line, crew, and branch.
- Dashboard: spend, booked work, revenue, margin, and exceptions.

WORKED EXAMPLES

Any sample values in this paper show the calculation method only. Replace them with verified account, sales, job, and margin data before publishing or making a budget decision.

THE OPERATING METHOD

Run the work in a sequence the team can repeat

01	Publish a source and branch naming standard.
02	Assign one stable lead or opportunity ID across handoffs.
03	Connect call tracking and forms to the CRM.
04	Import booked work or offline conversions back to the channel report.
05	Run a monthly exception report for missing sources, branches, and outcomes.

The weekly meeting

Review exceptions before averages.

Name the owner and due date for every correction.

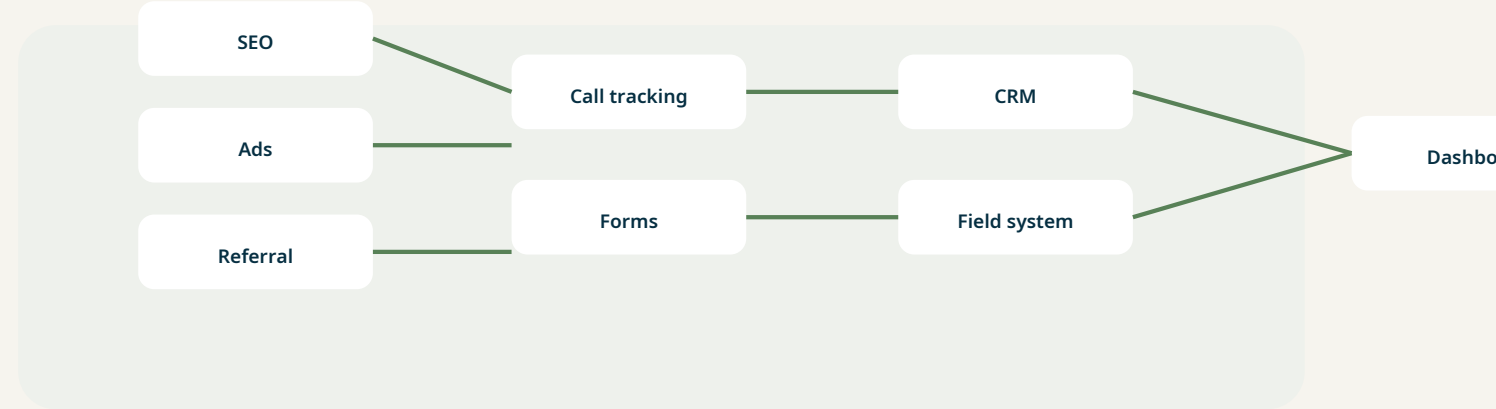
Separate marketing action from sales or operations action.

Stop spend when capacity or route fit is the binding constraint.

SYSTEMS AND OWNERSHIP

Keep one source of truth for each operating layer

GA4 and Google Tag Manager capture the website layer. Call tracking captures phone activity. The CRM holds sales ownership. Aspire, Jobber, LMN, Service Autopilot, SingleOps, or another field platform holds job delivery. The client owns every account and export.



Layer	System owner	Minimum record
Website and channel	Marketing	Source, campaign, landing page, call or form ID
Sales	CRM or pipeline	Lead owner, qualification, estimate, status, next action
Delivery	Field software	Job, crew, route, schedule, invoice, service history
Financial	Accounting	Collected revenue, committed cost, margin inputs
Management	Dashboard	Exceptions, operating measures, decisions, owner

GREEN INDUSTRY CONTEXT

Plan around the operating calendar, not a flat twelve-month budget

Branch comparisons need season context. Snow, lawn care, fertilisation, design-build, and commercial maintenance do not produce demand or revenue on the same calendar. Compare each branch with its own service mix and available crews.



Window	Primary operating question
January to March	What systems, scripts, pages, and spring capacity must be ready before demand rises?
April to June	Where is response, estimating, route fit, or crew capacity losing the value of demand?
July to September	Which services, contracts, and fall campaigns deserve budget and operational attention?
October to December	Which renewals, winter offers, reporting fixes, and next-spring builds happen now?

MEASUREMENT

Report the operating decision, not a pile of channel numbers

Measure	Current	Target	Owner	Next action
Spend by branch and service				
Qualified enquiries				
Booked estimates				
Won work				
Revenue by source				
Gross margin where available				
Missing-source rate				
Source-to-job reconciliation rate				

Monthly report order

- What changed against the company baseline.
- Why it changed, with exceptions named.
- What the team changed this month.
- What will be measured next.
- What cannot yet be claimed because the data is incomplete.

PROOF RULE

A result becomes publishable only when a named client approves the figure and the measurement method. Until then, show the process and the measures.

NINETY-DAY PLAN

Build the minimum system, then improve it from live data

Days 1-15	agree names, fields, and ownership.
Days 16-30	connect calls and forms to the CRM.
Days 31-60	add job and invoice outcomes from field software.
Days 61-90	publish branch scorecards and fix the exception list monthly.

What Vortex Lab would inspect first

- Account ownership and access.
- Tracking from source to booked work.
- Response and qualification rules.
- Service-line capacity and route fit.
- Seasonal priorities and renewal dates.

Get the written audit before the build.

We send the written audit within three working days, then book a 30-minute call.

[Book a growth audit](#)

[Growth packages from \\$2,000/mo](#)

OPERATOR WORKSHEET

Put your own baseline into the model

Use one row per service line, branch, route, campaign, contract, or operating period. The purpose is to identify the next decision, not to create another report nobody uses.

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

- ☐ Definition agreed
- ☐ Owner named
- ☐ Target tied to capacity
- ☐ Exception recorded
- ☐ Source verified
- ☐ Baseline entered
- ☐ Next action dated
- ☐ Review scheduled

NO DATA YET

Start with ten manually reconciled records. A small accurate sample is more useful than a dashboard built on unmatched names and missing outcomes.

OPERATOR APPENDIX

Branch 1 scorecard

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
- ☐ What costs time, margin, or renewal risk if nothing changes?
- ☐ Who owns the next action and when is it due?

OPERATOR APPENDIX

Branch 2 scorecard

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
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Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

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OPERATOR APPENDIX

Branch 3 scorecard

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

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OPERATOR APPENDIX

Branch 4 scorecard

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

- ☐ What changed since the last review?
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OPERATOR APPENDIX

Branch 5 scorecard

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

- ☐ What changed since the last review?
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OPERATOR APPENDIX

Branch 6 scorecard

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
- ☐ What costs time, margin, or renewal risk if nothing changes?
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OPERATOR APPENDIX

Organic search

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

- ☐ What changed since the last review?
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OPERATOR APPENDIX

Paid search

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

- ☐ What changed since the last review?
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OPERATOR APPENDIX

Local Services Ads

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

- ☐ What changed since the last review?
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OPERATOR APPENDIX

Paid social

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

- ☐ What changed since the last review?
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OPERATOR APPENDIX

Referral

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

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OPERATOR APPENDIX

Email and SMS

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

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OPERATOR APPENDIX

Direct and brand

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

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OPERATOR APPENDIX

Offline and partner

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

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OPERATOR APPENDIX

Source naming dictionary

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

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Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

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OPERATOR APPENDIX

Branch code dictionary

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

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Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

- ☐ What changed since the last review?
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OPERATOR APPENDIX

Service-line dictionary

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

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OPERATOR APPENDIX

Call-tracking audit

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

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OPERATOR APPENDIX

Form-tracking audit

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

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OPERATOR APPENDIX

CRM status audit

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

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OPERATOR APPENDIX

Field-system reconciliation

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

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		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

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OPERATOR APPENDIX

Monthly exception report

Keep source, branch, service line, owner, and final status consistent across every system. The exception list is part of the monthly report, not an afterthought.

Owner	Review date	Status
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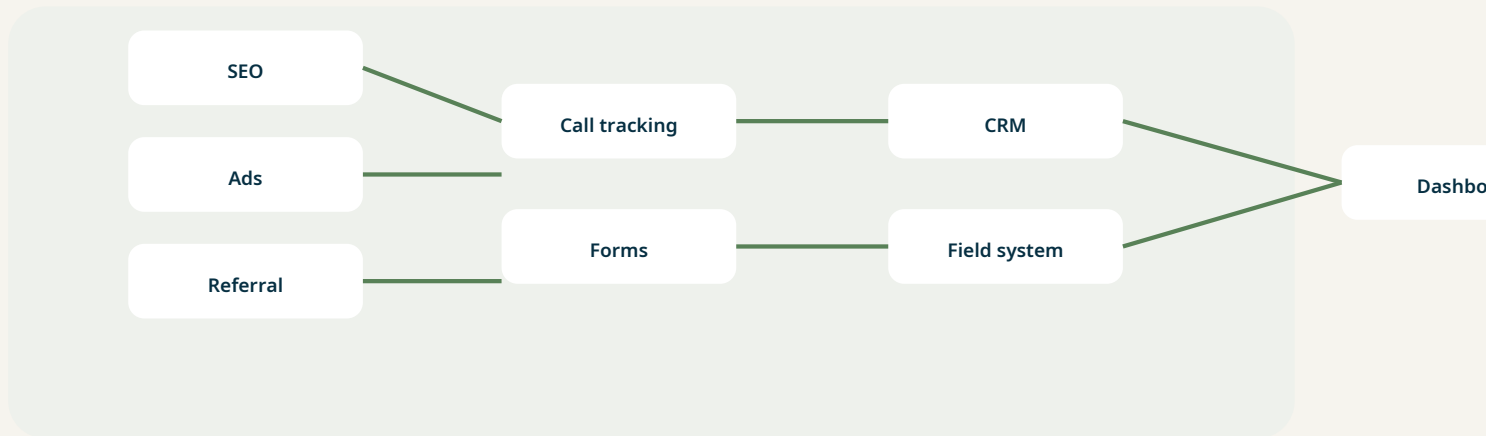
Measure	Current	Target	Owner	Next action
Source				
Branch				
Service line				
Lead owner				
Estimate status				
Job ID				
Revenue				
Exception				

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- ☐ What costs time, margin, or renewal risk if nothing changes?
- ☐ Who owns the next action and when is it due?

NEXT STEP

Attribution is one part of it. We run the whole growth system.

One team owns marketing, tracking, website, AI, and reporting cadence.



The growth audit

We review the accounts, website, tracking, response path, service mix, seasonal priorities, and the operating constraint. You receive a written priority list within three working days, then a 30-minute call. No contract, no obligation, and no mailing-list add.

Book a growth audit. See the constraint clearly.

Growth packages start at \$2,000 per month. Ad spend is excluded.

[Book a growth audit](#)[Growth packages from \\$2,000/mo](#)

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