

Weekly lead-source check

20 minutes, every Monday, for the previous Monday–Sunday. One reporting time zone (the clinic's).

The five steps

- ☐ **Count.** CRM new leads · GA4 *generate_lead* · conversions in each ad platform. Same dates, same time zone. A steady gap is normal; a jump week over week means something broke.
- ☐ **Sample five random leads.** For each: GA4 User explorer by *ga_client_id*, Clarity recordings by custom tag *lead_id*. Confirm channel, campaign, keyword, landing page and time.
- ☐ **Scan the red flags** below.
- ☐ **Check one or two calls** the same way: call tracking with dynamic number insertion carries source, campaign and click ID.
- ☐ **Log the week** in one row of the sheet.

Red flags

Red flag	Usually means	First check
(not set) in source or campaign	Hidden fields missing, or the form is in an iframe	Test lead from that page in GTM Preview
Sudden spike in direct	A redirect or widget strips parameters	Click your own ad, watch the URL
Duplicate leads within minutes	Double submit, or form + chat both create the lead	Timestamps and form_id
Same IP, many leads	Bots or competitor submissions	Clarity recordings; add a honeypot
Leads at 3 a.m. clinic time	Bots, or a UTC conversion error	Does the timestamp end in Z?
Click ID present, source = organic	UTMs missing while auto-tagging is on	Tracking template / final URL suffix
Source = Google, no gclid	Organic/Maps mislabeled, or auto-tagging off	Google Ads auto-tagging setting

Log columns (one row per week)

Week starting · Reporting time zone · CRM leads · GA4 *generate_lead* · Google Ads conversions · Meta leads · Microsoft Ads conversions · Gap CRM vs GA4 (%) · Leads with (not set) source · Leads sampled · Sample mismatches · Red flags found · Fix and owner · Fixed by (date)

Never send to GA4 or Clarity

Names, emails, phone numbers, dates of birth, treatment or condition details. Use the CRM record ID as *lead_id*. Strict masking on form pages. No GA4 or Clarity on patient portals.