KPIs, SLAs & Performance Metrics

The full set of inbound and outbound service level standards and production KPIs we commit to and manage against. Sections A and B mirror Section 7 (Service Level Standards) of the Master Services & Sales Agreement and the client-facing sales/service materials word-for-word. Section C are internal production benchmarks referenced across the Equity Mining Playbook and client-facing materials. Section D is the remedy structure for sustained SLA shortfall.

Updated October 7, 2026: Section B speed to lead, contact rate (redefined) and new-lead booking rate.

A. Inbound Call Handling — SLAs

Metric	Standard	Definition	Scope / Notes
Average Speed to Answer (ASA)	≤20 seconds	Average time from call connect to agent pickup, fleet-wide.	Measured monthly, reported on the standing performance-reporting cadence.
Service Level	90% within 20 sec	Share of inbound calls answered within the 20-second threshold.	Industry-standard 80/20 service level, set aggressively at 90/20.
Abandonment Rate	< 3%	Share of inbound calls where the caller hangs up before being answered.	Tracked against total inbound call volume.
First-Contact Resolution (FCR)	≥ 90%	Share of calls resolved (booked, answered, or routed correctly) without a required callback.	Within Company's scope — see Inbound Call Scope & Escalations.
Booking Rate (new leads)	90%	% of qualified calls booked as an appointment	Measured monthly - using the no-charge booking strategy

B. Outbound New Lead Response — SLAs

Metric	Standard	Definition	Scope / Notes
Speed to Lead	≤5 min average (about 60 sec the majority of the time)	Average time from lead delivery to first outbound contact attempt.	Business hours per the client's onboarded schedule; off-hours leads queue to the next shift start. Measured monthly.
Contact Rate	15–20%	Percentage of outbound calls answered by a human (a live person), out of total outbound calls placed.	Independent of Attempt Cadence below — one or more attempts may be needed to reach contact. Varies with lead source and completeness of contact details.
Booking Rate (new leads)	15–20%	Share of contacted new leads (calls answered by a human) that book an appointment.	Booking rates depend on lead source, quality of leads, completeness of contact details, strength of promotion, etc.
Attempt Cadence	Up to 3 attempts per lead	Maximum outreach touches per lead, prioritized toward a booked, shown appointment and a filled schedule — not toward reaching the third touch.	Ties to the Call Cadence; Scheduling Priority terms in the service agreement. Actual attempts per lead vary with client capacity (active technicians, time slots per technician, days of operation).

All booking rates (Sections A, B and C) depend on lead source, quality of leads, completeness of contact details, strength of promotion, etc.

C. Production KPIs (Equity Mining/Database Monetization)

Metric	Benchmark	Definition	Scope / Notes
Booking Rate	15–30%	Share of contacted database records that book a visit.	Off the dormant/lapsed customer database, equity mining campaigns.
Show Rate	70–80%	Share of booked visits that actually show.	Driven by the booking-verification call-flow standard.
Technician Close Rate	20–30%	Share of shown visits the client's technician closes into a sold job.	Client-side metric; reported for program ROI context.
Customer Reengagement (No-Charge Visit)	15–20% within 90 days	Share of non-buying no-charge-visit homeowners who call back with a real need within 90 days.	The hidden multiplier on the no-charge visit strategy; not part of the initial close rate.
Program ROI	8:1–12:1	Illustrative revenue-to-management-fee return, at a $3,500 average ticket.	Blended across Wave 1 (immediate close) and Wave 2 (reengagement).
Dials per Agent, per Day	300+	Outbound dial volume target, per agent.	Managed daily as a pipeline lever, not reported after the month closes.
Cost per Lead	$0.96–$1.07	Database Monetization cost per lead, by committed volume and term.	Lower at higher volume/longer term — see Current Rate Card (Monthly) tab.
Quality Coverage	100% of calls	Share of calls run through speech analytics.	Weekly calibration review evaluates the top and bottom 5% against the standard.

D. Remedy for Sustained SLA Shortfall

Applies to Section A and Section B SLAs. Does not modify the Call Cadence; Scheduling Priority or Fees Not Tied to Attempt Volume provisions — these SLAs are a floor on responsiveness, not a change to the attempt ceiling or the flat-rate pricing.

Trigger	Remedy
2 consecutive calendar months missing a standard, on a given SOW	Client may request a service review with Company's account leadership within 10 business days of the second month's performance report.
3 consecutive calendar months missing a standard, on that SOW	Material breach, subject to the cure rights in the Term; Termination section of the service agreement.