

CallRevu Marketing Status Report - First Draft

Prepared for Bill Hope Jr., Kari Amore, Emma Young, and Brittney Blanco.

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ROLLUP LEVELS

3

Enterprise, regional, and property every time.

SPEND MODEL

\$10 + Ads

Flat property marketing cost plus Google Ads and Meta spend.

NEXT UPGRADE

Matchback

Cloudbeds phone-number matchback is the strongest second-step improvement.

Executive Read

- This first draft locks the version-one reporting structure and the core data rules needed to build a durable weekly and monthly Eagle Suites marketing status report.
- CallRevu is now validated as a usable operating source for call volume, missed-call behavior, ad-source-level performance, and top-of-funnel call outcomes.
- Paid-media cost does not live in CallRevu and should instead come from Agency Analytics.
- Property-level call reporting should key off the CallRevu **Ad Source** names, not the **Eagle Suites 2** container name.

What Is Locked For Version One

AREA	LOCKED RULE
Rollups	Enterprise, regional, and property views should all appear in each version-one report.
Property key	Use CallRevu Ad Source naming for property-level totals. Do not treat Eagle Suites 2 as a property.
Google Ads spend	Pull from Agency Analytics campaign Cost .

AREA	LOCKED RULE
Meta spend	Derive from Clicks x Average CPC in Agency Analytics.
Base marketing cost	Use \$10 per room per property to cover non-paid-media marketing costs.
Room allocation	Allocate regional paid-media spend down to properties by room count.
Business outcome	Use CallRevu operating outcomes in v1, then test Cloudbeds phone-number matchback as the stronger business-proof method.

Comparison Logic In This Draft

- **Weekly operating comparison:** last 7 days vs prior 7 days.
- **Weekly trend context:** month to date vs same days in prior month, plus month to date vs same month in prior year when history exists.
- **Monthly executive comparison:** month to date vs prior month to date, plus full prior month.

Live CallRevu Validation Findings

Source basis: first validated live account review completed on 07/15/2026.

OBSERVED ITEM	VALUE
Enterprise access	Working
Visible reporting surfaces	Enterprise Performance, Store Performance, Missed Calls, Ad Source, Call List, Employee Performance
Export paths	Excel and PDF visible
Observed date range	07/01/2026 - 07/14/2026
Total Inbound Calls	4,166
Text Messages	123

OBSERVED ITEM	VALUE
Answered	2,811
Not Answered	1,074
Had Convo	2,053
Appt Set	219

Important Data Caveats Before Production Use

- **The homepage counters do not fully reconcile.** Answered plus Not Answered equals 3,885, which is below Total Inbound Calls of 4,166. That means at least one visible tile is using a different inclusion rule, status definition, or category filter.
- Employee Performance currently rolls calls into **Unidentifiable**, so employee-level coaching metrics are not yet decision-grade.
- CallRevu cost fields are not populated, so cost-per-call and cost-per-outcome metrics must wait for Agency Analytics spend pull-in.
- Cloudbeds matchback is still a second-step validation item, not a finished production metric.

Recommended Version-One Scorecard

Enterprise View

- Total marketing cost
- Total inbound calls
- Answered calls
- Missed calls
- Had-conversation calls
- Appointment-set calls
- Cost per inbound call
- Cost per answered call
- Cost per appointment-set call

Regional View

- Region marketing cost

- Region call volume
- Region answered and missed rate
- Region appointment-set volume
- Region cost per call
- Region cost per appointment-set call
- Largest positive and negative movement vs prior period

Property View

- Property call volume from ad-source naming
- Property share of region call volume
- Property answered and missed pattern
- Property appointment-set volume
- Property allocated spend
- Property cost per call
- Property watchlist for weak phone handling or weak demand

What I Need The Marketing Team To Confirm

- Whether the enterprise homepage counters are the intended KPI source of truth, or whether the detailed export should override them when totals differ.
- Whether **Appointment Set** is the preferred version-one outcome label in the draft tables, or whether a broader qualified-call measure should appear beside it.
- Whether any region-level paid-media exceptions exist that would break the simple room-count allocation rule.
- Whether the final review copy should also show channel splits separately for Google Ads vs Meta at the regional level.

Bottom Line

- The structure is now solid enough to move from readiness work into actual recurring reporting.

- The next real build should pull Agency Analytics spend, populate the first enterprise, regional, and property scorecard, and then test Cloudbeds phone-number matchback on a limited sample.