ENGINE SETUP PLAYBOOK

# Reporting Engine

Give partners a clear, weekly view of the funnel, conversion, and revenue.

**For:** Owners flying blind on where leads come from and where they stall. **Price:** $700 (installed for you, included)

## What's inside

- Full intake report set: funnel, leads by period, time in stage, source, lost reasons, conversion by practice area, consult revenue, consult-to-engagement time, stuck leads
- ROI tracker setup
- Partner dashboard layout
- Scheduled weekly intake summary

## How it installs

This engine is delivered through the LexLabs Lawmatics agency. After a quick onboarding (we email Lawmatics support and CC you to add your firm to our agency; you reply to confirm), we push the engine's assets into your account in about one click. The steps below activate and customize what was shared, not rebuild it.

1. We confirm marketing sources and the close-reason field (the Intake Response Engine sets these up).
2. We install the report set and confirm each returns data.
3. We connect your spend inputs in the ROI tracker.
4. We assemble the partner dashboard from the headline reports.
5. We schedule the weekly summary to your partners and confirm it sends.

## Questions

**Does this need the Intake Response Engine?**

It works best with it, since shared fields power several reports. It can stand alone if those fields already exist.

**Will it slow Lawmatics down?**

No. These are standard reports and a dashboard.

**Installed for you, included.** We push the engine into your Lawmatics, map it to your fields and links, customize the copy, and run a short review call. No setup fee.