LEAD GENERATION AND APPOINTMENT SETTING

Build a pipeline of accounts you can profitably serve

Lead Generation and Appointment Setting for Advertising Agencies

Research the business outcome behind the ad. Define the economics, evidence and delivery constraints. Build a campaign around a review worth having.

30	12	06
numbered sections	**editable emails**	**public workflows**

Research edition: 30 October 2026. Eight working templates, model calculations, source notes and a separate publishing pack accompany the guide.

Published research and public workflow observations are attributed. Commercial, production and test examples are fictional. No named company is presented as a client or a qualified prospect.

Inside the guide

Choose the section that matches the decision you need to make. The full guide connects account research, first offers, appointments, delivery and economics.

01. Define the pipeline and the economics first

02. Read the market evidence with its boundaries

03. Separate the agency service cells

04. Study the conversion destination before the ad

05. Public advertising research: what can be observed

06. Build a viability gate before buying contact data

07. Research the buying group and current arrangement

08. Build offers around the first unresolved decision

09. Lead quality: the cheaper enquiry can be worse

10. Ecommerce economics: revenue ROAS is not profit

11. Include the fees in the buyer's decision

12. B2B and local services need downstream events

13. Attribution, incrementality and marketing-mix modelling

14. Brand and creative agencies need a different first review

15. Media planning, CTV and commerce require scope discipline

16. Design a pilot with a decision, not a guaranteed result

17. Set a test budget from the question and uncertainty

18. Acquisition copy should make one review worth having

19. Use follow-ups to resolve a specific uncertainty

20. Convert a positive reply into an agreed review

21. Accept meetings according to the actual service cell

22. Use proof with the right denominator

23. Price the agency's own growth correctly

24. Connect appointments to delivery capacity

25. Troubleshoot the stage, then test a repair

26. Run a 90-day review cycle

27. Advertising agency message bank

28. Working templates

29. Sending and benchmark discipline

30. The standard for a useful first conversation

Source notes follow the numbered sections. The editable Markdown, structured JSON, message bank and research registers are included in the content package.

01. Define the pipeline and the economics first

An eligible account is a distinct buying entity within the campaign's service, geography and delivery rules. A positive account expresses relevant interest. A booked meeting has an agreed purpose and time. A held meeting occurred. An accepted held meeting satisfies the written first-discussion criteria. An opportunity has a separately qualified brief, decision route and commercial scope.

Advertising measures need equally precise definitions.

Measure	Definition	Important boundary
Media spend	Money paid for ad delivery	Not agency revenue
Agency fee	Payment for the agency's agreed services	Separate creative and pass-through treatment
Enquiry CPL	Media spend / defined enquiries	Not qualified-opportunity or customer cost
Qualified-lead cost	Agreed total cost / accepted qualified leads	State cost scope and acceptance rule
Customer acquisition cost	Agreed acquisition cost / new won customers in a mature cohort	Not every form submission
Attributed ROAS	Revenue credited by a named system / stated ad spend	Not proof of causality or profit
Incremental return	Additional outcome caused by the treatment / relevant incremental cost	Needs an appropriate measurement design
Agency contribution	Agency service revenue minus direct service cost	Excludes shared overhead and tax

Write the definition, period, currency, numerator, denominator, data owner and maturity window beside every number. "We deliver better ROAS" is not a specific proposition until those fields are clear.

02. Read the market evidence with its boundaries

IAB's January 2026 outlook projects US total ad-spend growth of 9.5%. The overall 2026 question has 205 respondents; channel questions use floating bases. Its paid-search, social and CTV projections are forecasts from that edition, not realised growth. A02

The May IAB digital-video release projects more than USD 80 billion in 2026 spending, up 11%, across CTV, online and social video. It is a different edition and scope. Do not add the forecasts or treat them as an individual prospect's budget. V05

LocaliQ's June 2026 benchmark article reports average search CPC of USD 5.42, CTR of 6.64%, CPL of USD 66.69 and a Google Ads conversion rate of 8.18%. The customer-campaign dataset is a reference point, not the economics of one account. The article does not establish identical weights and definitions for every displayed average. A01

For example, 5.42 / 0.0818 gives about USD 66.26, not the reported USD 66.69 CPL. This is a warning against reconstructing a fictional "average account" by combining separate aggregate means. It is not evidence that one of the report's figures must be wrong.

The useful first offer is a measurement or economics review using the buyer's own definitions. A benchmark can generate a question. It cannot justify claiming that a prospect wastes a known amount of money.

03. Separate the agency service cells

The phrase "ad agency" covers several different buying decisions. Choose the service cell before building a list or writing copy.

Service cell	Buyer decision	Owner to verify	Appropriate first artifact
Paid search	Capture defined demand at viable customer economics	Growth or acquisition lead	Search-to-sale measurement map
Paid social / performance	Acquire suitable customers with an offer and creative system	Growth and creative leads	Acquisition constraint brief
B2B demand generation	Produce accepted opportunities and mature revenue cohorts	Demand generation and sales operations	Lead-to-opportunity event dictionary
Local / multi-location	Generate serviceable enquiries and booked work	Central marketing and local operations	Service-area and lead-quality map
Brand and creative	Solve a communication or audience problem	Brand or marketing director	Campaign decision and creative brief
Media planning / CTV / video	Allocate reach and investment with a credible outcome measure	Media and measurement owners	Audience, inventory and measurement brief
Retail or commerce media	Judge channel return with margin and sales context	Ecommerce or commerce lead	Net-sales and contribution scope
White-label specialist	Supply a defined capability under another agency	Agency operations or channel lead	Responsibility and access map

Do not combine these buyers in one generic "scale your business" campaign. The research, proof, economics and meeting criteria should match the job. A brand agency does not need to pretend it owns direct-response attribution. A performance agency should not imply it can deliver every type of film or retail-media programme.

04. Study the conversion destination before the ad

The destination helps define the business outcome the agency should investigate. Public destinations do not reveal whether the company is advertising, how much it spends or whether it wants a new agency.

Public example	Observed destination	Outcome to define	First artifact
Shopify Plus contact	Enterprise enquiry	Accepted opportunity and won business	Lead-to-revenue event map
Allbirds men's collection	Product shopping	Net order, new customer and contribution	Order-value and margin dictionary
Harry's	Shopping, shave-trial and subscription routes	Trial conversion, paid renewal and cohort contribution	Trial-to-paid cohort brief
The Grounds Guys commercial services	Estimate request	Serviceable, quoted and won work	Service-area and quote-quality map
Slack enterprise	Sales contact	Account-level accepted opportunity	Qualification and conversion dictionary
Trainline journey pages	Route search and booking	Valid net booking after relevant adjustments	Net-booking and contribution brief

These six selected records contain different paths: business enquiries, product/trial transactions, a local estimate and travel booking. A "conversion" cannot mean the same event across all six.

For a campaign, choose a comparable account cell the agency can serve. The source register preserves exact URLs, dates and unknowns. No public example is presented as a client or a qualified lead, and no ad-library performance audit is implied.

05. Public advertising research: what can be observed

Use public advertiser and creative information to establish the advertiser, visible message, format, destination and observed dates within the selected country and filters. Preserve the exact advertiser identity and library reference where available. Record an access limitation instead of treating missing results as no advertising.

Google's transparency documentation explains advertiser disclosures. A library can support a factual creative observation. It cannot establish the account's spend, conversion cost, targeting quality, experiment result or satisfaction with its agency. A07

Public observation	Appropriate question	Unsupported claim
Several visible creatives	How are concepts and variants organised?	The team is testing correctly
A long-running asset	What decision keeps this asset in use?	It must be profitable
Different offer and destination wording	Is that difference deliberate and measured?	The page is wasting spend
A new product or market	How will the acquisition or communication task change?	A funded agency review is open
No ad found in selected filters	Is another identity, channel or period relevant?	The company does not advertise

Do not claim "creative fatigue" from public age alone. Fatigue requires relevant audience, frequency and performance context. Do not infer a budget from ad count. Several variants can be one concept; one creative can support substantial spend.

06. Build a viability gate before buying contact data

For performance accounts, check whether the offer, customer value, sales or fulfilment capacity and measurement path can support the proposed acquisition work. For brand accounts, establish a communication task, audience, distribution route and evaluation plan. Budget has different meanings across those cells.

Eligibility field	Evidence to seek	Hold or exclude when
Business offer	Clear product, service or communication task	Nobody can explain the intended result
Delivery economics	Plausible contribution or strategic value	Expected economics cannot support the scope
Capacity	Stock, appointments, sales coverage or operational ability	The buyer cannot serve added demand
Decision ownership	Relevant sponsor and route to implement	No relevant owner can be found
Measurement	Feasible agreed outcome and access path	Required measurement cannot be supported
Agency capability	Supported channel, creative and operating needs	Scope exceeds actual delivery skill
Contact route	Appropriate route, suppression and applicable rules	Stop instruction or unsuitable route

Exact media spend can remain unknown during public research. Do not replace it with an invented minimum based on company size. The first offer can help the buyer define a test budget or economic threshold. A firm with a large turnover can still be a poor fit for the agency's model.

07. Research the buying group and current arrangement

Map the sponsor, channel owner, creative owner, analytics owner, sales or ecommerce counterpart and commercial approver. Ask who owns the account and data. A brand manager may commission creative while an internal team buys media. A franchise group may centralise strategy while local entities own lead follow-up and budget.

An existing agency is not automatic disqualification. It changes the question. There may be no opening, a contract-review window, a specialist project or a complementary measurement need. Ask about a defined boundary instead of promising to replace the incumbent.

Situation	Suitable route
Internal buying team	Specialist creative, measurement or channel assessment
Existing full-service agency	A buyer-approved gap or review at the appropriate time
Multiple local operators	Clarify central versus local authority first
New channel	Readiness and test design before a long retainer
Explicit agency review	Follow the stated procurement and question route
No active decision	Deliver a useful artifact, defer or close the record

Record the current arrangement as buyer-confirmed, publicly stated or unknown. Never imply knowledge of an incumbent's performance from a landing page or ad-library search.

08. Build offers around the first unresolved decision

A useful first offer is bounded, tangible and connected to a buyer decision. The agency should be able to deliver it even if the buyer never books a meeting.

Offer	Input	Output	Boundary
Acquisition economics sheet	Buyer-supplied value and funnel assumptions	Allowable cost and downside scenarios	Not a promised campaign return
Lead-quality map	One service and sales process	Enquiry, qualified, opportunity and won definitions	No private CRM audit without access
Creative test brief	One verified offer and audience	Hypothesis, concept options and measurement dependencies	No guaranteed winning ad
Conversion event review	Agreed event list and owner	Count, deduplication, maturity and reconciliation questions	Not a completed tracking implementation
Local demand readiness	Service areas and capacity	Routing, booking and follow-up questions	No fixed lead-volume guarantee
Brand campaign brief	Audience and communication task	Message, proof, distribution and evaluation plan	No unsupported direct-revenue claim
Media review scope	Channels, geography and decision	Data requirements and an assessment plan	No budget allocation without evidence

The asset should reveal what is known and what needs the buyer's data. Avoid a free "audit" that ends as a generic score and a calendar link. A precise map of one unresolved decision is more useful than an unverified estimate of wasted budget.

09. Lead quality: the cheaper enquiry can be worse

Use mature, matched cohorts and the same qualification rules. The following example is fictional.

Metric	Campaign A	Campaign B
Media spend	USD 10,000	USD 10,000
Enquiries	200	100
Enquiry CPL	USD 50	USD 100
Qualified leads	80	80
Accepted opportunities	20	32
Won new customers	4	8
Media-only customer cost	USD 2,500	USD 1,250

Campaign A wins on enquiry CPL. Campaign B wins on media-only cost per won customer in this constructed cohort. The comparison still needs equivalent customer value, margin, sales maturity, audience and cost scope before a business decision.

Investigate what changed: qualification definition, form friction, serviceability, targeting, sales follow-up, duplicate leads or downstream acceptance. A lead-quality improvement can disappear if it is simply a stricter exclusion rule applied to one group.

Keep rejection reasons. "Bad lead" is too broad. Distinguish wrong geography, wrong service, no relevant need, duplicate, invalid contact, insufficient value, timing and missing follow-up. Assign an owner to each fix: targeting, offer, form, routing or sales process. This makes the agency's first meeting commercially useful without promising a lower CPL before understanding the funnel.

10. Ecommerce economics: revenue ROAS is not profit

Define order value after the adjustments relevant to the buyer: discounts, returns, cancellations, tax and shipping treatment. Then subtract product and other variable costs to calculate contribution before marketing. Keep media, agency fees and creative cost visible.

Fictional first-order model: net revenue per new customer is USD 100. Product and variable fulfilment costs total USD 60, leaving USD 40 before marketing. The buyer wants USD 10 contribution after acquisition. Agency and creative cost allocate to USD 5 per new customer at the stated volume. Allowable media CPA is therefore 40 - 10 - 5 = USD 25. Net-revenue media ROAS at that boundary is 100 / 25 = 4.0.

The USD 5 allocation depends on volume. If customer count falls, fixed fees allocate across fewer customers and the permissible media cost changes. Do not freeze the allocation while changing the denominator elsewhere.

Input	Confirm with
Net order and new customer definitions	Ecommerce and finance
Returns and refunds	Order-management data
Variable contribution	Finance and operations
Repeat-purchase value	Observed cohort, not assumed lifetime
Media, fee and creative cost	Buyer and agency scope

A high reported ROAS can coexist with weak cash economics. The first review should establish the buyer's allowable cost and measurement basis before the agency promises scale.

11. Include the fees in the buyer's decision

Fictional monthly case: USD 30,000 media, USD 3,500 agency management and USD 1,500 creative cost total USD 35,000. Platform-attributed revenue of USD 120,000 gives a media-only reported ROAS of 4.0. It does not subtract product, fulfilment or service costs.

If the buyer's relevant order cohort contributes USD 45,000 before acquisition, the model leaves USD 10,000 after the USD 35,000 acquisition cost. If refunds and customer mix reduce that contribution to USD 30,000, the same acquisition cost produces a USD 5,000 loss. The original platform revenue headline cannot resolve that difference.

Separate first-order contribution from repeat-purchase value. Show observation windows and refund maturity. When analysing subscription businesses, keep trial signup, first paid conversion, renewal, cancellation and contribution separate. Trial volume does not establish durable revenue.

The commercial review can also include cash timing. Media may be paid before customer receipts and refunds arrive later. A positive long-run contribution estimate does not automatically fund the next month's ad bill.

Make the report understandable enough that the buyer's finance owner can reproduce it. If the agency cannot connect its proposal to the agreed business economics, a larger media budget is a premature recommendation.

12. B2B and local services need downstream events

For B2B, define the enquiry, accepted lead, opportunity, won account and recognised value separately. Preserve account-level deduplication and an observation window long enough for the sale. For local services, add service area, contactability, appointment capacity, estimate, completed job and contribution.

Event	Define	Owner
Enquiry	Valid inbound contact for the agreed offer	Marketing operations
Qualified lead	Meets the written relevance and eligibility rules	Marketing and sales
Accepted opportunity	Sales accepts a real commercial project	Sales owner
Won customer	Contract or purchase under the agreed definition	CRM / finance
Completed local work	Service delivered and economically valid	Operations
Rejected event	Specific reason and review route	Responsible team

Google documents ways to connect offline outcomes with advertising events. Current ingestion and enhanced-conversion requirements should be checked before implementation, especially because supported product routes change. A measurement map should name data permissions, matching, reconciliation and the responsible owner. A05

Do not treat every uploaded event as accurate. Check duplicate IDs, stage changes, cancellations and whether the same customer is counted several times. A sales team that never updates CRM outcomes creates a measurement problem the ad platform cannot independently solve.

13. Attribution, incrementality and marketing-mix modelling

Attribution assigns credit to touchpoints under a rule or model. Incrementality asks what additional outcome the advertising caused. A before-and-after revenue rise may reflect seasonality, price changes, distribution, competitor behaviour or other channels.

Google Analytics documents attribution as credit assignment. Google Conversion Lift uses exposed and control groups to estimate additional conversions, with availability and data requirements that do not fit every account. These are different measurement tasks. A06 A03

Method	Can help answer	Needs caution about
Platform attribution	What outcomes does this system credit?	Overlap, windows, modelling and identity
CRM cohort	Which leads become suitable customers?	Missing data and sales maturity
Controlled lift test	What additional outcome did the treatment cause?	Design, contamination, precision and eligibility
Geographic experiment	What changes across a controlled market design?	Comparable regions, spillover and external events
Marketing-mix model	How do channels relate to outcomes under model assumptions?	Identification, controls, calibration and uncertainty

Meridian is an example of a marketing-mix modelling framework, not a guarantee that any dataset can support causal allocation. The agency must establish adequate data and assumptions before selling the output as a decision tool. A04

The first offer can be a measurement-readiness brief. It should state which question the available evidence can answer and which it cannot. Do not rename ordinary attribution as incrementality because it sounds more rigorous.

14. Brand and creative agencies need a different first review

For a brand campaign, identify the intended audience, the belief or behaviour to change, the proposition, supporting evidence, distribution and the decision the work must support. A direct-response metric may be useful in some contexts, but is not a universal test of brand work.

A strong first artifact can be a one-page campaign brief: audience, situation, communication task, message, proof, desired response, channels, constraints and evaluation. Make the creative problem specific enough that a treatment can be judged against it.

Separate concepts from executions and versions. Three ideas adapted to six placements do not necessarily equal eighteen independent concepts. Confirm who approves strategy, claims, talent, usage and final creative. Revisions to the core proposition after production may be a change of brief.

For evaluation, establish an appropriate method and timing: message comprehension, qualitative research, brand tracking, controlled lift where feasible, search or sales context and delivery measures. Be explicit about what each can support. A social like count cannot by itself establish changed brand preference or incremental sales.

The appointment is accepted when there is a relevant communication decision and an appropriate sponsor, not only when the prospect can name an ecommerce ROAS target.

15. Media planning, CTV and commerce require scope discipline

Begin with audience, geography, distribution, reach or acquisition objective, buying constraints and measurement. The agency should know which parts it controls: planning, buying, creative, landing pages, research, reporting or technology.

For CTV and video, confirm inventory, frequency management, creative requirements, outcome definition and the route to evaluate reach or incremental action. For retail or commerce media, clarify sales coverage, retailer data access, promoted products, margin and the meaning of reported return. A platform's attributed sales can cover a different population from the buyer's total business.

Scope question	Why it changes the offer
Which audience and geography?	Defines relevant inventory and measurement
What is the buying and reporting unit?	Prevents mixing household, person, impression and customer
What data can the buyer access?	Determines feasible analysis
What is included in cost?	Reveals platform, partner and agency charges
What is the decision after the test?	Keeps the assessment useful

Do not extrapolate national industry-spend growth into local buyer demand. Use the market evidence as context and qualify the actual brief. A specialist partnership can be appropriate when the agency can define responsibilities and avoid promising unsupported capabilities.

16. Design a pilot with a decision, not a guaranteed result

A pilot needs an objective, scope, owner, budget, data route, learning period, primary outcome, guardrails and a decision rule. "We will test ads for thirty days" is incomplete if conversions take sixty days to mature.

Pilot field	Example question
Decision	What would cause the buyer to continue, change or stop?
Scope	Which offer, channel, market and audience are included?
Budget	How much can be spent to answer the question?
Measurement	Which event, cost and maturity window define the result?
Dependencies	Who owns creative, site, tracking, CRM and sales follow-up?
Guardrails	What issue pauses the pilot immediately?
Interpretation	What can this design establish?

Define whether the pilot tests delivery readiness, a creative hypothesis, a conversion path or incremental impact. Each needs a different design. A low-volume account may support a useful measurement and implementation assessment before it supports a precise conversion-lift estimate.

Do not guarantee lower CPA when the agency has not established the baseline or controls. A guarantee about a deliverable can be concrete if the agency truly controls it. A guarantee about customer acquisition economics needs much more than confident copy.

17. Set a test budget from the question and uncertainty

Expected outcome counts can show whether a test is plausibly informative, but they are not a statistical power calculation by themselves. At an assumed USD 100 per qualified lead, USD 5,000 suggests fifty qualified leads under that scenario. It does not guarantee fifty or prove that splitting them across many arms can identify a winner.

If the target outcome is a won customer, expected volume can be much lower after qualification and sales conversion. A test with three eventual wins may be commercially useful yet too noisy for a fine-grained comparison.

For a controlled comparison, state the baseline rate, minimum effect worth detecting, allocation unit, desired precision and the cost of waiting. Use an analyst where the decision warrants it. Prevent one account, household or market from being treated as independent repeated observations when it is not.

Keep one primary decision metric and record exclusions before seeing results. Report uncertainty and conversion maturity. A point estimate of improved ROAS, without a comparable cost basis and a complete cohort, is not sufficient evidence to scale.

The first appointment can therefore lead to a readiness assessment rather than immediate media activation. That is a productive commercial outcome when measurement is the binding constraint.

18. Acquisition copy should make one review worth having

Use the LS Cold Email structure: relevant buyer, verified context, a concrete way to help and one next step. Manual outreach uses actual company facts. Segmented campaigns use truthful shared situations and clear selection rules.

Good openings name the decision: what counts as a qualified enquiry, which creative question to test, how to define net-order value, whether local service capacity can handle more demand or what a campaign must communicate. Weak openings claim secret wasted spend or promise scale from an ad-library glance.

Keep each email below 100 words including subject, signature and required footer. Use a true subject, simple language and a final request immediately before the signature. If an audit is offered, specify the scope and deliver it when requested.

The campaign brief should include the service cell, business viability rule, public evidence, supported capabilities, first artifact, response owner, meeting criteria, exclusions and contact route. The agency's delivery lead should approve the claim before the sales team sends it.

19. Use follow-ups to resolve a specific uncertainty

Illustrative cadence: initial message on day 1, useful follow-up on day 4, a different relevant clarification on day 9 and a clear pause on day 16. This is a suggested operating plan to test, not a universal best schedule.

Touch	Useful addition	Avoid
Initial	One fact and a bounded artifact	Unverified waste or performance claim
Follow-up	Exact scope and output	Repeating the pitch with more urgency
Follow-up	Measurement or ownership question	A new unrelated service
Close the loop	Clear defer/continue option	Fake scarcity or guilt

When a human responds, stop automation for that conversation. Deliver the requested artifact or answer the actual question. Coordinate other contacts at the same account. A buyer who says they are not reviewing agencies should not receive a replacement pitch from a second sender.

Use other channels only when appropriate for the buyer and rules. Do not assume a public phone number or profile authorises every kind of automated outreach. Record stop and deferral instructions in a place the whole team uses.

20. Convert a positive reply into an agreed review

Suggested operating target: a human reviews substantive replies within one business hour during stated coverage hours. Treat that as a staffing and service decision, not an evidence-based universal conversion multiplier.

If the buyer asks for details, give the relevant detail. If they ask for the sheet, send it. If they request a call, propose two real times with a timezone and explain the review's output. Do not treat curiosity as permission to create a calendar event.

Suggested 20-minute first review:

- Minutes 0-4: confirm the business or communication decision.
- Minutes 4-8: agree the customer, lead or audience outcome.
- Minutes 8-13: inspect available evidence and correct assumptions.
- Minutes 13-17: identify economics, measurement and delivery constraints.
- Minutes 17-20: agree an assessment, pilot, deferment or no-fit decision with an owner and date.

Private account access need not be required before a public-context conversation. It becomes necessary for work that depends on it. Explain the access scope and permissions before requesting data. A first meeting should reduce ambiguity, not make the buyer surrender control of an ad account to receive a basic answer.

21. Accept meetings according to the actual service cell

Condition	Accept	Hold	Decline
Relevant decision	Named acquisition, media or communication question	Only "more growth"	Outside capability
Appropriate owner	Sponsor or route to the decision group	Owner uncertain	No relevant buying entity
Viable scope	Plausible work and a route to evaluate it	Economics or measurement need assessment	Required work cannot be delivered
Agreed first output	Buyer knows what the review will decide	Asset or purpose vague	Buyer requires an unsupported guarantee
Appropriate contact	Agreement and no stop instruction	Scheduling not agreed	Stop instruction or inappropriate route

For a performance pilot, budget, tracking, customer economics and operational capacity need stronger confirmation before activation. For a brand project, the equivalent gates concern the brief, approvals, production and evaluation. Do not apply an arbitrary ad-spend threshold to every creative or strategy meeting.

Record meeting acceptance separately from opportunity qualification. Sales should explain rejections with facts and apply the same definition consistently. A good exploratory discussion can produce a paid assessment or a clear deferment instead of an immediate retainer.

22. Use proof with the right denominator

A credible performance case names the market, offer, period, cost basis, conversion definition, maturity, attribution source and work performed. Separate media-only results from all-in acquisition cost. Explain material changes to offer, pricing, website, sales process or product availability.

A credible brand or creative case explains the communication task, audience, strategy, production scope, distribution and evaluation. Do not borrow a media owner's revenue result to imply the creative agency independently caused it.

If the agency lacks matched proof, use a transparent public analysis, a labelled hypothetical case or a bounded paid assessment. The public company examples in this guide establish business workflows; they do not imply agency work, poor performance or available budgets.

Claim	Evidence needed
Lower CPL	Same lead definition, cost basis and comparable period
Better lead quality	Stable acceptance rules and downstream outcomes
More profitable acquisition	Net value, direct costs and mature new-customer cohort
Incremental growth	Appropriate causal design and uncertainty
Better creative delivery	Approved brief, acceptance and production records

Choose the proof after choosing the account cell. A large revenue screenshot is not automatically relevant to a local service buyer, an enterprise B2B team or a brand campaign.

23. Price the agency's own growth correctly

Media pass-through is not service contribution. Separate management fees, strategy, creative and project revenue from the costs required to deliver them. Record whether media is paid directly by the client or passes through the agency; do not let the accounting presentation inflate apparent growth.

Fictional acquisition cohort: 250 eligible accounts produce twenty positive accounts, ten booked meetings, eight held, six accepted, three proposals and one won client. These counts are constructed for planning.

Agency input	Fictional value	Meaning
Monthly service fee	USD 5,000	Excludes client media spend
Direct recurring service cost	USD 3,000	Staff, contractor and direct tools
Monthly contribution	USD 2,000	Before shared overhead and tax
Cohort acquisition cost	USD 4,000	Includes research, systems, replies and sales effort
New clients	1	USD 4,000 acquisition cost per client
Simple steady-state payback	2 months	Excludes onboarding, ramp and churn

If onboarding adds unbilled work, include it. If contribution is zero or negative, payback is not a meaningful positive number. If no clients win, cost per won client is undefined rather than zero. Use observed retention before estimating lifetime value.

24. Connect appointments to delivery capacity

Capacity includes channel expertise, creative throughput, analytics support, account management and the time needed to onboard a buyer safely. A team can have spare media-buying hours while its creative or implementation team is full.

Capacity field	Review with
Accounts by complexity and channel	Delivery lead
Creative and landing-page requirements	Creative and web owners
Measurement implementation queue	Analytics owner
Onboarding and sales promises	Sales and account management
Partner responsibilities	Operations and commercial owner
Expected contribution by account	Finance or agency leader

Set campaign volume against the number of suitable projects the agency can actually onboard. Hold or narrow a service cell when delivery dependencies are full. A referral or specialist partnership may be better than accepting unsupported work.

Review fulfilment after the sale. If good meetings repeatedly produce unprofitable accounts, appointment volume is not the main constraint. Repair scope, pricing, qualification or production before creating more demand.

25. Troubleshoot the stage, then test a repair

Pattern	Investigate	Repair
Wrong-person replies	Role and decision mapping	Contact the appropriate owner
Price-only interest	Broad offer or unclear value	Define the decision and bounded scope
Many meetings, weak fit	Eligibility and acceptance rules	Narrow the account cell
Accepted meetings, no access	Trust, permissions and assessment scope	Explain the data route and deliverable
Proposals stall	Economics, ownership or procurement	Resolve the specific missing decision
Wins, weak results	Offer, measurement and operational capacity	Review delivery evidence and assumptions
Revenue grows, margin falls	Pass-through, scope and direct costs	Restate contribution and fix pricing

Test one uncertainty at a time. Allocate comparable accounts, keep all contacts at an account in the same group and preserve a mature outcome window. A higher reply rate is not a winner if accepted meetings or contribution fall.

When samples are small, report counts and uncertainty. Do not call a test significant because a dashboard colours one variant green. Revisit the account selection, offer, response process and delivery constraints before changing only the subject line.

26. Run a 90-day review cycle

Period	Output	Gate
Days 1-10	One service cell, 25 reviewed accounts, first artifact, acceptance rule	Delivery and sales agree the promise
Days 11-30	Bounded outreach and coded replies	Relevant questions and response capacity
Days 31-60	Accepted reviews and scoped assessments or pilots	Economics, measurement and owners established
Days 61-90	Decided cohorts and delivery review	Expand only where contribution and capacity support it

These are operating intervals, not a promise of wins within ninety days. Enterprise media reviews or brand campaigns may have longer procurement and observation windows. Keep open, deferred and decided opportunities distinct.

27. Advertising agency message bank

Reusable drafts. Replace every factual bracket, sender detail and unsupported capability before use. Initial offers address different service cells. Follow-ups are alternatives to select from. Reply examples require the stated real buyer request. Keep the final email under 100 words including subject, signature and required footer.

1. B2B lead quality

Subject: after the [service] enquiry

Hi [first name],

Your [verified page] asks buyers to [specific enquiry action]. Which of those enquiries become accepted sales opportunities?

We can map the enquiry, qualification and won-account events before discussing a media change.

Would that one-page map help?

Thanks,
Shanay
[Business postal address]
Prefer no further emails? Reply stop.

2. Ecommerce contribution

Subject: the [product] acquisition threshold

Hi [first name],

Your [product page] sells [verified product]. What customer cost would leave the contribution your team needs after returns and fulfilment?

We can build a simple threshold sheet with media, fees and creative shown separately.

Would you like it?

Thanks,
Shanay
[Business postal address]
Prefer no further emails? Reply stop.

3. Local service readiness

Subject: serviceable enquiries in [area]

Hi [first name],

Your [verified service page] covers [area and service]. Who checks whether a new enquiry fits the service area and available appointment capacity?

We can map the enquiry-to-booking handoff before proposing more paid demand.

Would that worksheet help?

Thanks,
Shanay
[Business postal address]
Prefer no further emails? Reply stop.

4. Brand campaign brief

Subject: the [launch] communication task

Hi [first name],

Your [dated announcement] introduces [verified launch]. Which audience needs to understand [specific change] first?

We can outline the message, supporting proof, distribution and evaluation questions in a one-page campaign brief.

Would that help your planning review?

Thanks,
Shanay
[Business postal address]
Prefer no further emails? Reply stop.

5. Verified creative observation

Subject: one test for [offer]

Hi [first name],

The [verified ad reference, country and date] leads with [visible message]. Would your next review compare that opening with [specific relevant hypothesis]?

We can map the concept, fixed elements and measurement needs before producing variants.

Would the test brief be useful?

Thanks,
Shanay
[Business postal address]
Prefer no further emails? Reply stop.

6. Clarify the first output

Subject: Re: [original subject]

Hi [first name],

The sheet would cover [one agreed offer or funnel]. It would separate public observations, your team's assumptions and the data needed for a decision.

It would not estimate private spend from ad counts.

Would you like that version?

Thanks,
Shanay
[Business postal address]
Prefer no further emails? Reply stop.

7. Existing internal or agency team

Subject: the [measurement] boundary

Hi [first name],

For teams keeping their current media setup, we can review [supported specialist boundary] without taking over the whole account.

The output would define the gap, data needed and implementation owner.

Would that narrow review be useful?

Thanks,
Shanay
[Business postal address]
Prefer no further emails? Reply stop.

8. Close the loop

Subject: pausing the [review] offer

Hi [first name],

I will pause the [specific artifact] offer here.

If [acquisition or campaign decision] enters a later review, we can start with the outcome, evidence and owner rather than a broad agency pitch.

Would a later review date be useful?

Thanks,
Shanay
[Business postal address]
Prefer no further emails? Reply stop.

9. Buyer requests the worksheet

Subject: your [economics] sheet

Hi [first name],

Here is the [link] you requested. Start with [specific field] for [offer you named].

The sheet keeps media, service fees and customer contribution separate so your team can check the assumptions.

Would help with that field be useful?

Thanks,
Shanay
[Business postal address]
Prefer no further emails? Reply stop.

10. Buyer asks for performance proof

Subject: the [relevant case] details

Hi [first name],

Here is the [approved case] you requested. Our role was [accurate scope]. The result uses [cost basis], [conversion definition] and [period].

The closest match to your question is [specific element].

Would reviewing that element help?

Thanks,
Shanay
[Business postal address]
Prefer no further emails? Reply stop.

11. Buyer asks for budget

Subject: sizing the [test] budget

Hi [first name],

The budget depends on [outcome], [expected cost] and the evidence needed to make the next decision.

We can scope a readiness review first, then separate media, creative and agency fees in the pilot plan.

Would that scope help your budget decision?

Thanks,
Shanay
[Business postal address]
Prefer no further emails? Reply stop.

12. Buyer requests a meeting

Subject: the [campaign] review

Hi [first name],

Happy to review [question you raised]. We can confirm the business outcome, inspect the available evidence and decide whether an assessment or pilot makes sense.

Would [day, time, timezone] or [day, time, timezone] work?

Thanks,
Shanay
[Business postal address]
Prefer no further emails? Reply stop.

28. Working templates

Account and viability brief

Buying entity; country; service cell; commercial offer or communication task; public source and period; observation; unknowns; contribution hypothesis; capacity; relevant owner; first artifact; supported capability; contact route; suppression; next review.

Lead-to-revenue dictionary

Enquiry ID; account/customer ID; event date; service/geography; qualification definition; acceptance owner; opportunity stage; won definition; maturity window; rejection reason; duplicate rule; data system; reconciliation owner.

Acquisition economics sheet

Net customer value; returns/cancellations; product and fulfilment cost; contribution before acquisition; desired remaining contribution; media cost; agency fees; creative cost; allocation volume; allowable CPA; downside; cash timing; actual cohort source.

Public creative observation

Advertiser identity; library reference; country and filters; observation date; message; format; destination; concept/variant distinction; exact visible fact; unsupported inferences to avoid; test question; next owner.

Brand or creative campaign brief

Audience; situation; communication task; proposition; evidence; desired response; concepts; versions; distribution; claims and rights owners; approval; evaluation method; cost; dependencies; next decision.

Measurement and pilot plan

Question; scope; allocation unit; baseline; primary outcome; cost basis; maturity; tracking and matching; permissions; controls; sample/precision planning; guardrails; accept/change/stop rule; owner and review date.

Meeting and proposal handoff

Buyer request; agreed agenda; source facts; assumptions; service cell; current arrangement; attendees; data and implementation questions; promised artifact; qualification status; proposal scope; fee/media separation; exclusions; next owner and date.

Agency contribution and capacity review

Service revenue; pass-through media; direct labour; creative; contractors; direct tools; acquisition effort; onboarding; recurring contribution; shared overhead distinction; capacity by skill; open/decided cohorts; corrective action and review.

29. Sending and benchmark discipline

Use a real sender identity, appropriate contact route and shared suppression list. Verify the recipient's jurisdiction and type. US commercial B2B email and UK corporate/individual subscriber rules differ; both require a more careful decision than assuming a public email address permits every campaign. Follow relevant provider requirements. C01 C02 C03

Use human replies and downstream commercial stages for evaluation. Privacy features affect open tracking; an open event is not a demand signal or permission to apply pressure. C05

Belkins' current vendor dataset reports 34,393 replies from 7,530,489 sent emails in 2025, approximately 0.457%. It excludes auto-replies and bounce notifications. That is not an ad-agency positive-account, booked-meeting or accepted-meeting forecast. C04

30. The standard for a useful first conversation

The buyer and agency should leave knowing which decision is being made, what outcome matters, which evidence is available, what remains uncertain and who owns the next step. Sometimes the right next step is a pilot. Sometimes it is measurement repair, a creative assessment, a later review or no project.

A strong acquisition process can handle all of those outcomes. It earns meetings through specific, useful work and protects the agency from accounts whose needs, economics or operating constraints it cannot responsibly serve.

Sources, periods and interpretation limits

Research checked 30 October 2026. Primary-source documents, original research publishers and first-party company pages are distinguished from fictional worked examples. A source date is not a current purchase signal.

A02. IAB 2026 Outlook Study

January 2026 forecast. Projects US total ad-spend growth of 9.5%; paid search 8.2%, social 14.6%, CTV 13.8%.

Method: Overall 2026 question n=205; channel questions use floating bases.

Limit: Forecasts from a specific edition and question, not realised results. Do not merge with May video estimates as one consistent panel.

Read the source.

V05. IAB US digital video spending outlook

5 May 2026 forecast. Projects US digital video ad spend above USD 80 billion in 2026, up 11%.

Method: IAB with Advertiser Perceptions and Guideline; category includes CTV, online and social video.

Limit: Forecast, not realised full-year spend. Media spend is not the addressable editing or production-fee market.

Read the source.

A01. LocaliQ search advertising benchmarks

Updated 1 June 2026. Reports all-industry average CPC USD 5.42, CTR 6.64%, CPL USD 66.69 and conversion rate 8.18%.

Method: Vendor customer campaign analysis across Google and Microsoft; metric wording varies, with CVR described as Google Ads.

Limit: Blog excerpt does not establish a complete common weighting or exact sample for every metric. Do not combine averages to reconstruct one account or use enquiry CPL as won-customer cost.

Read the source.

A07. Google Ads advertiser transparency

Current documentation. Explains advertiser identity disclosures and transparency.

Method: Official product and policy documentation.

Limit: Visible ads establish creative presence in a filtered context, not budget, performance, fatigue or a search for a new agency.

Read the source.

A05. Google offline conversion imports

Current documentation, including 2026 API changes. Explains linking downstream offline outcomes to advertising events and enhanced-conversion approaches.

Method: Official product documentation.

Limit: Matching, policy, consent and implementation requirements apply. Recheck current supported ingestion route; hashing does not make all collection permissible.

Read the source.

A06. Google Analytics attribution settings

Current documentation. Attribution allocates credit along conversion paths; settings affect reporting.

Method: Official measurement documentation.

Limit: Allocated credit is not proof an ad caused the outcome. Different platforms may claim the same conversion.

Read the source.

A03. Google Ads Conversion Lift

Current documentation. Controlled tests compare exposed and control groups to estimate incremental outcomes; availability is limited.

Method: Official measurement documentation.

Limit: An attribution report or a before-and-after comparison is not a lift experiment. Check eligibility and precision.

Read the source.

A04. Google Meridian introduction

Current documentation. Marketing-mix modelling framework for estimating channel contribution, response and allocation under stated assumptions.

Method: Official model documentation.

Limit: A model label does not establish causal identification, adequate data, calibration or useful precision.

Read the source.

C01. Gmail sender guidelines

Current documentation. Authentication, sender identity, unsubscribe and spam-rate requirements vary by sender class.

Method: Official provider requirements.

Limit: Authentication is not permission to contact or a guarantee of inbox placement.

Read the source.

C02. FTC CAN-SPAM compliance guide

Current guidance. Commercial B2B email is covered; accurate identity, postal address and opt-out duties apply.

Method: Official US guidance.

Limit: US rule, not a worldwide sending permission. Verify jurisdiction and all applicable obligations.

Read the source.

C03. ICO business-to-business marketing

Current guidance. UK rules distinguish corporate from individual subscribers; personal-data duties can still apply.

Method: Official UK guidance.

Limit: Corporate status does not erase all data or channel obligations. Sole traders differ.

Read the source.

C05. Apple Mail Privacy Protection

Current documentation. Mail privacy features affect what senders can learn about email activity.

Method: Official product documentation.

Limit: Open tracking is not a reliable meeting-quality measure; no numerical open-rate adjustment is assumed.

Read the source.

C04. Belkins cold-email response-rate study

2026 article, January-December 2025 campaign data. 7,530,489 sent emails and 34,393 replies; excludes auto-replies and bounce notifications.

Method: Vendor-owned client campaign dataset; unique replies divided by emails sent.

Limit: Not positive-account, booked, held or accepted-meeting rate. Not specific to these three agency sectors.

Read the source.

Public workflow source register

The following pages support the named workflow examples. None establishes an agency relationship or purchase intent.

- AO1. Shopify Plus contact: Contact page offers expert help, pricing and migration discussion. Primary page. Checked 30 October 2026.
- AO2. Allbirds: Men's collection lists purchasable footwear. Primary page. Checked 30 October 2026.
- AO3. Harry's: Offers product shopping, a shave-trial route and subscription signup. Primary page. Checked 30 October 2026.
- AO4. The Grounds Guys: Commercial service page has a request-estimate route. Primary page. Checked 30 October 2026.
- AO5. Slack: Enterprise page has a sales-contact route. Primary page. Checked 30 October 2026.
- AO6. Trainline: Route search and ticket discovery end in a booking path. Primary page. Checked 30 October 2026.

Method and provenance

LS Cold Email informed the relevance, first-offer, message and appointment-setting design. Its reference examples are not presented as LeadScorer campaign results. Published numerical claims retain their population, period and limits. Fictional examples demonstrate calculations and operating decisions; they do not imply observed clients, sector benchmarks or forecast outcomes.