Lead Delivery & Tracking

Use one clearly labeled test inquiry to find which part of your lead journey is confirmed and which part still needs attention.

1. Agree on the test with the person who receives inquiries. Use a test identifier instead of a real customer record.
2. Record each result separately. A form success message or analytics event does not confirm inbox or CRM receipt.
3. Give every unresolved check a person and a retest date. Keep the original result when you add later evidence.

What to verify

Submission	Record the form result or call connection.
Receipt	Confirm the destination inbox or CRM record.
Source	Check the intended source/campaign is present.
Counting	Check the inquiry was counted once.
Routing	Confirm who received it and when.
Qualification	Use an agreed definition. Test records are not sales leads.

Completed example - fictional

Fictional test	T-001, website form, 10:05 a.m. ET
Observed	Success message and one analytics event.
Still unknown	CRM receipt and receiving-person confirmation.
Next action	Website owner investigates delivery. Qualification remains not assessed.

Reference checked November 3, 2026: Google Analytics: About events.

Your worksheet

Lead Delivery & Tracking | Record facts, evidence and the next action.

Test ID - Use a non-customer identifier.	
Test date, time and timezone	
Channel and landing page	
Test agreed with - Receiving person and destination.	
Submission result - Pass / fail / not tested / not applicable	
Inbox or CRM receipt - Record who confirmed receipt and when.	
Source and duplicate check	
Analytics / ad event - Separate from receipt.	
Routing and response time	
Qualification status - Not assessed for a test.	
Evidence and discrepancy - Use a safe reference, not private lead data.	
Next action, person and retest date	

Keep sensitive customer details in your own secure systems. Use safe record references here.

Use the online guide and companion download