Northwind Dental

northwinddental.com

AGENCY PORTFOLIO · SEPTEMBER 2026

The portfolio grew 12% to *1,292 leads*.

1 client grew and 1 slipped against August. Fernhill Fitness Studio is the biggest client with 44% of portfolio leads. Saltmarsh Family Law slipped the most: 108 leads, down from 150.

4 clients · 1,292 leads · 30 days

UTM Grabber 1,292 leads across 4 clients

Sample data fictional business

1,292	1	1	55%
PORTFOLIO LEADS ▲ +12%	CLIENTS UP	CLIENTS DOWN	AVG. TAGGING

01 THE BOOK

Every *client* at a glance.

Clients by *leads*

#	CLIENT	LEADS	CHANGE	TAGGED	TOP SOURCE	DAILY
1	Fernhill Fitness Studio	572	Flat	66%	Google, 45%	
2	Copperleaf Roofing	398	▲ +66%	75%	Google, 69%	
3	Bluebird Pediatric Therapy	214	▲ +4%	19%	Google, 38%	
4	Saltmarsh Family Law	108	▼ −28%	58%	Google, 67%	

Tagged: leads with source, medium and campaign. Green 80% or more, amber 50% to 79%, red under 50%.
Highlighted: the client that slipped the most.

BEST CLIENT

+66%

Copperleaf Roofing: 398 leads, up from 240

NEEDS ATTENTION

−28%

Saltmarsh Family Law: 108 leads, down from 150

TAGGING GAP

19%

of leads from Bluebird Pediatric Therapy arrived fully tagged

BIGGEST CLIENT

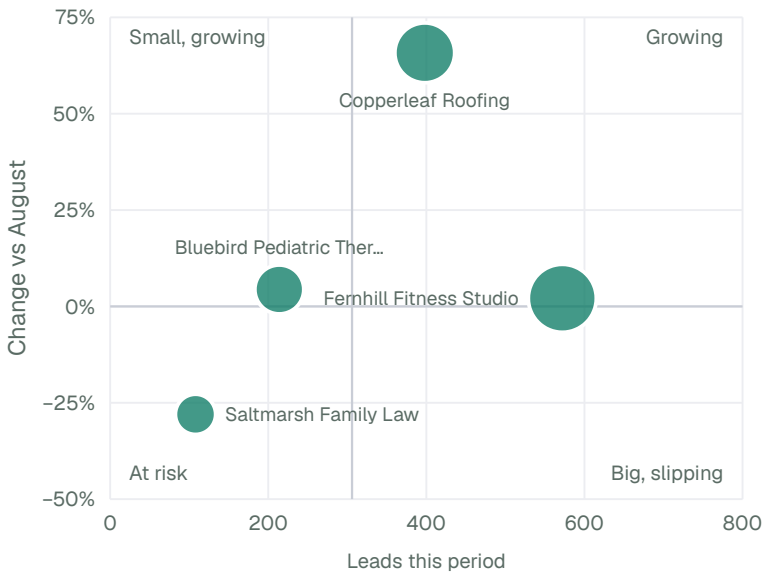
44%

of portfolio leads come from Fernhill Fitness Studio

02 GROWTH MAP

Which *clients* are growing.

Volume vs *growth*



The vertical line is the median client (306 leads).

READ THE MAP

Copperleaf Roofing is the account to grow.

Copperleaf Roofing grew 66% to 398 leads.

Saltmarsh Family Law fell 28% to 108 leads.

Who to *call* first.

THIS WEEK

Call *Saltmarsh Family Law*

Leads fell 28% to 108 (from 150). Check paused campaigns, budget caps and form errors on saltmarshfamilylaw.com before the next report goes out.

High impact · Low effort · –42 leads vs August

THIS WEEK

Fix UTM tagging for *Bluebird Pediatric Therapy*

Only 19% of its leads arrived with source, medium and campaign, so its campaigns can't be credited. Run the UTM hygiene audit for them.

Medium impact · Low effort

THIS MONTH

Pitch more work to *Copperleaf Roofing*

Leads grew 66% to 398. A growing account is the easiest one to expand.

High impact · Medium effort

THIS QUARTER

Lower the portfolio's reliance on *Fernhill Fitness Studio*

It sends 44% of all leads. Grow two smaller accounts so one client's dip can't sink the month.

Medium impact · High effort

How we built this report

- Each client's leads come from its own UTM Grabber site, September 2026.
- Change compares each client with August; a client counts as up or down when it moved by 5 leads and 10% or more.
- Avg. tagging is the plain average of the clients' fully tagged shares.

Next: call *Saltmarsh Family Law*. Its leads fell 28% this period.

Data: UTM Grabber, Sample data for northwinddental.com Brightline Agency. Prepared with UTM Grabber, v2.0.0, Oct 5, 2026