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.

Prepared by
Brightline Agency

4 clients 1,292 leads 30 days

UTM Grabber 1,292 leads across 4 clients

Sample data fictional business

Portfolio leads	Clients up	Clients down	Avg. tagging
1,292	1	1	55%
▲ +12% vs August	of 4 with an earlier period	Biggest drop: Saltmarsh Family Law	Lowest: Bluebird Pediatric Therapy, 19%
1,155 August			

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The book

Every client at a glance.

Leads this period, change against August, and how many leads arrived fully tagged.

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	Needs attention	Tagging gap	Biggest client
+66%	−28%	19%	44%
Copperleaf Roofing: 398 leads, up from 240	Saltmarsh Family Law: 108 leads, down from 150	of leads from Bluebird Pediatric Therapy arrived fully tagged	of portfolio leads come from Fernhill Fitness Studio

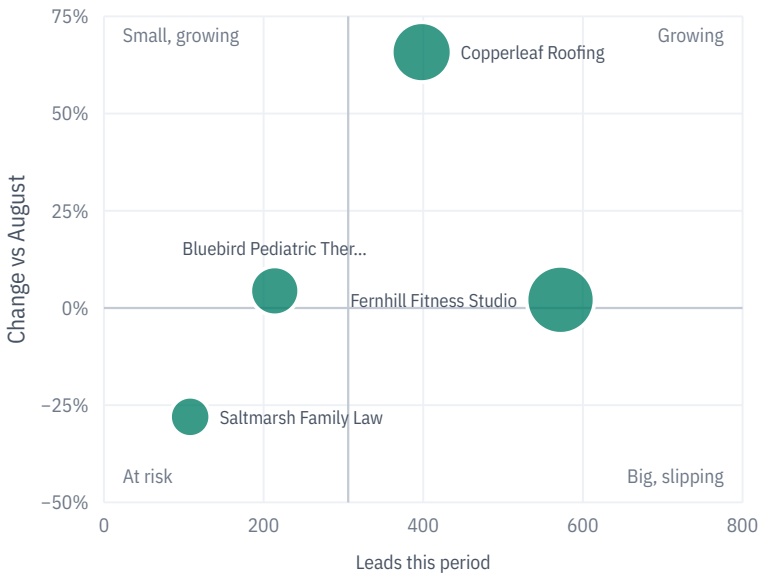
02

Growth map

Which clients are growing.

Across: leads this period. Up: change against August.

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.

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Next steps

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.

The book in one line

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

Clients	Portfolio leads	vs August	Avg. tagging
4	1,292	1 up, 1 down	55%

- Fernhill Fitness Studio leads the book with 572 leads.
- Saltmarsh Family Law slipped from 150 to 108.
- Lowest tagging: Bluebird Pediatric Therapy at 19%.

Data: UTM Grabber, Sample data for northwinddental.com

Brightline Agency. Prepared with UTM Grabber, v2.0.0, Oct 5, 2026