

VR-2026-001 / STUDY PROTOCOL | 07 OCT 2026 | v1.0

The 2026 UK SME Revenue Leakage Index

A proposed empirical analysis of 300+ service businesses examining missed calls, delayed quote follow-ups and fragmented CRM pipelines.

Publication status

Research protocol v1.0. No collected sample, completed analysis or revenue-loss findings are supplied. The 300+ businesses are a recruitment target, not an observed sample.

Research question

Which enquiry-handling and follow-up bottlenecks are associated with lost opportunities in UK service SMEs, and what changes when a documented operating workflow is introduced?

Sample and inclusion criteria

Recruit 300 or more consenting UK service businesses. Record sector, firm size, geography, enquiry volume and technology usage. Include firms able to supply comparable call and CRM event logs. Report recruitment methods and exclusions; a convenience sample cannot represent every UK SME.

Study design

Use an initial four-week observation window. Match call timestamps to CRM enquiries and quote stages. Where feasible, compare a subsequent four-week workflow pilot within each business. Separate association from causal claims and record seasonality, changes in marketing spend and capacity constraints.

METHODS / METRICS / LIMITATIONS

Metric definitions

Missed-call rate = unanswered inbound calls / eligible inbound calls. Time to follow-up = elapsed time from enquiry or quote issuance to the first documented response. Quote conversion = accepted quotes / quotes issued within a defined cohort. Report denominators, duplicate rules and missingness.

Revenue modeling

Potential contribution at risk = eligible unhandled enquiries x estimated qualification probability x estimated win probability x gross contribution per job. Inputs must come from a stated cohort. This is a scenario model, not observed revenue lost; do not sum overlapping enquiry and quote losses.

Analysis and limitations

Publish distributions and sector breakdowns with uncertainty intervals where appropriate. Report missing data, repeated observations within firms, attrition and sensitivity tests. Self-selection, inaccurate logs and attribution uncertainty may materially affect conclusions.

Data stewardship and affiliation

Use participant permission, minimized records and de-identified outputs. Vertex Research is part of SJ Vertex Group, which operates automation and staffing ventures. Disclose group funding and commercial interests in future publications.

Reference desk

UK Department for Business and Trade: Business population estimates 2025. Background population context only; it does not substantiate this proposed study.

<https://www.gov.uk/government/statistics/business-population-estimates-2025>

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