
SAMPLE PREVIEW

Agency Reporting Automation Kit

A few real pages from inside the kit.

The full version includes 12 files.

Command Center workbook - KPI Dictionary, UTM Builder, QA, prompts

8 branded guides - playbook, blueprint, SOP, QA, prompts, emails

BigQuery SQL - client deck - license and terms

MB DATA AUTOMATION

Full kit at www.mbddataautomation.com

What this kit is

This kit is a done-with-you implementation system for small agencies that need cleaner client reporting without hiring a full data team. It is built for the operator, account manager, analyst, or founder who owns weekly client updates.

Use it as a system, not a folder of templates

Start with the Command Center workbook, choose one client, clean that reporting flow end to end, then scale the same operating rhythm across every account.

Best-fit buyer

Best fit	Not ideal
Agency or small marketing team managing 3 to 25 clients	Enterprise BI team with mature warehouse governance
Reports built manually in Sheets, Looker Studio, screenshots, or slides	Team that needs custom data engineering immediately
Wants repeatable weekly campaign insights	Buyer looking for guaranteed campaign performance lifts

Implementation map

Phase	Timebox	Output	Main asset
1. Baseline	30 to 45 min	One client selected, reporting pain documented	Command Center, Client Roster
2. KPI alignment	45 to 60 min	Approved KPI definitions and thresholds	KPI Dictionary
3. Data hygiene	45 to 90 min	UTM and campaign naming rules	UTM Builder + Campaign QA
4. Report rhythm	60 min	Weekly reporting SOP and update structure	Weekly SOP + Deck Template
5. AI insights	30 to 45 min	Prompt library configured with client context	AI Prompt Library

Dashboard architecture

A client dashboard should not be a dumping ground of charts. It should answer a sequence of business questions a non-technical client can follow in under ten minutes.

Page	Question answered	Recommended components
Executive Overview	Are we on track?	Spend, revenue/leads, CPA/CAC, ROAS, conversion rate, trend line, short narrative.
Channel Performance	Which channels help or hurt?	Channel comparison, budget pacing, conversion efficiency, top movers.
Campaign Diagnostics	What changed and why?	Campaign table, week-over-week deltas, anomalies, landing page notes.
Lead / Conversion Quality	Are results meaningful?	Qualified leads, booked calls, pipeline, conversion stages, quality notes.
Data Quality	Can we trust this report?	Missing UTMs, untagged spend, tracking gaps, stale data, excluded rows.

Recommended layout

Executive Overview

- Top row: KPI cards with target vs actual.
- Middle row: time series trend by week.
- Bottom row: three bullets for wins, risks and next actions.

Channel Performance

- Use normalized KPIs so low-spend channels are not over-celebrated.
- Separate volume metrics from efficiency metrics.
- Show spend pacing and conversion contribution side by side.

Campaign Diagnostics

- Use campaign-level tables with conditional formatting.
- Include date range, campaign status, platform and landing page.
- Flag anomalies before the client asks.

How to use this checklist

Run this checklist before every client-facing report. It prevents the most common agency reporting failure: presenting performance conclusions when the underlying data is not clean enough to support them.

Category	QA check	Severity	If it fails, do this
Tracking	GA4 conversion event fires on the expected action	Critical	Pause interpretation; validate implementation or exclude the period.
Tracking	Paid traffic has source/medium/campaign populated	High	Fix UTMs and annotate the report.
Spend	Spend matches platform total for the period	Critical	Reconcile export, API and date range.
Campaign taxonomy	Campaign names follow the documented convention	Medium	Map the exception and update naming rules.
Landing pages	Landing page URL is present and active	High	Check broken pages and redirects.
Conversion quality	Lead quality or downstream stage is available	Medium	Label as top-of-funnel if the CRM stage is missing.
Reporting period	Current period is complete or labeled partial	High	Do not over-interpret partial periods.
Anomalies	Major KPI movement has an explanation or open investigation	High	Add a note to the client summary.
Exclusions	Bot, internal and test traffic excluded when known	Medium	Document the exclusion logic.
Narrative	Recommendation is tied to a business action	Medium	Rewrite as evidence, then risk, then action.

Prompting principles

- Give the AI structured data, not screenshots.
- Include client context, date range and campaign objective.
- Ask for evidence and a confidence level.
- Force separation between facts and interpretation.
- Never use generated insights without human review.

Prompt library

Use case	Prompt template	Output standard
Weekly executive summary	You are a marketing analytics lead. Summarize this weekly performance table for a client. Separate facts, interpretation, risks and recommended actions. Avoid hype. Data: [paste table]. Context: [context].	5 bullets max, with evidence and action.
Variance diagnosis	Find the biggest week-over-week changes in this campaign data. For each, propose the most likely driver and what to validate before presenting.	Ranked table: metric, change, likely driver, validation.
Data quality caveat	Rewrite this data issue in client-friendly language: [issue]. Explain impact, what we know, what we do not know, and next step.	Transparent but calm client note.
Budget recommendation	Given spend, conversions, CPA, revenue and quality notes, draft a budget reallocation recommendation. Include assumptions and risks.	Recommendation with a confidence level.
Anomaly triage	Identify anomalies in this paid media table. Do not assume causation. Provide hypotheses and checks.	Anomaly list and validation checklist.
Client email summary	Turn this report summary into a concise client email. Professional, clear, action-oriented. Include next steps and one question.	Email under 180 words.
Executive narrative	Create an executive narrative for a non-technical stakeholder. Focus on business impact, not platform jargon.	One paragraph plus three bullets.
Analyst handoff	Convert this weekly analysis into an internal handoff for the account manager: what to say, what not to overclaim, what to ask the client.	Handoff memo with guardrails.

GET THE FULL KIT

The whole reporting system, in one download

- 12 files: the Command Center workbook + 8 branded guides + SQL + client deck
- KPI Dictionary, UTM Builder, Campaign QA, weekly SOP and an AI prompt library
- A live Example Report so you see the system working from day one
- Instant secure download after payment. Lifetime access, updates included.
- Standard \$99 - Pro \$249 (adds BigQuery schemas, dbt, audit, exec deck, roadmap)

Get the kit -> www.mbddataautomation.com/products