
FREE SCORECARD

Agency Reporting Maturity Scorecard

Score your reporting in 5 minutes. See your stage and the one move that levels you up.

Four stages: Manual, Fragile, Scalable, Automated

Built for US-based small agencies and lean marketing teams

By the MB Data Automation team

MB DATA AUTOMATION

www.mbddataautomation.com

How to score it

For each statement below, rate how true it is for your agency from 1 to 4. Add up all ten scores, then find your stage on the next page.

1 = not true (manual) 2 = somewhat (fragile) 3 = mostly true (scalable) 4 = fully true (Automated)

Dimension	Statement	Score (1-4)
Data & sources	All client data sources are connected and refresh without manual exports.	
Data & sources	We have a documented list of every data source per client.	
Standardization	Every metric (ROAS, CPA, conversion) has one agreed definition we all use.	
Standardization	Campaign naming and UTM tagging follow one documented convention.	
Automation	Reports are built from a template that refreshes itself, not rebuilt by hand.	
Automation	We follow a repeatable weekly reporting rhythm with clear ownership.	
Data quality	A QA step runs before every report, so bad data never reaches a client.	
Data quality	We can reconcile our report numbers to the ad platforms within a known tolerance.	
AI-readiness	Our data is clean and structured enough to feed into AI tools for insights.	
AI-readiness	We use AI to speed up insight writing, with human review.	
		Your total (sum of all 10)

Your stage

Stage	Total	What it means	Your next move
Manual	10 to 17	Reporting is mostly manual and inconsistent. Every report is rebuilt by hand.	Standardize one client: define KPIs and clean the weekly flow end to end.
Fragile	18 to 25	You have pieces, but they break or vary depending on who built them.	Lock a KPI dictionary and run QA before every send.
Scalable	26 to 33	Reporting is repeatable and mostly automated across clients.	Add governance and executive reporting; templatzize across the whole roster.
Automated	34 to 40	Standardized, automated, trustworthy, and ready to feed AI.	Move to warehouse-backed reporting and AI-assisted narratives.

Most agencies land Manual or Fragile - here's your next step

The gap to Scalable is smaller than it looks, but only once you know which link in your reporting chain is leaking time and trust. The **Reporting Audit Sprint (\$27)** is a 60-minute, self-run audit of one real client workflow: you map the KPI gaps, dashboard leaks, QA holes, and AI-readiness blockers, and walk out with a prioritized fix list. It's the paid, deeper companion to this free scorecard. www.mbddataautomation.com/products/reporting-audit-sprint

When you're ready to fix it, not just diagnose it

The **Agency Reporting Automation Kit** is the full system: KPI dictionary, dashboard blueprint, QA checklist, weekly SOP, and an AI prompt library. www.mbddataautomation.com/products/agency-reporting-automation-kit

Reply to the email this came with and tell us your stage. We read every reply.