

# MARKTIVO GROWTH OS: MASTER DASHBOARD BRIEF

**Product:** Client Business Operating System (Growth OS)

**Target User:** Business Owner ("The Captain") & Internal Teams.

**Design Philosophy:** "The Glass Box." Radical transparency. The client sits in the cockpit; the dashboard provides the flight data.

**Visual Identity:** Dark Mode, High-Contrast Data, "Financial Terminal" Aesthetic, Neon Accents.

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## MODULE 1: REVENUE ENGINEERING (The Financial Terminal)

**Mission:** To provide the "Truth" about financial health (Short-Term Cash & Long-Term Wealth).

**Core Philosophy:** "Context is King." Enforce operational discipline and prevent knee-jerk decisions using statistical significance.

### 1. Data Integrity Layer ("The Enforcer")

*Before visualization, data must be cleaned. This is the foundation of the "Glass Box."*

- **The Naming Convention Validator:**
  - **Logic:** The system scans every incoming campaign for strict funnel tags: `[TOF]`, `[MOF]`, `[BOF]`, `[RET]`.
  - **The "Sin Bin":** Any campaign *missing* or *mislabeled* is forced into a pinned Red Row at the top: "⚠️ **UNCATEGORIZED SPEND**".
  - **Goal:** Operational purity. Proves the data is categorized correctly. If the Red Row exists, the data is invalid.

### 2. The North Star Ribbon (Top Sticky Bar)

*The pulse of the business. The Client defines the "Targets" here.*

Metric	Calculation	Source	Notes
<b>MER (7-Day Rolling)</b>	$\text{Revenue (7d)} \div \text{Spend (7d)}$	Hybrid	<b>Cash Efficiency.</b> Smoothed to remove volatility.
<b>Contribution Margin (\$)</b>	$\text{Total Revenue} - \text{Total Ad Spend}$	Hybrid	<b>Real Profit.</b> Cash available to cover OPEX.
<b>Projected LTV:CAC</b>	$60\text{-Day LTV} \div \text{CPA}$	Calculated	<b>The Wealth Ratio.</b> Target > 3.0 (Long-term growth).
<b>Real Revenue</b>	Sum of confirmed orders	Backend API	<b>Source of Truth.</b> (Shopify/Stripe). Never use Pixel data.
<b>Platform Trust Index</b>	$\text{Backend Sales vs Pixel Sales}$	Hybrid	Shows discrepancy (e.g., "Pixel is over-reporting by 20%").

### 3. The Main Terminal (The Funnel Breakdown)

*The central workspace. Organized by Customer Journey Stage.*

#### A. The Hierarchy (Rows)

- **Row 0:** ● **UNCATEGORIZED** (The Error Row).
- **Row 1:** ● **TOF (Top of Funnel)** - Cold Acquisition / Net New.
- **Row 2:** ● **MOF (Middle of Funnel)** - Engagement / Warm Audiences.
- **Row 3:** ● **BOF (Bottom of Funnel)** - Retargeting / Cart Abandoners.
- **Row 4:** ● **RET (Retention)** - Existing Customers / LTV.

#### B. The Columns (Metrics)

*Left-to-Right Flow: Financials  $\rightarrow$  Reach  $\rightarrow$  Engagement  $\rightarrow$  Conversion.*

Financials	Reach	Engagement	Conversion	Quality
Spend	Impressions	CTR (Link)	CPA	AOV
Contribution (\$)	CPM	CPC	ROAS	Conv. Rate

#### 4. The Wealth Engine (Cohort LTV Analysis)

*Located below the Main Terminal. Toggle View: "Cash Flow" vs. "LTV Cohorts".*

##### A. The "Triangle of Truth" (Cohort Heatmap)

- **Visual:** Standard Cohort Triangular Grid.
- **Dimensions:** Rows = Acquisition Month; Columns = Days Since First Order (0, 30, 60, 90).
- **Data Point:** Cumulative LTV (\$) or LTV % Increase.
- **Visual Logic:** Cells turn **Green** if the cohort is growing faster than the 3-month average. Cells turn **Red** if the cohort is "dying" early.




##### B. The Metric Stack (Retention Economics)

- **Cash Multiplier (Day 60):**  $LTV(\text{Day } 60) \div CPA$ . (The Scale Limit).
- **Payback Period:** Days to break even on Ad Spend.
- **Second Order Rate:** % of customers who buy again within 30 days.

#### 5. The Visualization (Context Graph)

*A Dual-Axis Time Series chart that explains "Why" numbers moved.*

- **X-Axis:** Timeline (Daily/Weekly).
- **Left Y-Axis (Bar):** Total Ad Spend.
- **Right Y-Axis (Line):** MER (Marketing Efficiency Ratio).

- **The Elite Feature: "Event Overlays"**
  - Small icons float on the timeline to indicate external factors.
  -  = Email Blast Sent (Explains MER spike).
  -  = Sale Launch (Explains Margin drop).
  -  = Tech Issue (Explains CVR drop).

## 6. The AI "Brain" Logic (The Advisor)

- **Logic A (Profit Protector):** "MER is down 15%. CTR is stable, but CVR dropped. Check site speed."
  - **Logic B (Delayed Attribution):** "ROAS is low today, but historical data shows this cohort improves >20% by Day 5. Do not cut."
  - **Logic C (Scale Signal):** "CPA < Target and Spend < Cap. Recommendation: Increase budget 20%."
  - **Logic D (Whale Watcher):** "Newest Cohort is repurchasing 2x faster than average. Your new ads are attracting High-LTV users. **Recommendation:** Scale spend immediately."
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# MODULE 2: ORGANIC ARCHITECTURE (The Brand Terminal)

**Mission:** To measure Brand Resonance, Community Loyalty, and Traffic Contribution.

**Platforms:** Instagram (Reels/Stories/Feed), TikTok, YouTube (Shorts/Long), LinkedIn.

## 1. The Data Architecture (The Aggregator)

- **View Mode 1: The Cross-Channel Pulse**
  - **Visual:** A "Ticker Tape" style row showing net follower growth (+/-) across all platforms.
- **View Mode 2: The Content Library**
  - **Visual:** Thumbnail Grid of posts, sortable by "Virality Score" (Views) or "Conversion Score" (Clicks).

## 2. The Metric Stack (Depth & Traffic)

- **Engagement Rate (ER):**  $(\text{Likes} + \text{Comments} + \text{Shares}) \div \text{Impressions}$ . (Benchmark: >5%).

- **Share of Voice:**  $(\text{Saves} + \text{Shares}) \div \text{Impressions}$ . (The "Virality" Metric).
- **Profile Conversion Rate:**  $\text{Link Clicks} \div \text{Profile Visits}$ . (The "Traffic" Metric).
- **Consistency Score:**  $\text{Posts Published}$  vs.  $\text{Goal}$ . (Accountability).

### 3. The Visualization (Community Health)

- **A. The "Engagement Funnel"**
  - **Visual:** Horizontal funnel: **Reach**  $\rightarrow$  **Interaction**  $\rightarrow$  **Click**.
- **B. The "Content Leaderboard"**
  - **Visual:** Top 3 Posts of the Week displayed as "Cards" with badges:
    - 🏆 **Most Shared** (Brand Awareness Winner).
    - 💬 **Most Commented** (Community Winner).
    - 🔗 **Most Clicked** (Traffic Winner).

### 4. The AI "Brain" Logic (The Community Manager)

- **Logic A (Sentiment Guard):** "Negative sentiment spike detected on TikTok regarding 'Shipping'. Recommendation: Address in Stories."
- **Logic B (Trend Spotter):** "Audio Track 'X' is trending +50%. Recommendation: Use for next Reel."
- **Logic C (SEO Assist):** "High retention but low reach on last post. Recommendation: Switch generic tags for niche SEO keywords."

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## MODULE 3: DATA STEERING (The CRO Terminal)

**Mission:** To identify and fix "Leaky Buckets" in the customer journey.

**Core Philosophy:** "Traffic is vanity; Conversion is sanity."

### 1. The Data Integrity Layer ("The Bouncer")

- **Feature: "True Traffic" Filter (Bot Detection)**
- **Logic:** Filters out "Junk Sessions" (Sessions < 1s, Bot IPs) before calculating Conversion Rate.
- **Visual:** Toggle: **"View: True Human Traffic"** (Default: ON).

### 2. The Visualization (The "Red Alert" Funnel)

- A. The Master Funnel (V-Shape Diagram)**
  - Steps:** Landing Page  $\rightarrow$  Product Page  $\rightarrow$  Add to Cart  $\rightarrow$  Initiate Checkout  $\rightarrow$  Purchase.
  - Dynamic Health States:** Blocks change color based on drop-off variance (Green/Yellow/Red).
- B. The "Matrix Split" (Device & Source)**
  - Comparative Table:** Breaks down funnel performance by **Device** (Mobile vs. Desktop) and **Source** (TikTok vs. Google).

### 3. The Metric Stack (CRO & Experience)

Metric	Calculation	Benchmark	Why It Matters
"True" CVR	$\text{Orders} \div \text{Human Sessions}$	>2.5%	The real conversion efficiency.
Bounce Rate	$\text{Single Page Sessions} \div \text{Total}$	<40%	Is the Landing Page irrelevant?
Cart Abandonment	$(\text{Carts} - \text{Purchases}) \div \text{Carts}$	<70%	Is the pricing/shipping too high?
Load Time (LCP)	Largest Contentful Paint (s)	<2.5s	<b>Speed Kills.</b> +1s = -20% CVR.

### 4. The AI "Brain" Logic (The CRO Expert)

- Logic A (Tech Check):** "Mobile CVR dropped 20% overnight. Load time spiked to 4s. Check recent app installs."
- Logic B (Offer Mismatch):** "High Ad CTR (2.5%) but High Bounce Rate (85%). The Landing Page is not delivering on the Ad's promise."

- **Logic C (Friction Monitor):** "Checkout Abandonment is abnormally high (60%). Check shipping settings or payment gateway."

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## MODULE 4: REVOPS & AI AUTOMATION (The Automation Terminal)

**Version:** 2.0 (Elite Edition)

**Mission:** To expose operational bottlenecks and prove Revenue Capacity.

**Core Philosophy:** "Scale without Headcount." Move beyond "Cost Savings" to "Revenue Expansion."

### 1. The Architecture (Adaptive Toggle)

- **State A: Pipeline Mode (Sales):** Focus on Velocity & Accountability (Fumble Rate).
- **State B: Support Mode (Service):** Focus on Retention & Repurchase (LTV).

### 2. The North Star Ribbon (The Scale Metrics)

*Metrics that prove the business can handle more volume.*

Metric	Calculation	The Elite Narrative
Revenue Capacity Added	(AI Vol. Capacity) × (Avg Deal Size)	"You can scale ad spend by 300% right now <i>without</i> hiring."
Pipeline Velocity	Avg Days from Lead \$\\rightarrow\$ Deal	"The AI shortened your sales cycle from 14 days to 4 days."

<b>Recaptured Revenue</b>	Revenue closed from "After Hours" leads	"The AI closed \$15k in deals while your team was asleep."
<b>Fumble Rate</b>	(Qualified Leads ignored >30m) ÷ Total	<b>The Accountability Metric.</b> "Your sales team is dropping 20% of the gold we hand them."

### 3. The Main Terminal (The Friction Detector)

*Designed to spot where humans are failing the machine.*

- **A. The "Demand Heatmap" (Time of Day)**
  - **Visual:** A 24-hour grid (Monday-Sunday).
  - **Data Layers:** Lead Volume (Heat) vs. Human Online Status (Overlay).
  - **Insight:** Visually exposes "Money Zones" (e.g., 9 PM) where AI is the *only* thing capturing revenue.
- **B. The "Handover Funnel" (The Truth)**
  - **Row 1:** Leads Generated.
  - **Row 2:** AI Qualified (Speed: 12s).
  - **Row 3: The Drop Zone (Fumbled Leads).** (Red bar showing leads qualified by AI but ignored by humans).
  - **Row 4:** Deals Won.

### 4. The Visualization (Competitive Speedometer)

- **Visual:** Side-by-Side Horizontal Bars.
  - **Bar 1 (AI Agent):** ● **0m 12s** (Instant Response).
  - **Bar 2 (Human Team):** ● **4h 25m** (Market Lag).
- **Context:** A "Revenue Probability" line underneath showing how conversion drops by 80% after minute 5.

### 5. The AI "Brain" Logic (The RevOps Director)

- **Logic A (The Lazy Rep Alert):** "Sales Rep 'Mike' has ignored 12 AI-Qualified leads today. Revenue Risk: ~\$4,500. Action: Re-assign leads."



- **Logic B (The Zombie Lead Reviver):** "Detected 50 'Dead' leads. AI is initiating the '90-Day Offer' reactivation sequence automatically."
- **Logic C (The Scale Check):** "AI Agents are only at 20% capacity. **Green Light** to increase Ad Spend by 50% immediately."

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