

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.

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
MER (7-Day Rolling)	$\text{Revenue (7d)} \div \text{Spend (7d)}$	Hybrid	Cash Efficiency. Smoothed to remove volatility.
Contribution Margin (\$)	$\text{Total Revenue} - \text{Total Ad Spend}$	Hybrid	Real Profit. Cash available to cover OPEX.
Projected LTV:CAC	$60\text{-Day LTV} \div \text{CPA}$	Calculated	The Wealth Ratio. Target > 3.0 (Long-term growth).
Real Revenue	Sum of confirmed orders	Backend API	Source of Truth. (Shopify/Stripe). Never use Pixel data.
Platform Trust Index	$\text{Backend Sales vs Pixel Sales}$	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:** Posts Published vs. 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."

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	Speed Kills. +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."

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	$(AI\ Vol.\ Capacity) \times (Avg\ Deal\ Size)$	"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."

Recaptured Revenue	Revenue closed from "After Hours" leads	"The AI closed \$15k in deals while your team was asleep."
Fumble Rate	(Qualified Leads ignored >30m) ÷ Total	The Accountability Metric. "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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