**SOP & WORKFLOW**

### **PHASE 1: CLIENT ONBOARDING & DATA INTAKE**

**Goal**: Collect all required data from the client before campaign generation.

#### **1. Brand & Business Info (Client Inputs Questionnaire)**

* Business Name, Industry, Products/Services
* USP, Mission, Brand Tone/Voice
* Target Audience Persona
* Goals (Leads, Awareness, Sales, etc.)

#### **2. Accounts Setup**

* Business Manager ID
* Ad Account ID & Currency
* Payment Method / Billing Access
* Connect Social Platforms (Meta, Instagram, Google Ads, etc.)
* Request Permissions (Page Access, Pixel Permissions, Catalog Access, etc.)

#### **3. Creative Assets (For learning)**

* Logos, Fonts, Brand Colors
* Images/Videos
* Past Ad Creatives (if any)
* Copy Inputs: Headlines, CTAs, Product Text

#### **4. Platform Preferences**

* Select Platforms (Meta, Google, LinkedIn, etc.)
* Ad Goal (Conversion, Reach, etc.)
* Schedule (Start/End Dates)
* Budget Type (Daily / Lifetime)

PHASE 2: STRATEGY ENGINE + CAMPAIGN GENERATION

#### **5. Workspace Creation**

* AI builds a custom “workspace” for the client
* Displays timeline phases: Exploration > Learning > Scaling

#### **6. Ad Campaign Strategy Generation**

* AI generates:  
  + Campaign structure: Campaign > Ad Sets > Ads
  + Targeting layers (location, age, behavior, lookalikes)
  + Budget allocation (manual or CBO)
  + Suggested creatives (copy, format, CTA)
  + Platform-specific placement mix

#### **7. Multi-Ad Set Generator**

* Auto-creates 2–5 ad set options based on variations
* Shows “Expected Results” (Reach, Leads, Impressions)
* Client selects preferred ad set(s)
* Optional: Edits suggestions > AI regenerates

PHASE 3: LAUNCH, DELIVERY & LIVE OPERATIONS

#### **8. Quality Control Before Launch**

* Creative Guideline Checks (Image Size, Text Ratio, Compliance)
* CTA Placement & Link Check
* Pixel/Tracking Verification
* Policy Compliance Pre-Scan

#### **9. Campaign Launch**

* Final confirmation from user
* Real-time estimation preview
* Launch to selected platforms
* Dynamic placement allocation

#### **10. Live Ad Monitoring Engine**

* Tracks real-time ad status: Draft, In Review, Active, Paused, Rejected
* Checks Reach, Impressions, Leads, CTR, CPL, CPC
* Budget usage and pacing tracker
* Top performing audience breakdown
* “Action Required” tab for issues (burnout, creative fatigue, policy alerts)

PHASE 4: ANALYTICS & OPTIMIZATION AI

#### **11. AI-Based Performance Dashboard**

* Real-time metrics with graphs and visualizations
* Spend vs Result analysis
* Audience vs Performance breakdown
* Device, Placement, Time performance
* Alert system:  
  + High-frequency fatigue
  + Burnout alert
  + Budget exceeded
  + Disapproved Ads
  + Low CTR or ROAS triggers

#### **12. Optimization Suggestions**

* Creative Refresh Suggestions
* Budget reallocation
* Audience narrowing or expansion
* Suggested ad pausing / boosting
* Funnel stage-specific retargeting tips
* Copy improvement prompt

PHASE 5: ADD-ON SERVICES & EXPANSIONS

#### **13. Organic Content Generator (Addon)**

* Based on inputs, AI generates 30-day calendars
* Content pillars and themes auto-generated
* Caption + Visual + Hashtag suggestions
* Viral reel trends & hooks

#### **14. UGC / Influencer Matching (Optional)**

* Suggest influencers based on brand niche & location
* Predict engagement ROI
* Auto-generate briefs

#### **15. CRM & Lead Handling**

* Integrate lead forms
* Collect + push leads to connected CRM
* Real-time lead qualification scores
* Notifies client of high-quality leads instantly

FULL FLOW CHART  
  
[Client Inputs]

↓

[Account Setup + Brand Assets]

↓

[AI Strategy Generation]

↓

[Multi-Adset + Expected Results Preview]

↓

[Client Approves]

↓

[Launch Campaign]

↓

[Live Tracking Dashboard]

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[Real-Time Alerts & Optimization]

↓

[Suggest Adjustments Automatically]

↓

[Optional: CRM, Influencers, Organic Content]

## **TECH BUILD CHECKLIST (Backend & Product Requirements)**

You’ll need to create:

* ✅ Intake Form + Workspace Generator
* ✅ Meta & Google API Integrations (Marketing API, Ad Library, Pixel, etc.)
* ✅ Ad Set Builder Logic (Targeting, Budget, Copy)
* ✅ Real-Time Dashboard with Alerts
* ✅ Optimization Engine with Decision Rules (based on thresholds like CTR < 0.5%)
* ✅ Creative Validator (image compliance, aspect ratio, text %)
* ✅ CRM Integration Layer (Webhook or Zapier-based)
* ✅ Optional Content Calendar Generator (OpenAI API + Post Scheduler Integration)
* ✅ Permission-based access roles for client workspace
* ✅ Analytics + Performance Reporting Engine
* ✅ Lead Notification & Email Triggers