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Unlock your advertising potential

Advertising Operations Playbook v7.5

A scalable, SOP-driven, ClickUp-native system for Amazon Advertising operations



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Core Principles

One Command Center

All advertising tasks centralized in ClickUp's Advertising Tasks list. No scattered spreadsheets, no missed deadlines, no confusion about task ownership.

One Data Source

MerchantSpring serves as the single source of truth for ads performance, sales data, P&L analysis, automated alerts, and comprehensive reporting.

Automation First

Weekly Adbrew rules + ClickUp dependencies enforce cadence. Recurring tasks, dependencies, and automations eliminate manual coordination and ensure nothing falls through cracks.

Execution Tools

Amazon Ads Console provides precise control, with Adbrew serving as the automation backbone. Adbrew rules are versioned and logged in a Rules Changelog to prevent drift. Every account maintains a rules history for troubleshooting and continuity, ensuring consistent optimization approaches across all client accounts.



Phase 1: Client Onboarding

Control Panel

- **Duration:** 3-5 business days
- **Stage:** Pre-Launch
- **Owner:** Account Manager
- **Success Metric:** 100% access confirmed + KPI Sheet complete within 72hrs

Critical Foundation

Onboarding establishes data infrastructure and success benchmarks before spending a dollar on ads. Poor onboarding creates 3-6 month delays as missing access blocks optimization and baselines are unavailable for performance comparison. This phase prevents the "blind optimization" problem where specialists guess at targets instead of measuring against pre-campaign reality.

Prerequisites

Signed contract, payment processed

Deliverables

Completed Airtable Onboarding Form, KPI Sheet with 30/60/90-day baselines, ClickUp client record with account owner assigned, MerchantSpring integration live

Tools

Airtable, ClickUp, MerchantSpring, Amazon Seller Central

Dependencies

Completion auto-triggers Phase 2 audit assignment

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Onboarding Step-by-Step Process



Verify Amazon Access

What: Confirm Ads Console + Seller Central permissions at correct level

How: Send access request via Seller Central (User Permissions > Add User). Required roles: Campaign Manager (Ads Console), View Only (Seller Central). Test login within 24hrs, document in Airtable checkbox sync

Threshold: All access confirmed within 48hrs or escalate to client

Time: 15 min setup, 24-48hr client response time



Collect Account Baseline Data

What: Capture 30/60/90-day historical performance before any campaign changes

How: Export from Ads Console: Campaign Manager > Reports > Create Report. Date ranges: Last 30d, Last 60d, Last 90d. Metrics: Spend, Sales, ACOS, ROAS, Orders, Impressions, Clicks, CVR

Threshold: All three timeframes required; if <30 days of history, note in KPI Sheet and flag for extended monitoring

Time: 30 min



Integrate MerchantSpring

What: Connect Amazon account to MerchantSpring for automated reporting

How: MerchantSpring > Add Account > Follow OAuth flow. Verify data sync: Check 7-day data appears within 24hrs. Set up automated alerts: ACOS >150% baseline, Spend >120% daily average

Threshold: Data appearing in MerchantSpring within 48hrs of integration

Time: 20 min



Inventory & Suppression Audit

What: Verify sufficient inventory (≥30 days) and no suppression issues before ad spend

How: Seller Central > Inventory > Manage All Inventory. Check: Available quantity, Inbound quantity, Days of cover calculation. Suppression check: Listings > Suppressed Listings report

Threshold: ≥30 days cover for all promoted ASINs

Time: 15 min



Quality Gate: All checkboxes must pass: Ads Console + Seller Central access confirmed, 30/60/90-day baseline data captured, MerchantSpring showing last 7 days of data, all promoted ASINs have ≥30 day inventory or flagged, Target ACOS defined, CPC_max calculated, ClickUp client record created, Account owner assigned and notified, No suppression issues on promoted ASINs.

Phase 2: Comprehensive Audit

Control Panel

- **Duration:** 5-7 business days (Tier 1), 10-14 days (Tier 1+2)
- **Stage:** Pre-Launch Analysis
- **Owner:** Sales Lead / Ops Lead (joint)
- **Success Metric:** Audit Deck delivered with 3-5 quantified opportunities, client sign-off

Business Impact

The audit transforms scattered observations into a quantified, prioritized action plan. This phase typically identifies \$2-5K/month in recoverable waste and 20-40% conversion rate improvement opportunities.

Strategic Purpose

Without this phase, campaigns launch blindly into structural problems including bad listings, missing coverage, and wasted spend patterns. The tiered approach balances speed (Tier 1 Critical in 5-7 days) against comprehensiveness (Tier 2 Extended for mature accounts), ensuring immediate issues are addressed while comprehensive opportunities are identified.

Prerequisites: Phase 1 complete (onboarding), MerchantSpring data available

Tools: Helium 10, Amazon Ads Console, MerchantSpring, Data Dive, Manual review



Audit Execution Framework

Listing Audit (7 Critical Checks)

Indexing Verification

Process: Helium 10 > Index Checker. Test top 10-20 keywords per ASIN from KPI Sheet. Document pass rate (target: >80%)

Threshold: ≥80% indexing on core terms

Impact: Un-indexed ASINs waste 100% of ad spend

Content Quality Assessment

Process: Review title, bullets, A+ content against conversion best practices. Score each element: Pass/Fail/Marginal

Threshold: All elements "Pass" or better

Impact: Poor content = low CVR = inflated CPC requirements

Visual Assets Review

Process: Verify ≥7 images, 1 video, zoomable quality, lifestyle + infographic mix

Threshold: ≥7 images + 1 video minimum

Impact: Video increases VCR by 15-20%, images drive engagement

Market Audit (5 Strategic Assessments)



Category Trends

12-month search volume analysis, seasonality patterns, growth classification
(Growing/Stable/Declining/Seasonal)




Competitive Mapping

Top 5 competitors documented with revenue, BSR, review count, ad strategy analysis



Coverage Gaps

High-volume keywords where client isn't visible organically or in ads - blind spot identification

 **Deliverable:** Audit Summary Deck (15-20 slides), Prioritized Opportunity Roadmap (90-day), Campaign Structure Recommendation with quantified impact projections

PPC Performance Analysis

\$2–5K

Monthly Waste Recovery

Typical recoverable waste identified through systematic PPC audit

20–40%

CVR Improvement

Conversion rate optimization opportunities uncovered

6

Campaign Types

Full coverage assessment: SP Auto, SP Exact, SP Phrase, SB, SBV, SD

PPC Audit Components



Campaign Coverage

Evaluate existing campaign types and structure quality. Check for SKAGs, proper negation, naming convention compliance. Score: Optimal/Adequate/Poor/Missing



Spend vs Revenue

Calculate current ACOS, ROAS, identify unprofitable spend. Flag campaigns: ACOS >150% target, ROAS <2.0, Spend >\$500 with <5 orders



Wasted Spend ID

Find specific keywords/targets burning budget without results. Apply negation criteria: ≥15 clicks, 0 sales, spend ≥\$12



Missing Opportunities

Identify campaign types not utilized: branded defense, product targeting, competitor targeting, SKAGs, video ads

The comprehensive audit phase concludes with a detailed presentation to the client, highlighting immediate opportunities (Tier 1 Critical issues requiring immediate attention) and extended opportunities (Tier 2 comprehensive improvements for sustained growth). Client sign-off triggers the transition to Phase 3 keyword research, ensuring full alignment before moving into campaign development.

Phase 3: Keyword Research

Control Panel

- **Duration:** 5-7 business days
- **Stage:** Launch Preparation
- **Owner:** PPC Specialist
- **Success Metric:** ≥90% keyword relevancy with ≥50 terms per ASIN

Quality Standards

Quality keyword research directly correlates with 25-40% improvement in campaign CVR and 15-30% reduction in ACOS. Poor research leads to wasted spend on irrelevant terms and missed opportunities on high-converting long-tail searches.

Strategic Purpose

Generate a high-quality, targeted keyword list that drives profitable traffic by identifying search terms with intent, volume, and relevance. This phase transforms broad product categories into specific, actionable targeting that aligns with customer search behavior and profitability thresholds.

Tools: Helium 10 (Cerebro, Magnet), Data Dive, MerchantSpring

Prerequisites: Phase 2 complete (Audit Deck approved, ASIN list finalized)

01

Competitor Discovery

Extract high-performing keywords from top competitors using Cerebro. Filter: SV>1000, Relevancy>70%, Volume Trend: Rising

02

Category Research

Generate broad keyword universe using Magnet. Filter: Search Volume>500, Relevancy>75%, Competition

03

04

Relevancy Filtering

Apply standardized criteria to maintain ≥90% relevancy using prebuilt filter sets and Decision Matrix thresholds

05

Intent Classification

Categorize by commercial intent and match type: High Intent (buying ready), Mid Intent (comparing), Low Intent (researching)

06

Seasonality Validation

Confirm keyword demand consistency using 12-month trend analysis. Flag: Rising, Stable, Declining, Seasonal patterns

07

Final Keyword Log

Create organized, prioritized list ready for campaign implementation with match type assignments and priority scores

Keyword Research Execution

Research Methodology



Competitor Intelligence

Use Helium 10 Cerebro to analyze top 3-5 competitors from Phase 2 audit. Extract ≥200 raw terms per competitor, filtering to ≥50 high-quality terms. Focus on proven, profitable search terms that competitors are successfully targeting.



Category Discovery

Generate comprehensive keyword universe using Magnet for client ASINs. Target ≥300 broad terms, filter to ≥75 relevant terms. Uncover long-tail opportunities that competitors may miss through systematic category exploration.



Quality Filtering

Apply Decision Matrix criteria: Search Volume ≥500, Relevancy ≥70%, Competition

Intent Classification Framework

Intent Level	Characteristics	Examples & Match Type
High Intent	Buying ready, commercial	"buy [product]", "[brand] vs [competitor]" → Exact Match
Mid Intent	Comparing options	"[feature] vs [feature]", "[product] review" → Phrase Match
Low Intent	Research phase	"[problem] solution", "[product] how to" → Broad Match (limited)

- ☒ **Quality Gate:** Final keyword log must contain ≥50 terms per ASIN with ≥90% relevancy, complete intent classification, seasonality validation for top 25% of terms, and priority scores calculated using Decision Matrix formula.

The keyword research phase concludes with a comprehensive Keyword Log that serves as the foundation for campaign structure design. All terms are validated for relevance, intent, and seasonal consistency, ensuring the subsequent campaign build focuses on profitable, high-converting search terms.

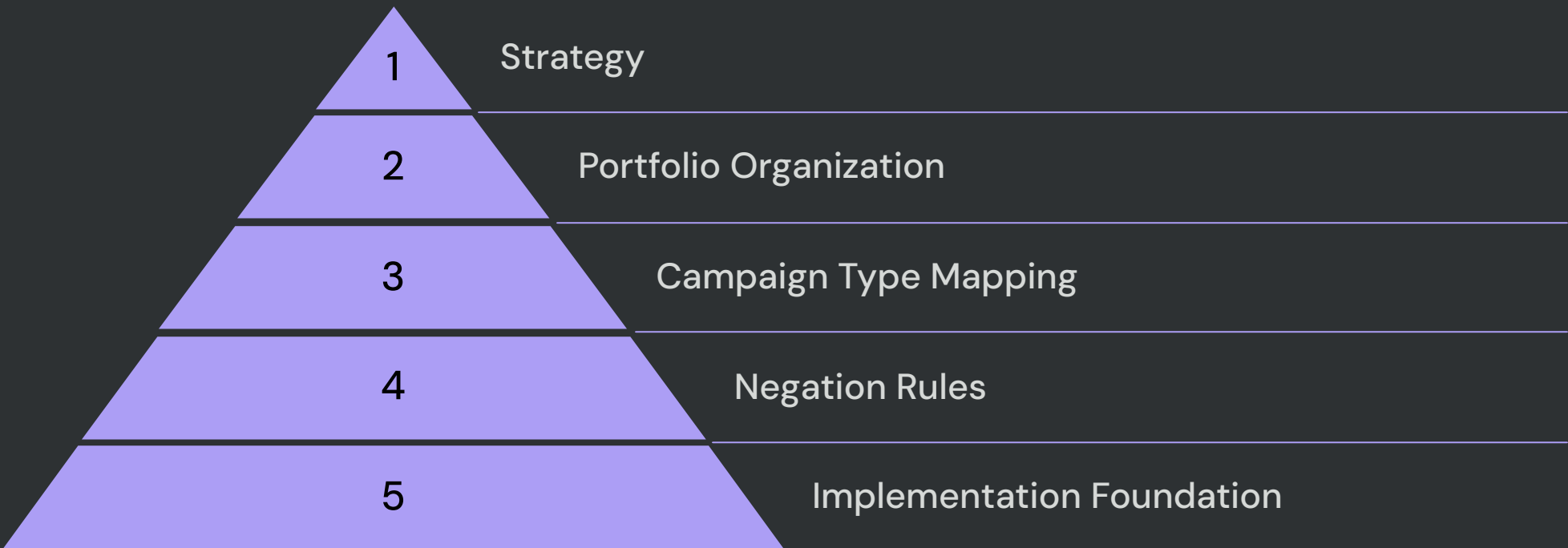
Phase 4: Campaign Structure Design

Control Panel

- **Duration:** 3-5 business days
- **Stage:** Launch Preparation
- **Owner:** PPC Lead
- **Success Metric:** Approved structure with 100% ASIN coverage and lifecycle portfolios

Strategic Foundation

Design an optimized campaign architecture that aligns keyword research with strategic objectives, lifecycle stage, and profitability goals. Proper structure prevents 40-60% of common optimization issues including cannibalization, overspending, and unclear attribution while enabling efficient scaling through lifecycle-appropriate automation rules.



Lifecycle-Based Portfolio Structure

Launch Portfolio

New products (0-90 days): SP Auto, SP Broad, SP Phrase, SB Branded, SD Retargeting campaigns focused on discovery and initial market penetration

Optimize Portfolio

Established products with improvement potential: Balanced campaign mix with focus on conversion optimization and efficiency gains

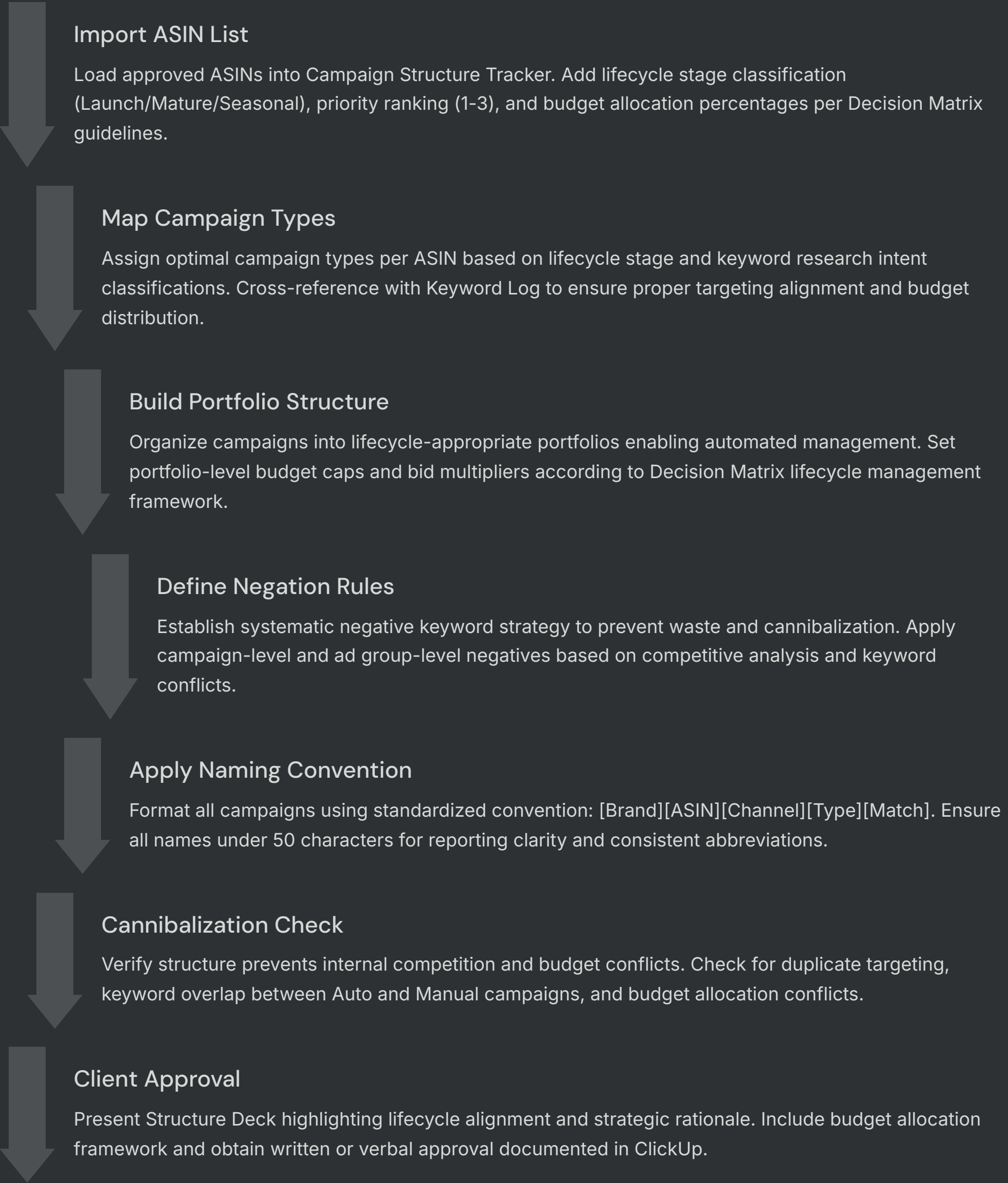
Scale Portfolio

High-performing products ready for growth: SP Exact, SP PT, SB Category, SD Prospecting with increased budgets and aggressive targeting

Maintain Portfolio

Mature products with stable performance: Full campaign coverage with automated rules and maintenance-focused optimization

Structure Design Process



Campaign Type Distribution by Lifecycle

