

◆ OPEN-SOURCE AI PLAYBOOK · FOR MARKETING

Campaign Performance Report

Campaign numbers live in five dashboards, and the report is always late.

THE SYSTEM

Pulls spend, leads and pipeline from every channel into one weekly report, with the why written up.

🕒 BUILD TIME

1-2 weeks

🔧 HOW IT'S BUILT

Low-code

🔌 WORKS WITH

Meta or LinkedIn Ads + HubSpot or Salesforce

👤 OWNER

Marketing lead, with marketing ops

How it works: every channel flows into one report, with the why in the margin



Meta Ads

Spend, clicks, leads



LinkedIn Ads

Spend, clicks, leads



Google Ads

Spend, clicks, conversions



CRM

Leads, deals, pipeline



Analytics

Visits, sign-ups, sources

🔗 Matched by campaign, checked, the why drafted · Monday, 6 am

Weekly campaign report

Week 42 · 12-18 October · Copperline, a fictional company

Draft for the marketing lead

Spend

\$44.2k

+8%

Leads

361

-10%

Cost per lead

\$122

+20%

New pipeline

\$412k

+30%

Meta



\$14.2k · **\$100** a lead **+30%**

LinkedIn



\$18.6k · **\$211** a lead **+34%**

Google



\$11.4k · **\$87** a lead **-7%**

The short version: cost per lead rose on LinkedIn, pipeline rose on two webinar deals, and the top Meta ad is wearing out.

1 Cost per lead up 20%, mostly

LinkedIn. The “Ops leaders” audience was widened on Tue 13 Oct. LinkedIn’s cost per lead went from \$158 to \$211.

2 Pipeline up 30% on fewer leads. Two enterprise deals (\$96k and \$74k) came from the month-end webinar.

3 Meta leads down 22%. The top ad has run for six weeks and its click rate fell from 1.3% to 0.8%. Suggest a creative refresh.

4 Google leads up 11%. Reason not found in the data. Flagged for the marketing lead.

5 Leads counted once, from the CRM.

The ad platforms report 417 between them, because each one counts every lead it touched.



The campaign table

CAMPAIGN	SPEND	LEADS	PER LEAD	PIPELINE
Month-end webinar LinkedIn	\$9,800	41	\$239	\$214k
Brand search Google	\$4,200	69	\$61	\$56k
Ops leaders, lead form LinkedIn	\$8,800	47	\$187	\$42k
Demo retargeting Meta	\$6,100	74	\$82	\$38k
Switch from spreadsheets Meta	\$8,100	68	\$119	\$31k
Reporting software, generic Google	\$7,200	62	\$116	\$31k
All campaigns	\$44,200	361	\$122	\$412k

Leads are counted once, from the CRM. Sample numbers, fictional company.

The marketing lead’s pass

Spend rose 8% to \$44.2k while leads fell 10% to 361, so cost per lead rose 20% to \$122, mostly on LinkedIn after Tuesday’s audience change. New pipeline rose 30% to \$412k, mainly two enterprise deals from the month-end webinar. The higher LinkedIn cost looks worth it. We’ll keep the wider LinkedIn audience one more week, then decide. Meta leads fell 22% as the top ad wears out. Google leads rose 11%; the reason isn’t in the data. brand searches jumped after Thursday’s webinar, so expect that to fade. Next: new Meta ads by Friday (Leo).

✓ Approved

Ana Ribeiro · Mon 10:12 am · then shared

Struck text was removed, green text was added by the lead. The system never shares the report on its own.

Can we build it? FOR YOUR TECH LEAD

🔧 Tools you’ll use

Ad and web numbers	The Meta, LinkedIn and Google Ads APIs, plus GA4	or Supermetrics, Funnel, Windsor.ai
Leads, deals and pipeline	HubSpot or Salesforce API	or a weekly CRM export
Joining it all by campaign	BigQuery	or Google Sheets, Snowflake
Running it every Monday	n8n	or Make, a scheduled script
Writing the why	Claude	or ChatGPT, Gemini

🔗 Three ways to build it

Start simple 2-3 days

Supermetrics pulls every channel into one Google Sheet. A saved Claude prompt reads the sheet and drafts the why.

Production 1-2 weeks

n8n pulls the APIs every Monday at 6 am into BigQuery, joins by campaign, runs the checks, has Claude write the notes and sends the draft to the lead.

Custom 3-4 weeks

Adds mid-week alerts when a number jumps, any-two-weeks comparisons, and cost per deal as well as cost per lead.

🔒 Access it needs

- ◆ Read-only access to each ad account and to analytics
- ◆ Read access to CRM contacts, deals and campaign fields
- ◆ Write access to one folder or channel, for the draft only

🛡️ Guardrails

- ◆ Read-only: it never changes budgets, bids or campaigns
- ◆ Numbers come straight from the data. The AI writes only the notes, and each one names its source
- ◆ When it can’t find a reason, it says so instead of guessing
- ◆ The marketing lead edits and approves before anyone else sees it

🎯 What to measure

- ◆ Hours from week end to report shared
- ◆ Hours spent pulling numbers by hand
- ◆ Share of big moves with a sourced reason
- ◆ Edits the lead makes per report, falling over time

👤 Who builds and runs it

A marketing ops person or analyst builds it, with an engineer for a day or two on the API connections. After that, the marketing lead spends about 20 minutes each Monday on the draft.

◆ **FREE, OPEN SOURCE, NO SIGN-UP**

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Pallav Kaushish

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