



The comprehensive prompt playbook *for marketing data analysts*

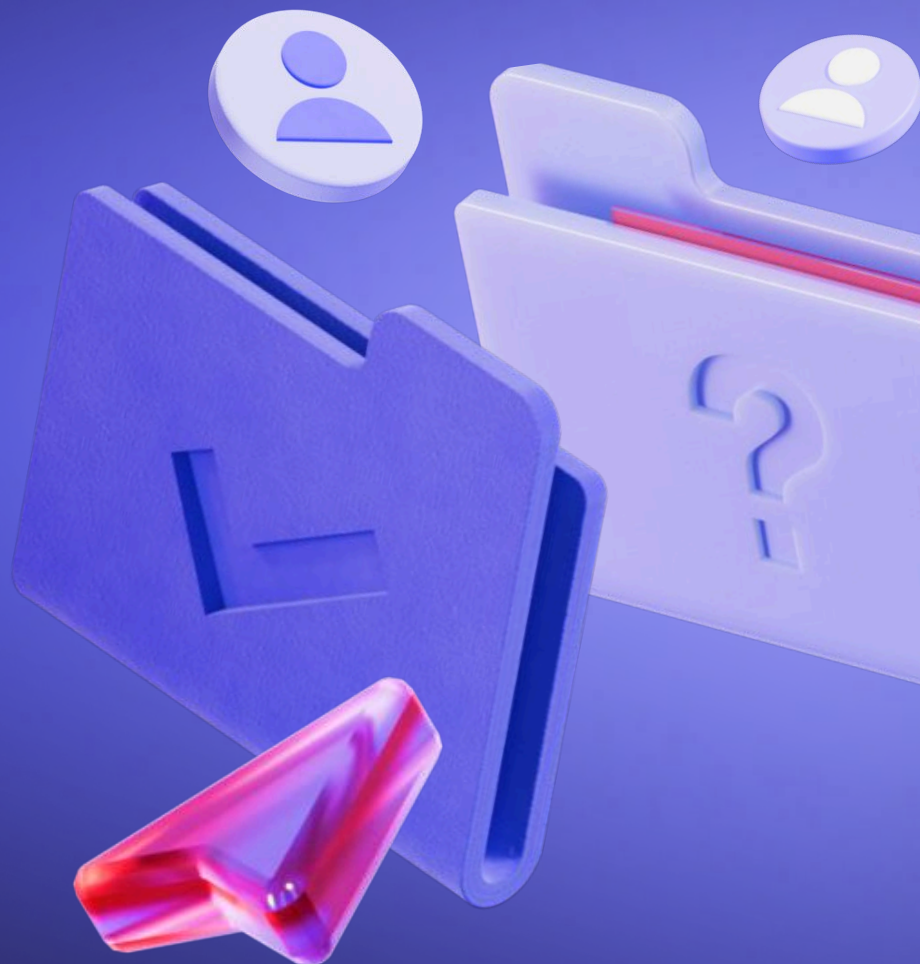


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Introduction

For data analysts, the challenge isn't simply getting to the numbers.

It's turning vague stakeholder questions into trustworthy analysis, diagnosis, forecasting, and action. AI can accelerate that work, but only if it follows the same analytical discipline you would expect from a strong analyst. This playbook is built around that process.

[Supermetrics for Claude](#) and [Supermetrics for ChatGPT](#) remove much of the friction between your marketing data and the analysis you need to do. By connecting clean, unified marketing data directly to Claude or ChatGPT, you can move beyond manual exports and spreadsheet prep to query live performance data in plain English, investigate cross-channel trends, and build data-backed strategies faster.

To get the best work out of your AI tool, treat it like a new senior analyst on your team. Give it clear briefs, strong boundaries, and logical workflows. This playbook provides the prompt sequences to do exactly that.

How to get started

Before diving into the workflows, the first step is to connect your marketing data to Claude. The installation process depends on whether you're new to Supermetrics or are an existing user.

Already use Supermetrics?

1. Connect Supermetrics to Claude or ChatGPT.
2. Sign in and authenticate your Supermetrics account.
3. Start using the prompts in this playbook.

New to Supermetrics?

1. Start a free Supermetrics trial.
2. Connect your marketing data sources.
3. Connect Supermetrics to Claude or ChatGPT.
4. Start using the prompts in this playbook.



Start a Supermetrics for Claude free trial



Start a Supermetrics for ChatGPT free trial



Connect Supermetrics to Claude

1. Open Customize.
2. Select Connectors.
3. Search for Supermetrics.
4. Add Supermetrics and sign in.



Connect Supermetrics to ChatGPT

1. Open Settings.
2. Select Plugins.
3. Hit Browse plugins.
4. Search for Supermetrics.
5. Install plugin and sign in.

Once the Supermetrics connector is active, you are ready to start pulling your performance data and using the prompt workflows in this playbook. Note that if you are a new user, you may need to connect your marketing data sources to Supermetrics. For more instructions, [check out our support documentation](#).

01

CHAPTER 1

Question

Turn stakeholder requests into clear analytical questions

Before you pull data, make sure you are solving the right problem. These prompts help you turn vague requests into clear analytical questions, define the evidence required, and identify problems with the request before the analysis begins.



PROMPT 01

Turn a vague request into an analytical question

A stakeholder has asked: [INSERT REQUEST]

Turn this into a precise analytical question.

Identify:

- The decision they are trying to make
- The business outcome that matters
- The primary analytical question
- Any important secondary questions
- Assumptions or ambiguities that need clarification

Finish with one clear analytical question. Do not retrieve or analyze data yet.

PROMPT 02

Build the analytical plan

I need to answer: [INSERT QUESTION]

Build the minimum analytical plan.

Define:

- **Primary KPI:** metric most directly tied to the business question
- **Diagnostic metrics:** metrics that could explain the result
- **Guardrails:** metrics that prevent a misleading conclusion
- **Dimensions:** the most useful breakdowns
- **Data sources:** sources and fields required
- **Comparison:** the strongest benchmark or period

Then decompose the primary KPI into the component metrics or questions we should investigate first.

Order the analysis from the broadest, highest-impact checks to narrower drill-downs.

Return: **Question** → **KPI** → **Supporting metrics** → **Dimensions** → **Sources** → **Comparison** → **Investigation order**

Flag any seasonality, promotions, budget changes, or other factors that could make the comparison misleading. Do not retrieve or analyze data yet.

PROMPT 03

Turn a stakeholder claim into a testable hypothesis

A stakeholder has claimed: [INSERT CLAIM]

Turn it into a testable hypothesis.

Provide:

- Hypothesis and null hypothesis
- Outcome metric
- Required comparison
- Control variables and confounding factors
- Evidence that would support or contradict it
- What the analysis could and could not establish

Do not assume the claim is correct. Do not retrieve data yet.

PROMPT 04

Clarify an ambiguous metric

A stakeholder has asked me to report on: [INSERT METRIC OR TERM]

Identify the reasonable ways it could be defined in this context.

For each definition, show:

Definition | Formula | Required data | Important inclusion/exclusion rules | How it could change the result

Then state exactly what needs to be clarified before the analysis begins.

Do not silently choose a definition unless the available information clearly supports one.

PROMPT 05

Stress-test the analysis request

Critically review: [INSERT QUESTION OR PROPOSED ANALYSIS]

Assess:

- Whether it addresses a real business decision
- Whether the proposed KPI and comparison are appropriate
- Whether important variables or data are missing
- Where correlation could be mistaken for causation
- Whether the requested conclusion is stronger than evidence could support

Classify as:

READY TO ANALYZE: The question is well framed and the required evidence should be available.

READY WITH LIMITATIONS: Useful analysis is possible, but important caveats remain.

REQUIRES MORE DATA OR CLARIFICATION: The question could be answered after specific gaps are resolved.

CANNOT SUPPORT THE REQUESTED CONCLUSION: The proposed analysis cannot establish what is being asked.

If needed, rewrite the request as the strongest question the available evidence could answer.

Do not retrieve data yet.

02

CHAPTER 2

Retrieve

Pull the right data from the right sources

Once you know what question you need to answer, pull only the data required to answer it. These prompts help you define the right scope, fields, sources, and level of detail while keeping retrieval separate from analysis.



PROMPT 01

Retrieve the data for an analysis

Pull the data required for:

- **Question:** [INSERT]
- **Scope:** [ACCOUNT / CHANNEL / CAMPAIGN / OTHER]
- **Date range:** [INSERT]
- **Comparison period:** [INSERT, IF NEEDED]
- **Metrics:** [INSERT OR USE THE AGREED METRICS]
- **Dimensions:** [INSERT]
- **Granularity:** [INSERT]

Retrieve only the fields required for the analysis.

If multiple platforms are included:

- Preserve the source
- Use the same date range and granularity where possible
- Flag metrics whose definitions differ

If a requested field or level of detail is unavailable, say so rather than substituting something else. Return the data without analyzing it.

PROMPT 02

Check what data is available

I want to answer: [INSERT QUESTION]

Before retrieving the full dataset, check the relevant connected sources.

Return: **Requirement** | **Available?** | **Source** | **Limitation**

Check:

- Required sources and accounts
- Metrics
- Dimensions
- Historical coverage
- Granularity
- Join keys or identifiers
- Important missing fields

Flag anything that would prevent or weaken the planned analysis. Do not retrieve the full dataset yet.

PROMPT 03

Retrieve data across multiple sources

Pull the data required to connect:

- **Sources:** [INSERT]
- **Analytical goal:** [INSERT]
- **Date range:** [INSERT]

This may include **paid media + web analytics, marketing + CRM, or full-funnel combinations**.

From each source, retrieve only the metrics, dimensions, identifiers, and timestamps required for the analysis.

Include the strongest available fields for connecting datasets: campaign or ad IDs, lead or customer IDs, UTM parameters, dates.

Before any join, report: **Source | Required fields retrieved | Join field | Missing field or limitation**

Also flag: likely unmatched records, differences in reporting grain, missing funnel stages, inconsistent stage definitions, relevant conversion lag

Do not join or analyze the data yet.

PROMPT 04

Retrieve historical data

Pull the historical data required for:

- **Metric or outcome:** [INSERT]
- **Scope:** [INSERT]
- **Period:** [INSERT]
- **Granularity:** [DAILY / WEEKLY / MONTHLY]

Include required metrics, relevant dimensions, and any known event or campaign fields needed later. Preserve the full chronological series.

Report: earliest and latest available dates, any missing periods, any changes in granularity or coverage

Do not identify trends, seasonality, anomalies, or forecasts yet.

PROMPT 05

Retrieve data for attribution analysis

Pull the data required to compare attribution across:

- **Sources or models:** [INSERT]
- **Date range:** [INSERT]

Retrieve where available:

- Conversions
- Revenue or conversion value
- Campaign or channel
- First-touch source
- Last-touch source
- Conversion date
- Interaction date

Also retrieve relevant attribution metadata, including:

- Attribution model
- Attribution window
- Conversion definition
- Reporting date logic

Keep each attribution view separate.

Return: **Source/model | Metric | Value | Attribution definition | Window**

Flag unavailable information.

Do not reconcile the figures or decide which source is correct yet.

03

CHAPTER 3

Validate

Check whether the data is reliable enough to analyze

Before analyzing the data, make sure you can trust it. These prompts help you find quality issues, check that metrics and datasets behave as expected, and decide whether the evidence is reliable enough to proceed.



PROMPT 01

Run a data quality audit

Audit this dataset before analysis.

Check for:

- Missing dates, entities, or important values
- Unexpected zeros
- Duplicate records
- Unusual values or row-count changes
- Stale or incomplete data
- Metrics that stop populating
- New, missing, renamed, or structurally changed fields

Where relevant, compare against: **Expected date range:** [INSERT] **Expected accounts / campaigns / entities:** [INSERT]

Return: **Issue** | **Evidence** | **Severity** | **Potential impact** | **Next check**

Use: Critical: could invalidate the analysis. **Warning:** analysis may be possible with a caveat.

Minor: unlikely to affect the conclusion. Do not automatically repair suspicious data.

PROMPT 02

Validate metrics, definitions, and aggregation

Validate the fields required for:

Analysis: [INSERT] **Sources:** [INSERT] **Metrics / business definitions:** [INSERT]

Check:

- What each metric or business term means in each source
- Formula and underlying fields
- Whether equivalent metrics are genuinely comparable
- What one row represents
- Which metrics can be summed safely
- Which ratios should be recalculated from totals
- Risk of double-counting
- Currency or unit differences
- Funnel or lifecycle definitions, where relevant

Where possible, recalculate derived metrics from their underlying fields.

Return: **Field / metric** | **Definition** | **Calculation or grain** | **Issue** | **Recommended treatment**

Flag anything that cannot be interpreted, compared, or aggregated reliably. Do not overwrite source values or silently standardize definitions.

PROMPT 03

Reconcile conflicting sources

These sources report different values for what appears to be the same metric:

- **Source A:** [INSERT]
- **Source B:** [INSERT]
- **Metric:** [INSERT]

Investigate differences in:

- Definition
- Date range and timezone
- Filters and scope
- Attribution model or window
- Reporting-date logic
- Currency
- Deduplication
- Data freshness

Return: **Confirmed differences. Likely explanations. Still needs verification**

Quantify the effect of confirmed differences where possible. Do not force the sources to match or declare one correct without evidence.

PROMPT 04

Validate a join

Validate the join between:

- **Dataset A:** [INSERT]
- **Dataset B:** [INSERT]
- **Join key(s):** [INSERT]

Check:

- Records before and after the join
- Match rate
- Unmatched records
- Duplicate keys
- Risk of duplicating spend, conversions, or revenue

Return: **Match rate | Unmatched records | Duplicate risk | Impact on totals | Verdict**

Classify the join as: **SAFE TO USE / USABLE WITH CAVEATS / NOT SAFE TO USE**

Preserve unmatched records. Do not deduplicate automatically.

PROMPT 05

Decide whether the data is ready for analysis

Based on the validation completed so far, return one verdict:

- **READY** – No material issue should affect the analysis.
- **READY WITH CAVEATS** – Analysis can proceed, but specific limitations must shape the interpretation.
- **NOT READY** – Material issues should be resolved first.

Summarize: **Issue | Impact | Required action**

Separate issues into:

- **Must resolve**
- **Can proceed with caveat**

If the original question cannot be answered reliably, state the narrower analysis the data can support.

Do not begin the performance analysis yet.

04

CHAPTER 4

Prepare

Standardize, clean, join, and reshape your data

Once the data has been validated, make it fit for the analysis you need to run. These prompts help you standardize, clean, join, and reshape data without changing its underlying meaning or losing the original source values.



PROMPT 01

Create an analysis-ready dataset

Prepare the validated data for: **[INSERT ANALYTICAL QUESTION]**

Determine the required granularity, metrics, dimensions, joins, and calculated fields. Then apply only the transformations required for the analysis.

Before making changes, return: **transformation, reason, fields affected, risk.**

Preserve original source fields and values, identifiers needed for drill-down.

Flag any transformation that requires an unsupported assumption. Do not analyze the resulting dataset yet.

PROMPT 02

Standardize and clean the dataset

Prepare these fields for consistent analysis:

- **Dimensions:** [INSERT]
- **Metrics:** [INSERT]
- **Target currency:** [INSERT]
- **Target timezone:** [INSERT]

Apply the validated rules for dimension names and categories, metric definitions and formulas, ratio calculations, currency, dates and timezones, and missing values.

Requirements:

- Preserve original values alongside standardized values
- Recalculate ratios from underlying totals where possible
- Do not average row-level ratio metrics
- Do not invent exchange rates or timezone assumptions
- Do not treat missing values as zero without evidence
- Mark ambiguous mappings as Needs review

Return: **Field | Original treatment | Standardized treatment | Issue or caveat**

Do not analyze performance yet.

PROMPT 03

Join datasets safely

Join:

- **Dataset A:** [INSERT]
- **Dataset B:** [INSERT]
- **Analysis goal:** [INSERT]

Identify the strongest available join key or keys.

Before joining, check: expected join relationship, duplicate-key risk, likely unmatched records, missing identifiers, and risk of duplicating additive metrics.

Then create the joined dataset while preserving: source identifiers, unmatched records, a match status field.

After the join, report: **Match rate** | **Unmatched records** | **Duplicate risk** | **Change in row count** | **Change in key totals**

Do not discard unmatched records or analyze the combined data yet.

PROMPT 04

Prepare data for funnel analysis

Prepare the validated data for:

[INSERT FUNNEL, E.G. TRAFFIC → LEAD → MQL → SQL → OPPORTUNITY → CUSTOMER]

Break it down by: [INSERT DIMENSIONS]

Use the validated stage definitions and create a table containing the fields needed to calculate:

- Stage volumes
- Stage-to-stage conversion
- Cost per stage
- Pipeline
- Revenue

Flag: missing stages, unmatched records, and records that do not fit the agreed funnel logic. Preserve source fields needed for drill-down. Do not calculate funnel performance yet.

PROMPT 05

Prepare data for an advanced analysis

Prepare the validated dataset for:

- **Analysis type:** [EXPERIMENT / COHORT / FORECAST / OTHER]
- **Primary outcome:** [INSERT]

Reshape the data into the structure required for that method.

- **For experiments:** preserve treatment/control assignment, exposure, outcomes, and guardrails
- **For cohorts:** preserve cohort definition, acquisition date, relative period, activity, and value
- **For forecasts:** create a continuous time series at the required granularity

Flag anything that could invalidate the intended analysis.

Preserve original source values.

Do not calculate the analytical result yet.

05

CHAPTER 5

Analyze

Establish what happened and where the result came from

Once the data is validated and prepared, use it to establish what happened. Quantify the result, identify where it came from, and separate meaningful changes from noise. Leave explanations and recommendations for the next stages.



PROMPT 01

Analyze performance and identify the biggest contributors

Analyze:

- **Scope:** [INSERT]
- **Period:** [INSERT]
- **Benchmark:** [PREVIOUS PERIOD / TARGET / YOY / OTHER]
- **Primary KPIs:** [INSERT]
- **Breakdown:** [CHANNEL / CAMPAIGN / REGION / PRODUCT / OTHER]

For each important KPI, show: current value, benchmark, absolute change, and percentage change.

Then identify the largest positive and negative changes, highest-volume and most efficient segments, segments contributing most to the overall result and important differences between scale, efficiency, and downstream value

Rank contributors by **absolute business impact**.

Calculate blended ratios from underlying totals rather than averaging segment-level ratios.

Finish with: **Headline result. Three most material findings. Three findings that need diagnosis next**

Describe what happened. Do not explain why or recommend actions yet.

PROMPT 02

Analyze the funnel and downstream value

- Analyze:
- **Funnel:** [INSERT]
- **Breakdown:** [CHANNEL / CAMPAIGN / SOURCE / OTHER]

Compare where available: spend, volume at each funnel stage, stage-to-stage conversion, cost per stage, pipeline, revenue, customer acquisition cost, and LTV or other downstream value metrics

Identify: largest funnel drop-offs, segments with materially stronger or weaker progression, sources where top-of-funnel efficiency and downstream quality tell different stories and high-cost acquisition that produces stronger customer value, or vice versa

Quantify the downstream business impact of the most important differences. Keep different attribution definitions separate. Do not diagnose causes or recommend changes yet.

PROMPT 03

Analyze trends and seasonality

Analyze the historical series for:

- **Metric:** [INSERT]
- **Period:** [INSERT]

Identify:

- Short-term movement and longer-term direction
- Major peaks and troughs
- Whether current performance is inside or outside its normal historical range
- Recurring daily, weekly, monthly, quarterly, or annual patterns

Distinguish between **sustained trend, seasonal pattern, short-lived movement, and one-off outlier.**

Quantify the evidence behind each conclusion and state how much history supports any claimed seasonal pattern. Do not diagnose causes or forecast yet.

PROMPT 04

Run a cohort analysis

Analyze cohorts defined by:

[ACQUISITION PERIOD / CHANNEL / CAMPAIGN / PRODUCT / OTHER]

Compare cohorts at equivalent periods since acquisition. Analyze where available:

- Cohort size
- Retention or repeat activity
- Cumulative revenue and revenue per customer
- LTV

Highlight cohorts with materially different downstream value or retention despite similar acquisition performance.

Do not compare immature cohorts directly with mature cohorts.

Quantify the differences but do not diagnose their causes yet.

PROMPT 05

Compare attribution views

Compare attribution across:

- **Models or sources:** [INSERT]
- **Date range:** [INSERT]

For each relevant channel or campaign, compare: conversions, revenue or conversion value, and share of attributed contribution.

Show how each channel's contribution changes between attribution views.

Highlight channels that remain stable and channels whose apparent contribution changes materially.

Clearly state the attribution definition behind each view.

Do not decide which model is "correct." Explain how the interpretation changes under each view.

PROMPT 06

Analyze an experiment

Analyze:

- **Experiment:** [INSERT]
- **Control:** [INSERT]
- **Treatment:** [INSERT]
- **Primary outcome:** [INSERT]

Compare: sample size and exposure, primary outcome, absolute difference, percentage lift, and guardrail metrics.

Where appropriate, calculate confidence interval and statistical significance.

Clearly distinguish between observed difference and statistically reliable difference.

Flag insufficient sample size, unequal exposure, or other factors that weaken the conclusion.

Do not recommend rollout yet.

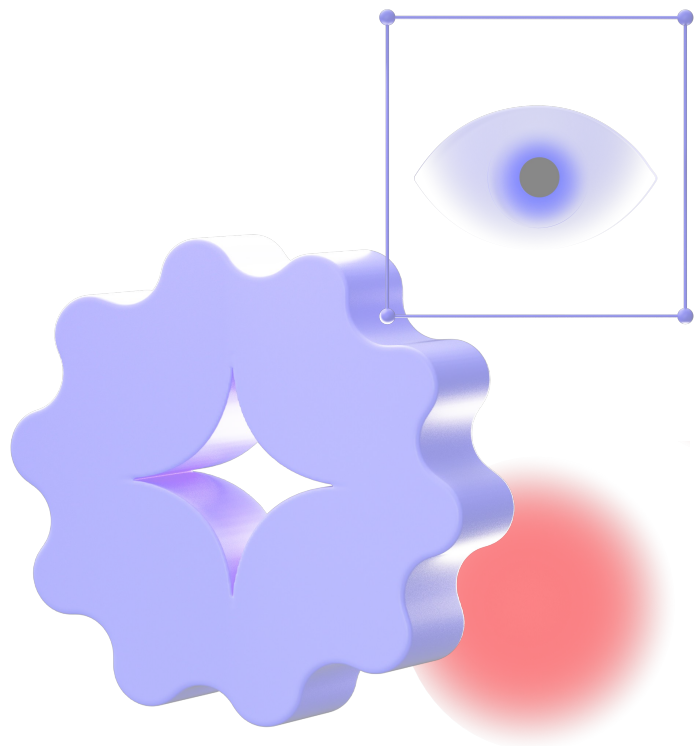
06

CHAPTER 6

Diagnose

Understand why performance changed

Once you know what happened, work out **why it happened**. These prompts help you decompose performance changes, test competing explanations, and separate evidence-backed drivers from plausible stories.



PROMPT 01

Diagnose a performance change

Diagnose:

- **Scope:** [INSERT]
- **Primary KPI:** [INSERT]
- **Observed change:** [INSERT]
- **Benchmark:** [PREVIOUS PERIOD / TARGET / FORECAST]

Decompose the KPI into its underlying drivers. Then identify: which component metrics changed, which channels, campaigns, audiences, products, or other segments contributed most, how much each material factor contributed, how much each material factor contributed to the overall movement and whether the result reflects within-segment performance, a mix shift, or both

Prioritize drivers by absolute impact rather than percentage movement alone.

If the benchmark is a target or forecast, compare the key assumptions with actual performance.

Return: **Driver | Evidence | Contribution | Confidence**

Separate: confirmed drivers, likely contributing factors, hypotheses requiring more evidence. Do not recommend actions yet.

PROMPT 02

Diagnose a funnel or lead-quality problem

Diagnose deterioration in: [FUNNEL / LEAD QUALITY / DOWNSTREAM CONVERSION]

Current period: [INSERT] **Benchmark:** [INSERT]

Compare progression through [INSERT FUNNEL] and break the result down by [CHANNEL / CAMPAIGN / AUDIENCE].

Determine whether the problem is mainly caused by:

- Lower volume entering the funnel
- Lower stage-to-stage conversion
- A shift toward lower-quality acquisition sources
- Deterioration within existing sources
- A downstream qualification or sales-process change

Quantify which stage or segment accounts for the largest downstream loss.

Do not assume the problem belongs to marketing if the evidence points further down the funnel. Separate confirmed drivers from issues that require more evidence.

PROMPT 03

Diagnose an anomaly and rule out a data problem

Investigate: **Metric:** [INSERT] **Observed anomaly:** [INSERT] **Period:** [INSERT]

Check:

- Whether the anomaly is genuinely outside normal variation
- Whether it appears across independent data sources
- Which segments contribute most
- Whether related metrics support or contradict it
- Whether tracking, freshness, or mix changes could explain it

Compare signals such as: ad-platform performance, web analytics, CRM outcomes, traffic, Spend, revenue.

Classify the result as:

- **Likely performance change**
- **Likely data or tracking problem**
- **Combination of both**
- **Insufficient evidence**

Return: **What we know** | **What the evidence suggests** | **What remains uncertain** | **Next check**

Do not force a performance explanation if the evidence points to a data issue.

PROMPT 04

Diagnose a change after an intervention or experiment

Performance changed after: **Intervention / experiment:** [INSERT] **Date:** [INSERT]
Observed result: [INSERT]

Assess whether the evidence supports the intervention contributing to the change.

Check: performance before versus after, the existing trend before the intervention, affected versus unaffected groups, treatment versus control, where available, sample size and exposure, supporting and guardrail metrics, tracking or implementation issues, and other changes occurring at the same time.

Separate **evidence consistent with an effect** from **evidence strong enough to support a causal conclusion**. Identify credible alternative explanations.

If the design cannot establish causality, state the strongest conclusion it can support.

Do not invent a post-hoc explanation simply because the result was unexpected.

PROMPT 05

Test hypotheses and finalize the diagnosis

We are trying to explain: [INSERT PROBLEM]

Generate or review the strongest competing explanations.

For each hypothesis, assess: supporting evidence, contradictory evidence, missing evidence, estimated contribution, and confidence

Return: **Hypothesis / driver | Supporting evidence | Contradictory evidence | Contribution | Confidence**

Use: **High confidence. Medium confidence. Low confidence**

Then build the deepest root-cause chain the evidence supports:

Headline result → Component metric → Segment → Underlying driver

Stop where the evidence stops.

Identify: main driver, secondary drivers, important explanations the evidence does not support, remaining uncertainty, the highest-value next check, if needed.

Finish with one verdict:

- **DIAGNOSIS COMPLETE:** The main drivers are sufficiently supported.
- **DIAGNOSIS PROVISIONAL:** A likely explanation exists, but important uncertainty remains.
- **MORE INVESTIGATION REQUIRED:** The evidence cannot yet distinguish between material competing explanations.

Do not recommend actions yet.

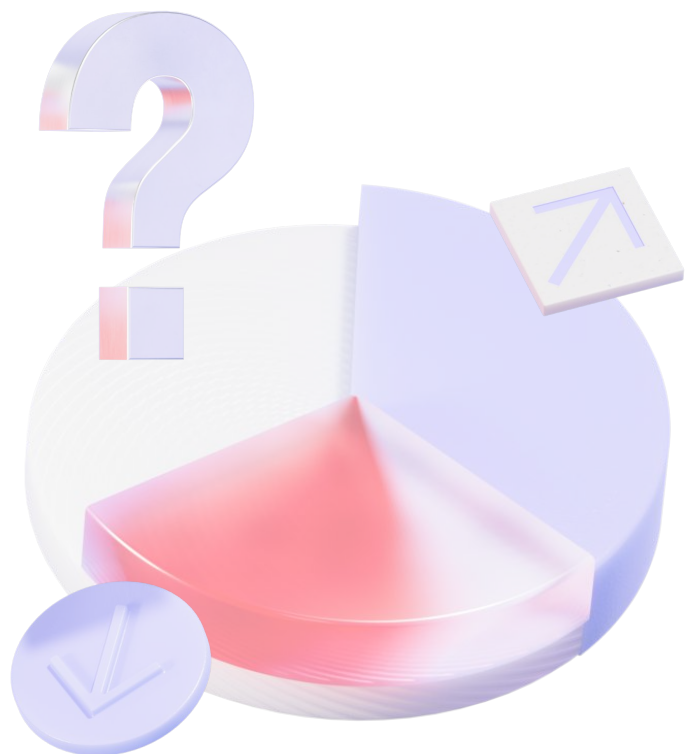
07

CHAPTER 7

Forecast

Estimate what is likely to happen next

Once you understand what happened and why, estimate what is likely to happen next. Good forecasts make assumptions visible, show a plausible range, and change when the evidence changes.



PROMPT 01

Forecast an outcome

Forecast:

- **Outcome:** [SPEND / CONVERSIONS / REVENUE / PIPELINE / OTHER]
- **Scope:** [INSERT]
- **Forecast horizon:** [INSERT]
- **Target or budget:** [INSERT]

Use the strongest available evidence including current run rate, historical performance, seasonality, funnel conversion rates, conversion lag, and recent changes in channel or customer mix.

Return:

- Current position
- Baseline forecast
- Reasonable range
- Gap to target or budget
- Performance required from now onward to hit the target
- Key assumptions

If relevant, compare the required future performance with the normal historical range.

Classify target attainment as: On track. At risk. Requires unusually strong performance. Outside the observed historical range.

Clearly separate observed data from forecast assumptions.

PROMPT 02

Build base, upside, and downside scenarios

Create three scenarios for: **Outcome:** [INSERT] **Forecast horizon:** [INSERT]

Build:

- **Base case:** current conditions broadly continue
- **Upside case:** [INSERT ASSUMPTIONS]
- **Downside case:** [INSERT ASSUMPTIONS]

Vary the most important drivers such as spend, traffic, acquisition cost, conversion rate, funnel conversion, and revenue per conversion.

Return: **Scenario | Key assumptions | Outcome | Efficiency | Target variance**

Use plausible ranges supported by the available evidence. Treat scenarios as conditional outcomes, not probabilities.

PROMPT 03

Model a budget reallocation

Model this proposed budget change:

From: [CHANNEL / CAMPAIGN + AMOUNT]

To: [CHANNEL / CAMPAIGN + AMOUNT]

Compare the current and proposed allocations using historical efficiency, current performance, downstream business value, and evidence about marginal performance at higher or lower spend.

Estimate the effect on conversions, revenue, blended CPA or CAC, and blended ROAS.

Return: Allocation | Expected outcome | Range | Main assumption | Confidence

Flag where the model assumes past performance will scale and where that assumption is weak. Do not recommend whether to make the change yet.

PROMPT 04

Forecast a new campaign before launch

Forecast:

- **Campaign:** [INSERT]
- **Budget:** [INSERT]
- **Duration:** [INSERT]
- **Channel:** [INSERT]
- **Objective:** [INSERT]
- **Audience / market:** [INSERT]

Identify the most comparable historical campaigns or benchmarks. Use them to estimate reach or traffic, conversions, CPA or CAC, revenue, and ROAS.

Return: Metric | Benchmark | Forecast | Reasonable range | Main assumption

Highlight the differences between the new campaign and its benchmarks that create the greatest uncertainty. Clearly distinguish historical inputs from assumptions and calculated outputs.

PROMPT 05

Stress-test and update a forecast

Review the forecast for:

Outcome: [INSERT] **Original forecast:** [INSERT] **Latest actual data through:** [INSERT]

Compare forecast versus actual performance, absolute and percentage error, and original assumptions versus actual outcomes. Identify which assumptions differ most from reality.

Then test how reasonable changes in the most important assumptions affect the result. Focus on variables such as: spend, traffic, acquisition cost, conversion rate, revenue per conversion, funnel conversion.

If the evidence has materially changed, produce: **Previous forecast | Updated forecast | Change | Reason**

Finish with: updated baseline, plausible range, main source of uncertainty, most influential assumption, forecast confidence: **High / Medium / Low**, whether the revised forecast materially changes the decision

Avoid false precision.

08

CHAPTER 8

Recommend

Turn evidence into clear, prioritized actions

Once you understand what happened, why it happened, and what is likely to happen next, decide what to do about it. Recommendations should follow from the evidence, account for uncertainty, and focus on actions likely to produce meaningful business impact.

PROMPT 01

Recommend and prioritize actions

Based on the completed analysis, diagnosis, and forecast, recommend what we should do about: **[INSERT PROBLEM OR DECISION]**

Identify only actions supported by the evidence. For each option, assess: supporting evidence, expected business impact, confidence, effort or cost, time to impact, main assumption, and risk or downside.

Return: **Priority | Action | Evidence | Expected impact | Confidence | Effort | Risk**

Classify each as: **Act now / Test first / Monitor / Do not pursue.**

Prioritize business impact over superficial metric improvements.

Where relevant, account for trade-offs such as volume versus quality, short-term efficiency versus downstream value, or the risk of acting on an uncertain anomaly.

Stress-test the highest-priority recommendation and weaken it if the evidence does not support the original version.

Finish with: **Recommendation | Why | Expected impact | Confidence | Main risk | Next step**

PROMPT 02

Recommend a budget allocation

Recommend how to allocate:

Total budget: [INSERT] **across:** [CHANNELS / CAMPAIGNS]

Use: current and historical performance, downstream business value, forecast scenarios, marginal efficiency where available, and strategic constraints.

Return: **channel/campaign, current budget, proposed budget, change, evidence, expected impact, and confidence.**

Ensure allocations total the available budget. Do not assume the best-performing channel can absorb additional spend at the same efficiency. Where scalability is uncertain, recommend a controlled change.

PROMPT 03

Recommend the next experiment

Based on: **[INSERT FINDING, UNCERTAINTY, OR COMPLETED EXPERIMENT]** decide the most useful next testing step.

If no experiment has been run, define: hypothesis, control, treatment, primary KPI, guardrails, expected business or learning value, and required sample or duration.

If an experiment has already been completed, recommend: Roll out / Roll out cautiously / Run a follow-up test / Do not roll out / Insufficient evidence.

Base the decision on effect size, reliability of the result, business impact, guardrail metrics, and risk and reversibility.

Distinguish statistical evidence from commercial significance.

PROMPT 04

Define how success will be measured

Before implementing: **[INSERT RECOMMENDATION]** define how we will determine whether it worked.

Specify:

- Primary success metric
- Guardrail metrics
- Baseline or control
- Minimum meaningful improvement where possible
- Evaluation period and evaluation date

Define what would count as: success, no meaningful impact, and negative impact.

Identify any external changes that could make the comparison misleading.

Set the criteria before observing the result.

PROMPT 05**Prepare and execute approved campaign changes**

Prepare the following recommendation for execution: [INSERT APPROVED RECOMMENDATION]

First show:

Platform | Campaign/ad set | Setting | Current value | Proposed value | Evidence | KPI to monitor

Flag anything that cannot be verified, cannot be executed as specified, or differs from the approved recommendation.

Do not make any changes until I explicitly approve this checklist.

After approval, apply only the approved changes where the connected platform and available tools support them.

Before execution, verify:

- Correct account and campaign
- Current setting has not materially changed
- Proposed value matches the approved value

If anything has changed since approval, stop and flag it.

After execution, return: Campaign/ad set | Setting | Previous value | New value | Status

Do not make additional optimizations outside the approved scope.

09

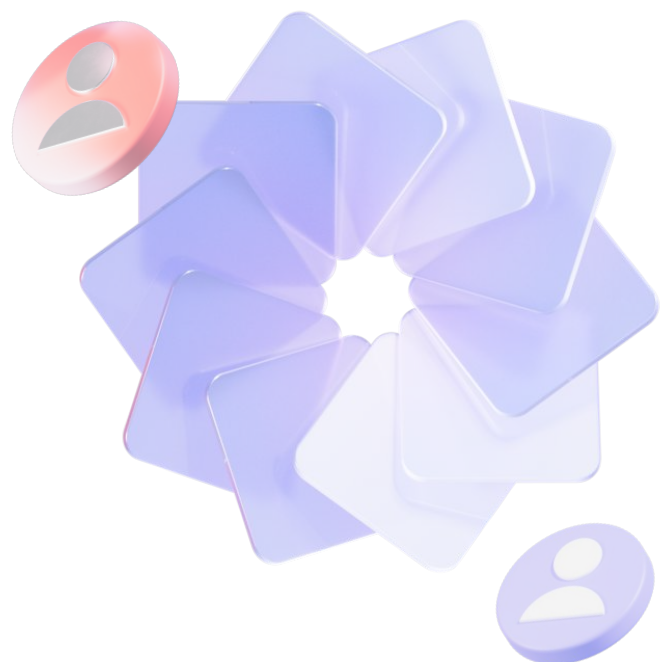
CHAPTER 9

Communicate

Adapt findings for stakeholders and decision-makers

Analysis only creates value when people can understand and act on it. These prompts help you adapt findings to different audiences and formats without changing the underlying evidence or overstating what the data shows.

Expert tip: Turn your analysis into a live, shareable dashboard with [Supermetrics Studio](#), so stakeholders can explore the numbers behind your conclusions.



PROMPT 01

Adapt analysis for a stakeholder

Turn the completed analysis into a clear update for:

- **Audience:** [CMO / CFO / CLIENT / PERFORMANCE MARKETER / DATA TEAM / OTHER]
- **Purpose:** [INFORM / SUPPORT A DECISION / PREPARE FOR A MEETING]
- **Length:** [INSERT]

Focus on what this audience needs to know while preserving the same facts, numbers, confidence, and recommendations.

Structure the update as:

- **Headline:** the most important result.
- **What changed:** the two or three most material findings.
- **Why it matters:** translate the result into the business outcomes this audience cares about.
- **What we recommend:** include only evidence-backed recommendations.
- **What to watch:** the main KPI, assumption, or risk.

Then anticipate the most important questions this stakeholder is likely to ask and provide:

Question | Answer | Evidence | Caveat

Use plain English. Explain technical concepts only where needed. If the evidence cannot answer an important question, say so rather than filling the gap.

PROMPT 02

Create a decision memo

Turn the completed analysis into a decision memo for:

Decision: [INSERT] **Audience:** [INSERT]

Include:

- **Decision required:** what needs to be decided
- **Recommendation:** the evidence-backed option
- **Evidence:** the strongest supporting findings
- **Expected impact:** quantify where possible
- **Confidence and risk:** main uncertainty or downside
- **Alternative:** the strongest credible alternative
- **Next step:** what should happen after the decision

Keep it concise enough to review before a meeting.

PROMPT 03

Build a presentation-ready analysis story

Turn the completed analysis into a presentation for:

- **Audience:** [INSERT]
- **Purpose:** [INSERT]

Build the story around: objective, headline result, most important changes, diagnosis, forecast or implications, recommendations, and next steps.

For each slide, provide: conclusion-led title, supporting evidence, recommended visual, and key takeaway.

Use one main message per slide.

Where a chart is needed, specify: appropriate chart type, conclusion-led title, axes and units, relevant benchmark, and a short analytical caption explaining what it shows and why it matters.

Do not imply causality unless the diagnosis supports it. Do not add findings that are not in the completed analysis.

PROMPT 04

Document methodology and limitations

Create a concise methodology note for this analysis.

Include:

- Business question
- Data sources
- Date range and scope
- Metric definitions
- Granularity
- Important transformations or joins
- Comparison or benchmark
- Analytical method
- Exclusions
- Assumptions
- Known limitations

Separate limitations into: affects interpretation, and does not materially affect the conclusion.

Include enough detail for another analyst to understand how the result was reached. Do not describe methodology that was not actually used.

PROMPT 05

Audit a report for unsupported claims

Audit this draft against the completed analysis:

[INSERT REPORT OR DRAFT]

Review every material factual, analytical, causal, forecast, and recommendation claim.

Classify each as:

- Supported
- Partially supported
- Unsupported
- Overstated

Flag:

- Numbers that do not match the analysis
- Incorrect comparisons
- Correlation presented as causation
- Hypotheses presented as findings
- Forecasts presented as certainties
- Recommendations presented as guaranteed outcomes
- Important caveats that have been removed

Return: **Claim | Classification | Evidence | Problem | More accurate wording**

For anything weakly supported, rewrite it as the strongest claim the evidence genuinely supports.

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CHAPTER 10

Monitor & Operationalize

Turn one-off analysis into a repeatable workflow

The final stage turns one-off analysis into a repeatable system. Define what matters, apply consistent thresholds, and surface only the exceptions that require attention.

PROMPT 01

Monitor performance against thresholds

Review the latest complete data for:

- **Scope:** [INSERT]
- **KPIs:** [INSERT]
- **Targets / budgets:** [INSERT]
- **Tolerance:** [INSERT]

Compare performance against: target, previous equivalent period, historical range, budget, and latest forecast.

Flag only material exceptions: KPI significantly off target, abnormal performance movement, overspend or underspend risk, and actual performance materially diverging from forecast.

Return: **Priority | KPI / issue | Current value | Benchmark | Variance | Business impact | Next check**

Suppress normal variation, low-volume noise, and immaterial differences.

If forecast assumptions have materially diverged from reality, flag whether a reforecast is required.

Do not diagnose or recommend action until the exception has been investigated.

PROMPT 02

Monitor data quality and tracking health

Review the latest data for:

- **Sources:** [INSERT]
- **Expected latest complete period:** [INSERT]

Check: freshness, missing dates or entities, unexpected row-count changes, metrics that stop populating, partial periods, and suspicious tracking changes.

Compare independent signals where possible.

Return: **Source | Issue | Evidence | Potential impact | Severity**

Classify each issue as: likely data/tracking problem, possible data/tracking problem, likely genuine performance change, or insufficient evidence.

State which reports or analyses may be affected. Do not treat missing data as zero or automatically repair it.

PROMPT 03

Measure whether an implemented recommendation worked

Evaluate:

- **Change implemented:** [INSERT]
- **Implementation date:** [INSERT]

Use the success criteria defined before implementation:

- **Primary KPI:** [INSERT]
- **Guardrails:** [INSERT]
- **Baseline/control:** [INSERT]
- **Evaluation period:** [INSERT]

Compare actual performance with the agreed criteria.

Return: **Metric | Baseline | Result | Change | Success threshold | Status**

Classify the recommendation as: Working as expected / Positive signal, more data required / No meaningful impact / Negative impact.

Check for other changes that could affect the comparison. Do not attribute the result to the recommendation unless the evidence supports it.

PROMPT 04

Produce a recurring exception-led report

Produce the recurring [DAILY / WEEKLY / MONTHLY] report for [SCOPE].

Use the agreed: metric definitions, data sources, benchmarks, validation checks, and materiality thresholds.

First confirm that the latest data is complete and reliable. Then surface only: material performance changes, target or budget risks, forecast deviations, data-quality issues, and important progress after recent changes.

Suppress: normal variation, low-volume noise, duplicate alerts, and issues already under investigation.

Return: **Priority | Issue | Evidence | Business impact | Next step**

If nothing materially requires attention, state: No material exceptions detected.

Do not manufacture commentary simply to fill the report.

PROMPT 05

Design a closed-loop optimization workflow

Design a repeatable workflow for:

- KPI: [INSERT]
- Target: [INSERT]
- Scope: [INSERT]

Define each stage:

- **Monitor:** KPI, benchmark, and materiality threshold
- **Trigger:** the condition that warrants investigation
- **Diagnose:** metrics and dimensions required to identify the driver
- **Recommend:** types of action that may be considered
- **Approve and execute:** what requires human approval before execution
- **Measure:** success metric, guardrails, baseline, and evaluation period

Return: Monitor → Trigger → Diagnose → Recommend → Human approval → Execute → Measure

Keep the workflow focused on material business outcomes and avoid thresholds that create excessive false alerts.

From question to action

Good analysis isn't just about getting to an answer faster. It's about making sure the answer is based on the right question, reliable data, and evidence you can defend.

Used together, the workflows in this playbook give you a repeatable way to move from:

Question → Data → Analysis → Decision → Action

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