

Client reporting proposal

Proposed: Illustrative discussion proposal for marketing reporting workflow.

Proposed: Inspired by a public request. No client engagement is claimed.

Marketing reporting workflow · illustrative

The request in brief

- 01 Bring advertising, analytics and CRM reporting together.
- 02 Check reported figures against the original systems.
- 03 Document the workflow for the receiving team.

Proposed work sequence

Understand

Proposed: Confirm metric definitions and the available source exports.

Prototype

Proposed: Prototype one report before connecting every channel.

Verify

Proposed: Test refreshes and record known differences in attribution.

Proposed deliverables

- 01 Proposed: A source and metric definition inventory.
- 02 Proposed: A reviewable reporting prototype.
- 03 Proposed: A reconciliation log and operating guide.

Inputs and boundaries

Material to request

Proposed: Approved metric definitions and access to relevant exports.

Proposed: A reviewer who can explain attribution and reporting periods.

Confirm before committing

To confirm: Final scope, exclusions and ownership of supplied assets.

To confirm: Dates, fees and any third-party costs.

Proposed acceptance checks

Check	Evidence
Proposed: Completeness	Scope mapped to outputs
Proposed: Revision	Edits survive reopening
Proposed: Handover	Owner follows editing notes

Commercial details to confirm

- 01 To confirm: The provider has not issued a quote for this demonstration.
- 02 Proposed: A public job budget is not an accepted project price.
- 03 To confirm: No past results or customer endorsement are supplied.

A concrete next step

Proposed: Review this outline against the full brief before committing.

Proposed: Agree scope, inputs and commercial terms together.

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