

Know what's working.

1

Measure the path from attention to sales, then choose one place to improve.

Start with one goal, one owner and one weekly report.

This workshop example contains no verified Gasper results. Confirm the goals, team roles and source accounts before giving a performance verdict. Missing data stays **NOT CONNECTED**; it never becomes zero.

How are we doing?

Track **visits** → **enquiries** → **qualified leads** → **bookings/orders** → **sales** → **revenue**. Compare the last complete seven days with the prior seven, and the quarter with its target and a comparable prior period. Allow for seasonality and the time it takes leads to buy.

Core scorecard: qualified leads, bookings/orders, sales, collected revenue, ad spend and paid cost per qualified lead (campaign spend ÷ its qualified leads). Add gross profit when costs are available. Traffic and email clicks help explain the result; they are not sales.

Give the agent access in this order

What it needs	Who connects it / simple first step	Prove it works
Goals + context	Marketing lead: last two quarterly reports, approved goals and relevant decision emails.	Agent quotes the target, deadline and source.
Leads + sales	Sales/data owner: CRM, order or booking export, with dates, stable IDs, status and lead source.	One lead can be traced to its outcome.
Revenue + spend	Finance/ad owner: collected revenue and campaign spend for matching periods.	Totals reconcile to the source reports.
Traffic + search	Analytics owner: GA4 and Search Console read access, or dated exports by channel/landing page.	Correct account, dates and timezone.
Email + calls	Email/phone owner: delivered email, clicks, enquiries, unsubscribes; answered calls and outcomes.	Clicks/call taps stay separate from leads.

Connection rule: use your company-approved AI workspace and scoped read access. A dated CSV is enough for the pilot. Have the agent list each source, owner, account, period and last successful read. Keep customer details and credentials out of public reports.

What should we focus on? Follow the evidence.

Sources missing? Fix tracking and definitions first.

Visits up, qualified leads flat? Check targeting, offer and landing page.

Leads up, bookings flat? Check response time, routing and follow-up.

Bookings up, sales flat? Check fit and the sales process.

Sales up, profit down? Check margin and acquisition cost.

Too little data? Collect more before judging or scaling.

Set up your first agent.

2

One recurring job with clear inputs, rules, outputs and a human owner.

A suggested 45-minute kickoff

- 1. Pick one outcome (10 min).** Example: more qualified leads turning into appointments. Write the current baseline, target and deadline. If the baseline is unknown, measuring it is the first job.
- 2. Create one workspace (10 min).** Use the tool your company already approves. Name it "Marketing Performance." Add the reports, goal sheet, team map and dated exports. Put the prompt below in its instructions.
Setup links: [ChatGPT Projects](#) · [Claude Projects](#) · [Microsoft Copilot / SharePoint agents](#). Microsoft setup requires the applicable license/billing and permissions. Features vary by plan.
- 3. Run and check once (15 min).** Ask for one weekly report. A person checks three key numbers against their sources, one lead-to-sale path and the proposed action. Keep platform-attributed conversions separate; do not add them together as unique sales.
- 4. Repeat (10 min).** Pick a weekly time, output folder and reviewer. Start manually. Automate only after the report passes; if your approved tool supports scheduling, verify the first actual run and alert an owner when a source fails.

Copy this prompt into your approved AI tool

You are our Marketing Performance Agent.

First ask: What business and website is this? Who are our customers? What is our main goal, target and deadline? Who owns marketing, sales, data access and approval? What do Jean and Christina own? Which processes must be protected?

Read the approved goals, quarterly reports, relevant emails and performance exports. List what you can actually read and what is missing. Do not assume past chats or a connected account contain the needed data.

Compare complete, matching periods. Report qualified leads, bookings/orders, sales, collected revenue, ad spend and paid cost per qualified lead, matching spend to its lead sources. Cite the source, account, dates, timezone and definition for each number. Check duplicates and attribution differences. Mark missing data NOT CONNECTED and uncertain conclusions UNKNOWN.

Choose the main bottleneck. Propose at most three actions, ranked by likely business value, confidence and effort. Give each an owner, due date, cost, approval needed and proof of success.

Produce a one-page team report and a five-line boss update. Save sources, decisions and results in our shared work folder. Begin read-only. Ask the authorized person before sending, publishing, changing records or spending money.

Ask the team before assigning work

Fill in the names: outcome owner ____; marketing executor ____; sales/lead owner ____; analytics/IT owner ____; sponsor/approver ____.
One person may hold several roles. Confirm Jean and Christina's roles rather than guessing.

Agree on the reporting channel, weekly review time, budget limits and changes needing approval. Pick one shared task list: **action | owner | due | measure | proof | status**. An agent can prepare and track the work; a named person owns the outcome.

Prove a win. Then grow.

3

A small pilot creates the evidence and confidence for the next stage.

A practical 90-day path

Stage	Agent job + team action	Advance when...
Week 1 Get a baseline	Performance agent: connect the essential sources, agree on metric definitions and produce one weekly report.	Source checks pass; owner accepts the baseline.
Weeks 2-4 Capture one win	Action agent: propose one small test at the weakest stage. An owner approves and executes it, with a start/end date and rollback.	Before/after proof exists; quality and costs stay within limits.
Days 30-60 Make it repeatable	Coordinator agent: turn accepted actions into tasks; draft team/boss updates; track completion on the existing board.	Two repeat cycles work; saved time and outcomes are recorded.
Days 60-90 Expand carefully	Specialist agents: add the proven need - email, paid media, content or lead follow-up. Share one goal sheet and source record.	Each added agent has an owner, measured value and clear limits.

These are stages, not promises. Move faster or slower as evidence allows. Start with one agent; add jobs when they pay their way. Use inexpensive automation for routine collection and stronger review for decisions.

Handle sacred cows without making enemies

Invite the process owner. Ask: "What must stay reliable, and what makes this work hard?" Start with a tedious report or a missed handoff they want fixed. Give the team credit for the improvement.

Run beside the current process. Try one approved test for two weeks. Define success and a stop rule first. Keep a way back. Show the result, teach a teammate, then propose the next change.

Send the boss five useful lines

1. **Goal:** [business outcome, target, deadline]
2. **Result:** [before → after, matching period, source link]
3. **Value:** [measured revenue/profit or hours saved; costs]
4. **Confidence:** [data gaps, small sample, other changes]
5. **Next:** [one action, owner, due date, decision needed]

A win needs proof. Keep the original report, the action taken and the result. Use a control group or staggered test when practical; a before/after change alone does not prove AI caused it. Track lead quality, unsubscribes and customer experience as well as volume.

Count value honestly: separate measured profit from estimated value of time saved; subtract software and implementation costs. Attributed ad revenue ÷ ad spend is ROAS, not profit. Do not count the same sale twice.

Your first step tomorrow

Name the owner. Hold a 20-minute kickoff with marketing, sales and the data owner. Choose one goal, add the exports and run page 2's prompt. Aim for **one trusted report and one approved test**. Share an approved win story with evidence and team credit.

Useful links: [New agents: start here](#) · [GA4 reporting access](#). The setup links on page 2 open the official platform guides. Keep your performance reports private; share this public guide freely.