SOP: Pacing Document

Background

This document walks through the process of creating a new pacing document. This primarily focuses on eComm clients but can also be replicated for B2B clients. For B2B clients, irrelevant columns can be deleted from the client's sheet.

Notice: It is critical that steps 3-5 are followed precisely as outlined in this document. Failing to do so may result in the document not functioning correctly.

Step 1: Copy The Template

- Make a copy of [this](#) template.
- Upon copying, remove the square brackets ("[ ]") and replace "ClientName" with the name of the client in the title of the sheet.
    - Enter the client name as it appears in nova.

Step 2: Connect to Client Data Sources

- Log into Funnel and check all relevant template workspaces to see if the client's data sources are connected.

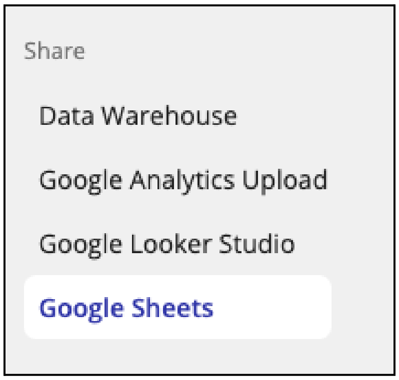
TEMPLATE - EMAIL (Klaviyo)
TEMPLATE - EMAIL (MailChimp)
TEMPLATE - FACEBOOK
TEMPLATE - GOOGLE ANALYTICS - OPERATING SYSTEM
TEMPLATE - GOOGLE ANALYTICS - GA4
TEMPLATE - GOOGLE ANALYTICS - PRODUCT LEVEL

- If the data sources are not connected, or if some are missing, refer to The New Client Report Standup [Checklist](#) to ensure all are added.

- If no data sources are connected, copy this checklist for the client.
- If data sources are missing and this checklist already exists for a specific client, simply add the missing data sources.

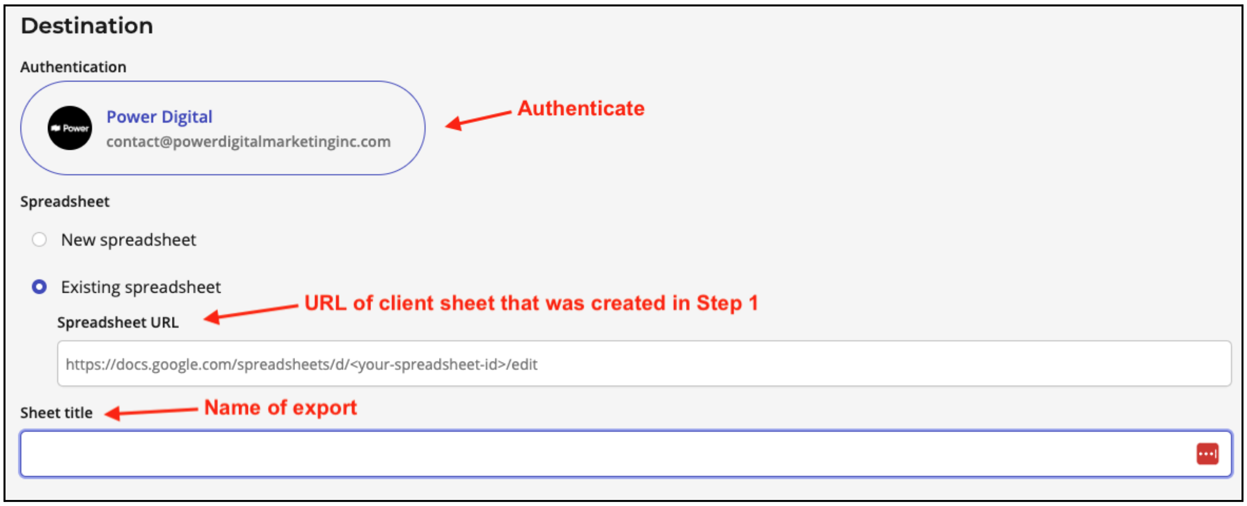
Step 3: Setup Platform Export

- In Funnel, navigate to The “ROLLUP - USE THIS FOR ALL EXPORT REQUESTS” Workspace.
- Upon landing, navigate to “Google Sheets” under “Share.”

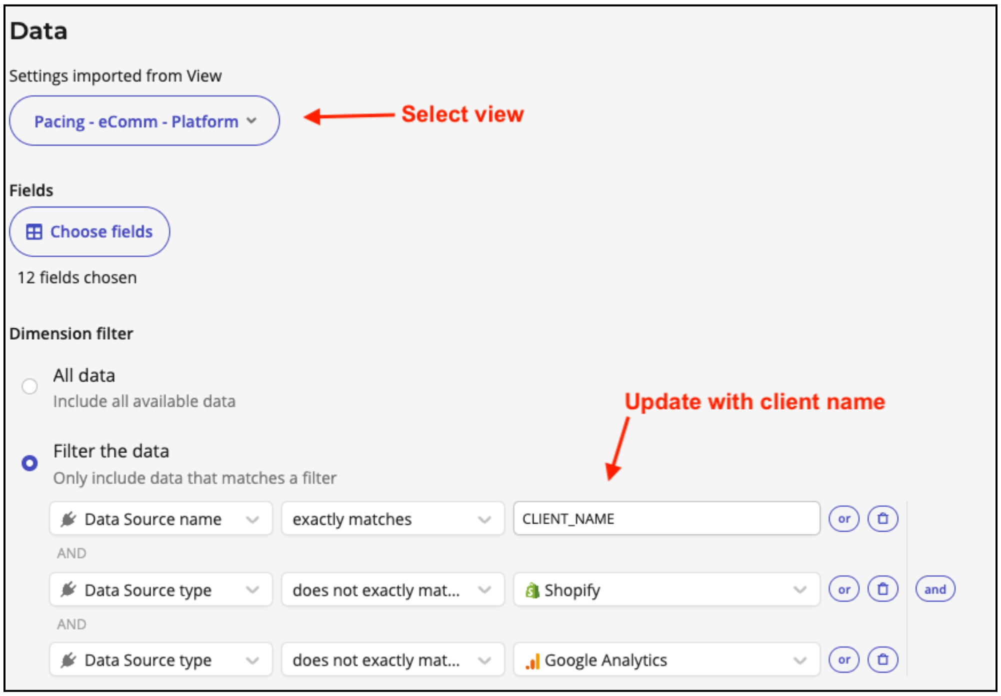


- Select “Create Data Share.”

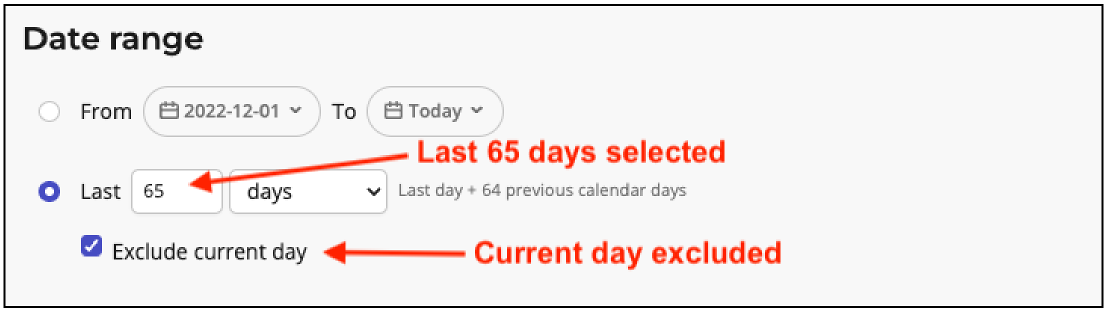
- Under The “Destination” section, complete the following steps.
  - Authenticate with contact@powerdigitalmarketinginc.com.
  - Copy and paste the URL of the client sheet that was created in [Step 1] under “Existing Spreadsheet URL.”
  - Change the sheet's title to “**Funnel Export - Platform**”.



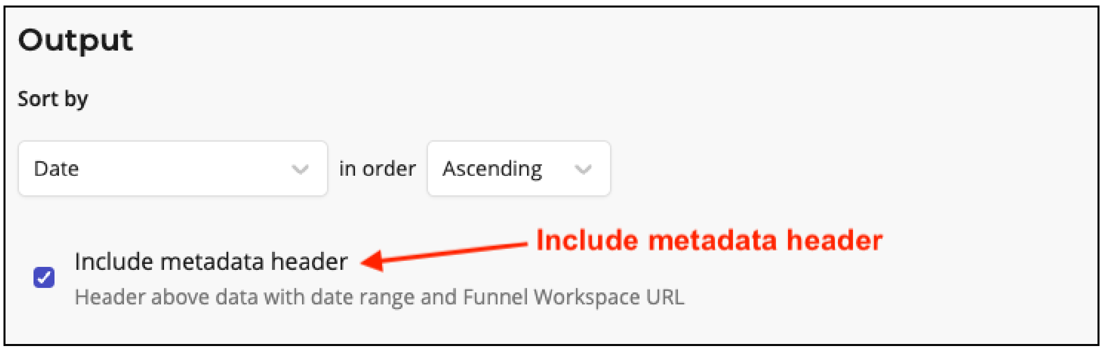
- Under The "Data" section, complete the following steps.
  - Import settings from the "**Pacing - eComm - Platform**" view.
  - Update the Data Source Name to filter to export data from the desired client.



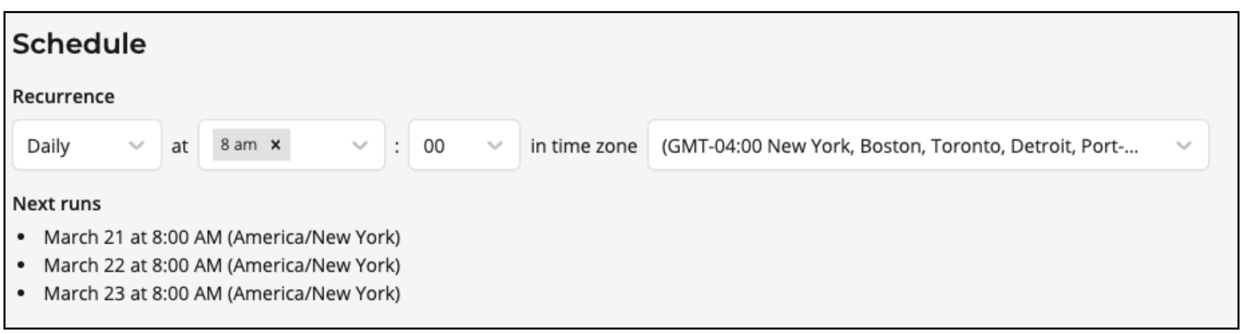
- Under The "Date Range" section, complete the following steps.
  - Extract the last 65 days of data. This is done so we can cover the current month and last month.
  - Enable the setting to exclude the current day's data.



- Under The “Output” section, complete the following steps.
  - Enable the setting to include the metadata header in the export.



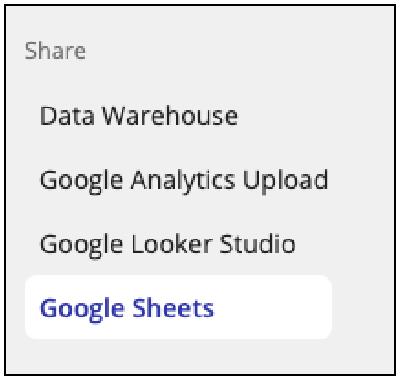
- Under The “Schedule” section, complete the following steps.
  - Ensure the data is being exported daily.
  - Ensure the time is set for early morning (e.g., 8 AM) in the required time zone. In most cases, your local time zone should suffice.



- Lastly, scroll back to the top of the screen and click “Save & Run.”

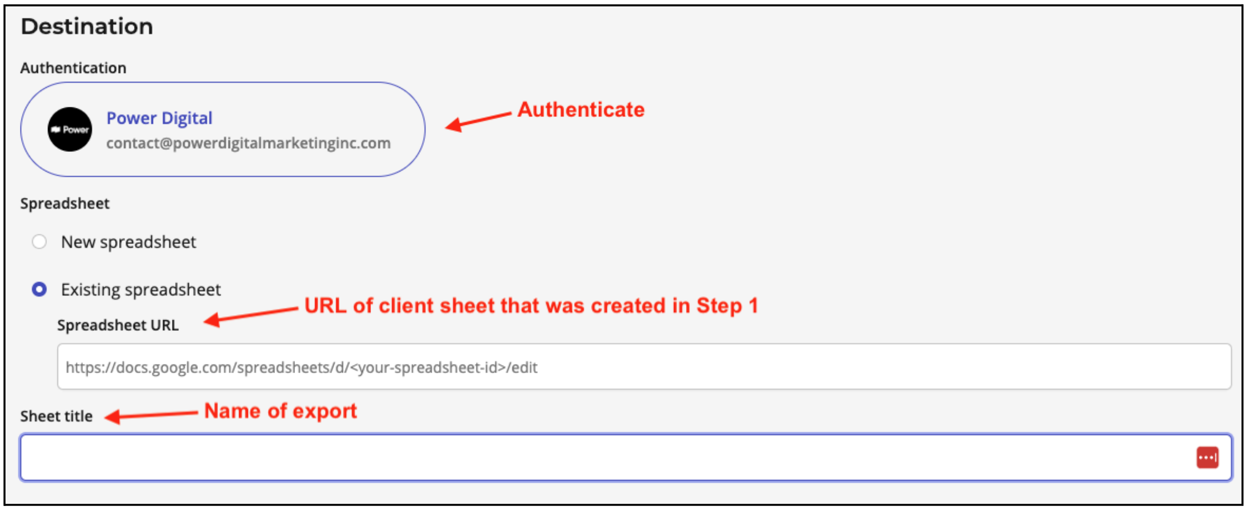
Step 4: Setup Shopify/GA Export

- **If the client does not use Google Analytics *and* Shopify, ensure data is deleted from the "Funnel Export - Shopify/GA" tab in your sheet and skip the remainder of this step.**
- In Funnel, navigate to The "ROLLUP - USE THIS FOR ALL EXPORT REQUESTS" Workspace.
- Upon landing, navigate to "Google Sheets" under "Share."

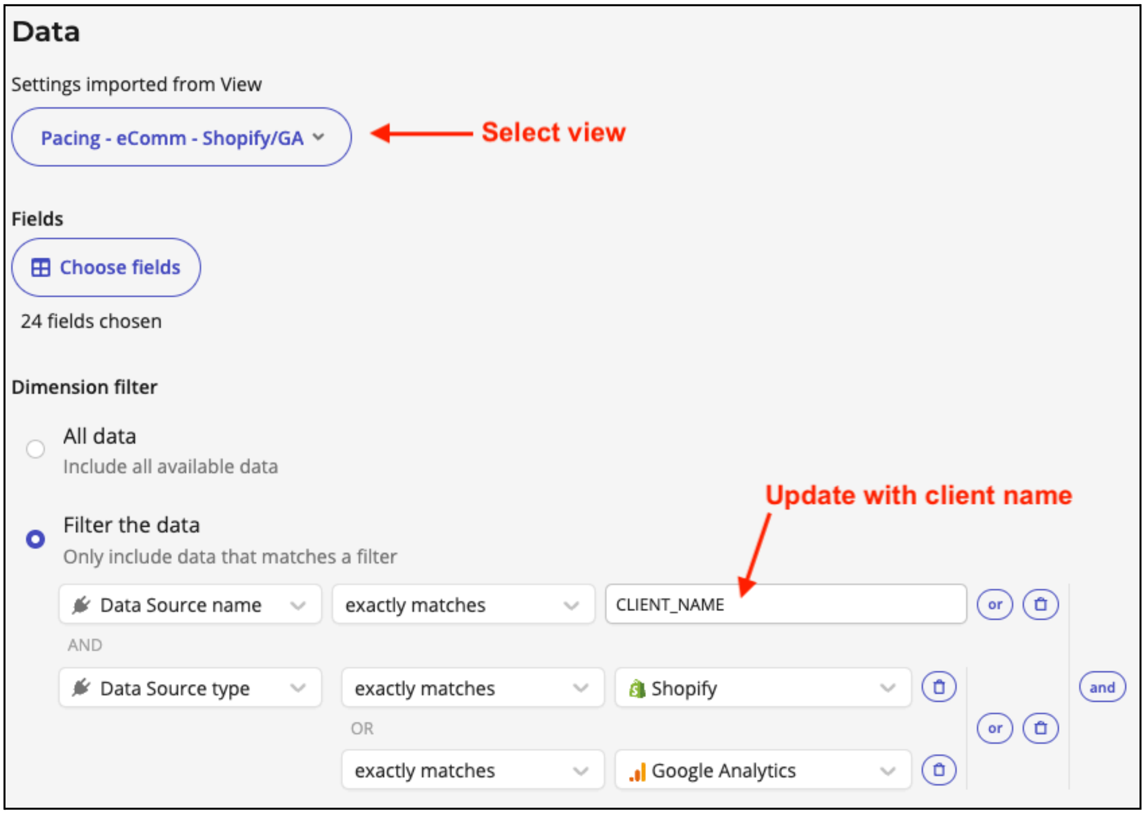


- Select "Create Data Share."

- Under The "Destination" section, complete the following steps.
    - Authenticate with contact@powerdigitalmarketinginc.com.
    - Copy and paste the URL of the client sheet that was created in Step 1 under "Existing Spreadsheet URL."
    - Change the sheet's title to "**Funnel Export - Shopify/GA**".

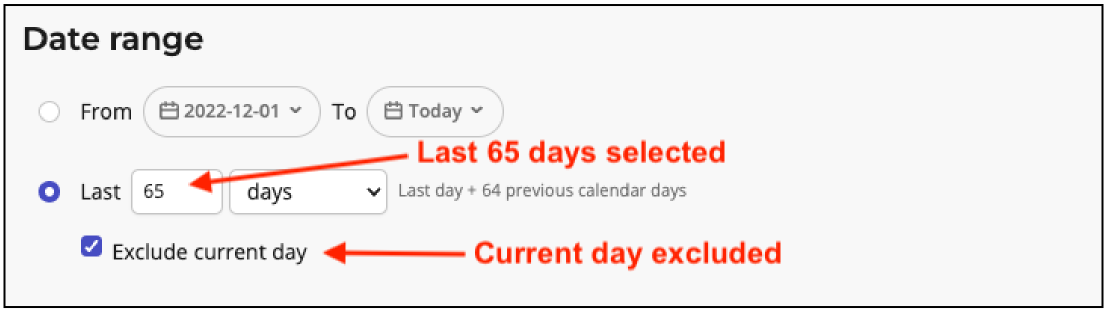


- Under The “Data” section, complete the following steps.
    - Import settings from the “**Pacing - eComm - Shopify/GA**” view.
    - Update the Data Source Name to filter to export data from the desired client.

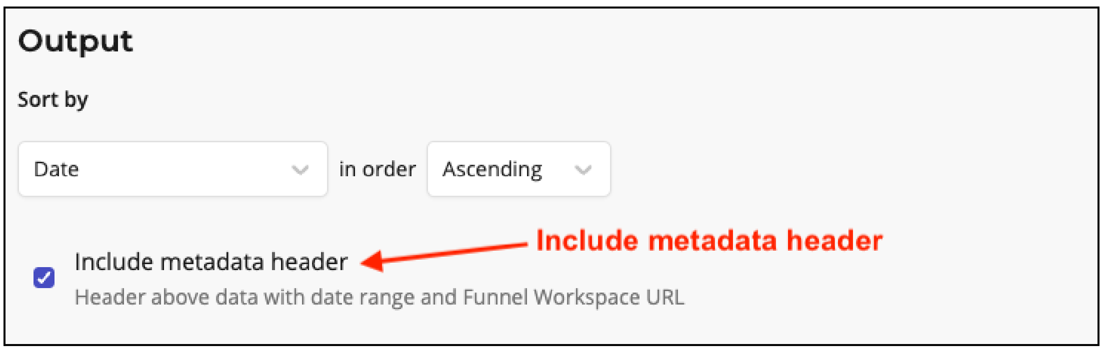


- Under The “Date Range” section, complete the following steps.
    - Extract the last 65 days of data. This is done so we can cover the current month and last month.

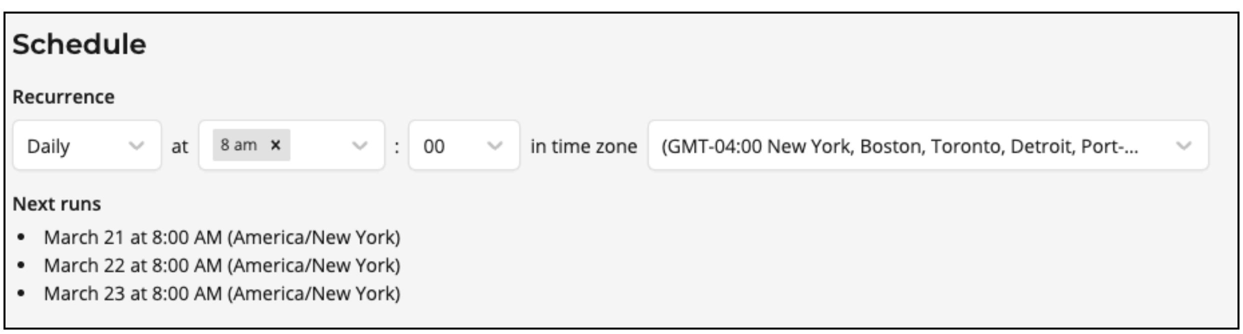
- Enable the setting to exclude the current day's data.



- Under The "Output" section, complete the following steps.
  - Enable the setting to include the metadata header in the export.



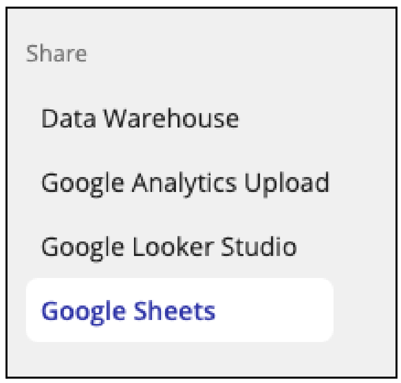
- Under The "Schedule" section, complete the following steps.
  - Ensure the data is being exported daily.
  - Ensure the time is set for early morning (e.g., 8 AM) in the required time zone. In most cases, your local time zone should suffice.



- Lastly, scroll back to the top of the screen and click "Save & Run."

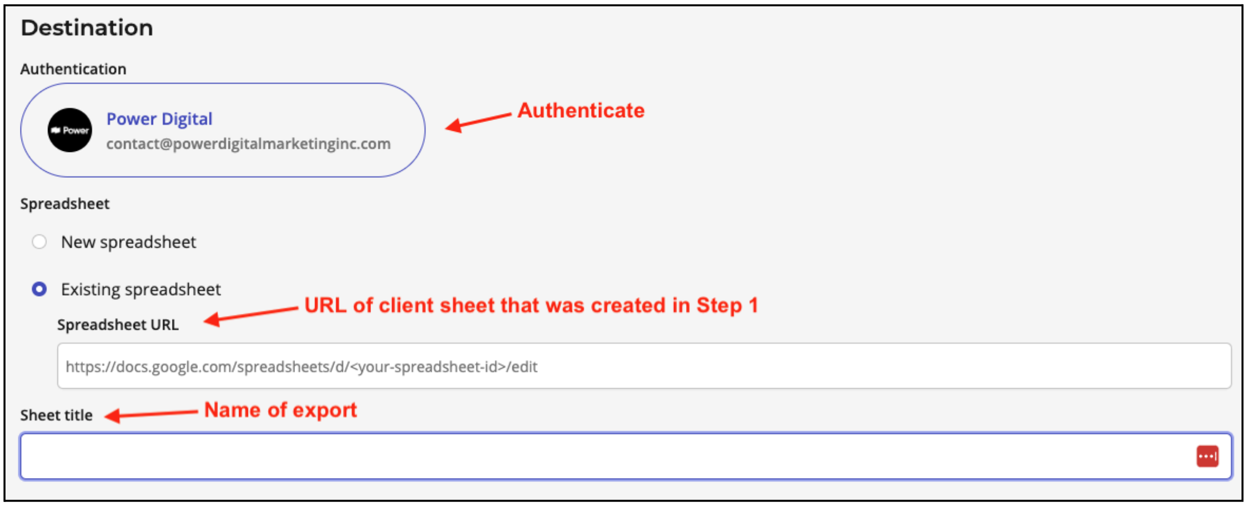
Step 5: Setup Amazon Export

- **If the client does not use Amazon, ensure data is deleted from the "Funnel Export - Amazon" tab in your sheet and skip the remainder of this step.**
- In Funnel, navigate to The "ROLLUP - USE THIS FOR ALL AMAZON EXPORT REQUESTS" Workspace.
- Upon landing, navigate to "Google Sheets" under "Share."

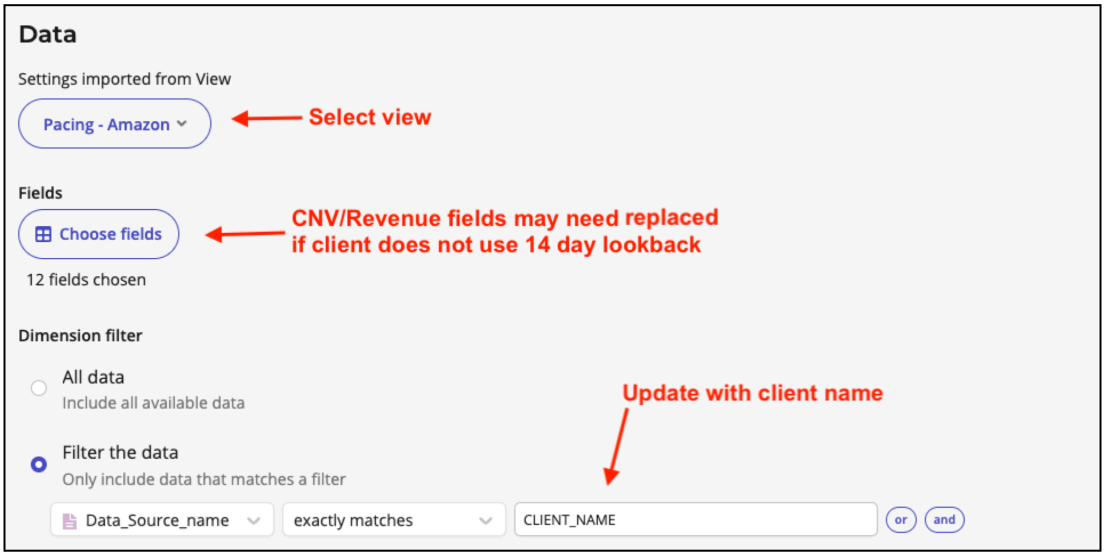


- Select "Create Data Share."

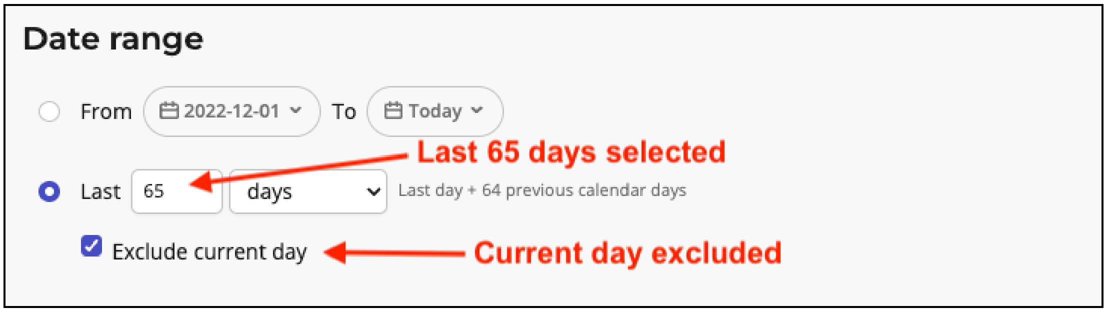
- Under The "Destination" section, complete the following steps.
    - Authenticate with contact@powerdigitalmarketinginc.com.
    - Copy and paste the URL of the client sheet that was created in Step 1 under "Existing Spreadsheet URL."
    - Change the sheet's title to "**Funnel Export - Amazon**".



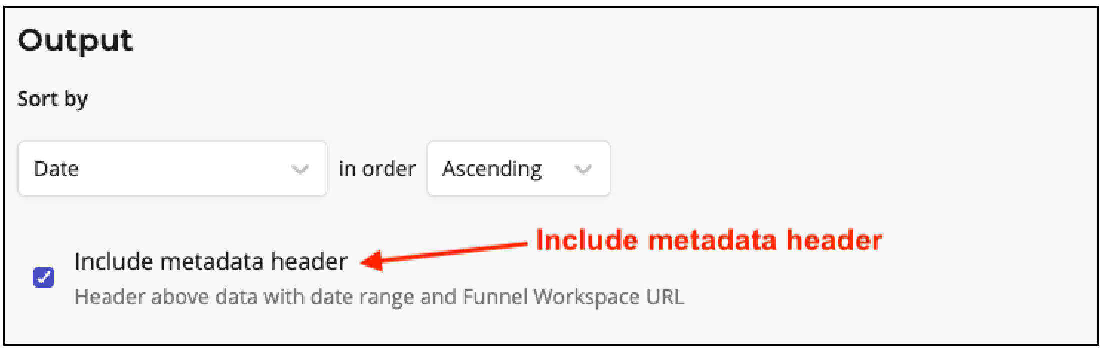
- Under The “Data” section, complete the following steps.
    - Import settings from the “**Pacing - Amazon**” view.
    - Update the Data Source Name to filter to export data from the desired client.
    - **Note**: The imported view uses The 14-day lookback for Revenue and Conversions.
        - If the client needs a different look back, you must **replace** the 14-day fields with the required fields.



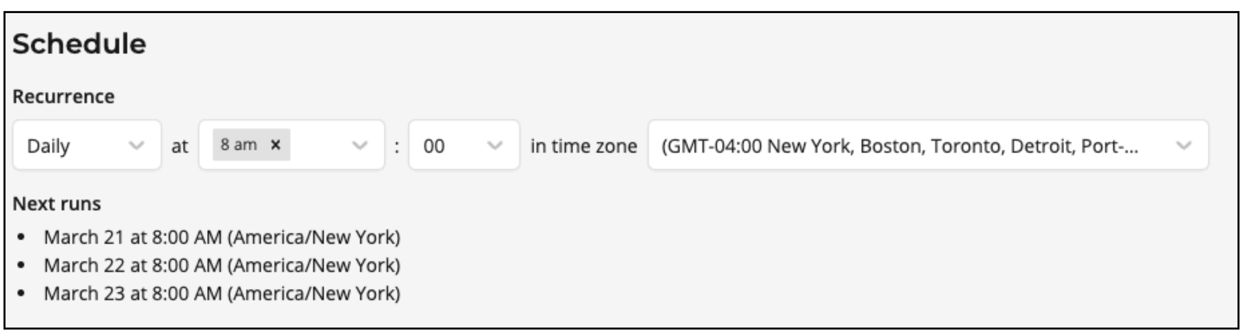
- Under The “Date Range” section, complete the following steps.
    - Extract the last 65 days of data. This is done so we can cover the current month and last month.
    - Enable the setting to exclude the current day’s data.



- Under The “Output” section, complete the following steps.
  - Enable the setting to include the metadata header in the export.



- Under The “Schedule” section, complete the following steps.
  - Ensure the data is being exported daily.
  - Ensure the time is set for early morning (e.g., 8 AM) in the required time zone. In most cases, your local time zone should suffice.



- Lastly, scroll back to the top of the screen and click “Save & Run.”

[Conditional] Step 6: Input Fiscal Calendar

- **Skip this step if the stakeholder has not requested a fiscal calendar view.**
- In the hidden "Fiscal Calendar" tab, paste the calendar information in columns A-G.
- You must input the fiscal calendar according to the column headers A-G.
    - This may require some manual intervention on your or the stakeholder's end.

A	B	C	D	E	F	G
Paste calendar in cells A-G, matching the format below. Modify with caution.						
Date	**Fiscal Year**	**Fiscal Month**	**Fiscal Week**	**Fiscal DOW**	**Fiscal DOM**	**Fiscal DOY**
1/1/23	2023	1	1	1	1	1
1/2/23	2023	1	1	2	2	2
1/3/23	2023	1	1	3	3	3
1/4/23	2023	1	1	4	4	4
1/5/23	2023	1	1	5	5	5
1/6/23	2023	1	1	6	6	6

[Conditional] Step 7: Unhide Fiscal Tabs

- **Skip this step if the stakeholder has not requested a fiscal calendar view.**
- Unhide tabs "Channel Breakdown [Fiscal]" and "Misc. Breakdown [Fiscal]".
- Hide tabs "Fiscal Calendar", "Channel Breakdown", and "Misc. Breakdown".

Step 8: Validate Export

- Once the client's pacing sheet is populated, validating the exported data against the source platforms is strongly encouraged to ensure accuracy.
- **Notice:** If you see empty Shopify metrics in the export, this may be because the client is not using the "Sales Transaction" Report. You will want to connect to this report in the "TEMPLATE - SHOPIFY" workspace.

Shopify + CAC/CPA	Google Analytics (UA)	Blended Performance	Facebook Ads	Google Ads	TikTok
Gross Sales	Sessions	Spend	Spend	Spend	Spend
$36,973	8,342	$6,143	$4,080	$1,363	$700
$32,187	5,564	$5,008	$3,013	$1,295	$700
$39,119	6,376	$4,725	$2,497	$1,528	$700
$35,562	5,548	$4,734	$2,514	$1,520	$700