



**ajaxunion**

# REPORTING REVIEW & PAID ADS TRANSITION GUIDE

Building the Infrastructure for Scalable Growth



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# INTRO

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## Data-Driven Decision Making

Transitioning from organic growth to paid media requires a shift in how we interpret data. In the B2B sector, the journey from initial click to closed deal is rarely linear.

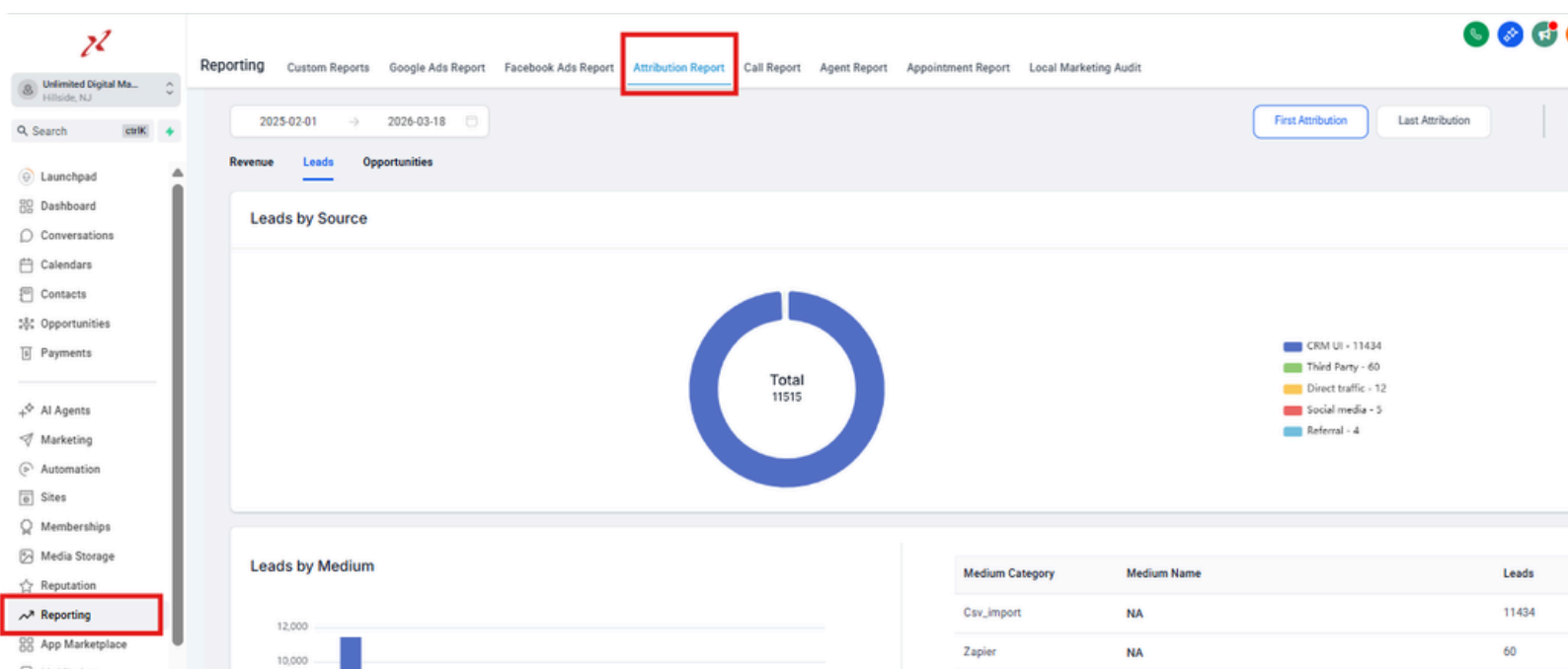
This guide ensures that your infrastructure at [app.ajaxunion.com](http://app.ajaxunion.com) is fully optimized to track every touchpoint. Before we spend a single dollar on ad spend, we must ensure our reporting is "source of truth" accurate. This transparency allows us to scale winners and cut losers with surgical precision.

# PHASE 1: NAVIGATING YOUR REPORTING DASHBOARD

Your dashboard at [app.ajaxunion.com](http://app.ajaxunion.com) is the nerve center of your growth strategy. Unlike standard reporting tools, this system integrates directly with Google Ads and Meta Ads to provide an "Attribution View." This allows you to see exactly which ad campaign, keyword, or creative resulted in a specific lead within your CRM.

## Technical Dashboard Overview

The "Reporting" tab is divided into specific segments for Google Ads, Facebook Ads, and overall Attribution. By toggling between these views, you can monitor your click-through rates, total spend, and, most importantly, your conversion data in real-time. This level of visibility ensures total accountability for every marketing dollar deployed.



## PHASE 2: ESTABLISHING YOUR B2B KPI BENCHMARKS

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To measure success, we must first define it. B2B benchmarks differ significantly from B2C; we focus on "Quality over Quantity." During this phase, we analyze your historical data to set benchmarks for the following:

- **Cost Per Lead (CPL):** The investment required to generate a new inquiry.
- **Lead-to-Opportunity Rate:** The percentage of leads that are qualified for sales.
- **Customer Acquisition Cost (CAC):** The total cost to win a new client.

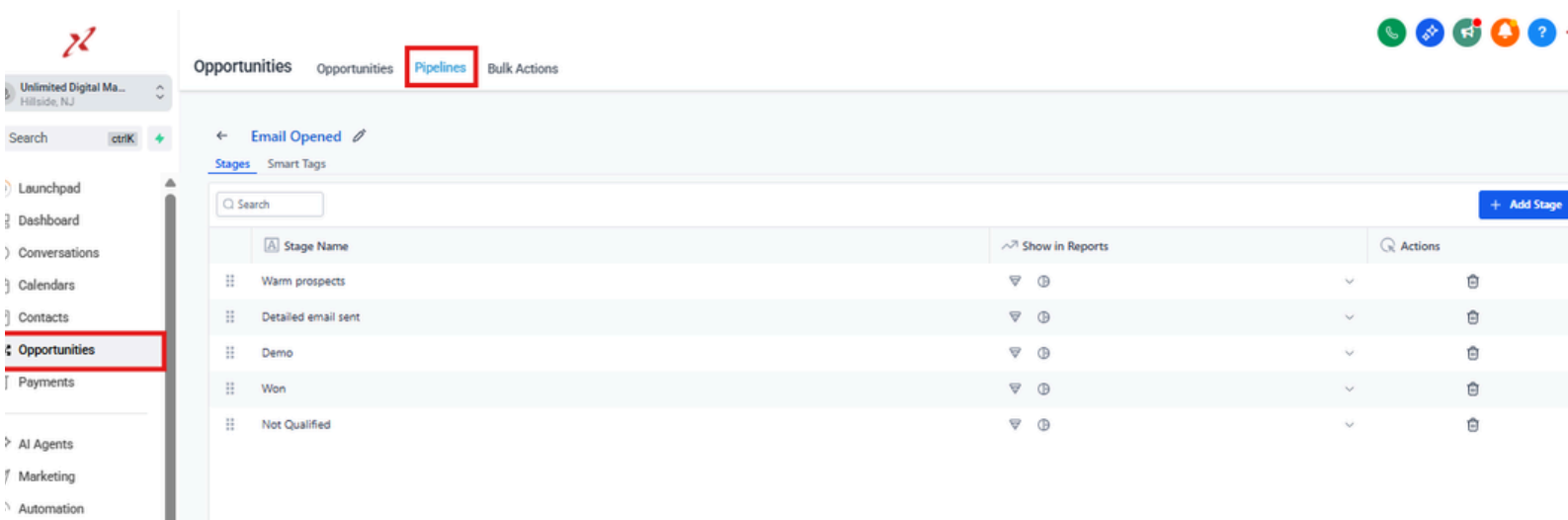
By establishing these numbers now, we can accurately predict the ROI of your upcoming paid campaigns.

# PHASE 3: IDENTIFYING GROWTH BOTTLENECKS

Scaling paid ads will only be successful if your "leaky bucket" is fixed. We use the Pipeline Overview in [app.ajaxunion.com](http://app.ajaxunion.com) to identify where prospects are dropping off. Common bottlenecks include slow lead response times, high landing page bounce rates, or a lack of automated follow-up.

## Conversion Rate Optimization

Before launching ads, we review the "Attribution View" to see which organic sources are currently converting. If an organic source has a 5% conversion rate but your landing page only converts at 1%, we address the page design and copy before initiating paid traffic.



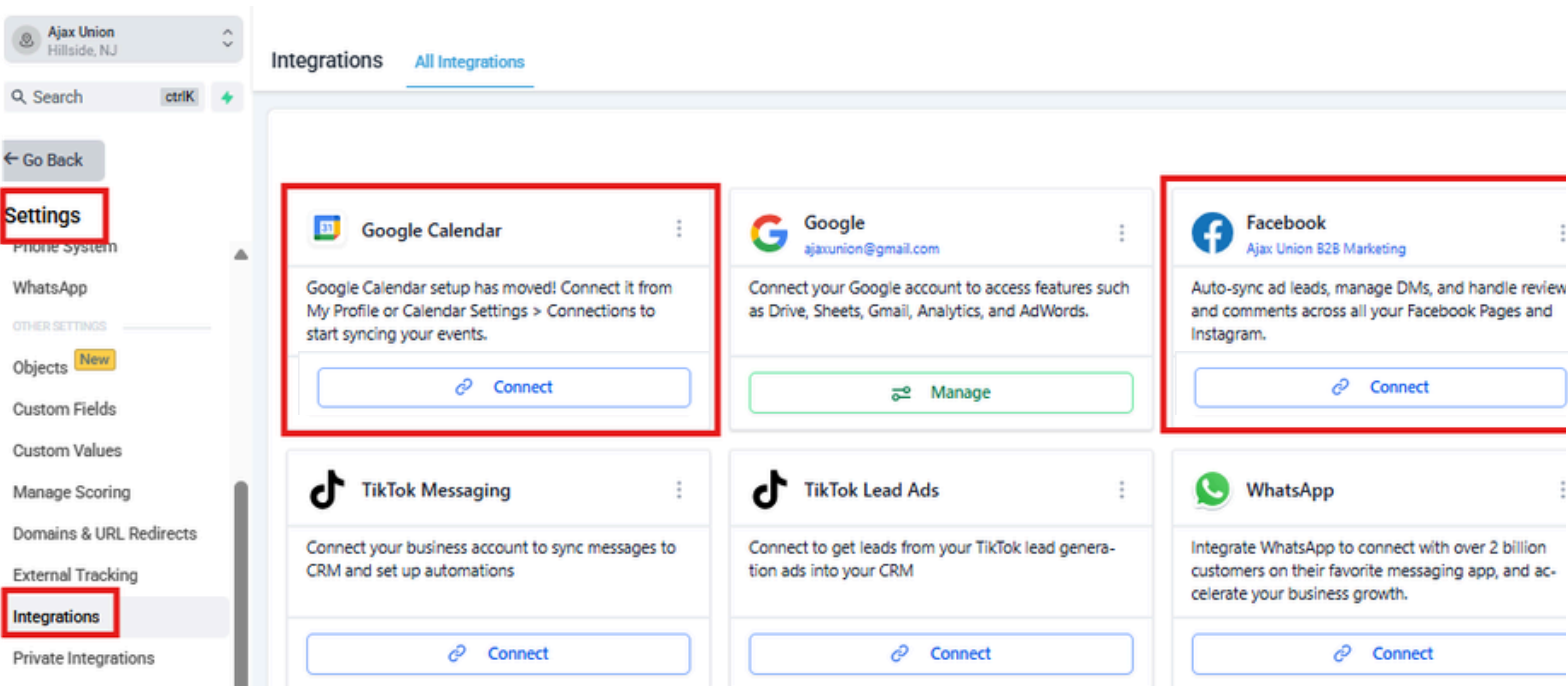
The screenshot displays the 'Opportunities' section of the app, with the 'Pipelines' tab selected. The main view shows a table of pipeline stages for 'Email Opened'. The table has columns for 'Stage Name', 'Show in Reports', and 'Actions'. The stages listed are: Warm prospects, Detailed email sent, Demo, Won, and Not Qualified. Each stage has a search icon, a dropdown arrow, and a trash icon.

Stage Name	Show in Reports	Actions
Warm prospects	▼ ⓘ	▼ 🗑️
Detailed email sent	▼ ⓘ	▼ 🗑️
Demo	▼ ⓘ	▼ 🗑️
Won	▼ ⓘ	▼ 🗑️
Not Qualified	▼ ⓘ	▼ 🗑️

# PHASE 4: PAID ADS READINESS CHECKLIST

To ensure a seamless transition into paid media, the following technical and strategic assets must be finalized within [app.ajaxunion.com](http://app.ajaxunion.com):

- **Ad Account Integration:** Google and Meta accounts linked in Settings > Integrations.
- **Tracking Pixels:** Google Tag Manager and Meta Pixel verified on all landing pages.
- **Lead Forms:** Native lead forms synchronized between Facebook/Google and the CRM.
- **Attribution Logic:** UTM parameters standardized for all ad URLs.
- **Sales Alignment:** Sales team trained on lead notification workflows.

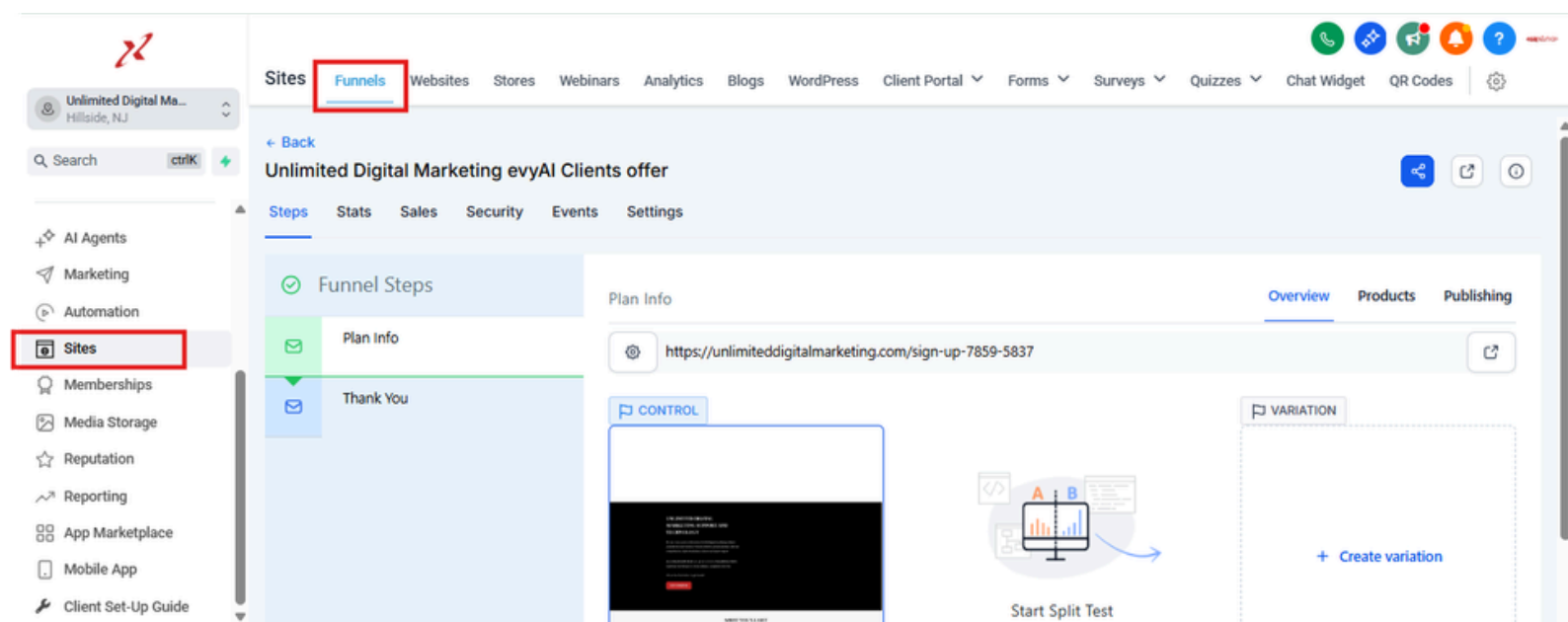


# PHASE 5: THE TRANSITION ROADMAP TO PAID MEDIA

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Scaling is a process, not an event. Our 90-day roadmap moves through three distinct stages:

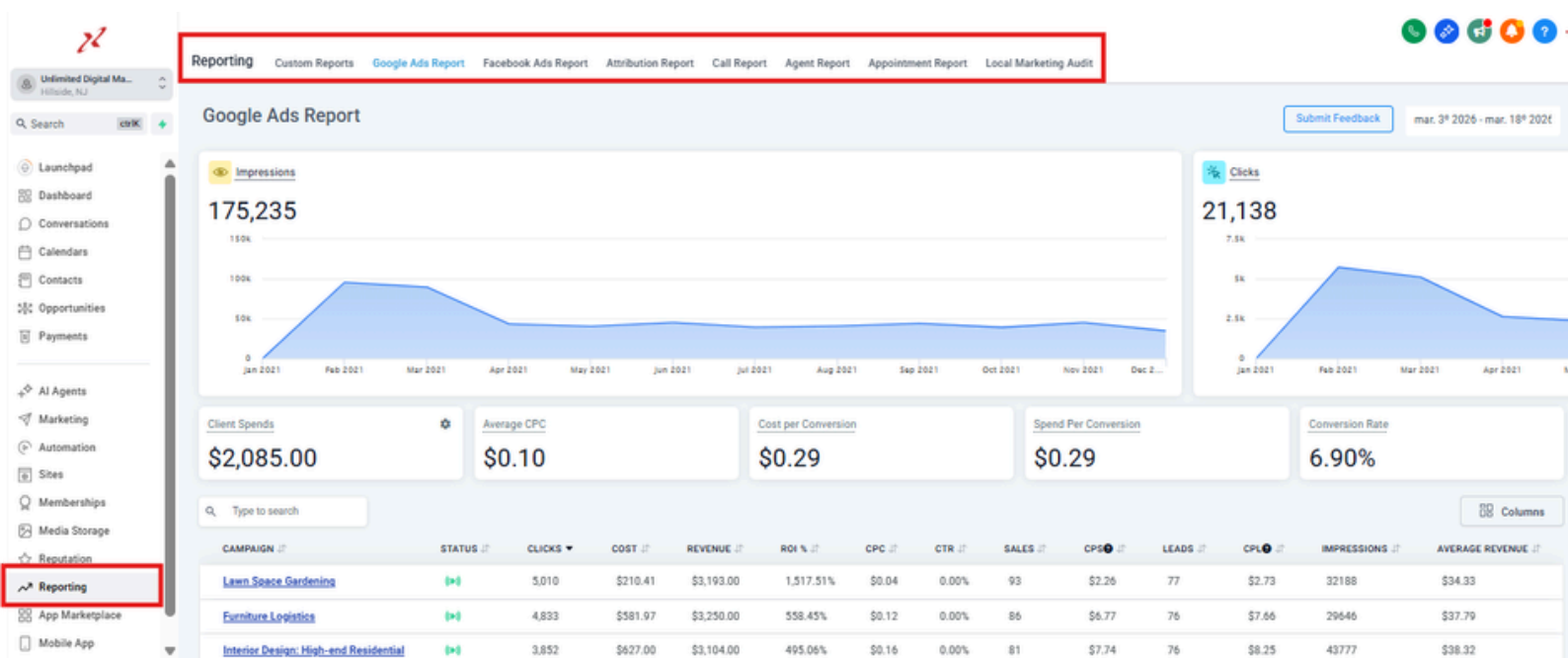
- 1. Days 1-30: The Testing Phase.** We launch "Alpha" campaigns to test messaging, audiences, and creative hooks.
- 2. Days 31-60: The Optimization Phase.** We double down on high-performing segments and refine the lead-scoring criteria
- 3. Days 61-90: The Scaling Phase.** With a proven CPL, we increase budgets to drive consistent, predictable lead volume.



# YOUR NEXT STEPS

With your reporting dashboard live and your readiness checklist complete, you are positioned to dominate your market. The data we collect over the next 30 days will serve as the foundation for your long-term growth.

- Review your Reporting Dashboard weekly.
- Ensure all "Won" deals are updated in the CRM for accurate ROI tracking.
- Prepare your creative assets for the Phase 1 Testing launch.



## ABOUT AJAX UNION

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Ajax Union is a digital marketing and technology company focused on helping businesses build scalable marketing infrastructure and sustainable growth systems.

Through its Unlimited Digital Marketing platform, Ajax Union provides businesses with a powerful CRM, automation, and lead management system designed to centralize marketing, communication, and customer engagement in one place.

In addition to delivering marketing strategy and implementation services, Ajax Union offers white-label CRM solutions powered by GoHighLevel, allowing businesses to operate advanced marketing automation, funnels, messaging, and reporting under their own branded platform.

To learn more about marketing services, if you are interested in a free trial, visit [ajaxunion.com](http://ajaxunion.com) or access our platform at [unlimiteddigitalmarketing.com](http://unlimiteddigitalmarketing.com).

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