

CONFIDENTIAL: INTERNAL USE ONLY

UTDM Agency Master SOP

2025 Edition

Brand: UT Digital Media

Document Type: Full-Funnel Performance Marketing & Operations SOP

Version: 1.0 (Q4 2025)

Prepared For: UTDM Performance Marketing Division

Date: October 2025

Table of Contents

1. Cover
2. Table of Contents
3. Introduction & Objectives
4. Core Principles & North-Star Metrics
5. Tools & Stack Overview
6. Naming & Structure Conventions
7. UTM & Tracking Setup
8. Google Ads Campaign Setup
9. Meta Ads Campaign Setup
10. Landing Page SOP
11. Google Sheets SOPs
12. Automation Framework
13. Creative Production SOP
14. Reporting & Dashboards
15. QA & Data Integrity
16. Continuous Improvement Framework
17. Key Appendices & Resources
18. Closing & Contacts

Introduction & Objectives

- **Purpose:** Master SOP for performance marketing, tracking, automation, and reporting
- **Audience:** Marketers, analysts, and sales executives
 - Training manual for new team members
 - Process reference for experienced staff
- **Objectives:** Generate high-quality leads and maximize ROI
 - Structured campaign execution
 - Accurate data tracking and reporting
 - Continuous optimization processes
- **Scope:** Google Ads, Meta Ads, SEO-assisted, CRM operations
- **Principles in action:** Data-driven, consistency, automation-first

Core Principles & North-Star Metrics

Core Principles

- **Data-Driven Decisions:** Every action (budget, creative, scaling) backed by measurable data
- **Consistency Over Creativity:** Repeatability builds growth
- **Automation First:** Manual repetition → automation → review
- **Transparency:** All results visible in shared dashboards and Sheets
- **Learning Loop:** Weekly learning → SOP update → new tests

North-Star Metrics

CPL	Cost per Lead	As per Profitability Sheet Target
CPQL	Cost per Qualified Lead	$\leq 1.3 \times \text{CPL}$
CAC	Cost per Acquired Customer	$\leq 25\text{--}30\%$ of AOV
MER	Marketing Efficiency Ratio (Revenue/Spend)	$\geq 4\times$ for B2C
Payback	Time to Recover CAC	< 45 days for service-based clients

Tools & Stack Overview

Campaigns Google Ads, Meta Ads Manager

Analytics GA4, GTM, Looker Studio

CRM TeleCRM, GoHighLevel

Automations Pabbly, Zapier, Apps Script

Reports Google Sheets, Looker Studio

Communication Slack, WhatsApp Business

Naming & Structure Conventions

- **Format:** Maintain naming discipline across all platforms

```
<Platform>_<Objective>_<Geo>_<Audience>_<Hook>_<YYYYMM>
```

- **Example:** Real-world application
 - FB_Lead_IND_Broad_FreeAudit_202510
- **Why it matters:** Ensures ad data, UTM, and CRM tracking align seamlessly
- **Implementation:** Apply consistently across platforms
 - Campaigns, ad sets/groups
 - Individual ads
 - Creative files and landing pages
 - Tracking documents and reports

UTM & Tracking Setup

- **UTM Template:**

```
utm_source={{platform}} (google / facebook / instagram)
utm_medium=cpc
utm_campaign={{campaign_name}}
utm_term={{keyword/audience}}
utm_content={{ad_name}}
```

- Example:

utm_source=facebook&utm_medium=cpc&utm_campaign=FB_Lead_IND_Broad_FreeAudit_202510&utm_term=broad&utm_content=VID_Testimonial_V1

- **GTM + GA4 Setup Checklist:**

- 1. Install GTM on site
 - 2. Create GA4 Events (generate_lead, view_item, purchase)
 - 3. Verify via Preview mode
 - 4. Link GA4 ↔ Google Ads
 - 5. Fire test lead to verify conversion in Ads

- **Meta Pixel & CAPI:**

- Pixel installed through GTM
 - Events: Lead, ViewContent, Contact
 - CAPI via GTM Server or Cloud Gateway

Google Ads Campaign Setup

- **Search Campaign:**

- Objective: **Leads**; Bidding: **Maximize Conversions** → shift to **tCPA** after 30 conversions
- Keywords: Start with **Exact** + add **Broad** after data collection
- Ads: 2–3 RSAs with pinning logic; Assets: Sitelinks, Callouts, CTA extensions
- Example: Campaign: `GADS_Search_IND_Exact_Packers_202510`
- AdGroup: `Exact_[packers+ movers+ mumbai]`

- **Performance Max Campaign:**

- Feed with 5 images, 3 videos, 5 headlines, 4 descriptions
- Use Customer Match for scaling and precision targeting
- Import Offline Conversions weekly for complete attribution

- **YouTube Lead Campaigns:**

- Hook in first 3 seconds: *"Before you move, see this..."*
- CTA overlay → LP link → Form submit tracked via GTM
- Best for awareness with high-intent audiences (In-market, Custom Intent)

Meta Ads Campaign Setup

- **Structure:**

- **Campaign Level:** Leads or Sales with Conversion Objective and CAPI enabled
- **Ad Set Level:** Start Broad, later use 1–5% Lookalike audiences
- **Ad Level:** Test 3–5 hooks/angles per ad set

- **Naming Examples:**

- Campaign: FB_Lead_IND_Broad_Audit_202510
- Ad Set: Broad_25-45_All
- Ad: VID_Testimonial_V1

- **Creative Testing Rules:**

- **CTR < 0.8%:** Hook fatigue – Replace headline/image
- **CPL > 1.5× target:** Ad fatigue – Pause variant
- **CTR > 2% & CPL < target:** Winner – Scale budget +20%

- **Best Practices:**

- Enable all placements for initial testing, then optimize
- 7-day learning period before major adjustments
- Dynamic creative: min. 2 images/videos + 3 headlines

Landing Page SOP

- **Core Structure:**

- Headline = Same as Ad Hook for message match
- Trust signals (logos/testimonials) positioned near CTA
- Form: 4–6 fields, mobile responsive design
- Page load speed \leq 2.5s for optimal user experience
- Conversion event generate_lead via GTM for tracking

- **Performance Benchmarks:**

Conversion Rate	Bounce Rate	Avg Time on Page
5–12%	< 65%	> 40s

- **Quality Indicators:**

- Direct correlation between ad creative and landing page
- Clear value proposition above the fold
- CTA visible without scrolling on mobile devices

- **Tracking Elements:**

- Hidden fields: UTM parameters, GCLID/FBCLID
- Form submission tracking via GTM dataLayer.push()

Google Sheets SOPs

Daily Campaign Tracker Spend, Impr., Clicks, Leads, Sales; auto formulas calculate CTR, CPC, CPL, CVR, CPA

Lead Quality Tracker Log Hot/Warm/Cold leads daily; add GCLID/FBCLID for attribution

A/B Test Tracker Record [Hypothesis → Result → Learning](#) for all tests

Budget Pacing Monthly spend formula: [Target = Budget/Days](#). Adjust if $\pm 15\%$ variance

Profitability + LTV Sheet Calculate CAC, LTV:CAC, Payback periods; update monthly with Finance inputs

 **Best Practice** Set consistent naming, color coding, and version control across all sheets

Automation Framework

- **Data Flow:**



- **Automation Tools:**

- Zapier/Pabbly: Push leads to CRM + Sheets
- Apps Script: CSV Importer for ad data
- GTM: Send CAPI events

- **Automation QA:**

- Daily check if lead count drops 50% vs average → investigate Zap history
- Implement retry logic for failed API calls where available
- Document all webhook endpoints in central knowledge base

- **Triggers & Alerts:**

- Slack notifications for automation failures
- Daily health check report via email

Creative Production SOP

- **Pre-Production Checklist:**

- Hook bank idea sourced from competitors
- Script written (UGC/Testimonial/Authority)
- Shot list prepared (camera, lighting, CTA frame)

- **Naming Convention:**

- Format: <Platform>_<Format>_<Hook>_<Version>
- Example: FB_IMG_Offer_V1

- **Archiving:**

- Store on Drive: [/Creative Bank/<Client>/<Platform>/<Month>](#)
- Include raw files, exported assets, and source files
- Label versions consistently with creation date

- **Quality Control:**

- Review against brand guidelines before publication
- Verify all CTAs are trackable and functional

Reporting & Dashboards

Weekly Report (Sheets/Looker)

Performance Spend, Leads, CPL

Quality Hot/Warm/Cold ratio

Funnel CTR, CR%, CAC

Insights Top creatives, LP CR%, next steps

Send weekly reports by EOD Monday

 Compare to previous week's baseline

Monthly Report

Financial MER, CAC, Payback, ROI chart

Commentary What worked / What failed / What's next

Attribution Platform vs GA4 data comparison

Key Stakeholders:

- Marketing Director
- Finance Team
- Client Leadership

QA & Data Integrity

- **Checkpoints and Owners:**

- Pixel events fire correctly Weekly Tracking
- Form UTMs captured Daily Marketing
- GA4 + Ads data match ($\pm 5\%$) Weekly Analyst
- CRM → Sheet Sync Daily Automation

- **Data Hygiene:**

- Standardize naming conventions across platforms
- Create timestamped logs for troubleshooting
- Implement version control on Google Sheets

- **Reconciliation Protocol:**

- Audit data discrepancies $> 10\%$ between platforms
- Document resolutions in Data Integrity Log

- **Key Flags:** Sudden drop in lead quality, tracking interruptions, unattributed revenue

Continuous Improvement Framework

- **Weekly Review:**

- ✓ What worked: List top 3 campaigns & reasons
- ✗ What didn't: List underperformers
- ➔ What's next: 3 new tests (hook/audience/offer)

- **Monthly Audit:**

- 🔍 Tracking: Are all conversions firing?
- 📄 LP: Does message match ads?
- 🖌 Creative: Have new hooks been tested?
- 🧑 Lead Quality: Are Hot leads $\geq 25\%$?

- **Implementation Process:**

- Document learnings in shared spreadsheet
- Update SOP with new findings monthly
- Schedule quarterly review with all stakeholders

- **KPI Improvement Targets:** 5% monthly CPL reduction, 3% CPA improvement

Key Appendices & Resources

Quick-Access References

Negative Keywords

job salary free course internship
training pdf contact number review

Hook Ideas

- ⌚ **Scarcity:** "Last 10 slots this week."
- 🏆 **Authority:** "Trusted by 5,000+ businesses."
- 🎁 **Offer:** "Free Audit + ₹1,000 off."
- 👤 **UGC:** "Got my quote in 2 minutes!"

Form Fields

Name | Phone | Email | Service | City

Hidden: UTM_Source, UTM_Campaign, GCLID

Test Calendar

Week 1 [Hook testing:](#) Scarcity vs Authority

Week 2 [Format:](#) Video vs Static

Week 3 [Offer:](#) Free vs Discount

Week 4 [LP:](#) Test copy impact

Brand Style

Font: Poppins/Inter | Colors: [#0072FF](#), [#101820](#),
[#F1F3F6](#) | Logo placement: Top-right

Closing & Contacts

- **Next Steps:** Review and update SOP quarterly
 - Maintain live copy: Google Drive → /UTDM/Internal SOPs/Master_SOP_2025
 - Onboarding: Complete walkthrough within 5 days of joining
- **Contacts:** Strategy & Performance Team
 - Prepared by: Strategy & Performance Team – UT Digital Media
 - Approved by: Managing Director
 - Questions? Connect via #sop-questions Slack channel
- **Implementation Timeline:** Effective immediately
 - All new campaigns must follow this SOP structure
 - Legacy campaigns to be migrated by end of Q4 2025
- **Access:** Available via company intranet and shared drive