

AI CAMPAIGN DATA PREPARATION KIT

Prepare a clean, useful campaign data package before asking AI for recommendations.

CAMPAIGN		PLATFORM	
DATE RANGE		PRIMARY GOAL	

1. Export the right information

[]	Campaign report with spend, impressions, clicks, conversions, conversion value, and campaign status.
[]	Ad group, asset group, or ad set report so AI can see where performance differs inside the campaign.
[]	Search term, keyword, audience, placement, product, or creative report when relevant to the platform.
[]	Conversion-action report showing which outcomes the platform is counting.
[]	Enough history to represent normal performance. Start with 30 to 90 days and note major changes.
[]	Business outcomes that advertising platforms may not know, such as qualified leads, booked calls, sales, refunds, margin, or repeat purchases.

2. Add the context AI cannot infer

QUESTION	YOUR ANSWER
What is the campaign supposed to accomplish?	
What counts as a valuable conversion?	
What is your target CPA, CAC, ROAS, or profit goal?	
Which products, services, locations, or customers matter most?	
What changed during this date range?	
What constraints must the analysis respect?	

SAFE DATA CHECK

Remove information that is unnecessary for the analysis before uploading campaign files to an AI tool.

SAFE TO INCLUDE	REMOVE OR REDACT
Aggregated campaign performance	Names, email addresses, and phone numbers
Campaign, ad set, ad group, and asset names	Street addresses and precise location data
Spend, clicks, conversions, revenue, and rates	Payment information and account credentials
Anonymous order or lead-quality totals	Medical, legal, financial, or other sensitive details
Product or service categories	Customer lists unless the tool and use are explicitly approved
General sales-cycle and margin context	Unnecessary internal notes or confidential contracts

Data quality checks

[]	The date range is the same across every report.
[]	Currency and time zone are identified.
[]	Paused and removed campaigns are labeled instead of silently omitted.
[]	Primary and secondary conversions are distinguished.
[]	Duplicate rows, totals, and incomplete exports have been removed.
[]	Major budget, bidding, targeting, tracking, creative, or landing-page changes are listed.
[]	Offline outcomes have had enough time to mature.
[]	The file names clearly describe the platform, report, and date range.

DO NOT SKIP THIS

AI can analyze a perfectly formatted report and still give bad advice if the campaign is optimizing toward the wrong conversion. Confirm what the platform is counting before trusting the analysis.

REUSABLE AI CAMPAIGN ANALYSIS PROMPT

Paste this prompt with your cleaned reports. Replace every bracketed section before submitting it.

You are helping me analyze a paid advertising campaign for a business.

Business and offer: [DESCRIBE THE BUSINESS, OFFER, AND CUSTOMER]

Platform and campaign: [PLATFORM AND CAMPAIGN NAME]

Primary goal: [PURCHASES, QUALIFIED LEADS, BOOKINGS, ETC.]

Date range: [DATE RANGE]

Target performance: [CPA, CAC, ROAS, REVENUE, PROFIT, OR OTHER GOAL]

Important context: [SEASONALITY, PROMOTIONS, BUDGET OR TRACKING CHANGES, SALES CYCLE]

Business constraints: [BUDGET, LOCATION, INVENTORY, COMPLIANCE, MARGIN, STAFFING]

Review the attached data and:

1. Summarize what happened without guessing why.
2. Identify the three strongest performance patterns.
3. Identify possible waste, tracking problems, and missed opportunities.
4. Separate confirmed findings from hypotheses that require more evidence.
5. Recommend no more than five actions, ranked by expected impact, confidence, and implementation risk.
6. State what additional data would make the analysis more reliable.

Do not assume a lower platform CPA means better business performance. Use qualified leads, sales, revenue, margin, and other downstream outcomes when available. Cite the specific rows, campaigns, or metrics supporting each conclusion.

Before you act on the answer

[]	Can I trace each recommendation to evidence in the reports?
[]	Did the AI distinguish facts from assumptions?
[]	Does the recommendation optimize for the business outcome, not just the platform metric?
[]	Could the proposed change harm tracking, brand, profitability, or lead quality?
[]	Should this action be Automated, AI-Assisted, or Human-Approved?

LESSON 2 ACTION

Export one active campaign, remove sensitive information, complete the business-context fields, and run the reusable prompt. Save the AI output for Lesson 3, where you will evaluate waste and missed opportunities.