

Digital Advertising Campaign Readiness Workbook

Plan the numbers before you spend the money. Use this workbook to connect your business goal, lead ratios, CPA, budget capacity, tracking and KPI review process.

1. Define the Business Goal

Business outcome	
Target number / revenue	
Campaign time period	
Primary conversion	
Why this goal matters	

2. Audience and Offer

Ideal customer / audience	
Geography	
Problem / need	
Offer	
Primary CTA	

3. Build Your Campaign Acquisition Profile (CAP)

CAP is a Released Solutions planning framework. Enter known historical data where possible. Clearly label assumptions.

CAP Input	Value	Data type	Notes / source
Customer goal		Known / Assumed	
Available ad budget		Known / Assumed	
Expected CPL		Known / Assumed	
Lead qualification rate		Known / Assumed	
Qualified-lead close rate		Known / Assumed	
Expected customer CPA		Known / Assumed	
Average first-sale revenue		Known / Assumed	
Gross profit / contribution available		Known / Assumed	
Sales capacity		Known / Assumed	
Planning period		Known / Assumed	

4. CPA and Funnel Formula Worksheet

Metric	Formula	Your result	Notes
CPL	Ad spend / total leads		
CPQL	Ad spend / qualified leads		
Customer CPA	Ad spend / customers		
Lead qualification rate	Qualified leads / total leads		
Lead-to-customer rate	Customers / total leads		
Qualified-lead close rate	Customers / qualified leads		
Required qualified leads	Customer goal / qualified-lead close rate		
Required total leads	Required qualified leads / qualification rate		
Budget acquisition capacity	Available ad budget / expected CPA		
Required budget	Customer goal x acceptable CPA		

5. Traffic Requirement Worksheet

Use this only when you have a reasonable landing-page conversion assumption and CPC estimate.

Input / formula	Value	Notes
Required leads		
Landing-page conversion rate		
Required traffic = leads / conversion rate		
Expected CPC		
Estimated spend = traffic x CPC		
Expected CPL = CPC / conversion rate		

6. Acceptable CPA Guardrails

Economic input	Value	Reason / source
Average first-sale revenue		
Gross profit / contribution available		
Maximum acquisition allowance		
Target CPA		
Watch-zone CPA		
Intervention-zone CPA		

7. Tracking Readiness Checklist

Tracking item	Status	Notes
Primary website conversion works	[] Ready	
GA4 / analytics event tested	[] Ready	
Key event identified where applicable	[] Ready	
Ad-platform conversion configured	[] Ready	
Form source / UTM capture tested	[] Ready	
CRM routing tested	[] Ready	
Phone / offline outcome plan defined	[] Ready	
Test conversion completed end-to-end	[] Ready	
Thank-you / success state verified	[] Ready	
Reporting access confirmed	[] Ready	

8. Sales and Operations Readiness

Lead owner	
Target response time	
Qualification process	
Follow-up cadence	
CRM stage definitions	
Maximum lead volume team can handle	
Escalation / missed-lead process	

9. Weekly / Biweekly KPI Scorecard

Review active campaigns weekly when volume supports it. Use a biweekly decision window when weekly conversion volume is too low, while still monitoring tracking, spend and delivery for problems.

KPI	Target / Guardrail	Current	Prior	Trend	Decision / Note
Ad spend					
Impressions / reach					
Clicks					
CTR					
CPC / CPM					
Leads / conversions					
Qualified leads					
Lead qualification rate					
CPL / CPQL					
Customers					
Lead-to-customer rate					
Customer CPA					
Revenue / conversion value					
ROAS, if applicable					

10. KPI Zone Governance

Zone	Meaning	Your threshold	Planned response
TARGET	Within planned range		
WATCH	Outside target but economically tolerable		
INTERVENTION	Outside guardrail or tracking unreliable		

11. Campaign Review Notes

What improved?

What declined?

Where is the funnel breaking?

Is lead quality changing?

Is CPA inside the planned zone?

Is the budget producing enough volume to evaluate?

What will we change?

What will we deliberately leave unchanged?

12. Pre-Launch Sign-Off

Readiness item	Ready	Owner / notes
Business goal defined	[]	
CAP completed	[]	
CPA guardrails approved	[]	
Audience and offer ready	[]	
Tracking tested	[]	
Landing page ready	[]	
Creative ready	[]	
Sales process ready	[]	
KPI scorecard ready	[]	
Launch / review dates scheduled	[]	

Planning reminder

A budget is not a goal. A goal is not a forecast. A forecast is not a guarantee. Use your real business data whenever possible, label assumptions, and update the CAP as the campaign produces better evidence.

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