THE AGENCY MARTECH HEALTH CHECK

Diagnostic Tool: Are you scaling a strategy? Or a "Frankenstack"?

INSTRUCTIONS: Audit your client's current tech stack against the 12 pillars of data integrity below.

- Check **YES** only if you are 100% certain the system works this way *today*.
- Check **UNSURE** if you have to ask someone else or log in to verify.
- Check **NO** if you know the connection is broken or missing.

SECTION 1: FINANCIAL INTEGRITY (The Truth)

1. Revenue Parity Ad platforms, ecommerce platforms, and the CRM report the exact same revenue for the same time period.

- [ ] YES
- **[ ] NO / UNSURE**

  The Risk: If Meta says you made $10k but the bank says $8k, you are overspending on ads based on false signals.

2. Single Source of Truth One system defines Revenue, CAC, LTV, and Churn. Everyone (Sales, Marketing, Finance) references this same number.

- [ ] YES
- **[ ] NO / UNSURE**

  The Risk: If departments have different KPIs, you are fighting internal battles rather than the market.

3. Automated Reporting Dashboards update automatically via API. No manual CSV exports, no copy-paste work, no fragile spreadsheet formulas.

- [ ] YES
- **[ ] NO / UNSURE**

  The Risk: Manual reporting introduces human error and wastes high-value agency hours on data entry.

SECTION 2: SIGNAL & TRACKING (The Engine)

4. Server-Side Tracking Conversions are tracked via API (CAPI), not just the browser pixel. You are protected against cookie loss and ad blockers.

- [ ] YES
- **[ ] NO / UNSURE**

The Risk: Reliance on browser-only pixels loses up to 30% of attribution data instantly.

5. Offline Conversions Loop Closed deals and qualified leads are fed *back* into Meta/Google/TikTok APIs to train the bidding algorithms.

- [ ] YES
- **[ ] NO / UNSURE**

The Risk: If ad networks don't know who actually bought, they can't find more people like them.

6. Event Naming Standards Events are clearly named and documented (e.g., "Purchase_Completed" vs "bought_item"). No duplicates or vague labels.

- [ ] YES
- **[ ] NO / UNSURE**

The Risk: Messy data makes historical analysis impossible and breaks automation triggers.

SECTION 3: AUTOMATION & FLOW (The Nervous System)

7. Bi-Directional Data Flow CRM status, support tickets, and product usage feed *back* into marketing tools. (e.g., Ads stop automatically when a support ticket is open).

- [ ] YES
- **[ ] NO / UNSURE**

The Risk: Marketing to angry customers or churned users increases refund rates and damages brand reputation.

8. Behavior-Based Lifecycle Email/SMS triggers are based on real behavior (usage, churn risk, purchases), not just "page views" or "time delay."

- [ ] YES
- **[ ] NO / UNSURE**

The Risk: Generic time-based emails get marked as spam. Behavioral emails get read.

9. Active API Maintenance No expired tokens, abandoned middleware (Zapier/Make), or silent sync failures. Everything is actively monitored.

- [ ] YES
- **[ ] NO / UNSURE**

The Risk: Silent failures mean you might lose weeks of leads before anyone notices.

SECTION 4: GOVERNANCE (The Control)

10. Attribution Logic Documented Everyone uses the same rules for conversion credit (First touch vs Last touch). No debates in reporting meetings.

- [ ] YES
- **[ ] NO / UNSURE**

The Risk: If you can't agree on what caused the sale, you can't confidently scale the budget.

11. New Tool Impact Review No tool is added to the stack without mapping exactly how data will flow in and out of it first.

- [ ] YES
- **[ ] NO / UNSURE**

The Risk: "Shadow IT" creates data silos that break your single source of truth.

12. The "Named Owner" One specific person is named responsible for stack uptime and data quality.

- [ ] YES
- **[ ] NO / UNSURE**

The Risk: If everyone is responsible, no one is responsible.

THE SCORECARD

Count your "NO" and "UNSURE" checkmarks.

[ ] 0 - 2 Checkmarks: Healthy Stack.

Your client is in good shape. Minor tweaks might be needed, but the foundation is solid.

[ ] 3 - 5 Checkmarks: The "Frankenstack" Danger Zone.

Data is leaking. Reporting is likely inaccurate. You are manually patching holes that technology should handle automatically.

[ ] 6+ Checkmarks: Critical Data Failure.

Your strategy is being undermined by broken tech. You are likely flying blind on ROAS and attribution. Immediate audit required.

WHAT NEXT?

Option 1: Fix it Yourself (DIY) Use the checklist above to go into your client's accounts, investigate the APIs one by one, and patch the connections.

Option 2: Use Your Free Blueprint (Recommended) You already claimed a free audit for this client. Let us do the deep dive. We will verify all 12 points for you and hand you a roadmap to fix the red flags.

- **Book a Data Collection Call**