

From Days to Minutes: The Automated Reporting Framework for Marketing Agencies

Reclaim **20+ hours a month**, eliminate manual errors, and turn reporting into your most powerful client retention tool.



www.hurree.co



Contents

01 Introduction

Page 3

02 The real cost of manual reporting

Page 5

03 The 4-phase escape plan

Page 7

04 The 10 KPIs you should consider

Page 12

05 Escape the manual reporting trap

Page 17

06 Your next step

Page 18

07 Get started with Hurree

Page 19

Introduction

Agency teams aren't losing clients because they lack skill. It's because they're losing time.

Every agency we speak to tells the same story:

- **Reports take hours, days or weeks**
- **Data is scattered across 5, 10, sometimes 15 tools**
- **Teams spend more time gathering and entering data than actually improving the campaigns that created it**
- **Client reporting happens at the end of the month, long after fixes could have been made**

Manual reporting isn't just annoying. It drains margin, kills creativity, and makes every campaign reactive instead of strategic.

The real threat isn't client churn someday. It's burnout **today**, and the lost opportunities **every week it continues**.

This playbook shows how to reclaim hours (or even days) instantly by reducing manual work, unifying your data, and creating reporting that scales.



Dashboard snippet showing:

- Monthly Recurring Revenue (MRR): 705 ALL TIME, -8% since previous 30 days
- Top Performing Post: Image of a person working at a laptop
- Partial pie chart with a legend for Sam (cyan) and Other (light blue).

Dashboard snippet showing:

- Dashboard Templates menu
- Profile icon and notification bell

Dashboard snippet showing:

- Email Open Rate (%): 66.67% ALL TIME, +10% since previous 30 days
- Closed Won: 6 20 MINUTES AGO, +0.2% since previous 30 days
- Deals Closed By Owner Today: Pie chart with legend for Tom, Jack, Sarah, Lucy, Finn, James, Louise, Martin, Sam, Other.

Hurree Monthly KPIs

- Home, Favourites, Monthly KPIs (selected), Dashboards, Private Dashboards
- Total Sales: 1653 THIS YEAR, +7% since previous 30 days
- Engagement Rate Overall (%): 10.77% THIS YEAR, +2% since previous 30 days
- Email Open Rate (%): 66.67% ALL TIME, +10% since previous 30 days
- Closed Won: 6 20 MINUTES AGO, +0.2% since previous 30 days
- Deals Closed By Owner Today: Line chart comparing Total New Users: My Website and Stripe: Main Account from 12 Apr to 22 Apr.
- Monthly Recurring Revenue (MRR): 705 ALL TIME, -8% since previous 30 days
- Top Performing Post: Image of a person working at a laptop
- Deals Closed By Owner Today: Pie chart with legend for Tom, Jack, Sarah, Lucy, Finn, James, Louise, Martin, Sam, Other.

Hurree Monthly KPIs

- Home, Favourites, Monthly KPIs (selected), Dashboards, Private Dashboards
- Total Sales: 1653 THIS YEAR, +7% since previous 30 days
- Engagement Rate Overall (%): 10.77% THIS YEAR, +2% since previous 30 days
- Line chart: Total New Users: My Website and Stripe: Main Account
- Monthly Recurring Revenue (MRR): 705 ALL TIME, -8% since previous 30 days
- Top Performing Post: Image of a person working at a laptop

Hurree Monthly KPIs

- Home, Favourites, Monthly KPIs (selected), Dashboards, Private Dashboards
- Total Sales: 1653 THIS YEAR, +7% since previous 30 days
- Engagement Rate Overall (%): 10.77% THIS YEAR, +2% since previous 30 days
- Email Open Rate (%): 66.67% ALL TIME, +10% since previous 30 days
- Closed Won: 6 20 MINUTES AGO, +0.2% since previous 30 days

Hurree Monthly KPIs

- Home, Favourites, Monthly KPIs (selected), Dashboards, Private Dashboards
- Total Sales: 1653 THIS YEAR, +7% since previous 30 days
- Engagement Rate Overall (%): 10.77% THIS YEAR, +2% since previous 30 days
- Line chart: Total New Users: My Website and Stripe: Main Account

The real cost of **manual** **reporting**

Does any of the following sound familiar to you?

“It takes 7 days to prepare our reports”

“Data is scattered across Google Sheets, Meta, Google Analytics, Ads, CRM and Looker”

“Half a day...for a simple report”

Manual reporting creates a cycle that traps agencies.

Here are the five most damaging traps:

The reactive insight delay:

By the time a manual report is done, the data is old. You're forced to make slow, reactive decisions, not proactive ones.

The confidence erosion trap:

Static, monthly reports signal to clients you're not actively managing their account, eroding trust.

The scalability quicksand:

Every new client means a new, manual report build. Growth increases pain instead of profit.

The fragmentation trap:

Your team wastes billable hours as data processors, copying numbers from a dozen different platforms instead of analyzing them.

The strategic paralysis trap:

The reporting grind consumes all capacity, leaving no time for the high-value strategic work that grows your agency and improves campaigns.

The 4-phase escape plan

Breaking free requires a systematic approach. Follow this framework to automate reporting and reclaim your strategic edge.



Phase 1: Centralize

Goal: Create one source of truth.

Action: Connect all client data sources (Ads, CRM, Analytics) to a single dashboard.

Solution: Hurree enables this with **live connectors**, 70+ & counting.



Use this checklist to help get started:

- List every data source per client
- Identify duplicated and unnecessary metrics
- Align naming conventions for each client
- Identify missing sources that are currently being monitored manually
- Choose leading vs lagging metrics to prioritize



Phase 2: Templatize

Goal: Standardize the core, customize the details.

Action: Create your standard reporting templates then clone, customize and adjust per client.

Solution: Hurree enables this with drag-and-drop, **clonable templates and white-label branding.**

Consider what you want in a standard template. Here are some examples:

- KPIs by funnel stage (awareness, engagement, conversion, retention)
- What are the most common goals for most clients? Ensure there are datapoints in your report to reflect the most common goals
- Is there space for insights and comments, not just numbers?
- Have you used the most appropriate visualization for your data? E.g graph, pie chart, table etc



Setup Scheduled Snapshot



Phase 3: Automate

Goal: Become proactive, not reactive.

Action: Schedule automated report delivery and set up real-time alerts for key metrics.

Solution: Hurree enables this with **scheduled snapshots and client-facing dashboards.**

Set & forget triggers

- Benchmarks added for each of your key metrics
- Set up weekly performance updates to client inbox to keep everyone informed of performance
- Alerts when ROAS drops below target to prevent overspend and underperformance



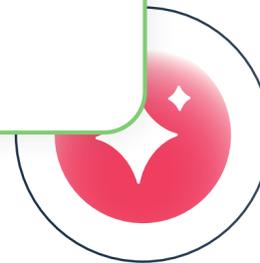


Phase 4: Analyze

Goal: Shift from compiling data to guiding strategy.

Action: Use reclaimed time to deliver insights and recommendations.

Solution: Hurree enables this with its **AI Analyst, Riva**, which automatically explains the “why” behind the numbers and what to do next to improve on the campaigns that did well.



Insight prompts to consider:

- What changed this week/month vs last?
- Why did that shift occur? Was it seasonality, budget, creative fatigue, competition?
- What performed well and how can it be replicated?
- What didn't work well and why?

The 10 KPIs you should consider tracking in your client reports

While every client is unique, these 10 core KPIs form a universal foundation for proving value and driving business outcomes. Focus on these before adding channel-specific metrics.

Acquisition & demand

These reveal how well your campaigns are attracting the right audience and converting. They help you prove that your top-of-funnel strategy is driving real, trackable growth, not just traffic.

1

Cost per acquisition (CPA)

Shows how efficiently campaigns convert spend into real customers.

2

Click-through rate (CTR)

Indicates whether your targeting and messaging are resonating.

3

Website traffic-to-lead ratio

Reveals if traffic is converting, not just showing up.

Lead quality & pipeline

Generating leads is easy. Generating the right leads is what matters. These KPIs ensure marketing efforts are feeding the pipeline with sales-ready opportunities that convert, not just inflating vanity numbers.

4

Marketing qualified leads (MQLs)

Measures how many leads are demonstrating true buying intent.



5

MQL-SQL conversion rate

Validates that campaigns are generating quality, sales-ready leads.

Revenue & efficiency

Performance means nothing without profitability. These metrics connect marketing activity directly to revenue, helping you demonstrate financial impact, defend budgets, and scale what truly works.

6

Customer acquisition cost (CAC)

Puts total acquisition efficiency into context across channels.

7

Return on investment (ROI)

The ultimate proof of performance tied to business outcomes.

8

Revenue by channel/campaign

Surfaces where the best returns are coming from.

Retention & growth

Winning a customer is only the beginning. These KPIs measure long-term value, loyalty, and sustainability, proving your campaigns don't just acquire customers, but help build durable revenue over time.

9

Customer lifetime value (CLV)

Shows long-term revenue impact beyond first conversion.



10

Customer churn rate

Protects revenue by spotting retention risks early.

What happens when you escape the **manual reporting trap?**

When agencies move from spreadsheets to automated reporting, everything changes.

You get:



Time back:

Hours reclaimed every week to focus on strategy, not number crunching.

Better decisions:

When every channel is visible in one place, it's easier to prove what actually drives results. Insights surface when they matter, not at month-end when it's too late to do anything about it.

Happier clients:

Because they see value every day, not just once a month. Instead of telling clients "Here's what happened," reviews become "Here's what we're doing next."

Room to grow:

New clients no longer mean extra chaos, late nights and panic; they mean more profits and company growth.

Automation isn't about removing the human touch. **It's about protecting it and freeing your team to think, advise, create, and lead.**

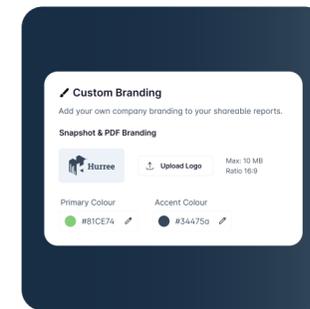
Your next step

If you're ready to reclaim your time and turn reporting into a growth engine, not a workload crisis, the tool already exists.

Hurree is built for agencies that want:



Live dashboards, connected once and used forever



White-labeled client reporting that scales



AI-powered insights instead of spreadsheet chaos



Real-time visibility into every campaign, across every platform



Get started with Hurree and take reporting off your to-do list, permanently.

Give your team their time back, and your clients better results.

Get started

