02 — Media Buying SOP / Process

Full-Funnel Multi-Channel Acquisition

Primary Platforms: Google Ads + Meta
Operating Model: Test → Measure → Qualify → Decide → Protect / Scale → Learn → Repeat
Primary Optimization Objective: Profitable qualified-call acquisition

---

2.1 Purpose

This SOP defines the process for planning, launching, testing, monitoring, optimizing, scaling, and reporting performance media campaigns.

The system is designed around a simple commercial principle:

> **Buy qualified acquisitions profitably, then scale what has proven profitable.**

The buyer is not expected to optimize campaigns simply because a platform metric moved.

Every significant decision should connect back to:

Spend → Calls → CPA → Qualified Calls → Profitability

The process is designed for multi-channel acquisition across Google and Meta, but the underlying decision framework is platform-independent.

2.2 Operating Philosophy

The core operating loop is:

TEST

↓

MEASURE

↓

QUALIFY

↓

DECIDE

↓

PROTECT / SCALE / CUT / DIAGNOSE

↓

RE-MEASURE

↓

LEARN

↓

REPEAT

The system deliberately separates **measurement** from **decision-making**.

A campaign should not be changed simply because one day's numbers look unusual.

Likewise, a campaign should not be protected indefinitely simply because it was previously successful.

The decision must be based on:

- Current economics
- Sufficient data
- Campaign baseline
- Call quality
- Profitability
- Attribution reliability
- Business conditions

2.3 Decision-Metric Hierarchy

The ACA operation used a deliberately simple economic hierarchy.

Primary decision metrics

1. CPA

Target: < $90

This was the primary performance benchmark.

2. Profitability

The campaign must remain economically profitable.

CPA was the main operational indicator used to monitor whether profitability was being maintained.

Secondary quality metrics

Qualified-call rate

Historical operating target:

~30%

Call duration

Minimum qualification requirement:

2:00+

Revenue per qualified call

Historical benchmark:

~$50

This is a supporting economic indicator rather than a standalone kill rule.

Volume thresholds

Initial evaluation

A new campaign should generally generate at least the following:

10–15 calls

before making a normal performance judgment.

Scale eligibility

A campaign should generally have:

20+ calls

before being considered for scaling, provided the economic criteria are also satisfied.

2.4 Target Economics Table

The following table converts the historical operating logic into explicit decision ranges.

Metric	Green	Yellow	Red
CPA	**< $90**	**$90–$110**	**> $110**
Qualified-call rate	**~30%+**	Below target but recoverable	Material deterioration
Call duration	**≥ 2:00**	Near threshold	**< 2:00**
Revenue / qualified call	**~$50+**	Below benchmark	Material deterioration
Profitability	Profitable	Marginal investigation	Unprofitable
Call volume	20+ for scaling	10–19 for evaluation	0 calls after spend = kill

Important hierarchy

The metrics above do **not** have equal authority.

The primary decision remains:

> **Is the acquisition profitable at an acceptable CPA?**

Qualified-call rate, duration, and revenue per qualified call help explain **why** performance is or is not economically attractive.

The buyer should not automatically kill a campaign because one secondary metric is temporarily below target if overall economics remain acceptable.

2.5 CPA Decision Rules

CPA is the primary operational warning signal.

CPA < $90

Status: GREEN

Action:

- Protect
- Continue
- Consider scaling if other scale criteria are satisfied.

CPA $90–$110

Status: YELLOW

Action:

- Do not automatically kill
- Monitor closely
- Diagnose if deterioration is persistent
- Avoid unnecessary structural changes
- Determine whether profitability is still acceptable

The campaign may continue operating in this range if the underlying economics remain profitable.

CPA > $110

Status: RED

Action:

- Stop aggressive scaling
- Begin diagnosis
- If deterioration persists, reduce spend
- Improve quality
- Consider returning toward the previous stable budget

The $110 level is the historical **descaling/quality-control trigger** used in the operation.

2.6 Minimum Data Requirement

Time alone does not determine whether a campaign has enough information.

The buyer should consider four dimensions:

Time + Spend + Conversion Volume + Economic Signal

A decision should not be based solely on the number of calendar days elapsed.

For example:

A campaign that has run for two days but produced only three calls does not necessarily provide the same evidence as a campaign that has produced twenty calls over the same period.

Therefore:

> **The observation window must be long enough and the data volume sufficient enough to support the decision.**

2.7 Initial Campaign Evaluation

A new campaign enters the **TEST** state.

Minimum evaluation volume

Target:

10–15 calls

At this point, the buyer can begin making a meaningful initial assessment.

The buyer reviews:

- Spend
- CPA
- Calls
- Call quality
- Qualified-call rate
- Profitability

Zero-call rule

If the campaign is spending but produces **no calls**, it should not be allowed to consume budget indefinitely waiting for performance to appear.

The default action is:

Kill/pause and investigate the reason.

Possible causes to check before finalizing the decision:

- Tracking failure
- Delivery issue
- Targeting issue
- Creative issue
- Funnel issue
- Account/platform problem

If measurement is confirmed to be working and the campaign is spending without generating calls:

CUT.

2.8 Scale Eligibility

A campaign does not become scale-eligible simply because it has one good CPA result.

The default scale gate is:

Requirement 1 — Volume

20+ calls

Requirement 2 — CPA

< $90 target

Requirement 3 — Profitability

Campaign remains economically profitable.

Requirement 4 — Quality

Call quality is acceptable, with the historical minimum call-duration requirement of:

2:00+

Requirement 5 — Measurement

Tracking and attribution are functioning sufficiently for the decision.

If these conditions are satisfied:

PROTECT → SCALE

If not:

CONTINUE TESTING / WATCH / DIAGNOSE

2.9 Baseline Requirement

Before every meaningful campaign intervention, record a baseline.

At minimum:

- Spend
- CPA
- Calls
- Qualified calls
- Qualified-call rate
- Call duration
- Conversion
- Revenue
- Profitability
- Current budget

The process becomes:

Baseline

↓

Change

↓

Observation

↓

Post-change measurement

↓

Comparison

↓

Decision

This prevents the team from making changes without knowing what the previous state actually was.

2.10 No-Change Rule

A validated campaign should not be modified simply because the buyer wants to optimize something.

No-change rule

> **If a campaign is within its approved economic range, tracking is reliable, and there is no identified structural problem, do not make a major campaign change solely to improve a platform metric or because performance has remained stable.**

This is particularly important in automated advertising environments.

Google's Smart Bidding systems use conversion and conversion-value signals to optimize bids at auction time, while Meta recommends minimizing changes during learning and maintaining sufficient creative variety.

Therefore, unnecessary changes can create more disruption than value.

2.11 Observation Window

The standard operating observation window is approximately:

3 days

This is a default, not a mandatory deadline.

The buyer may extend the observation period when:

- Call volume is insufficient
- Conversion volume is insufficient
- Revenue data is delayed
- Attribution is incomplete
- Market conditions are unusually volatile

The principle is:

Three days is the normal review window—not an automatic decision deadline.

2.12 Performance Deterioration Rules

The historical two-day rule remains useful but is now combined with minimum-data requirements.

One bad day

Action: Observe

Do not make a structural change solely because of one negative day.

Two consecutive bad days

Action: Diagnose

Check:

- CPA
- Calls
- Call quality
- Conversion
- Spend
- Tracking
- Campaign changes
- Market conditions

But first confirm that sufficient data exists to justify the diagnosis.

CPA consistently above $110

Action: Descale / improve quality

If the campaign continues crossing the $110 CPA threshold:

1. Stop aggressive scaling.
2. Return toward the previous stable spend level where appropriate.
3. Diagnose the cause.
4. Improve quality.
5. Re-observe.

Persistent unprofitable performance

Action: CUT

If the campaign has sufficient evidence and remains economically unviable:

Pause/reallocate budget.

2.13 Decision Matrix

Status	Conditions	Action
TEST	Insufficient evidence	Continue collecting data
WATCH	Mixed signals / insufficient volume	Hold and observe
PROTECT	CPA < $90 + profitable + quality acceptable	Avoid unnecessary changes
SCALE	20+ calls + CPA < $90 + profitable	Increase budget
DIAGNOSE	Persistent deterioration	Investigate root cause
DESCALE	CPA begins consistently crossing $110	Reduce toward stable spend
CUT	Sufficient evidence + unprofitable	Pause/reallocate
REFRESH	Creative/funnel deterioration	Test new inputs
RESTRUCTURE	Structural issue identified	Rebuild deliberately

2.14 Test Isolation

Every test should have one primary hypothesis.

Whenever practical, isolate the variable being tested.

Creative test

Hold as constant as practical:

- Audience

- Funnel
- Offer
- Budget methodology
- Conversion event

Change:

Creative

Audience test

Hold as constant as practical:

- Creative
- Funnel
- Offer

Change:

Audience

Funnel test

Hold as constant as practical:

- Audience
- Creative
- Offer

Change:

Funnel

Environment test

Hold the acquisition concept constant.

Change:

Campaign/account/environment

This makes it easier to identify what actually caused the result.

2.15 Test Hypothesis

Every meaningful test should document:

Hypothesis

What do we believe will happen?

Variable

What are we changing?

Control

What remains constant?

Metric

What determines success?

Observation window

When will the result be reviewed?

Decision

What will happen if the test wins, loses, or produces useful learning?

2.16 Learning Agenda

Not every test is simply a winner or loser.

Every test should produce one of three outcomes.

WINNER

Meets the economic requirements.

Action:

Protect / scale.

LOSER

Fails the economic requirements after sufficient evidence.

Action:

Cut/archive.

LEARNING

Does not win, but produces useful information.

Example:

> Age 25–34 produced lower CPA but materially weaker call quality.

This is not useless.

It creates knowledge about the relationship between:

CPA × audience × call quality

The learning should be documented so the team does not unknowingly repeat the same experiment.

2.17 Creative SOP

Creative is evaluated based on downstream acquisition economics.

The operation used formats including:

- UGC
- Trending/native formats
- B-roll + voiceover
- Influencer-style content
- Direct-response scripts
- New hooks and messaging angles

The creative should feel native to the platform while maintaining direct-response intent.

Creative is not judged solely by:

- Likes
- Comments
- Engagement

- CTR

The actual question is:

> **Does this creative generate economically valuable calls?**

2.18 Funnel SOP

When CPA deteriorates, do not automatically assume the audience is responsible.

Review the entire conversion path.

Check:

- Landing-page conversion
- Page experience
- Mobile experience
- CTA
- Number of questions
- Qualification flow
- Endpoint
- Friction
- Script
- Message alignment

The goal is to identify where valuable traffic is being lost.

The historical operation found opportunities through:

- Landing-page optimization
- Script changes
- Content changes
- UGC
- Influencer-style creative
- Funnel improvements

2.19 Scaling SOP

Scaling follows:

Validate → Baseline → Increase → Observe → Compare → Continue / Rollback

Step 1

Confirm:

- 20+ calls
- CPA < $90
- Profitability
- Acceptable call quality
- Reliable measurement

Step 2

Record baseline.

Step 3

Increase budget.

The historical operating standard was approximately:

+35–40%

The team was comfortable with this level of controlled growth and consistently wanted to increase profitable volume.

Step 4

Observe.

Step 5

Compare post-scale performance with baseline.

Step 6

If economics remain acceptable:

Continue scaling.

If CPA begins consistently crossing $110:

Descale / stabilize/improve quality.

2.20 Scaling Rollback Procedure

A budget increase is reversible.

If scaling causes material deterioration:

1. Record

Capture post-scale:

- Spend
- CPA
- Calls
- Qualified calls
- Profitability

2. Compare

Compare against the pre-scale baseline.

3. Descale

Return toward the previous stable budget.

4. Stabilize

Do not simultaneously introduce multiple unrelated structural changes.

5. Diagnose

Determine whether the deterioration came from:

- Scale
- Creative
- Audience
- Funnel
- Auction
- Tracking
- Market conditions

6. Re-observe

Determine whether performance recovers at the stable budget.

7. Decide

Continue, restructure, refresh, or cut.

2.21 Capacity Rule

Media should not be scaled simply because the advertising platform can spend more.

Scaling must consider:

Media capacity → Call capacity → Sales capacity → Operational capacity

The system should not generate more volume than the downstream operation can process effectively.

Therefore:

> **Never scale media beyond validated downstream capacity.**

2.22 Attribution and Measurement

The measurement system consists of three levels.

Platform

Google + Meta

Used primarily for:

- Spend
- Delivery
- Media cost
- Campaign performance

Call Tracking

Ringba

Used primarily for:

- Calls
- Paid calls
- Call duration
- Qualified calls

Business Data

Used primarily for:

- Conversion

- Revenue
- Profitability

The final economic decision should rely on the most reliable reconciled business data available.

Google's current documentation similarly distinguishes conversion-volume optimization from conversion-value optimization, reinforcing the importance of defining what business outcome the bidding system should optimize toward.

2.23 Attribution Discrepancy Rule

If platform data and call/business data disagree:

Do not immediately optimize around the discrepancy.

First:

1. Identify the discrepancy.
2. Determine its source.
3. Check tracking.
4. Check attribution.
5. Reconcile available data.
6. Establish the most reliable dataset.
7. Resume major optimization decisions.

The historical operation encountered situations where some Ringba revenue was not correctly assigned by Google.

Therefore:

> **Attribution quality is a prerequisite for confident economic optimization.**

The historical attribution/revenue picture was also subject to long-tail reconciliation, so the SOP should not treat delayed revenue as if it were immediately complete.

2.24 Call Quality

Call quality is a supporting economic control.

Historical operating requirements included:

2+ minute call duration

and approximately:

30% qualified-call rate

The buyer should monitor:

- Average duration
- Qualified-call rate
- Paid-call volume
- Conversion
- Revenue

However, these metrics should be interpreted alongside CPA and profitability.

The primary question remains:

> **Are we buying profitable acquisition?**

2.25 CPA Troubleshooting Tree

When CPA rises:

CPA ↑

↓

Is tracking reliable?

No → Fix measurement

Yes → Continue

↓

Has media cost increased?

Check:

- CPM
- CPC
- Auction conditions
- Delivery

↓

Has conversion performance declined?

Check:

- Creative
- Audience
- Funnel
- Landing page
- Endpoint

↓

Has call quality declined?

Check:

- Traffic quality
- Audience
- Campaign environment
- Qualification

↓

Has profitability declined?

Check:

- Revenue
- Qualified-call economics
- Buyer economics
- Attribution

↓

Is the deterioration broader than one campaign?

Compare:

- Other campaigns
- Other accounts
- Other environments
- Other platforms

↓

Is there an external market/platform issue?

Check:

- Policy
- Regulatory conditions

- Auction changes
- Market conditions

↓

Decision

Hold / Improve / Descale / Cut / Restructure / Refresh / Re-test

---

2.26 Daily Buyer Checklist

Account Health

- Account active
- Billing functioning
- Policy status checked
- Tracking functioning
- Campaign delivery normal

Spend

- Yesterday's spend
- Budget pacing
- Scale status
- Major deviations

Performance

- CPA
- Calls
- Qualified calls
- Profitability
- Conversion
- Revenue

Quality

- Call duration
- Qualified-call rate
- Revenue per qualified call

Creative

- New creative performance
- Fatigue
- Script performance
- Content-type performance

Funnel

- Landing-page performance
- Conversion path
- Friction
- Endpoint performance

Decision

Assign each campaign:

TEST / WATCH / PROTECT / SCALE / DIAGNOSE / DESCALE / CUT / REFRESH / RESTRUCTURE

Next-Day Plan

Record:

- What changed?
- Why?
- What action is required?
- Expected result?
- Review date?

2.27 Change Log

Every significant campaign intervention should be recorded.

Date	Campaign	Change	Reason	Baseline	Expected Outcome	Review Date	Result

This creates institutional memory.

It also provides an objective record when performance changes after a stakeholder-requested intervention.

The change log should make it possible to answer:

> **What changed, why was it changed, and what happened afterward?**

2.28 Governance

The media buyer is responsible for day-to-day execution and monitoring.

Major decisions can involve the wider team.

The operating principle is:

> **The person closest to the data should have sufficient authority to act within predefined operating limits.**

Stakeholder involvement should increase with decision size.

Routine decisions

Media buyer:

- Daily optimization
- Standard testing
- Routine budget adjustments
- Campaign monitoring
- Standard pauses

Major decisions

Team/management:

- Major budget reallocations
- Major funnel changes
- Strategic changes
- New vertical
- Response to major regulatory/platform changes

Governance rule

No stakeholder decision should override:

- Compliance requirements
- Measurement-integrity requirements

Strategic stakeholders can change the business objective, but operational changes should be documented with the reason and expected outcome.

2.29 Compliance Gate

Compliance is a **hard gate**, not a recommendation.

Before launch or major creative/funnel changes:

Compliance approved?

NO

Do not launch/do not scale.

YES

Continue to:

Build → QA → Launch

The buyer should verify applicable:

- Platform advertising policies
- Healthcare/regulated-industry requirements
- Creative claims
- Landing-page claims
- Targeting restrictions
- Lead-handling requirements
- Required disclosures

This is particularly important for regulated verticals.

2.30 Market-Shock Protocol

If CPA deteriorates across multiple campaigns or accounts simultaneously, first determine whether the problem is:

Campaign-level

or

Market-level

Process

Verify tracking

↓

Compare accounts

↓

Compare platforms

↓

Compare audiences

↓

Review creative

↓

Review funnel

↓

Review auction conditions

↓

Review regulatory/platform changes.

↓

Determine root cause

↓

Adapt

Possible responses:

- Creative change
- Funnel change
- Landing-page optimization
- Audience change
- Budget reallocation
- Channel diversification
- Vertical diversification

The historical ACA operation demonstrated why this distinction matters: the media-buying system had already achieved significant efficiency and scale before broader external conditions made the ACA market increasingly difficult to operate.

When the constraint becomes structural, endlessly optimizing individual campaigns is not necessarily the correct response.

2.31 Weekly Review

The weekly review evaluates the system rather than only individual campaigns.

Performance

- CPA
- Profitability
- Calls
- Qualified calls
- Revenue

Scaling

- Campaigns scaled
- Campaigns rolled back
- Budget changes
- Performance after scaling

Creative

- Winners
- Losers
- Emerging concepts
- Fatigue
- New tests

Funnel

- Landing-page results
- Conversion changes
- Quality changes

Accounts

- Account health
- Delivery
- Performance differences

- Environment differences

Learning

Document:

- What worked?
- What failed?
- What was learned?
- What should be tested next?

2.32 Learning System

The goal of the SOP is not merely to produce profitable campaigns.

It is to continuously increase the team's understanding of profitable acquisition.

Every meaningful test should contribute to an accumulated knowledge base.

Examples:

> “This audience produced cheap calls but weaker qualified-call economics.”
>
> “This creative format produced higher call volume without increasing CPA.”
>
> “This funnel reduced friction but lowered downstream call quality.”
>
> “This budget increase caused CPA deterioration beyond the acceptable range.”

These findings serve as input for future tests.

The operating loop, therefore, becomes the following:

TEST → MEASURE → DECIDE → ACT → RE-MEASURE → LEARN → TEST AGAIN

2.33 Historical Case-Study Evidence

CASE STUDY — NOT AN SOP THRESHOLD

The following figures demonstrate the historical performance of the methodology during the 2023 U.S. ACA operation.

They are **evidence of past execution**, not performance guarantees or mandatory future benchmarks.

Overall Operation

Metric	Historical Result
Incoming Calls	470,522
Paid Calls	147,617
Converted Calls	64,287
Reported Revenue	$4.41M
Media Spend	~$3.3M
Average Call Length	2:26
Reported ROI	~35%

Before vs. After

Metric	Before	After
CPA	~$220	< $90
Monthly Spend	~$7K	$30K–$60K
Monthly Calls	~2K	50K–70K
Monthly Revenue	~$8K	>$500K
Conversion	<10%	~30%
ROI	0–10%	~35%

The historical case study demonstrates that the system was capable of moving from approximately **$220 CPA to below $90 CPA** while simultaneously increasing media spend and call volume substantially.

2.34 Historical Campaign Evidence

One documented high-performing campaign generated approximately:

- **31,035 total calls**
- **11,533 paid calls**

- **$299K reported revenue**
- **~$215K media spend**
- **2:18 average call length**

The campaign is presented as evidence of execution at scale.

It is not a requirement that future campaigns reproduce these exact numbers.

2.35 Historical Top-Account Evidence

The strongest documented account generated approximately:

$681K revenue

against approximately:

$408K media spend

This demonstrates the ability of the testing and scaling methodology to support substantial spend while maintaining positive campaign economics.

Again:

> **This is historical evidence, not an SOP target.**

2.36 Final SOP Workflow

The complete operating procedure is:

01 — GOVERN

Define:

- Objective
- Economics
- Authority
- Compliance requirements

↓

02 — MEASURE

Define:

- Tracking
- Source of truth
- Attribution
- Reporting

↓

03 — BUILD

Create:

- Campaign
- Audience
- Creative
- Funnel
- Tracking

↓

04 — QA

Verify:

- Delivery
- Tracking
- Compliance
- Creative
- Funnel

↓

05 — TEST

Test one primary hypothesis.

↓

06 — MEASURE

Collect:

- Spend
- Calls
- CPA
- Qualified calls

- Quality
- Profitability

↓

07 — QUALIFY

Check:

- 10–15+ calls for meaningful initial evaluation
- 20+ calls for scale consideration
- CPA < $90
- Profitability
- 2+ minute call quality

↓

08 — DECIDE

Choose:

WATCH / PROTECT / SCALE / DIAGNOSE / DESCALE / CUT / REFRESH / RESTRUCTURE

↓

09 — ACT

Implement the smallest appropriate intervention.

↓

10 — RE-MEASURE

Compare against baseline.

↓

11 — ROLLBACK IF REQUIRED

If CPA consistently crosses **$110** after scaling:

Descale → stabilize → diagnose

↓

12 — LEARN

Document the result.

↓

13 — REPEAT

Use the learning to create the next test.

2.37 Core Rules

Rule 1

CPA < $90 = target operating zone.

Rule 2

CPA > $110 = begin descaling and quality improvement.

Rule 3

20+ calls = minimum historical scale-validation volume.

Rule 4

10–15 calls = minimum initial evaluation range.

Rule 5

No calls after spend = investigate tracking; if delivery/tracking is valid, kill.

Rule 6

2+ minute calls = historical minimum call-quality requirement.

Rule 7

~30% qualified-call rate = historical quality benchmark.

Rule 8

Profitability is the final economic requirement.

Rule 9

One bad day does not justify a structural change.

Rule 10

Two consecutive bad days trigger diagnosis, provided sufficient data exists.

Rule 11

Three-day review is a default observation window, not an automatic decision deadline.

Rule 12

Every meaningful change requires a baseline.

Rule 13

Every test should have a hypothesis.

Rule 14

Every test should produce a winner, loser, or learning.

Rule 15

Do not modify profitable campaigns without a defined reason.

Rule 16

Scaling is a test, not a permanent entitlement.

Rule 17

If scaling damages economics, rollback toward the previous stable level.

Rule 18

Do not make major economic decisions when attribution is materially unreliable.

Rule 19

Compliance approval is a hard launch gate.

Rule 20

Do not scale media beyond downstream operational capacity.

2.38 Final Operating Principle

The purpose of this SOP is not to make the buyer change campaigns more frequently.

It is to make the buyer **more consistent about when to act and when not to act**.

The operating philosophy is:

> **Find the opportunity. Measure it correctly. Give it enough data. Judge it against real economics. Protect what works. Cut what doesn't. Scale proven profitability carefully. Roll back when scale damages economics. Record the learning. Then test again.**

That is the acquisition operating system.

TEST → MEASURE → QUALIFY → DECIDE → ACT → RE-MEASURE → LEARN → REPEAT