

PAID & LEAD GENERATION · PERFORMANCE MARKETING SPECIALIST

Platform Automation Constraint Sheet

What we feed the machine, now that we no longer drive it. As buying automates, the job migrates from operating campaigns to architecting the inputs, and almost no template library has caught up.

THE DECISION THIS TEMPLATE PROTECTS

What inputs and constraints we give the system, since those are now the levers we actually hold.

ROLE	COURSE PLACEMENT	REVISION
Paid & Lead Generation	Main Course Module 4 · Asset and funnel design	Version 1.0 Current as of 19 August 2026

Automated buying will optimise faithfully toward whatever you give it, using whatever material you supply, within whatever limits you set. Those three things are the job. Complete each section as a deliberate decision rather than as a default you inherited.

BEFORE YOU START, YOU NEED

- Current campaign configuration.
- Conversion and audience data quality assessment.
- Creative and feed inventory.

01 The four inputs you control

INPUT	WHAT IT DETERMINES	CURRENT STATE	QUALITY
	What the system is trying to get more of		

INPUT	WHAT IT DETERMINES	CURRENT STATE	QUALITY
The objective and conversion signal			
Creative and asset supply	What it has to work with		
Data: audiences, feeds, first-party lists	Who it can find and what it knows		
Constraints: budgets, exclusions, guardrails	Where it is not allowed to go		

Everything else in the interface is increasingly advisory. Spending your attention on the levers that no longer move anything is the characteristic error of this transition.

02 Signal architecture

QUESTION	ANSWER	DELIBERATE?
What event are we optimising toward		
Does it have a value attached, and is the value real		
How many of these events occur weekly		
Do downstream outcomes get fed back		
What is the lag between event and truth		

03 Asset supply

ASSET TYPE	HOW MANY LIVE	REFRESH RATE	ENOUGH FOR THE SYSTEM TO TEST?
Headlines and text variants			
Images			
Video			

ASSET TYPE	HOW MANY LIVE	REFRESH RATE	ENOUGH FOR THE SYSTEM TO TEST?
Product or service feed quality			

Starving an automated system of creative and then blaming the system is common. It can only choose between what you gave it.

04 Data quality

DATA INPUT	PRESENT	ACCURATE	FRESH	CONSENT BASIS RECORDED
First-party customer list				
Exclusion and suppression lists				
Value or margin data				
Feed attributes				

05 Constraints and guardrails

GUARDRAIL	SET?	VALUE	REVIEWED
Geographic exclusions			
Placement or inventory exclusions			
Brand safety settings			
Budget caps and pacing			
Negative or exclusion terms			
Audience exclusions			

06 What we can no longer see

Automation removes visibility as well as work. Write down what you have lost sight of, so nobody later assumes you were watching it.

WHAT IS NOW OPAQUE IN THIS ACCOUNT

WHAT WE DO INSTEAD TO STAY HONEST ABOUT PERFORMANCE

JUDGMENT PROMPTS

1. Which lever are you still pulling that the system now overrides?
2. If the signal you optimise toward is imperfect, what is the system quietly getting better at finding?
3. Are your guardrails deliberate decisions or platform defaults nobody has examined?
4. What has become invisible, and does the client know?

WHAT THIS TEMPLATE WILL NOT DO FOR YOU

- It will not tell you how any platform's system works internally. Those are not disclosed and change without notice.
- It has a short half-life. Check the review date before relying on the mechanics described here.
- It does not replace judgment about strategy. Better inputs to the wrong objective produce faster failure.

THE DEFENSIBLE OUTPUT

A documented input architecture across signal, assets, data and constraints, plus an honest statement of what has become unobservable.

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