

SYSTEM BUILD

Campaign Tracker

Marketing Ops · Airtable · AI Automation

This document describes an Airtable ops system I designed and built for campaign planning: two linked tables, calculated readiness and cost metrics, two daily automations, three read-only interfaces, and an AI agent that writes the next action for every campaign — with the decision rules kept in formulas, not in the prompt.

All campaign data in the base is fictional and exists only to exercise the system. Built October 2026.

WHAT'S INSIDE

The Problem — plans in one place, content status in another

What I Built — data model, calculations, automations, agent, interfaces

Decisions — why it's built this way

Testing the Agent — three failures, three fixes

What's Next — and where to see it live

THE PROBLEM

The question that matters gets answered too late

Campaign plans live in one place, content status in another. Which campaign is about to launch without its content ready? Usually someone finds out on launch day.

The tracker puts both in one base, links every content piece to its campaign, and lets the system do the checking — dates, readiness, alerts. People only step in when something actually needs a decision.

WHAT I BUILT

Five layers, one base

DATA MODEL

Two linked tables, closed vocabularies

Campaigns and Content, linked one-to-many. Status, type, channel and format are fixed lists, not free text. Campaigns follow one path: In Planning → Scheduled → Active → Completed.

CALCULATIONS

Readiness, conversion rate, cost per conversion

A conditional rollup counts content marked Ready against the total linked. Cost per conversion uses actual spend when it is recorded and falls back to budget when it isn't, so planned and live campaigns share one field.

AUTOMATIONS

Two daily runs, no manual status changes

Auto-activate (14:00) moves Scheduled campaigns whose launch date is today or earlier to Active. Overdue alert (08:00) finds content past its due date that isn't Ready or Published, and emails only if that list isn't empty.

AI AGENT

A Next Action field that reads one context block

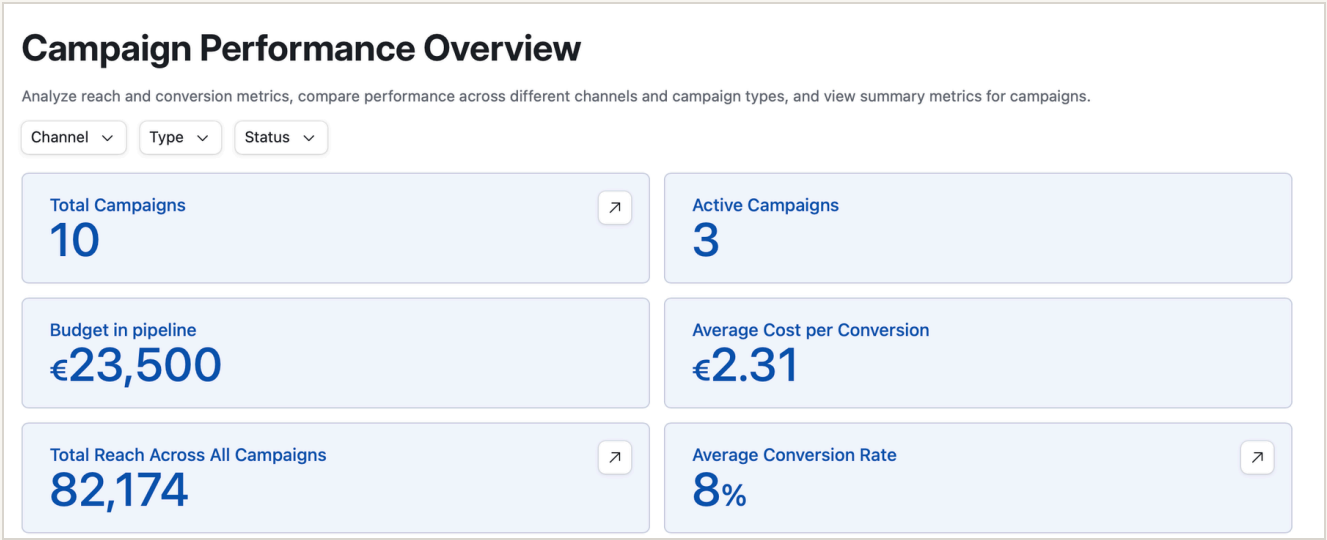
An AI field writes the most urgent action for each campaign in one sentence. A formula assembles its context — status, dates, days to launch, readiness, a computed urgency flag, cost per conversion, notes — with an explicit value for every empty field.

INTERFACES

Three views for three questions

A dashboard (how are we doing), a six-month timeline (what's running when) and a content view (what's left to produce), all shared as read-only live views.

The dashboard and the agent's output

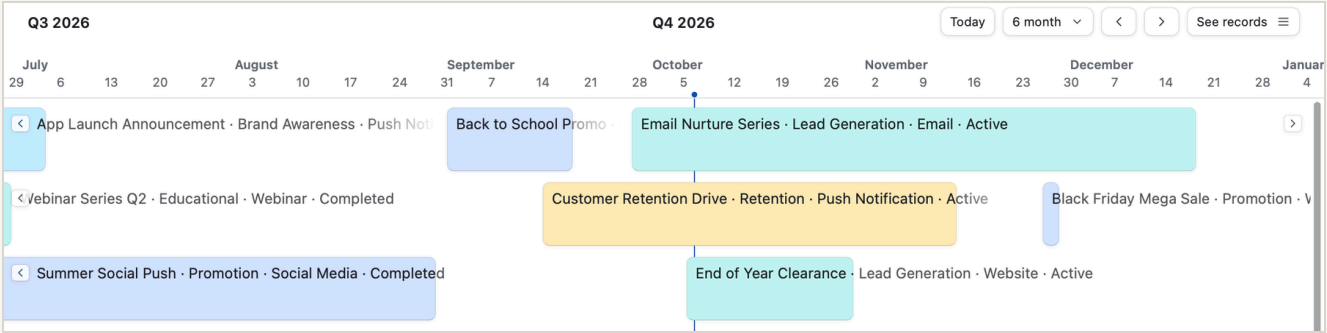


Performance dashboard: KPIs with filters by channel, type and status.

At Risk

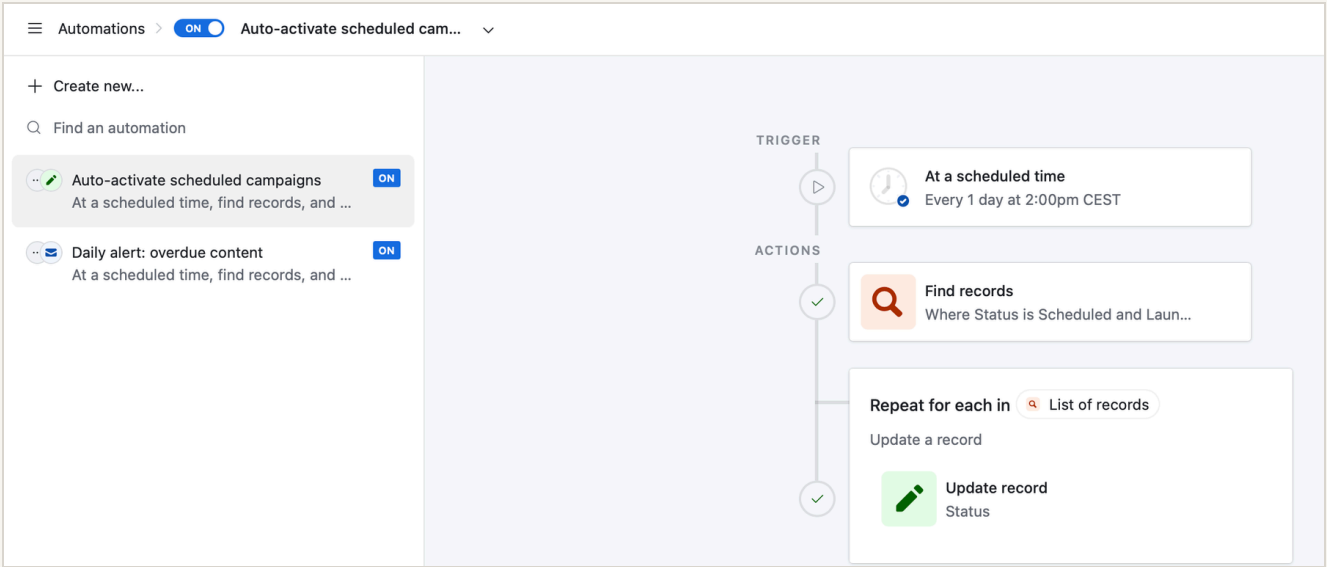
Campaign Name	Launch Date ↑	Content Readiness	Next Action
End of Year Clearance	2026-10-06	0%	Urgent: Campaign already launched but content is not ready—immediate action required to prepare and upload content.
Black Friday Mega Sale	2026-11-27	25%	Increase content production to improve content readiness, as only 25% is ready with 51 days until launch.
Spring Product Launch	2027-03-15	50%	Continue preparing campaign content to reach 100% readiness before the 2027-03-15 launch.

At Risk list: a launched campaign with no content ready is urgent; the other two are flagged without inflating the tone.

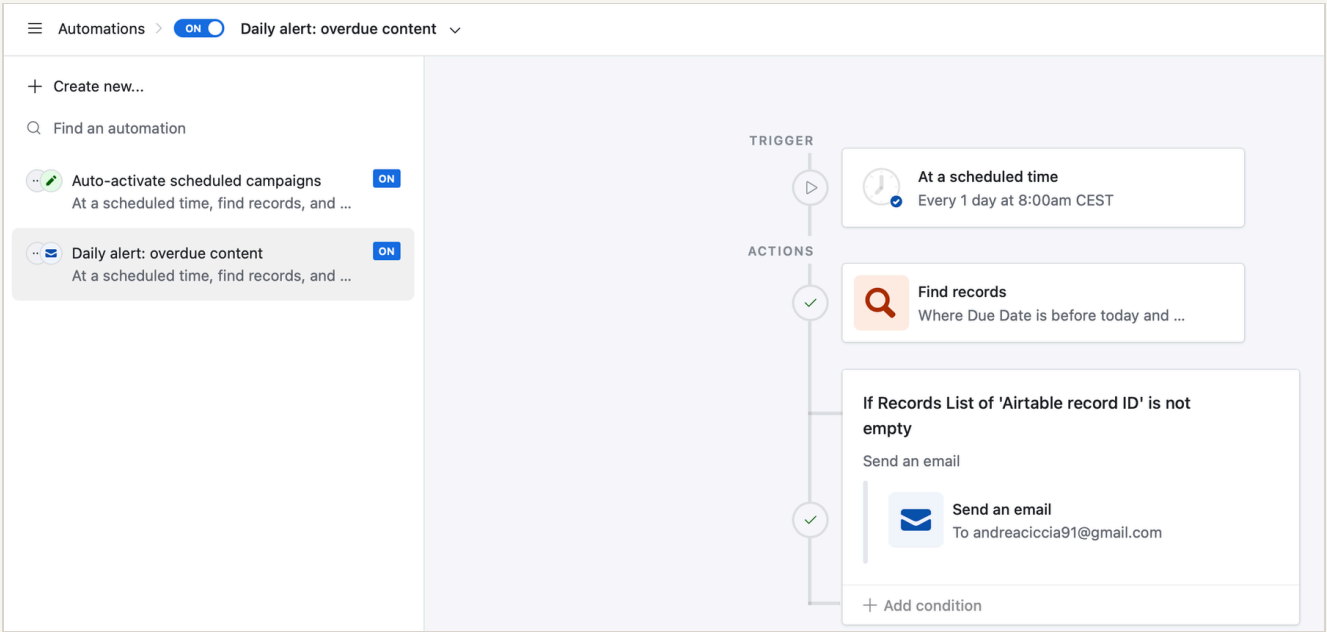


Campaign Planning timeline: each bar runs from launch date to end date.

Built to run without anyone watching



Auto-activate: daily trigger, find Scheduled campaigns due today or earlier, update status for each.



Overdue alert: the email sits behind a condition, so quiet days send nothing.

DECISIONS

Why it's built this way

CLOSED
VOCABULARIES

Status, type, channel and format are fixed lists, so filters, charts and the agent always see the same values. One typo in a free-text status is enough to drop a campaign out of every view that filters on it.

ONE CONTEXT FIELD
FOR THE AGENT

The agent reads a single formula field instead of raw columns. The formula decides how every value is presented, including the empty ones, so changing what the agent sees is a formula edit, not a prompt rewrite.

RULES IN FORMULAS,
LANGUAGE IN THE
MODEL

Anything that can be computed is computed: days to launch and the urgency flag are formulas. The model's job is only to turn a known state into a clear sentence.

SELF-CORRECTING
AUTOMATION

Activation checks for launch dates of today *or earlier*, so if a run is ever missed, the next one catches up instead of leaving a live campaign marked as scheduled.

ALERTS ONLY WHEN
NEEDED

A daily email gets ignored by day three. The overdue alert sits behind a condition: no overdue content, no email.

THE CONTENT VIEW

Campaign Name	Type	Channel	Status	Launch Date
▼ Customer Retention Drive	Retention	Push Notification	Active	2026-09-15
+ Add record				
▼ Spring Product Launch	Product Launch	Website	In Planning	2027-03-15
Content Name	Due Date	Status	Notes	
Landing Page Spring – Product page	2027-03-01	Ready	–	
Email Spring – Launch email	2027-03-08	In Review	–	
+ Add record				
Campaign Name	Type	Channel	Status	Launch Date
▼ App Launch Announcement	Brand Awareness	Push Notification	Completed	2026-06-15
+ Add record				
▼ Black Friday Mega Sale	Promotion	Website	Scheduled	2026-11-27
Content Name	Due Date	Status	Notes	
Landing Page BF – Landing page	2026-11-20	In Review	–	

Content Coordination: each campaign expands into its content pieces, with format, due date and status.

Three failures, three fixes

Before trusting the agent, I ran it against the edge cases in the data and read every output against the record behind it.

1 · IT DIDN'T READ STATUS AS A STATE

A completed campaign with no linked content was flagged as something to fix, as if it were still running. The real issue wasn't operational: the content had never been tracked.

Fix: rules separating operational issues from data gaps. That case now returns `Data gap: no content tracked for this campaign`, not urgent; a completed campaign with consistent data returns exactly `No action needed`.

2 · URGENCY DRIFTED, EVEN WITH A RULE

I added a prompt rule — urgent only within 14 days of launch with content not ready — and the model still labelled a campaign 51 days out as urgent.

Fix: the rule moved out of the prompt. A formula computes days to launch and an `URGENT` / `not urgent` flag; the agent uses that line exactly as given.

3 · MISSING NUMBERS LOOKED LIKE PROBLEMS

Campaigns that haven't launched have no cost per conversion yet. The context now says so explicitly, and a rule tells the agent not to treat it as an issue.

You are a senior media planner reviewing a campaign tracker.

Agent Context: [[✕ Agent Context](#)]

Today's date matters: compare the launch date with today.

In ONE sentence, state the most urgent next action for this campaign.

Flag clearly if the campaign is about to launch or already launched with content not ready.

If no action is needed, write exactly: "No action needed".

Do not invent facts that are not in the data above.

Rules:

- Distinguish operational issues from data gaps.
- If cost per conversion is not available, do not treat it as a problem.
- If Status is Completed and no content is linked, write: "Data gap: no content tracked for this campaign" (not urgent).
- If Status is Completed and data is consistent, write "No action needed".
- Use the "Urgency (computed)" line exactly as given. Never call a campaign urgent if it says "not urgent".

Preview ⓘ 1 credits

Continue preparing campaign content to reach 100% readiness before the 2027-03-15 launch.

The final prompt, with the rules and a preview of the output.

AT A GLANCE

What the system runs on its own

2

Linked tables

2

Daily automations

3

Read-only interfaces

1

AI agent field

WHAT'S NEXT

The base is ready for real spend data: Spend to Date already drives cost per conversion, which falls back to budget when no spend is recorded. The next step is a sync that pulls an Ads Manager export into the base through the Airtable API.

SEE IT

Full write-up — andrea-ciccia.netlify.app/campaign-tracker

Live dashboard (read-only) — airtable.com/.../shrnbyOIEUoHIIIPT

Built with Airtable: linked tables, formulas, conditional rollups, scheduled automations, AI fields and Interface Designer. Demo data.

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