CAPABILITY BRIEF

Marketing work. Connected.

A customized SaaS Hero Marketing Hub showcase
Prepared for agency prospects and companies hiring Mandy Miller

From onboarding to client review, this workspace brings the moving parts of a paid marketing program into one connected experience.

For an agency buyer

A clearer view of how an agency organizes strategy, creative work, performance analysis, and client feedback — not just a collection of reports.

For a company hiring Mandy

A concrete example of translating business needs into a tailored working tool through AI-assisted development, information design, and workflow customization.

The central idea

Client knowledge informs the plan. The plan informs the creative. Performance informs the next decision. Clients review the work in context.

CONTEXT > PLAN > CREATE > REVIEW > LEARN

Demonstration, not a results case study. The current build is offline, with sample metrics and simulated external services.

Turn the brief into a coherent program.

Move from scattered onboarding information to structured marketing deliverables that an account team can refine and a client can understand.

Campaign strategy & onboarding

Collect business inputs and organize audience, pain points, offers, messaging, funnel stages, and channel plans. Strategy views and refinement workflows keep the plan close to the work.
Agency value: a more consistent starting point. Client value: a clearer explanation of why a campaign exists.

Keyword research & account structure

Review intent-based keywords, clusters, uploaded lists, search-demand and CPC data, budget estimates, and account structures. Export working lists for the next stage.
Agency value: organized search planning. Client value: visibility into the demand being targeted.

Ad copy, UGC & creative previews

Work with headlines, descriptions, copy variants, uploaded copy, refinement, and UGC scripts. Build Meta and LinkedIn-style mockups with brand elements and editable previews.
Agency value: keep message and execution aligned. Client value: review an ad in a recognizable format.

Competitor intelligence

Organize website and landing-page observations, competitor advertising and keyword research, positioning, battlecards, and email-template workflows. Use share and PDF options where provided.
Agency value: a reusable competitive reference. Client value: understand the proposed differentiation.

AI drafting, live keyword metrics, crawling, and external ad research are simulated in this offline demo; outputs require human review.

Connect channel activity to business decisions.

Give specialists, strategists, and account managers a shared performance vocabulary — while keeping channel detail available.

Four paid-media workspaces

Google Ads, Meta Ads, LinkedIn Ads, and Microsoft Ads views bring together account context, performance snapshots, campaigns, trends, and findings. Channel-specific detail supports focused review rather than forcing every platform into the same template.

Audits, findings & account questions

Surface potential waste, tracking concerns, creative opportunities, search-term issues, and recommended actions. Analyst chat workflows let the team ask questions about account performance and save useful observations to client knowledge.

Budget pacing & alerts

Review spend against budgets and select campaigns for pacing where supported. Alert-rule and Slack-alert workflows provide a structure for keeping exceptions visible. This supports attention management; it does not prove savings or automatic correction.

Analytics, search visibility & full funnel

Google Analytics and Search Console views add traffic, landing-page, query, and ranking context. Full-funnel views connect marketing stages, channel mix, CRM inputs, and cross-channel findings to downstream outcomes.

Experiments & continuous learning

Organize hypotheses, proposed tests, and outcomes. Keep lessons alongside client context so the next planning cycle can start with what the team has already learned.

Demo charts and audit results are sample data. Blended lead counts depend on conversion definitions; validate those definitions before making budget decisions.

Make the account less dependent on memory.

A marketing agency works through people, not just platforms. The workspace gives those people a common place to keep context and coordinate delivery.

Client Brain & business context

Keep ICP details, product positioning, objections, notes, observations, and pinned knowledge together. Saved analyst answers can become part of the account reference.
Benefit: help new teammates understand the client without reconstructing every past conversation.

Documents, calls & conversations

Organize onboarding materials and client documents alongside call notes and conversation context. Drive, Slack, and email-related workflows are represented in the broader application.
Benefit: bring the brief and supporting evidence closer to day-to-day work.

Projects, folders & saved deliverables

Group strategy, keywords, ad copy, mockups, and competitor work under projects. Saved workspaces and document lists give the team a structured handoff rather than an assortment of disconnected attachments.

Teams, pods & administration

Team and pod organization, assignments, role-related views, user management, and invitations support agency operating structure. Production permissions still need verification in a connected deployment.

CRM inputs & shared learning

CRM import and mapping workflows can support funnel analysis. Cross-client knowledge and agency roll-ups offer a place to compare patterns while keeping the underlying definitions and client context explicit.

In this demo, edits live in the browser that made them. Shared multi-user storage, external sync, and durable production access controls are not demonstrated.

Share the work.
Keep the conversation attached.

Clients should be able to understand what is proposed, review it, and respond without deciphering the agency’s internal tool stack.

A recognizable client workspace

Keep account overview, channel performance, funnel views, projects, documents, context, and settings within a consistent client structure.
Client benefit: less hunting for the latest work. Agency benefit: a clearer place to lead an account conversation.

Shareable deliverables & review links

The application includes project sharing, battlecard sharing, and audit-review flows. Public review pages are designed to present selected work outside the internal agency workspace.
Client benefit: a focused review experience. Agency benefit: a repeatable way to present deliverables.

Comments, highlights & notifications

Comment threads and highlights keep feedback tied to the relevant deliverable. Notification workflows help the team identify where a response is needed.
Client benefit: specific feedback has context. Agency benefit: fewer ambiguous revisions.

Exports & presentation-ready previews

PDF and CSV options, where available, support portable reporting and working files. Ad mockups make proposed creative easier to discuss before production.
Client benefit: tangible materials to review and circulate.

An illustrative account journey

Onboard the client → agree on strategy → review copy and mockups → examine results → choose the next experiment. This is a workflow the platform can organize, not a guarantee of marketing outcomes.

Offline sharing does not prove a link works across devices, that notifications are delivered, or that client access is secure. Test these in a connected environment.

A delivery system. And the skill to shape it.

The product story has two audiences: a buyer choosing an agency and a company looking for someone who can turn operational friction into a usable tool.

The agency proposition

“We connect strategy, creative work, performance review, and client collaboration around your business context — so you can see the rationale, review the work, and participate in the next decision.”
Positioning: a more transparent, organized service experience. Do not present projected efficiency as measured ROI.

The Mandy Miller proposition

“I translate business workflows into tailored digital workspaces. This customized Marketing Hub demo shows how I use AI-assisted development to organize complex information, shape the experience, and make the process tangible.”
Credit accurately: this work customizes and extends an existing SaaS Hero platform; it is not a claim to have authored every original feature.

Skills this project makes visible

Business-process interpretation; information architecture; client-workspace customization; demo and sample-data design; document-to-workflow translation; practical testing and iteration; communicating value across technical and nontechnical audiences.

Where this approach can apply

An agency client portal, internal marketing operations workspace, onboarding and knowledge system, sales-enablement hub, or departmental decision tool. Scope should follow the actual workflow — not a promise to recreate every enterprise platform.

A practical engagement

Map one recurring workflow, identify the users and decisions, build a focused prototype, review it with real users, and then connect and harden the agreed production version. Expand only after the first workflow earns its place.

Potential benefits include clearer handoffs, less tool switching, and reusable knowledge. No time-saved, cost-saved, revenue, or performance uplift has been measured here.

Show the ambition.
Be precise about the proof.

The Mandy Miller, LLC account gives buyers a concrete tour of the operating model without requiring live ad-platform connections.

What the demo represents

A remote visual-support business serving HVAC, plumbing, and electrical teams, renamed Mandy Miller, LLC and modeled on supplied Virtually OnSite onboarding materials. The sample monthly advertising budget is $10,000. Campaigns, performance numbers, and other synthetic records illustrate workflows; they are not actual business results.

What is demonstrable now

Navigable client and project views, populated sample channel dashboards, editable workspace elements, document/context structures, and example creative and planning outputs. This is a presentation environment; it does not establish that every button or export path has been tested.

What is simulated or unverified

External advertising and analytics connections; live research and AI responses; Slack, Drive, and email delivery; multi-user persistence and cross-device sharing. Demo actions may return canned responses rather than complete a live task.

Before a production commitment

Validate authentication, roles, client isolation, share-link controls, and persistence. Configure authorized connections and live AI. Verify metric definitions, imports, notifications, exports, and error states. Agree on hosting, support, data retention, monitoring, and client-document consent.

A strong next conversation

For an agency prospect: Which part of your current marketing process feels hardest to see or review?
For a company hiring Mandy: Which recurring workflow would you want turned into a tool your team can actually use?

Prepared October 6, 2026 from the current application and demo context. Review supplied client materials and permission before using them in a public portfolio.