



LESSON 6.

AUTOMATING TEAM MANAGEMENT: how to control processes without extra effort

Hello everyone! In this lesson, we'll discuss how to automate team management in affiliate marketing so that you can see all results in real time, save time on data collection, avoid stressful deadlines, and easily control all processes even if your team has dozens of people and constant turnover.

Collecting and Visualizing Metrics (Dashboards, Analytics)

If you work through platforms like EVEDEX or Admitad, you already have built-in analytics, but usually it's limited to standard reports.

To track everything in detail (down to each affiliate's conversions, daily dynamics, and real campaign performance) **use Google Data Studio (now called Looker Studio) or Power BI.**

How to Set It Up:

Google Data Studio / Looker Studio:

1. Sign in (a regular Google account works).
2. In the dashboard, choose “Create Data Source”, use Google Sheets or Excel Online where your affiliate platform automatically exports reports (usually via “Data Export” or “Integrations” section).
3. Set up automatic data refresh. Enable daily or weekly auto-updates in the spreadsheet settings.
4. In Data Studio, build visualizations: dynamics for registrations, turnover, deposits, active affiliates, commissions. Easily add filters by managers or traffic channels.
5. Access can be granted to the whole team, with each person limited to their specific section if needed.

Power BI:

1. Download Power BI Desktop (free) or use the cloud version (powerbi.com).
2. In “Get Data,” select Google Sheets, CSV, or API connection (if your affiliate platform supports API export).
3. Import reports and set refresh schedules (e.g., nightly).

4. Create dashboards: KPI tables, trends, comparisons, custom reports for managers and team.
5. You can also set up automated email report distribution directly from Power BI.

**Important:**

If your affiliate platform doesn't support auto-export, ask support or set up automatic export via Zapier/Make.

Example: *“Every night new data → Google Sheets → Data Studio.”*

TASK AUTOMATION AND FEEDBACK

To ensure no one “forgets” reports, deadlines aren't missed, and tasks stay transparent, use a task manager that integrates with Google Sheets or your dashboards.

ClickUp:

1. Sign up and create a workspace.

2. Create individual tasks for each manager and key affiliate (e.g., “Weekly report,” “Upload new creatives,” “Traffic source check”).
3. Set recurring tasks (weekly/monthly) and assign responsible persons.
4. In “Automation,” connect Google Sheets or email: when a new report appears in the sheet, ClickUp auto-creates a “Review and Approve” task.
5. All actions get logged — you see who did what and at which stage any task is.
6. Integrate with Telegram or Slack for instant task notifications.

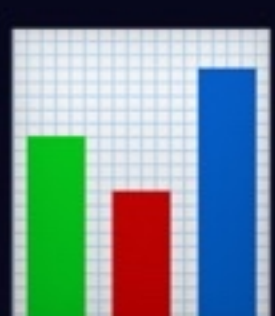
Trello — simpler but effective:



Create separate boards for categories: “Creatives,” “Training,” “Finance,” “Affiliate checks.”



Cards are individual tasks with deadlines and checklists for control.



Integrate Google Sheets via Power-Ups or Zapier — new reports auto-turn into task cards.

COMMUNICATION AND REMINDER AUTOMATION

An API is essentially a “bridge” between your affiliate platform and any other services, allowing data to be transferred automatically without manual input.

Telegram Bots for Notifications

- Create a bot via BotFather (if you need a custom one) or use standard corporate solutions (e.g., Combot for groups).
- Most task managers (ClickUp, Trello, Asana) integrate with Telegram: all reminders and important messages appear in team chats or direct messages.
- Set automatic reminders for critical events (e.g., missed report, pending task) to ensure no issues slip through.

Email Newsletters

1. Use Gmail or corporate mail.
2. Set filters and labels to see only important emails (e.g., affiliate reports, platform notifications).
3. For mass mailing — SendPulse or UniSender: upload address lists (can be exported from platforms), create templates, and schedule automated sends weekly or monthly.



CENTRALIZED FILE STORAGE AND SHARING

Google Drive

1. Organize folders: “Reports,” “Creatives,” “Legal Documents,” “Finance.”
2. Role-based access: affiliates see only their materials, managers the whole structure, accounting only needed sections.
3. Set up automatic file uploads: new creatives go to “Creatives,” reports to “Reports.”

Task Manager Integration:



In ClickUp and Trello, attach files directly from Google Drive to tasks. All documents stay accessible and don't get lost in private chats.

Weekly Full Control Without Manual Collection



Set up auto-reports:

Once a week, the system generates a summary (registration count, deposits, turnover per affiliate/manager, problem areas) and sends it via Telegram, email, or Google Drive.



For agile teamwork, use auto-calls (Zoom, Google Meet).

Calendar integration sends reminders and links in advance—no manual scheduling needed.

Real-Life Example

Suppose you have a team of 20 affiliates and 3 managers:

1. Everyone daily logs progress and closes tasks in ClickUp.
2. Each day at 8 AM, you get a Telegram report: “Yesterday: +120 registrations, \$9,500 deposits, top 3 affiliates — ...”
3. All reports and documents automatically appear in the right Google Drive folders.
4. If someone misses a report or deadline, an immediate reminder goes to the general Telegram chat.
5. Weekly, the system creates a final table in Data Studio: shows dynamics by manager, highlights issues and growth areas.

If Nothing Works — What to Do

Any modern affiliate platform supports at least data export or Google Sheets connection.



If not, request integration via Zapier or Make: templates like “new report → new task → notification” are almost always available.

Setup takes 2–3 days once; later you just maintain the system (change templates and logic as the team grows).

LESSON SUMMARY

Team management automation is about consistent implementation of tools:

Google Sheets → Data Studio → Task manager (ClickUp/Trello) → Telegram bots → centralized cloud drive.

Set it up once and your team runs on autopilot; you manage the process instead of spending time on endless manual checking and messaging.

Everything important is **on your screen, the whole team stays in control, and no task or report gets lost.**