

OMMO Analytics

SOP - Monthly Account Review

Standard operating procedure for OMMO Analytics delivery, support, and managed client operations.

Owner	OMMO Group Company
Product	OMMO Analytics
Version	1.0
Status	Active operating draft

Purpose

Review each active client workspace for business value, data quality, and next actions.

Scope

Applies to live tenants and high-value onboarding tenants.

Roles

- Account owner: leads review.
- Data owner: checks numbers.
- Client admin: receives summary where needed.

Required inputs

- Monthly dashboard.
- Source freshness.
- Subscription tier.
- Open alerts.
- Support tickets.
- Client feedback.

Procedure

- Review executive KPIs.
- Check source freshness and failed syncs.
- Identify stock, ad spend, support, and shipping issues.

- Review user count, brand count, and plan fit.
- Prepare client summary and recommended actions.
- Log upsell or support opportunities.

Quality checks

- Numbers are explainable.
- No source has been stale without admin awareness.
- Client is on the right tier.
- Open issues have owners.

Records to maintain

- Monthly review note.
- Client recommendations.
- Risk list.
- Expansion opportunities.