MANOR

SAMPLE REPORT: NAMES CHANGED

Keap Account Health Report

What the account is doing, what looks off, and what to fix first

This report covers every campaign, sequence, goal, tag, Easy Automation and pipeline in the account, and flags what looks off in plain language. It was produced in the owner's own signed-in browser, read-only. Nothing in the account was changed.

01	**The account at a glance**	What was read, and what the read cannot see
02	**What looks off**	Every finding by kind, and the three checks in plain language
03	**Worth knowing**	The leftovers that make the account slow and risky to change
04	**A short fix plan**	What to fix first, in the order that protects your contacts
05	**What's next**	How we can work on it together

ACCOUNT	Sample account on Keap Max Classic, about ten years of use
READ ON	22 November 2026
HOW	Manor health check, run by the owner in their own browser, read-only
REVIEWED WITH	Eric Connelly, Manor

Sample report. The counts come from one real ten-year Keap account. Every campaign, tag, product, program and pipeline name, and every id number shown, is invented. Keap is a trademark of Thryv; Manor is independent and not affiliated with or endorsed by Keap or Thryv.

01 The account at a glance

THE BOTTOM LINE

In about two minutes the read covered 372 campaigns, 273 Easy Automations and 15 pipelines, and found 483 items worth checking. The most urgent are automations that wait for a tag nothing in Keap applies. Anyone who reaches one of those steps can wait there with no end.

372
Campaigns, 120 of them live

273
Easy Automations, 249 of them live

15
Pipelines, every stage read

483
Items to check, plus 1,057 notes

EXHIBIT 1

The whole account was read in two minutes, and nothing in it changed

WHAT WAS READ	COUNT	WHAT THE READ LOOKED AT
Campaigns	372 listed 120 live	Each campaign's sequences, goals and links to other campaigns, and how many people are in it
Easy Automations	273 249 live	Every one opened: its trigger, the tags it applies and removes, deal moves, unpublished edits
Pipelines	15	Every pipeline and stage, and the automations that move deals between them
Tags	Every tag in use	Which automation applies each tag, which removes it, and which waits for it
Time and load	About 2 minutes	600 read requests, all from the owner's own browser
Changes made	None	The check only reads. No campaign, tag, contact or setting was touched

Source: Manor health check of the sample account, 22 November 2026.

WHAT THIS READ CANNOT SEE

- **Tags applied from outside Keap.** A web form, Zapier, another app or a person can apply a tag. The read sees only what Keap's own automations do, so "nothing applies this tag" is a question to answer, not a verdict.
- **Tag names, unless an API key is saved.** Without a Keap API key in Settings, tags show by number. This sample shows names to make it easier to read.
- **Every draft campaign in one pass.** A first pass can leave some draft campaigns unopened. Those show up as links "not scanned" until a second pass opens them.

02 What looks off

Each finding is either a **check**, something that can stop people getting what they signed up for and needs a decision, or a **note**, something worth knowing that is rarely urgent.

EXHIBIT 2

Most findings are years of clutter, but 483 of them can stop a contact in their tracks



Tags applied but never read by anything	762	NOTE
Tags something waits for, but nothing applies	406	CHECK
Tags one automation applies and another removes	244	NOTE
Links to campaigns not scanned or missing	72	CHECK
Published campaigns with nobody in them	51	NOTE
Easy Automations edited but not republished	5	CHECK

Source: Manor health check of the sample account, 22 November 2026. 483 checks (406 + 72 + 5) and 1,057 notes (762 + 244 + 51).

The three checks, in plain language

1 Automations wait for tags that nothing in Keap applies — 406 CHECK

WHAT THE READ SAW
"Course Module 3 delivery" (#2231) waits for the tag "Module 3 unlocked" (#4127) before it sends anything. No campaign or Easy Automation in the account applies that tag.

WHAT IT COSTS YOU
If nothing outside Keap applies it either, every student who reaches that step stays there. They paid, and Module 3 never arrives. Nobody gets an error, so nobody notices until someone writes in.

WHAT TO DO
For each tag, confirm whether a form, Zapier or a person applies it. If something does, note it. If nothing does, connect it or remove the wait.

2 Campaigns send people on to campaigns that are missing or not yet read — 72 CHECK

WHAT THE READ SAW
"Webinar follow-up" (#1593) hands people to another campaign at its last step. That campaign is not in the account's campaign list.

WHAT IT COSTS YOU
Anyone who finishes the webinar emails drops out of the journey there. The sales emails that were meant to come next never send, and Keap shows no error.

WHAT TO DO
Re-read the campaigns this pass did not open. For each real gap, point the step at the live campaign or remove it.

3 Easy Automations were edited, but the edits were never published

5 CHECK

WHAT THE READ SAW
"Free guide opt-in, tag and route" has edits saved as a draft. Keap still runs the older, published version.

WHAT IT COSTS YOU
The team believes the new rule is live. New sign-ups get the old tags, so they land in the wrong follow-up and hear about the wrong offer.

WHAT TO DO
Compare the two versions together, then publish or discard each one. This is the quickest fix in the report.

03 Worth knowing

The notes are rarely urgent. They are what ten years of building leaves behind, and they make every future change slower and riskier.

EXHIBIT 3

Three kinds of leftovers make the account hard to change safely

FINDING	EXAMPLE FROM THE READ	WHAT IT COSTS YOU	WHAT TO DO
Tags one automation applies and another removes 244 notes	"Signature Program welcome" applies "Program: active". "Membership renewal" removes it.	If both reach the same person, the order decides what they get. A member can lose their access emails, or get a welcome and a renewal reminder in the same week.	Decide which automation owns each tag, and remove the other's step.
Published campaigns with nobody in them 51 notes	"Spring Launch 2024 promo" is published, has no one in it, and was last published over two years ago.	Clutter that slows every change. An old offer, with old prices, can start again if a tag fires it by mistake.	Check nothing links to it, then retire it.
Tags applied but never read 762 notes	"Webinar attended, March" is applied by "Webinar follow-up". No automation reacts to it.	Often nothing, when the tag is for searches or reports. Over the years it makes the tag list hard to trust, and the important tags hard to find.	Keep the ones used in searches and reports. Archive the rest under a naming rule.

Source: Manor health check of the sample account, 22 November 2026. Examples are one item of each kind, with names changed.

THE READ IN ONE LINE

The account does a lot of real work every day. The risk is not one big break. It is hundreds of small paths where a person can stop getting emails, get the wrong ones, or land in the wrong place, without anyone seeing it happen.

04 A short fix plan

In order of what protects your contacts first. You make each change in your own account, or we make it together on a call with you approving each one. After each step, run the health check again and confirm the count went down.

1 **Publish or discard the 5 unpublished Easy Automations** — FIRST
Compare the draft with what runs today, decide, and publish. One working session.

2 **Answer the 406 waiting tags** — FIRST
Group them by campaign so each group is one decision. Mark the tags applied from outside Keap, then connect or remove the rest.

3 **Repair the 72 campaign links** — NEXT
Open the campaigns this pass missed. Point each real gap at the live campaign, or remove the step.

4 **Give every contested tag one owner** — NEXT
Work through the 244 tags that are applied in one place and removed in another, starting with the live programs.

5 **Retire the idle campaigns, then tidy the tags** — THEN
Retire the 51 empty published campaigns after a link check. Archive unread tags under a naming rule the team keeps.

05 What's next

STEP 1

Account map and fix plan

$1,500 fixed ($950 under 100 campaigns)

Every one of the 483 checks sorted into fix, keep or ask. A map of how campaigns, tags, pipelines and outside tools connect. The fix plan in order, with the effort for each step. Reviewed with you on a 90-minute call.

STEP 2

Clean-up

Fixed price from the plan, from $2,500

We work through the plan together in scheduled sessions. You approve every change in your own account, and the health check is run again after each step to prove it held.

STEP 3, OPTIONAL

Monthly care

$750 a month

The health check, run with you every month, a monthly call, up to four hours of fixes together, and answers within one working day. Stop any month.

Eric Connelly, Manor. I'm an American engineer living in France, and I build business systems and the tools that read them. Calls run in European daytime, which is the US East Coast morning.

Book the review call at runmanor.com/contact · linkedin.com/in/ericmconnelly