refinery

From Hours to Instants:

How Refinery Saves Time on Your Most Repetitive Affiliate Tasks

Affiliate managers are pros at taking on tasks that have just become part of the job. Pulling reports, chasing down performance data, checking for fraud. It's all just become part of the daily and weekly routine.

On the surface these tasks look like simple to-do's, but are often multi-step, manual processes that eat up hours and slow real impact.

In this infographic, we're highlighting just four of those time-consuming tasks, but there are many more.

Here's what it really takes to uncover these insights manually, and what happens when you let Refinery automate them.

Manual

Automated

1. ROAS/ROI by Placement & Partner

MANUAL WORKFLOW (9 STEPS)

- Locate performance by Ad ID in your affiliate platform
- Click into the specific Ad ID tied to the placement
- Identify the associated publisher for that Ad ID
- Manually calculate ROI (Revenue + Spend) or export raw data
- Adjust date ranges to compare pre- vs. post-placement performance
- Identify the associated publisher for that Ad ID
- Merge reports and align timeframes in a spreadsheet
- Build a custom formula to calculate lift between periods
- Interpret the data to assess placement effectiveness

WITH REFINERY (3 STEPS)

- Pre-built dashboards calculate placement-level ROAS across partners in one click
- Spot over- or under performers instantly
- Adjust metrics automatically (Revenue vs ROAS vs New customers, etc...)

Estimated Time Saving:
30 minutes to 1 hour per week

2. Tracking Performance of Specific Groups of Affiliates (e.g. influencers, content partners)

MANUAL WORKFLOW (6 STEPS)

- Define partner group manually (via tags or saved filters, if supported)
- Pull reports by partner ID
- Isolate group via VLOOKUP or manual matching
- Aggregate clicks, conversions, revenue or other metrics important to KPIs
- Create pivot tables to compare group performance
- Repeat weekly/monthly for trends by copying and pasting updated data to hopefully match with predefined calculations/lookups

WITH REFINERY (2 STEPS)

- Custom partner groups tracked automatically
- Trend lines and group insights updated in real time. No more re-pulling updated data. Data updates automatically!

Estimated Time Saving:
1 hour per reporting cycle

3. Fraud Pattern Recognition

MANUAL WORKFLOW (10 STEPS)

- Create baseline of averages for clicks and conversions
- Pull 6+ months of click and conversion data
- Export and calculate baseline averages
- Manually refresh reports to spot spikes or anomalies
- Cross-reference suspicious data by time of day, device, and geo
- Compare new patterns to historical fraud cases
- Flag traffic sources that exceed thresholds or resemble past fraud
- Investigate suspicious activity and identify violating partners
- Reach out to partners directly if needed
- Alert internal or compliance teams for follow-up

WITH REFINERY (2 STEPS)

- AI pattern detection identifies potential fraud early
- Anomaly alerts surface unusual click and conversion behavior in real time

Estimated Time Saving:
2+ hours/month (and still reactive)

4. Dormant Partner Detection

MANUAL WORKFLOW (8 STEPS)

- Export two historical partner performance reports (include unique identifiers like partnerID)
- Compare revenue from two time frames (e.g., most recent 90 days vs. the prior 90 days)
- Use VLOOKUP or similar to align partner data across reports
- Calculate percentage drop in performance for each partner
- Sort by revenue to prioritize highest-volume accounts
- Identify partners with significant declines
- Cross-check for seasonal or program-related factors
- Locate contact info and manually create re-engagement outreach

WITH REFINERY (4 STEPS)

- Pre-set rules highlight dormant partners
- Find outliers and previous top performers with out the work
- Re-engage with more than 1 publisher at a time; saving you more time
- Automatically create a cohort to track progress

Estimated Time Saving:
1.5 hours/month

TL;DR: What Takes You 5+ Hours, Refinery Does in Seconds

Affiliate managers aren't short on skills—they're short on time.

Refinery is built to handle the heavy lifting, so you can focus on strategy, not spreadsheets.

Curious how much time your team could save?

See Refinery in Action