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**3 myths of email analytics**  
and how they are impacting your results

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*The volume of insights you can gain by adding ad hoc analysis capabilities to your standard set of email reporting metrics can help you uncover hidden data gems and gain valuable insights.*

Campaign results and ROI have taken center stage for marketing departments everywhere. More and more focus has been put on making dollars count and being held accountable for trackable performance. This is especially true for email marketing. There is a wealth of metrics that we are able to collect from the most basic email marketing systems to complex integrated marketing automation systems. The data is there and we are expected to collect, translate and share that information, in a constant effort to prove that, yes, marketing efforts (and dollars) do make a difference. This paper will explore some of the common myths about analyzing and distributing email marketing data that are impacting your analytics and hindering your results.

### **Myth 1: There is a constant set of email metrics and reports to tell what's going on with email marketing efforts**

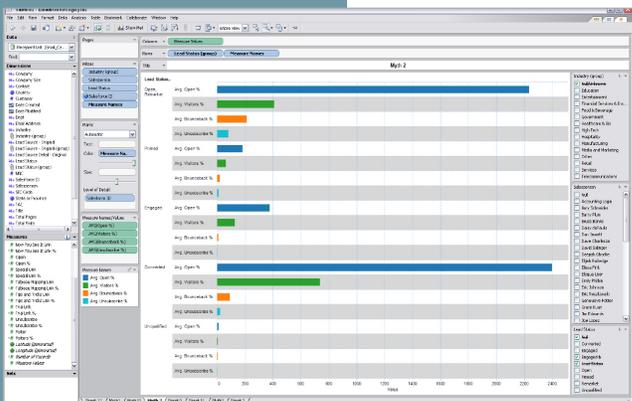
In terms of how you get your analytics and metrics, you're probably in one of a few camps:

- 1) Your email marketing tool likely comes with a pre-built set of metrics tools for you to monitor and analyze your campaign performance. This could be a simple list of open rate, click-through rate, and bounce or unsubscribe percentages. You use this information to compare it to industry benchmarks to determine how your campaigns are over or under performing.
- 2) Your email marketing solution is more robust and provides you with a set of dashboard widgets that allow you to monitor your single email blast performance, or compare it to recent or similar email campaigns. Often these dashboard widgets have industry benchmarks built in so that you can quickly see how your campaign has performed against the industry standard.
- 3) Or maybe you put in the extra effort to export the raw data and use Excel to analyze the data, create pivot tables, or use custom calculations that allow you to display and compare results among a variety of dimensions.

No matter which camp you fall into, chances are that you use a consistent set of email analytics to track your campaign performance and provide the results to your organization.

These types of standard reports and metrics can be helpful for what is known – things like overall open rates, bounce rates, and click-through rates. Are there other factors out there that are impacting those knowns? What insights are you missing by only looking at the same set of reports and data?

Provide analysis in a format that allows for easy ad hoc grouping and filtering capabilities.





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Take for example a company newsletter email campaign. This newsletter goes out to everyone in your database including leads that are in different stages of the marketing funnel or sales pipeline, as well as leads from different industries and job functions. By having the ability to add simple dimensions like lead status and industry to the mix, your analytics story can change dramatically. Suddenly you can see that new leads in the healthcare industry are unsubscribing at an incredibly high rate. Based on the large healthcare segment in your database, you are able to see how much that segment's unsubscribe rate is dramatically affecting your overall unsubscribe rate. You might also notice that finance and IT leads that salespeople had previously judged to be of poor quality had very high click-through rates. The content in the latest newsletter engaged this audience giving you insight to the types of content this group finds relevant as well as reenergizing many leads that had previously been unresponsive or lost interest.

Supplementing your standard reporting metrics with ad hoc analysis capabilities will help you uncover hidden data gems and gain valuable insights that standard reporting would not have identified. In our example above, we were able to discover the impact that a smaller segment's actions can take on your overall performance metrics.

Although it's important to benchmark and look at known performance metrics, the reality is that it's critical to include metrics and insights found during ad hoc analysis to take a deeper, more insightful look at your data. A standard set of email metrics and reports can't always tell you the whole story.

## **Myth 2: A single report can be perfected to communicate all the information needed to take action**

Think back. You had started out with a fairly comprehensive email marketing campaign report that you shared with your organization. Then the Segment Marketing Manager asked you to start including job function and industry in the report, and Sales wanted lead status. Then the Retention Manager wanted to know which records are customers. Pretty soon you had an overly complex report that included all the data that everyone wanted in a format that nobody wanted. Now you get requests to create custom reports for each of the different groups in the organization and find yourself drowning in data. The idea of having to create custom reports for everyone implies a huge burden on you to create analyses for each use scenario.

We might classically define the type of information each group wants and then create a huge report including all the information. A better idea is to create quick ad hoc analyses that are customized for the type of content or insight that you want them to see: the story that you see coming through the data that is interesting and relevant to that group is one way of providing more useful and meaningful results to your audience.

*Delivering analysis and insights that can be easily customized to meet the different needs is far more effective and useful than communicating one set of data to very different audiences.*



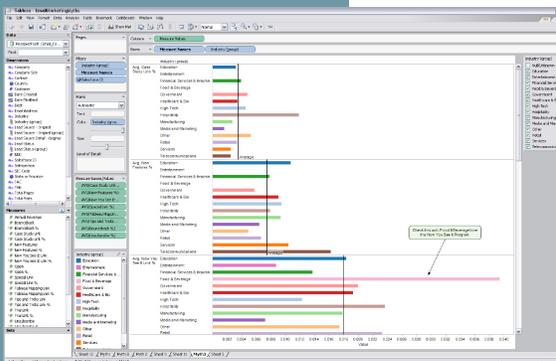
The reality is that each group in your organization has a different job function and requires different metrics from your email marketing campaigns to take action and make informed recommendations. Delivering analysis and insights that can be easily customized to meet the different needs is far more effective and useful than communicating one set of data to very different audiences. Again, select a tool or means of analysis that makes this easy; the last thing you have time for is repeating time-intensive analyses for every different group that asks.

### Myth 3: Insights and results from email campaigns are clear and obvious

Click-through, open, unsubscribe. We all know what these terms mean to our email marketing campaigns but not everyone does. You may also know that last week's campaign had a higher click-through rate and that the improved click-through rate meant an additional 50,000 people responded. Or last month's newsletter had higher than normal unsubscribe and bounce rates because you uploaded a huge list of purchased leads to your database the week before. Many

of these things are obvious to us right away, even when just glancing at the campaign summary metrics. But how often do we fail to communicate the impact of our campaigns when providing results? Or maybe we mention it in the email with the spreadsheet of results attached, but is your audience really making that connection to the data? What you see in a report about your campaigns is not necessarily what other people are seeing and understanding.

It's to your benefit to learn and implement best practices on producing graphics and visualizations of your data to make the insight obvious to your audience at a glance.



Include reference lines and annotations to highlight important discoveries.

Going back to distributing the metrics of your latest newsletter email campaign - you have a list of numbers and percentages based on a series of dimensions. Because the list of dimensions isn't too long, you can easily see that one group had a higher open rate than the others, or the opt-out rate among most of the groups was similar. Maybe it's obvious to you, but looking at these numbers it's not easy to tell why these numbers are meaningful and why others in your organization should care about these numbers.

Consider a Program Manager that you might send click-through rate results by lead source from that newsletter campaign. Who in your database are you sending this to and why should they care? For you it's clear that certain types of lead sources are easier to engage with than others. If we can engage (or re-engage) them with the newsletter and move them further down the pipeline, then we want to run more marketing programs that can create similar engagement results. Having that extra background knowledge makes these numbers more tangible and actionable. Without providing that meaningful level of information, this wouldn't necessarily be the case.



The way to make the findings clear is to put them into interactive data visualization. This includes a bar charts or trendline graphics. By putting your findings into pictures you can communicate more vividly and directly than a table of numbers. The human brain processes and understands pictures faster than it can process and understand tables of numbers. So leverage that in your communications by being more visual. Choose to include a reference threshold or reference line in your graphic so that the audience can quickly see how well or poor your campaign is overperforming or underperforming. Also add custom annotations to comment on the results so it's fast and easy for your audience to see and understand what types of information you are trying to share and where they should focus their attention. Enable people to filter or sort the data interactively. Factor customer segments into your view to see how these numbers change when you look at the different segments so that you can continue to customize your email communication to drive better results.

The reality is that the results and implications are not always obvious. Interactive data visualization can help to communicate more rapidly a series of numbers that have to be compared and contrasted. It's your responsibility to help guide the consumer of the data through the results, highlighting key insights and take-aways.

### Next Steps

The most important thing in overcoming these myths is to recognize when you are being limited. Ask yourself what you want to get from this data. What do you want others to get from your analysis? Have you communicated this clearly and effectively? Have you made relevant information accessible to the different groups in your organization? Have you discovered interesting insights and shared them in a way that create actionable insights?

Take a quick mental inventory of the different types of reports you make on a regular basis and who you share this information with. It is fine to rely on standard reports to compare and contrast those known data points, but you also need the ability to conduct ad hoc analysis allowing outliers and hidden gems to guide your data questions and help to discover new unexpected insights. Make sure you have the tools to do this in a quick and easy way so that you will continuously explore your data without feeling burdened by the process.

There is not a single communication vehicle or report that you can produce that will give everyone the information they need to act on. You need to empower these groups by producing reports that provide them with the ability to interact with the data. This not only takes the pressure off of you having to create multiple custom reports or huge reports that loose their meaning with the volume of information. Instead, empower the consumers of your data to dig into the information that they care about the most.

*Interactive data visualization can help to communicate this even more rapidly due to the fact that the human brain can process and understand a picture faster than it can process and understand a series of numbers that have to be compared and contrasted.*



Finally, remember that the insights and results are not necessarily obvious to those you are sharing your reports with. Make the effort to provide the information in a visual way so that others can quickly digest and highlight the important take-aways from the data.

So much of the analysis we rely on and share with others we do because it's what is expected. These myths have gotten marketers stuck in an analytics rut. It's time to break free and turn to meaningful analytics that can provide insights, uncover hidden gems, and give us actionable insights to continuously improve on future campaigns.

## ABOUT TABLEAU SOFTWARE

Tableau Software, a privately held company based in Seattle WA, provides software applications for fast analytics and visualization. The power of data visualization and analysis enables marketing professionals to quickly gain insights and make discoveries from all types of marketing data. Tableau allows marketers to dive deep into all types of data, quickly analyze campaign performance, conversion metrics, and easily determine ROI on marketing efforts.

Access a trial copy of Tableau Software to help you break out of the analytics rut.

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