



# **Marketing Analytics** dashboards: The do's and don'ts

## Marketing analytics dashboards: The do's and don'ts

The days of instinctual marketing are gone. Now, all marketing levels are focused on making data-driven decisions to support brand awareness and customer conversion. However, a 2017 CMO survey from [Black Ink](#) reported that marketers rank access to advanced analytics as the top barrier to their initiatives; general data access ranks third. Facing some hurdles with accessing advanced analytics or adopting modern BI solutions, marketers rely on legacy solutions such as Excel or CRM systems. Ill-equipped with the right resources to reflect their marketing value, they feel increasing pressure to perform and challenged with optimizing customer data to create relevant, personal experiences.

In this era of omni-channel brand engagement by consumers, finding the right blend of platforms, channels, and technology that offer a 360-degree view of the elusive customer, campaign, and sales data is critical to success.

### **With rich data to glean, marketers—especially CMOs—now ask these questions, to obtain a competitive edge:**

- How much revenue was attributed to paid search investments last quarter?
- Which online channels are generating the highest quality leads?
- Are we consistently maintaining all privacy and compliance measures to keep our customer data secure?
- Does my team have the necessary resources to gain customer insights, then justify spending on their programs and finally demonstrate the value of those programs?
- How is my marketing performance comparing to that of my leading competitors?

Meanwhile, marketers spend serious time logging into Salesforce.com or Microsoft Dynamics, sending emails with Eloqua or Marketo, monitoring or engaging on social channels like Twitter, LinkedIn or Facebook, and using Google Analytics, Adwords and Doubleclick. Juggling these solutions and multiple data sources with their other job responsibilities becomes tricky and time-prohibitive to collect a 360-degree view of marketing performance.

All these factors considered, analytics dashboards are a critical asset and necessity. They offer a complete view of customers and marketing performance and make data both accessible as well as actionable for the whole organization—even staff without analytical skills. And with the growing sophistication of business intelligence solutions like Tableau, visual analytics dashboards quickly reveal what's really happening across channels, correlate metrics patterns, provide summary and in-depth performance views, and enable decision making on the spot. To provide an example of Tableau's growing capabilities, with a newly launched [Dashboard Starters](#) feature in Tableau Online, marketers and brands gain visually stunning, data-rich dashboards that are populated with their information from solutions such as Salesforce, Eloqua, Marketo and ServiceNow.

On the other hand, dashboards are one of the most overlooked marketing tools. More organizations are realizing they can gain powerful insights around program performance and goals from analytic dashboards. They are understanding the benefit of aligning departments around one source of truth where data silos once impacted efficiency and understanding.

Core to effective, modern dashboards are four defining characteristics: Objectives-focused, optimized for multiple data sources, visual and interactive, and accessible. The best place to start your marketing planning is by considering these best dashboard practices but choose the right BI solution first with thorough research and trial. And don't overlook the importance of having cross-department champions and leadership who are willing to roll up their sleeves as they push brand marketing creativity into uncharted territory with the help of analytics.

- 1. Choose meaningful metrics**
- 2. Integrate data sources for a full picture**
- 3. Collaborate using visual, interactive solutions**
- 4. Make accessibility simple, ensuring ease of use**

As we dive into these four elements, please reference this collection of best-practice, [marketing analytics dashboards](#).

## Choose meaningful metrics

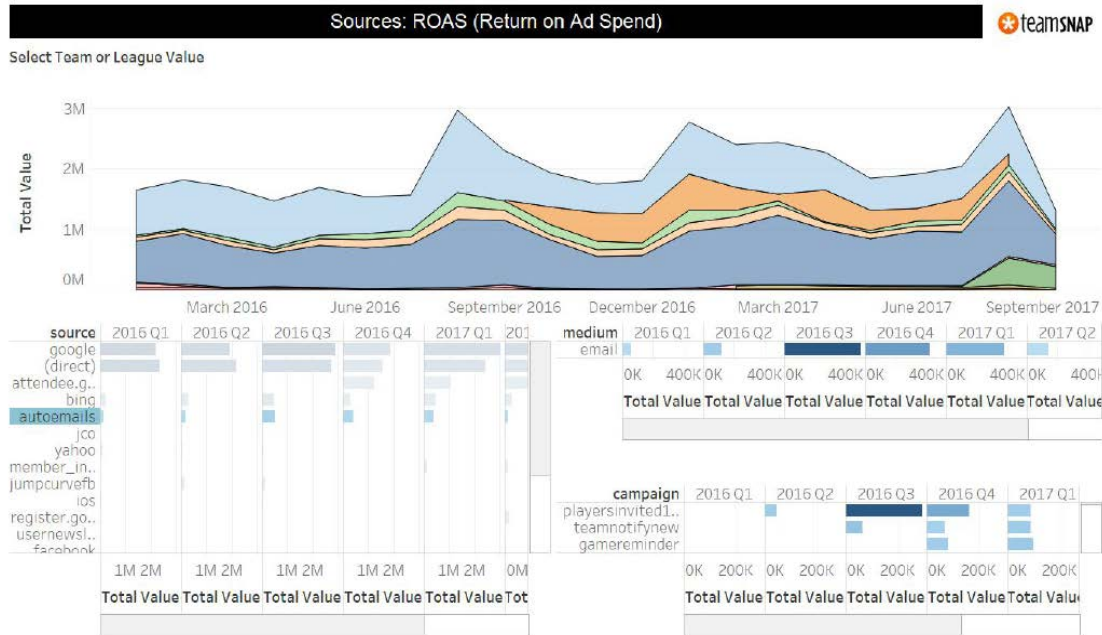
Dashboard metrics must be relevant to brand goals. Make sure your team is highly selective in determining which metrics earn a spot on your marketing dashboards and regularly evaluate if they need to be modified.

### **Factors to consider when selecting metrics:**

- What are your organization's core objectives?
- How do your campaigns and marketing efforts contribute them?
- Do you have internal or external data that can shed light on the objectives?
- Can you create a meaningful metric measuring all inputs?
- Is this metric necessary to explain marketing's contribution to the objectives?
- Can you build a systematic and ongoing measurement process?

It's also critical to have strong clarity of executive objectives and how marketing contributes to them. We recommend keeping these measures in mind, should you meet the defined criteria:

- If your company is in growth mode and new customers are key, visualize your media mix model to optimize spending on advertising.



Team Snap puts its KPIs in one place

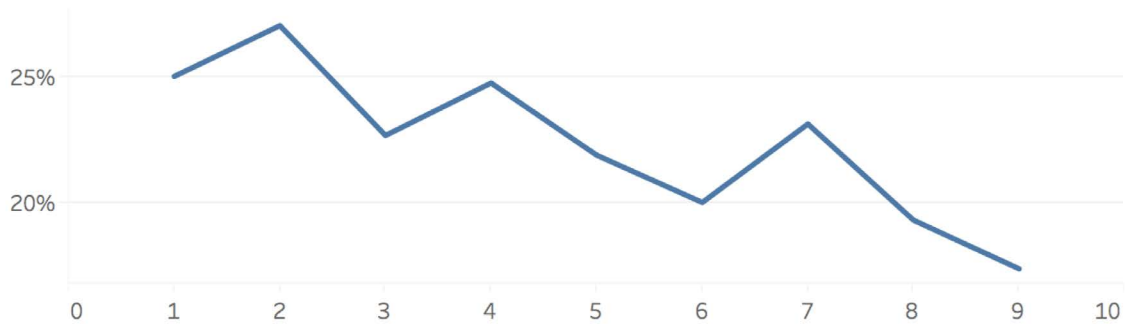
- If top-line revenue is priority for management, measure marketing funnel against forecast.

## What is our conversion rate from Lead to Opportunity?

(since Jan 1)

**22%**

### Conversion Rate by Month

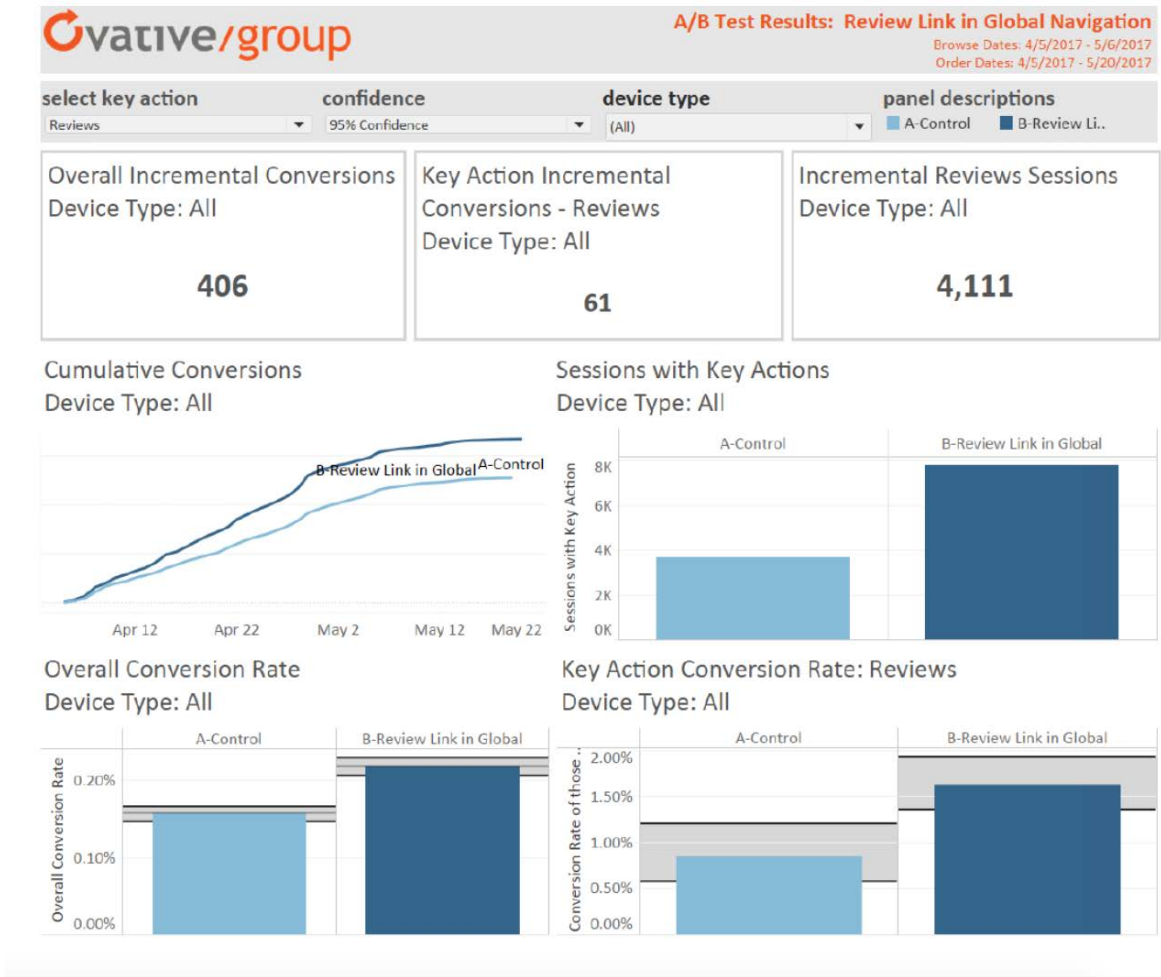


### Velocity

	Months to Opportunity									
	0	1	2	3	4	5	6	7	8	
<b>Grand Total</b>	<b>61%</b>	<b>24%</b>	<b>6%</b>	<b>3%</b>	<b>2%</b>	<b>2%</b>	<b>1%</b>	<b>1%</b>	<b>0%</b>	
September	100%									
August	67%	33%								
July	62%	29%	10%							
June	63%	30%	5%	3%						
May	57%	27%	10%	4%	2%					
April	55%	30%	9%	2%	2%	2%				
March	59%	24%	5%	5%	3%	2%	2%			
February	54%	21%	7%	5%	4%	4%	4%	2%		
January	53%	17%	7%	5%	3%	5%	3%	3%	2%	

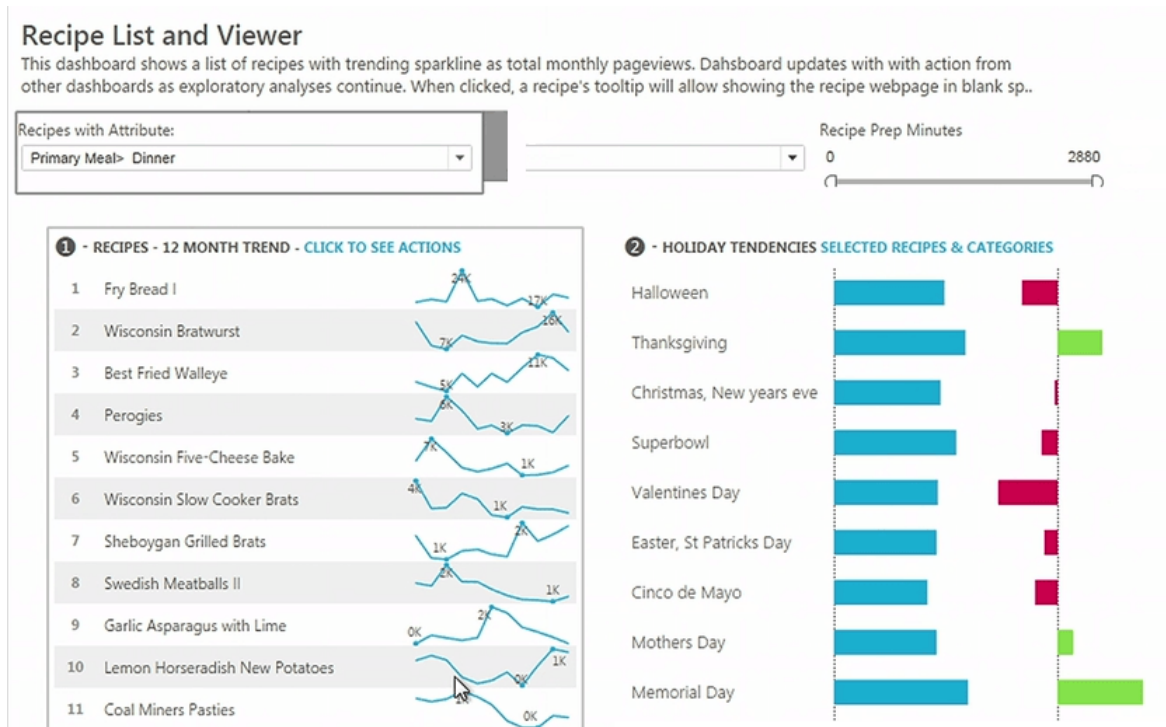
New Relic analyzes funnel velocity

- If the market you're in is highly competitive, evaluate your program effectiveness



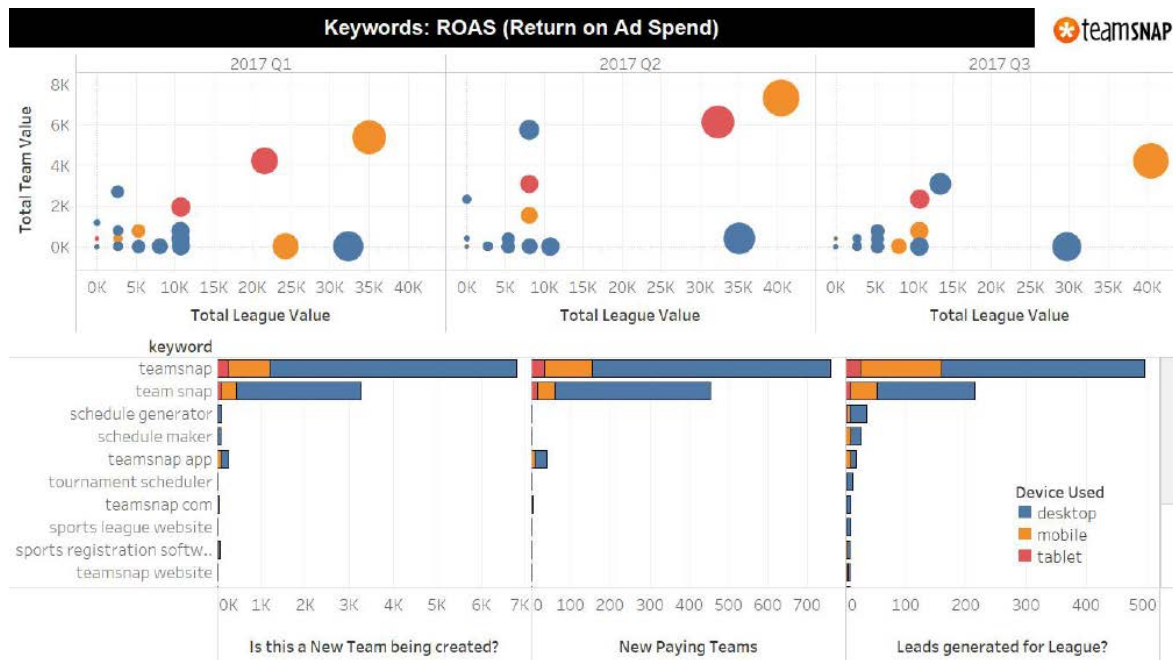
Ovative visualizes online-to-store A/B testing

- If your company wants to maintain its current leadership position or stay the course, analyze your content traffic trends.



Allrecipes analyzes their billion yearly website visitors

TeamSnap, a company seeking to help sports teams and organizations spend more time playing and less time organizing, used Tableau to measure their marketing analytics. They combined customer segmentation with higher level analyses that compare customer acquisition costs (CAC) to average lifetime value (LTV).



Exploring ROI by segment using Tableau

By performing a deeper form of analysis, using Tableau as well as Google BigQuery, TeamSnap determined which customer segments are most profitable. Consequently, they saved \$300,000 in one day by uncovering new pockets of spending that weren't working and reallocated millions of yearly advertising spend. Chief Growth Officer, Ken McDonald, explained, "As a growth-stage company, the business impact of aggressively reallocating marketing dollars is incredibly strategic for us."

There will be other marketing metrics that are indicators of overall corporate goals; these are important to include if the relationship between the metrics and goal is clear. For instance, if the number of daily website visitors is a leading indicator of brand awareness, reflect it in your dashboard. It's critical that you clearly explain how every metric on the dashboard also connects to specific company objectives.



## Integrate data sources for a full picture

With the proliferation of data and sources, blending data for dashboard display is critical to put insight into action. Cohesion of data also creates significant benefit by bringing teams together and propelling their collective efforts into exciting, new territories.

Data blending is the ability to combine data from multiple sources in one view. Data is blended on a common field; therefore, we recommend using this approach when you have related data in various sources but want to analyze it together. Blending and dashboards allow marketers to pull any related data together and segment findings by metrics (i.e. site traffic, geography, advertising channel, and cost per click). Even more beneficial, they break down the silos that manifest inefficiencies and preclude a team and brand from flourishing.

REI, the United States' largest consumer co-op and specialty outdoor retailer, has an incredible digital and physical presence with 150 stores in 36 states and 16 million members. To compete against e-commerce and brick-and-mortar competitors, REI moved from Excel tables housing billions of data rows to advanced analytics in Tableau. The REI team now monitors metrics like attribution, customer lifetime value, customer and member counts, churn and retention rates, items per order, price per item, and frequency of trips across their physical and online presence.

By using Tableau to analyze their acquisition, retention and reactivation metrics, the marketing teams have determined the trade-offs of investing in retail versus digital. With this information in hand, they've been able to create stronger member lifecycle programs to increase customer loyalty and repeat sales.

“We see an experience that traverses both channels, so omni-channel analytics is incredibly important to REI,” explained Clinton Fowler, Director of Customer and Advanced Analytics. “In the face of the consumer shifts that are happening right now—including brick-and-mortar stores to digital and online purchasing—one of the core things at REI is the ability to actually take the data accessible to us, put that into Tableau, discover the insights, and actually have those insights drive our strategy and drive a better customer experience.”

## Collaborate using visual, interactive solutions

Dashboards are meant to be created fast and easily understood—so keeping them visual is a no-brainer to guarantee everyone looks at the same view of your brand’s data. Report and text-based tables are simply not easy to gather insight from and require considerable time investment and manual work to build and keep updated.

The human brain processes a number, visualization, or picture as a single “chunk” of information. This makes comprehension and insight dramatically faster when data is visually displayed on a well-designed dashboard with interactive graphs and charts. Instead of pondering how to read and interpret the data, those consuming it can focus on the story that the visuals are telling them and generate insights.

Since you’ve carefully chosen to select metrics that also map to corporate objectives, visualization will help cross disconnected departments, and colleagues will finally see the direct translation of marketing objectives into broader business objectives.

Dashboard interaction is another critical element that supports audiences in performing basic analytical tasks—like filtering views, adjusting parameters, quick calculations, and drilling into the details with intuitive dashboard selections. With interactivity, stockpiled data transforms into actionable insight and becomes key assets instead of a stale library of information. By using solutions that prioritize dashboard interaction, marketers and business leaders throughout an organization will become engaged in problem solving and decision making instead of struggling to understand the data. And marketers alongside agency clients will consult the same data to get answers to their questions.

## Make accessibility simple, ensuring ease of use

Unless easily accessible, your data and dashboards may only be viewed by a select few or just you. It won't matter if you've mastered the other characteristics; no one can interact with a dashboard that they can't find.

Tim Nall, Chief Information Officer at Brown-Forman, one of the top 10 largest global spirit companies, explained that communication is critical to determining best practices and selling more product with their global reach. Their teams need insight into pricing and shipping details, so they can effectively manage stock keeping units (SKUs).

Optimizing their existing technology investments in data storage and analytics, Brown-Forman's teams are achieving optimum collaboration. "From a global perspective, it becomes more and more paramount to have all of this information and be able to discern it. Now with what we've created with our logical data warehouse and Tableau, people can collaborate, and all of that information is accessible," explained Tim.

Depending on your team's needs, use simple browser-based distribution to publish the marketing dashboard—especially if it displays live data or refreshes often. Provide a single sign-on experience for one-click access to engage your audiences with the dashboard, regardless of the device used to access it. Your company may want to embed dashboards in their existing reporting tools, intranets, and other internal web-based resources.

Also, consider a prototype—distribute it through planned communication and solicit feedback. Just like in direct marketing, the key is to test, test, test. As you gain experience, and learn what teams or individuals are using, you can enhance the dashboard and your distribution approach.

### *The new reality and possibilities of marketing analytics*

Cross-channel marketing won't be going away anytime soon; the need to see and understand every win and loss of your marketing efforts will only shift higher on the marketing team and company's priority list. If you're already engaged in dashboarding, take notice of these four best practices and evaluate how your data insights measure up. And if you haven't engaged, consider if applying the practices will give better visibility to your marketing objectives.

For those brands that haven't plunged into dashboards for one reason or another, it's never been a better time to reconsider. Many marketers beyond the stories we've spotlighted are seeing the advantages gained through the power of modern analytics with Tableau. With new insights in hand, they've elevated their strategic position within the organization, gained performance momentum, and strengthened the agility and impact of their marketing results.

## About Tableau

Tableau helps people transform data into actionable insights. Explore with limitless visual analytics. Build dashboards and perform ad hoc analyses in just a few clicks. Share your work with anyone and make an impact on your business. From the individual analyst looking at a specific marketing program to the Chief Marketing Officer looking at overall performance against marketing objectives and company goals, people everywhere use Tableau to see and understand their data. See the impact Tableau can have on your marketing organization by downloading a free trial at [tableausoftware.com/trial](https://tableausoftware.com/trial)

## Related Materials

### [Tableau's Marketing Analytics Solutions Page](#)

– A one-stop resource to understand how Tableau helps marketers see and understand data

### [Zulily Marketing Analytics Case Study](#)

– Learn how the e-commerce company created a self-service marketing analytics platform optimizing Google BigQuery integration with Tableau

### [Webinar: Learn 6 Ways CMOs Are Driving Shareholder Value](#)

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