

HOW TO BECOME A MARKETING ANALYTICS MASTER

A Tactical Guide for
Marketing & Analytics Leaders



By Hailey Friedman
Head of Marketing at Improvado

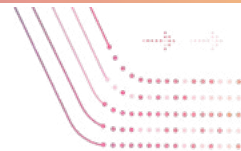


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How To Become a Marketing Analytics “Master”

A Tactical Guide for Marketing & Analytics Leaders

I'm not going to sit here and bore you with the history of marketing analytics.

You know the deal.

Shit's been growing like wildfire--

Thousands of new martech platforms means that our job as marketers has, quite frankly, been getting out of hand.

We're each responsible for:

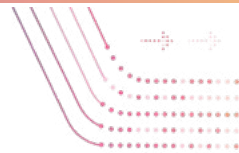
1. Driving revenue and growth for our business
2. Managing millions of dollars in ad spend
3. Being creative
4. Managing teams
5. And most of all-- being analytical

But that analytical piece is easier said than done.

And there's really no “experts” out there, doing a really great job of telling everyone exactly how it's done. At least not that I've seen. How do we get started? How are we sure we're tracking EVERYTHING and doing it correctly?

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How do we tie all this website data, customer data, ad spend data, sales data to revenue?

And then how do we display this data in a way where we can easily pull actionable insights and make smart decisions?

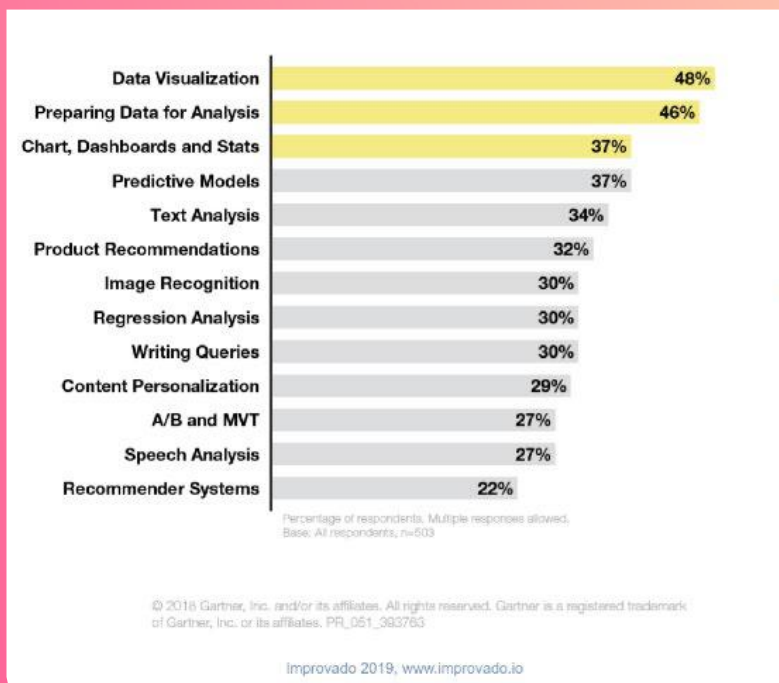
Right now, this whole process is feeling pretty manual and tedious.

“All over the place,” if you will. And apparently, I’m not alone.

Marketing Analytics is Taking Too Much Time

Gartner ran a [study](#) and found that marketing teams are spending WAY too

Marketing teams are spending WAY too much time on the wrong tasks



much time on the wrong tasks, like data visualization, preparing data for analysis, and building charts dashboards and stats.

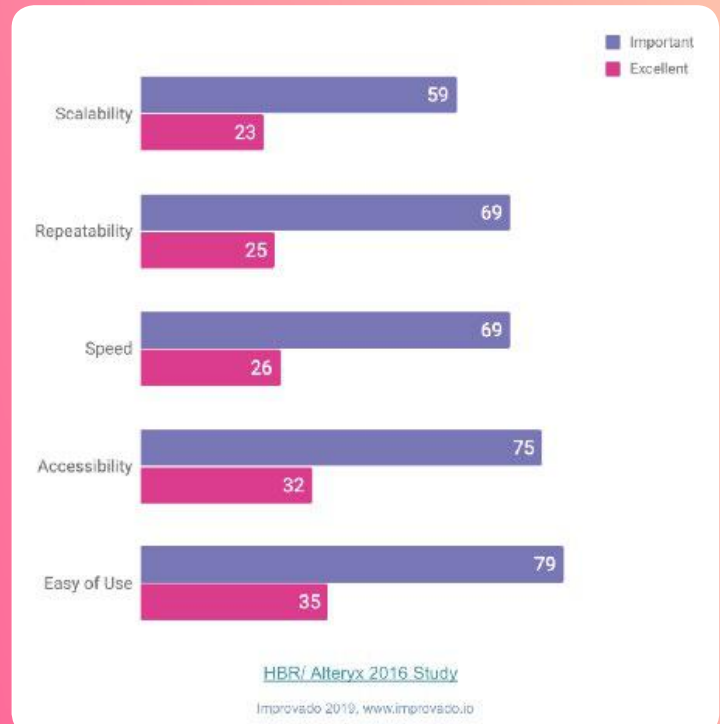
And even though we’re all spending 10-20 hours of our week up to our chins in



data, we're not even getting what we really need out of the analytics tools we're using.

Harvard Business Review and Alteryx ran a study that found that while we all

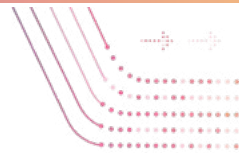
Executives are not getting what they need from their data analytics tools



agree that marketing analytics is critically important, executives are not getting what they need out of the tools they're using.

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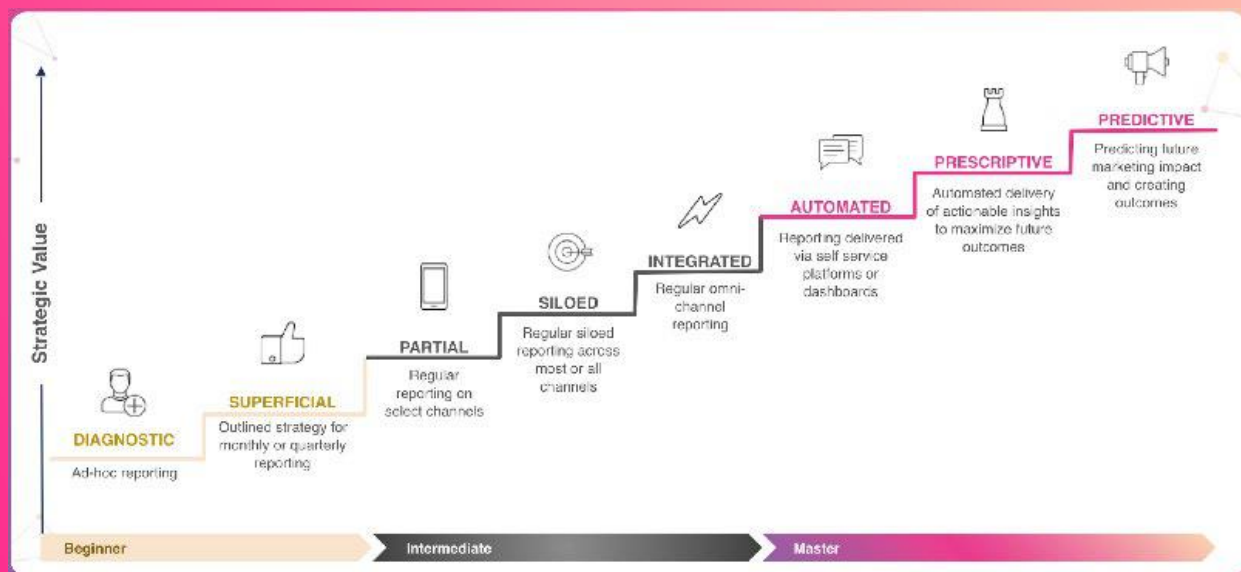
Most Marketing Leaders Are Not Really That Data-Driven

[Improvado](#) and [Growth Marketing Pro](#) just spent the past 4 months interviewing nearly 100 data-driven CMOs and marketing leaders from startups to Fortune 500 companies, and what we found is that *almost everyone is confused*.

Finding a really sophisticated data-driven CMO was like looking for a needle in a haystack. But we did find some [brilliant data-driven marketers](#), and by talking to them, we learned a TON about what it looks like to build a data-driven org that operates like a machine.

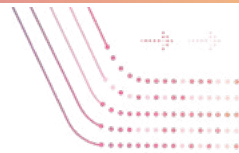
We learned that the “Analytics Culture” within an organization is an important indicator of how data-driven a marketing department will be.

The Path to Mastering Marketing Analytics



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How Would You Rank Your “Mastery of Marketing Analytics”?

Every company we spoke with fell somewhere within the scale below when measuring their Marketing Analytics Mastery. They were either a “Beginner”, “Intermediate”, or “Master” of their marketing analytics.

Beginner at Marketing Analytics

Most people start out with ad hoc reporting that is **diagnostic** or **superficial** reporting which is really more like an outlined strategy for monthly or quarterly reporting.

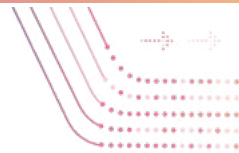
Intermediate at Marketing Analytics

As they develop, their data advances and maybe it looks something like **partial** data, meaning they are putting together regular reporting for specific channels like Facebook or Adwords. The next step is having regular **siloed** reporting across all or most of their marketing channels. And the next step up as they become more sophisticated and many people actually top out here -- where they are actually able to put together regular **integrated** omni-channel reporting, showing data from all their channels.

Master at Marketing Analytics

But it's only the most sophisticated data-driven marketers that ever make it up to becoming a MASTER. They take that regular omni-channel reporting and they **automate** it. They use the tools necessary so that the reporting is delivered via self serve platforms or dashboards. This is incredible because it frees up the marketing team of having to do any manual, tedious reporting work so they can actually become strategic with their time and efforts.

And those who take it one step further, actually have data that is **prescriptive**,



meaning it spits out automated delivery of actionable insights so that you can make quick optimizations to maximize ROI.

And the absolute holy grail, that very few marketers ever make it to, is **predictive** analytics, Meaning being able to predict future marketing impact and outcomes.

The Impact of Analytics Culture



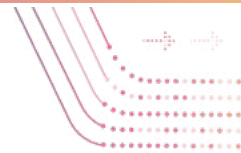
The Impact of Your Marketing Analytics Culture on ROI

Now some of you might be thinking, “Why does your mastery of marketing analytics matter anyway?”

Well, Forrester ran a [study](#) that found that “Analytics Culture” is directly related to money. ROI.

The difference between an Analytics Culture that is just starting out versus one that is at the “Master” level, can be seen in the impact numbers below.

Marketing leaders who are “Masters” at Analytics Culture see a 2.8X increase in decision making velocity, and a 1.7X increase in marketing ROI.



How to Become a Marketing Analytics Master

When I realized how few CMOs and marketing leaders are actually Marketing MASTERS, I had an idea.

What if I took the time to do the research and reallyyyyyy figure this thing out.

From top to bottom, start to finish, what is this all supposed to look like if done PERFECTLY?

So I pulled in data-driven CMOs, analytics experts and consultants and I began testing tools and solutions.

And now I've put together what I believe is The. Perfect. Marketing. Analytics.

1

TRACK DATA

How are you tagging & tracking all your marketing efforts?

1. Beginner - Using UTM Parameters
2. Intermediate - Using Event Tracking and Tag Manager
3. Master - Using Streamlined Marketing Automation

2

COLLECT DATA

How are you pulling your marketing data together and where do you store it?

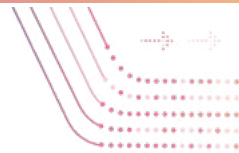
1. Beginner - Making In-platform Optimizations
2. Intermediate - Manually Updating an Excel Marketing Dashboard
3. Master - Automated, Real-Time Marketing Dashboard

3

VISUALIZE DATA

How are you displaying and reporting on your data?

1. Beginner - Creating Graphs and Charts in Excel
2. Intermediate - Building Powerpoint Deck Presentations
3. Master - Using a Visualization Tool



Stack. Follow the process that I outline here and you will have the building blocks for a Master Marketing Analytics Culture.

Don't believe me? I encourage you to share your thoughts in the comments.

I've given this process everything I've got and I really think you're going to like how I lay it all out.

I've distilled this process into 3 easy steps: TRACK, COLLECT and VISUALIZE. And from there, I've broken it down by what this looks like at each level of marketing analytics mastery: BEGINNER, INTERMEDIATE and MASTER.

Browse the 3 chapters below in the order that makes most sense for your needs:

If you read this post in it's completion, you will understand what each of these 3 steps looks like at the BEGINNER, INTERMEDIATE and MASTER level and you will also walk away with actionable, ready-to-use templates and checklists to make sure you are following this process perfectly, every step of the way.

This Guide is Perfect for Marketing Leaders & Analytics Leaders

Now let's talk about who this post is for. This post is meant for two types of people:

Marketing leaders:

Maybe you're the Director of Marketing, a VP or a CMO at a mid to enterprise size business. You're responsible for deciding how to spend a large budget and you're also responsible for presenting marketing performance to the leadership team.

If that's you -- This post will show you how to OWN your analytics with confidence, like the sophisticated data-driven leader you are!



Analytics Leaders:

Maybe you're an analyst, the VP of Engineering or the CTO at a mid to enterprise size business. You're responsible for mapping data together across the business and presenting visual insights to the leadership team. You're sick of replying to one-off requests from the marketing team about building out APIs and running scripts.

If that's you-- This post will show you how to build a clean flow of data that puts an end to one-off marketing requests, once and for all!

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TRACK DATA

How are you tagging & tracking all your marketing efforts?

Don't be a marketing tracking laggard.

According to ITSMA and Vision Edge Marketing, [74% of marketers](#) can't measure or report how their efforts impact their business.

That's simply insane. Don't let that be you.

Here's what tracking data looks like at each level of mastery:

- 1. Beginner at Tracking** - Using UTM Parameters
- 2. Intermediate at Tracking** - Using Event Tracking and Tag Manager
- 3. Master at Tracking** - Using Streamlined Marketing Automation

Beginner at Tracking

Using UTM Parameters



To cover the topic of UTM tracking, I pulled in the #1 expert on the topic to make sure we cover all our bases. His name is [Dan McGaw](#) and he is the CEO & Founder of UTM.io. Here's how to begin tracking your data with UTM parameters...

UTM tracking offers an unparalleled level of accuracy and detail when you're tracking your traffic. You can track traffic from multiple sources and display the results in Google's free and familiar [Google Analytics](#) dashboard.

The level of detail would be impressive from a paid tool: set up UTM right and



you can see how much traffic came from a specific tweet, or from a specific image in a particular email. From monitoring entire campaigns to A/B testing changes in imagery, placement and copy, UTM tracking provides the depth of detail you need to make every decision data-driven.

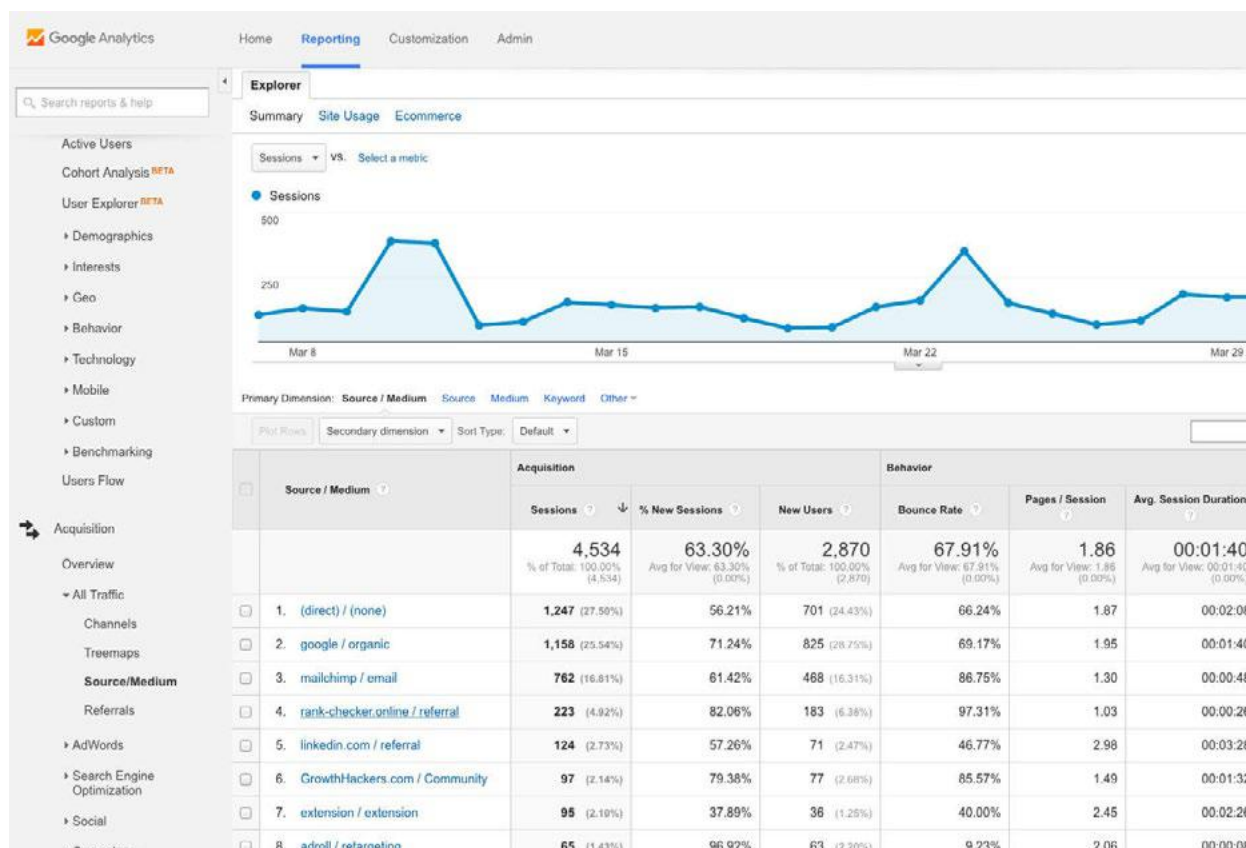
So why don't more marketers use UTM? Mainly because it's seen as difficult, cumbersome and time consuming. But it doesn't have to be. Armed with our 'dummies' guide,' you should be prepped to start using UTMs on all your campaigns and reaping the benefits. First, though – [what is a UTM?](#)

What Is A UTM Parameter?

UTM parameters (sometimes called UTM codes) are specific text strings that you can append to URLs that allow you track those URLs when they get clicked on. UTM parameters make Google Analytics pick up on the data in the code and log it with the pageview. The resulting data is visible in Google Analytics, meaning you can track traffic in terms of where it came from and how it got to you.

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Google will track traffic with cookies – but UTMs let you overwrite standard Google tracking with your own, custom tracking, tailored with parameters that exactly fit your needs.

Tag your URLs with UTMs and Google will tell you where your traffic came from, which campaign it's a part of and the route it took to reach you, as well as information about exactly where on a screen your visitors clicked and which keywords were effective.

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What Can You Track With UTM Codes?

Social

UTM parameters let you track social media efforts, allowing you to show which content was most effective on which channel.

Emails

In-email links can have UTMs attached. You can get differential click-through metrics from the same email – are more people clicking the link at the top, or the bottom? Tag the same landing page or signup URL in emails sent to different lists or at different times and get a unique level of granularity.

Advertisements



PPC advertising can be monitored closely with UTMs. Distinguish between sidebar and banner ad performance, or A/B test designs, graphics, sizing and copy.



And More...

Anything that involves someone clicking on a link or typing a URL to come to your website can be tracked with UTMs. Even print ads can offer a shortened URL, usually a redirect to keep your domain visible, which can then be used to track response rates.

The one place you really don't want to use UTMs is internal tracking: every time a link containing a UTM parameter gets clicked, Google flags a new visit. If someone navigates around a few pages on your site using UTM'd URLs, you'll see them in your analytics as multiple new visitors, reducing your data to a mess. The UTMs will also override the original referral data so you'd still be left none the wiser as to the real source of your traffic. It makes more sense to use event tracking or JavaScript's `_trackPageView` function.

Anatomy Of A UTM Code

A naked, UTM-free URL might look something like this:

<http://effinamazing.com/blog/i-deleted-2187-of-my-twitter-followers-here-is-why/>

But the whole URL including the UTM code looks like this:

http://effinamazing.com/blog/i-deleted-2187-of-my-twitter-followers-here-is-why/?utm_source=ReviveOldPost&utm_medium=social&utm_campaign=ReviveOldPost

Everything from the question mark onward are tracking modules. You'll see three in that URL; in fact there are five categories of UTM. Campaign, Source and Medium are compulsory. You have to use them if you're using UTM at all. The other two, Term and Content, are optional, so you see them less.



Understanding UTM Codes

Campaign Source

utm_source= tracks where the traffic is coming from. That usually means the website the traffic came from, or the name of the social channel, and that's what Google recommends. In this URL, for instance:

http://unbounce.com/ppc/adwords-account-manager/?utm_source=twitter&utm_medium=social&utm_content=direct-ongoing&utm_campaign=blog

...the **utm_source=** tag identifies Twitter as the origin of the traffic. Typically, you can use the site name as the Source. But one major exception to this is email campaigns. It's vital to use tagging on emails, but they're not static – there's no website to identify as the Source.

Really, though, the Source just needs to be something that's useful to you when you're doing your analytics at the other end. Using the name of your email service could work: **utm_source=mailchimp**. You can use any convenient term – 'internal' and 'newsletter' are common. What you can't do is use your domain. It might seem intuitive to do this, but it will make a mess of your analytics by causing email clickthroughs to show up as self-referrals or visits sent from your own site.

Campaign Medium

utm_medium= tracks how the traffic is getting to you, rather than where the link actually lives.

http://unbounce.com/ppc/adwords-account-manager/?utm_source=twitter&utm_medium=social&utm_content=direct-ongoing&utm_campaign=blog

Google recommends using this field to identify the marketing medium, tagging



traffic from emails, PPC, and so on. Source/Medium are usually offered together in the GA dashboard.

See Source/Medium data under Acquisition > All Traffic > Source/Medium. Here you'll see all the activity for UTMs with that source and medium tags.

You can separate them by choosing single parameters, either source...

	Source ?	Acquisition			Behavior	
		Sessions ? ↓	% New Sessions ?	New Users ?	Bounce Rate ?	Pages / Session ?
		4,534 % of Total: 100.00% (4,534)	63.30% Avg for View: 63.30% (0.00%)	2,870 % of Total: 100.00% (2,870)	67.91% Avg for View: 67.91% (0.00%)	1.86 Avg for View: 1.86 (0.00%)
<input type="checkbox"/>	1. (direct)	1,247 (27.50%)	56.21%	701 (24.43%)	66.24%	1.87
<input type="checkbox"/>	2. google	1,158 (25.54%)	71.24%	825 (28.75%)	69.17%	1.95
<input type="checkbox"/>	3. mailchimp	762 (16.81%)	61.42%	468 (16.31%)	86.75%	1.30
<input type="checkbox"/>	4. rank-checker.online	223 (4.92%)	82.06%	183 (6.38%)	97.31%	1.03
<input type="checkbox"/>	5. linkedin.com	134 (2.96%)	56.72%	76 (2.65%)	50.00%	2.85
<input type="checkbox"/>	6. extension	132 (2.91%)	37.88%	50 (1.74%)	43.94%	2.71
<input type="checkbox"/>	7. GrowthHackers.com	97 (2.14%)	79.38%	77 (2.68%)	85.57%	1.49

...or medium.

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<input type="checkbox"/>	Medium ?	Acquisition			Behavior	
		Sessions ? ↓	% New Sessions ?	New Users ?	Bounce Rate ?	Pages / Session ?
		4,534 % of Total: 100.00% (4,534)	63.30% Avg for View: 63.30% (0.00%)	2,870 % of Total: 100.00% (2,870)	67.91% Avg for View: 67.91% (0.00%)	1.86 Avg for View: 1.86 (0.00%)
<input type="checkbox"/>	1. (none)	1,247 (27.50%)	56.21%	701 (24.43%)	66.24%	1.87
<input type="checkbox"/>	2. organic	1,175 (25.92%)	71.40%	839 (29.23%)	68.94%	1.95
<input type="checkbox"/>	3. email	848 (18.70%)	61.20%	519 (18.08%)	79.60%	1.44
<input type="checkbox"/>	4. referral	711 (15.68%)	71.31%	507 (17.67%)	67.79%	1.88
<input type="checkbox"/>	5. Community	97 (2.14%)	79.38%	77 (2.68%)	85.57%	1.49
<input type="checkbox"/>	6. extension	95 (2.10%)	37.89%	36 (1.25%)	40.00%	2.45
<input type="checkbox"/>	7. social	80 (1.76%)	42.50%	34 (1.18%)	77.50%	1.85

Mediums work best when they're general. Don't make them too precise – while Campaign and Source can be specific, Mediums want to be inclusive. Google automatically identifies:

- Organic
- (None)
- Referral
- CPC (for autotagged AdWords links)

One of the major advantages to using UTM tracking is that you choose the parameters – you can select the mediums, campaigns and sources that make sense in terms of your business. But as examples, these make good Mediums:

- Social
- Email



- Feed
- Banner
- CPC
- Display
- Affiliate
- E-book
- Print
- Billboard
- Partner
- QR code
- Widget

Campaign Name

utm_campaign= tracks which campaign the traffic was generated by. It shows up in Google's URL builder as Campaign Name, and Google recommends using it to track the product or overall campaign.

http://effinamazing.com/blog/i-deleted-2187-of-my-twitter-followers-here-is-why/?utm_source=ReviveOldPost&utm_medium=social&utm_campaign=ReviveOldPost

Here the **utm_campaign=** is ReviveOldPost, identifying that traffic as part of a strategy to leverage already-existing content.

When choosing campaign tags, look for something that's going to make sense to your team – don't try getting super cryptic to hide what you're measuring from the competition. You'll just wind up mystifying your own team.



Try to make sure that your Campaign tags are unique to that campaign, but remember that you only need **one** – don't worry about making Source and Medium tags campaign-specific, but keep the Campaign tag the same across multiple channels.

You can compare campaign performance across different channels only if the three metrics don't interfere with each other, and you can compare them with each other in Google Analytics anyway.

Find Campaign data under Acquisition > Campaign > All Campaigns. (Here, the campaign tag is the same as the source tag.)

<input type="checkbox"/>	Campaign ?	Acquisition			Behavior
		Sessions ?	% New Sessions ?	New Users ?	Bounce Rate ?
		1,407 % of Total: 31.03% (4,534)	58.71% Avg for View: 63.30% (-7.26%)	826 % of Total: 28.78% (2,870)	68.59% Avg for View: 67.91% (1.00%)
<input type="checkbox"/>	1. content-marketer	506 (35.96%)	55.34%	280 (33.90%)	91.50%
<input type="checkbox"/>	2. utm-launch	209 (14.85%)	72.25%	151 (18.28%)	73.21%
<input type="checkbox"/>	3. chrome-extension	104 (7.39%)	34.62%	36 (4.36%)	41.35%
<input type="checkbox"/>	4. Submission	96 (6.82%)	80.21%	77 (9.32%)	86.46%
<input type="checkbox"/>	5. utm-tool	70 (4.98%)	95.71%	67 (8.11%)	11.43%
<input type="checkbox"/>	6. ReviveOldPost	48 (3.41%)	31.25%	15 (1.82%)	70.83%
<input type="checkbox"/>	7. update-profile	46 (3.27%)	82.61%	38 (4.60%)	89.13%

GA lets you track both stats and raw numbers. URLs tagged ReviveOldPost pulled in 48 sessions, 31.25% of them new. Compare that to email, responsible for 50 sessions, and it seems almost level; but 78% of the sessions email produced were new.



UTM tracking gives you the raw material to draw conclusions about which channels are most successful. The granularity of the results allows you to assess whether you're getting more new users, or whether a channel might instead be facilitating retention or engagement, as well as demonstrating ROI on a channel and campaign basis.

Campaign Content

utm_content= tracks the specific ad or link location that produced the traffic. You can use the Content tag to give you the data you need to differentiate and test different versions of the same ad, for instance, since it identifies the specific content even if it shares its destination URL with another ad. This works for different ad placement, design, wording and any other variable you want to test.

Content can also be used for marketing campaigns. You can use it to differentiate links within an email, so you can compare text and image, for instance. In an email with multiple links you can compare link placement by flagging links at the top, middle or bottom of the email with different Content tags. It's also possible to record the date of emails.

Campaign Term

utm_term= mainly used for letting you see ROI on paid keywords, but can track any keyword. It's largely superseded by AdWords autotagging, but if you're running ads outside Google – on Bing, for instance – you'll still need this parameter for tracking. If you don't, your ad traffic will be merged in GA with your organic traffic because Google won't have any means of knowing the difference, which will mean junk data you can't reliably base future advertising decisions on.



UTM Setup

Setting up your UTM tags is simple. If you're doing a small campaign or a one-off, use [Google's URL Builder](#).

URL builder form

Step 1: Enter the URL of your website.

Website URL *

(e.g. <http://www.urchin.com/download.html>)

Step 2: Fill in the fields below. **Campaign Source**, **Campaign Medium** and **Campaign Name** should always be used.

Campaign Source *

(referrer: google, citysearch, newsletter4)

Campaign Medium *

(marketing medium: cpc, banner, email)

Campaign Term

(identify the paid keywords)

Campaign Content

(use to differentiate ads)

Campaign Name *

(product, promo code, or slogan)

[GENERATE URL](#) * Required field

For larger jobs, UTM generators like [Effin Amazing's UTM Builder](#) has you covered.



Online UTM Tracking Code Builder

Fill in the information in the form below and click the **Generate URL** button.

Website URL*	<input type="text" value="http://www.yourdomain.com/"/>
Campaign Source*	<input type="text" value="referrer: google, emailnewsletter2, facebook"/>
Campaign Medium*	<input type="text" value="marketing medium: cpc, banner, email, social"/>
Campaign Name*	<input type="text" value="e.g. product, promo code, slogan"/>
Campaign Term	<input type="text" value="(optional) Identify the paid keywords"/>
Campaign Content	<input type="text" value="(optional) use to differentiate ads"/>
<div><button>Build URL</button><button>Clear URL</button></div>	

Your Generated URL:

Copy URL

UTM parameters are **case sensitive** and need to be entered exactly the same each time. If they're not they'll be flagged by Google as different channels.

One solution is to keep a spreadsheet and paste directly from it into the UTM parameters you're creating. You'll likely wind up using a spreadsheet to hold your codes and their meanings anyway, allowing you to keep track of multiple campaigns, sources and mediums.

To ensure that parameters are entered accurately, your team can use Effin Amazing's UTM Builder's Chrome plugin, which offers presets to save the UTMs you need. (It integrates with Google Sheets too.)

With all the UTM appendages, it's easy to create a URL that's too long to Tweet. This one:

http://effinamazing.com/blog/i-deleted-2187-of-my-twitter-followers-here-is-why/?utm_source=ReviveOldPost&utm_medium=social&utm_campaign=ReviveOldPost



... Is 150 characters. So take it over to Bitly or any other URL shortening service and trim it down, or use the built-in Bitly integration in Effin Amazing's UTM Builder to generate a Bitly'd URL directly. (You can also use 301 redirects to create a shortened URL that redirects to the UTM-bearing URL. However this can have adverse SEO ramifications.)

The UTM tracking is all intact; if you're Tweeting it, that's all you need. If you're posting it to Facebook, you'll need to use the Facebook Power Editor to add your UTM parameters after you insert the regular URL. Find your ad in [Power Editor](#), select your ad and scroll down to Tracking, then paste your UTM parameters into the URL Tags box.

Summing Up UTM Tracking

UTM parameters excel in two distinct ways at the same time: you get excellent granularity, and you get it across channels with the results all in one place. You also get it the way you want it, with control over how it's logged and presented. It's something every marketer should be doing!

Recommended Tools for Beginner Data Tracking

[Google URL Builder](#): For adding UTMs to your links

[UTM.io](#): For adding UTMs to your links, keeping track of UTM links and link shortening.

[Advanced UTM Cheat Sheet](#): A spreadsheet for keeping track of your UTM links.

[Bitly](#): A tool for link shortening



Intermediate at Tracking

Using Event Tracking and Tag Manager

Once you've got UTM parameters on every link, you'll start having a much better idea about where your traffic is coming from. And you can track that by looking at the Source/Medium in Google Analytics. However, at the intermediate level, tracking goes beyond Google Analytics.

Google Analytics will only show you aggregate counts of users who visited from different channels based on the referring domain and UTM links. But if you have a customer sign up with their email on your site, and you want to know exactly which marketing channel that individual came from, aka "marketing attribution", you will need to be using a tool like Heap Analytics or Mixpanel to show you individual user behavioral data.

Now we're talking about not just Marketing Attribution, but understanding every move a visitor makes on your site. Behavioral analytics such as this is "event based". For example, a user clicked on this button, or visited this page, or submitted this form.

Having this behavioral, event based data, allows us to create funnels in Heap or Mixpanel that help us better understand our business.



Built a funnel in 5 minutes with no dev!



How to Get Started with Event Tracking Analytics

Now when you're just getting started, it's a good idea to keep things simple and pick ONE metric that's most important for you/your business to track.



I Have One Metric



For example, if you're a subscription service, MRR is probably key. If you're a business with a lot of annual contracts, ARR is key.

Pick one metric to focus on and you can always build out from there to understand the rest of your business.



What is most important to you?

MRR
ARR
Bookings
Leads
Meetings
Opptys
Close deals

It's important to note as we develop our understanding of tracking, that not everything is going to be 100% perfect, and not everything we want to measure is going to be measurable.

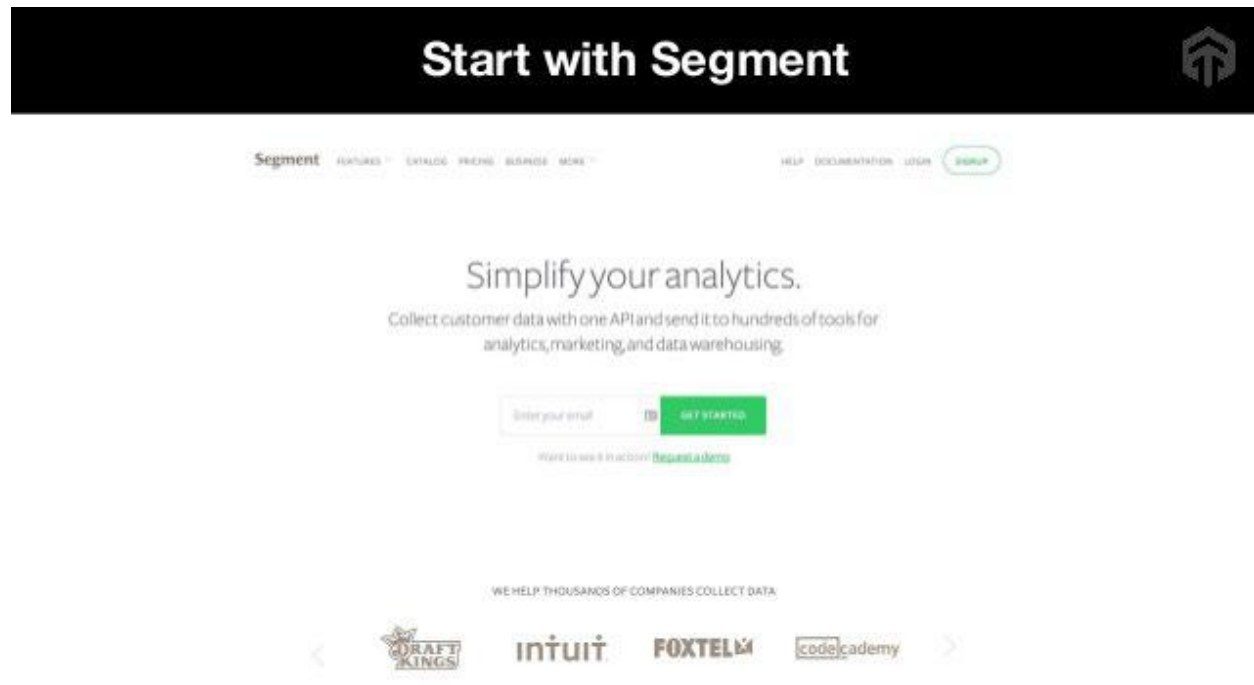
Analytics are not going to solve all your problems. One tool alone will not be the holy grail and there will be caveats to our data.

However one tool that is going to be a big help when it comes to event tracking, is Segment. That's because Segment allows you to write one line of code that tracks an action across hundreds of other tools. Because it's so easy to integrate, it can send data to your CRM and update all your tools every time a user takes a new action.

This makes it possible to do all sorts of fancy marketing automation later down the line and the ability to make the customer journey hyper-personalized. It also saves your engineering team from having to spend a lot of time going back and



forth with marketing about which events they want tracked.



But before we get too far ahead of ourselves, let's talk about what exactly is event tracking anyway?

An event is the action that a user takes.

A Property is the context about that action.

For example if I were to jump, "jump" would be the action, the event. And how high I jumped would be the property, so maybe height of jump is 2ft.



Events and Properties

Event = Action take by user

Event Property = Context about action

Sprint	server / client	Integrated	event	audited	prop name	prop value	p.description	note/docs /js ex.
1	c	no	viewed case study	no	case study	kginger consulting	we will want to store the case study name here. We can do this in different ways, just depends on what is the easiest thing to grab from the page.	mixpanel.track('viewed case study',{ 'case study': 'kginger consulting' })
			trigger					
			this event should fire whenever some one views a case study itself. This will not include viewing the high level case studies over view page, only the individual case studies themselves.					

<http://bit.ly/AnalyticsSpec>

Event = This person took this action

Properties = these are the things that we know about this person at this time.

Events need to be described in the past tense because you're looking at them from a historical lense. "Viewed case study" "Trial started" "Trial ended" "Signed up" "Purchased" "Cancelled"

Now in order to have one single point of truth for what events you are tracking for your business, you should create a Google Sheet that is shared between marketing and engineering. This is how everyone can be 100% clear about what events are being tracked and what they mean.

To download this template for yourself, visit <http://bit.ly/AnalyticsSpec>

Build out all events first

Property = Adjective

<http://bit.ly/AnalyticsSpec>

Sprint	server / client	Integrated	event	audited	prop name	prop value	p.description	note/docs / js ex.
			viewed case study	no	case study	lynger consulting	we will want to store the case study name here. We can do this in different ways, but depends on what is the easiest thing to grab from the page.	mispanel track/ 'viewed case study / case study', 'lynger consulting')
			trigger					
1	c	no						
			This event should fire whenever some one views a case study itself. This will not include viewing the high level case studies over view page, only the individual case studies themselves.					
Sprint	server / client	Integrated	event	audited	prop name	prop value	p.description	note/docs / js ex.
			trial started	no				
			trigger				Since this event is being server side we will want to follow the docs below for accurate tracking. Here is a video we made to help you: https://youtu.be/vG999v2EzThmP#t=3m29s https://www.youtube.com/watch?v=vG999v2EzThmP	
1	s	no						
			This event will be sent when a new account is created with a trial associated with it. There is no trial associated with this event since they are all captured using the super properties			Docs: https://mispanel.com/blog/214/6998#everything-about-server-side-updates		
Sprint	server / client	Integrated	event	audited	prop name	prop value	p.description	note/docs / js ex.
			trial ended	yes/no	reason	purchase/trial/cancelled	we will attach what type of end it is.	mispanel track/ 'trial ended' / 'reason' (purchase/trial/cancelled')
			trigger					
1	s	no						
			This event will fire when an trial ends. This will be sent when the customer purchases as well			Since this event is being server side we will want to follow the docs below for accurate tracking. Here is a video we made to help you: https://youtu.be/vG999v2EzThmP#t=3m29s https://www.youtube.com/watch?v=vG999v2EzThmP		
						Docs: https://mispanel.com/blog/214/6998#everything-about-server-side-updates		

Make sure to clearly build out all your events first, before sharing your clean spec with your engineering team.



Come prepared with your clean spec

Sprint	server / client	Integrated	event	audited	prop name	prop value	p.description	note/docs / js ex.	audited	people property name	people property value	p.description	server / client	note/docs / js ex.
2	c	no	logged in	yes/no	successful	true/false	If the user tries to log in, but it does not succeed due to an error, we would say false	mixpanel track('logged in' / 'successful' / 'true/false')	no					mixpanel.people.set({ " " })
			trigger		failed log in reason	account not activated	When the user tries to log in, but it fails, we will track the failure reason	mixpanel track('logged in' / 'failed log in reason' / 'account not activated')						
			This event will be fired whenever a user tries to log in											
2	c	no	account activated	no				mixpanel track('account activated' / " ")	yes/no	account activated date	1/1/2016	This is the date the account was activated	c	mixpanel.people.set({ 'account activated date': "1/1/2016" })
			trigger											
			This event is sent whenever the user activates their account from the email confirmation email.											
2	?	no	completed account setup	no				mixpanel track('completed account setup' / " ")	no				?	mixpanel.people.set({ " " })
			trigger					mixpanel track('completed account setup' / " ")	no				?	mixpanel.people.set({ " " })
								mixpanel track('completed account setup' / " ")	no				?	mixpanel.people.set({ " " })
								mixpanel track('completed account setup' / " ")	no				?	mixpanel.people.set({ " " })
			During the sign up process the user is requested to fill in additional company information. When that information is submitted, we would fire this event.					mixpanel track('completed account setup' / " ")						

For a step by step walkthrough of how to work with your team to track events, watch Dan McGaw's expert video [here](#).

Rather get your event tracking done without a developer? You can use Google Tag Manager along with Heap or Mixpanel to create events without ever having to ask a developer for help. These tools track events tracked based on visits to different URLs on your site. Like your "thank you page" for example.



New Event
What a customer does to trigger this event

When a person:

With the URL:

Full or partial URLs okay. You can also use wildcards (*) in the path or parameters.

Record an event named:

[+ Add property](#)
Properties are attached to a PERSON, not an event.

[Cancel](#) • [Delete event](#) [Create Event](#)

Master at Tracking

Using Streamlined Marketing Automation

What is marketing automation? According to Hubspot, marketing automation refers to software that automates your marketing for you. The software is designed to help you prioritize and execute your marketing tasks in a more streamlined and efficient way.

But what does that mean for you as a marketer? Your marketing stack is comprised of a wide variety of combination of tools you use to help you do your job as a marketer. This could include outbound email tools, analytics tools, sales and marketing automation tools, and the services that connect them.



Of course, none of these tools are going to reach their full potential if they can't share data with one another.

The problem with a lot of tools, though, is that they're "siloed."

This means that they're not very good at communicating and sharing data with one another.

And even when you do have tools that integrate well, they rarely do so right out of the box. You have to take the time to make sure they communicate with one another. In my experience, no one takes the time or effort to do this—so they aren't getting the most value from their tools. At worst, they're getting incorrect data, glitches, and other nagging errors.

This leads to a situation where you have different departments simply throwing leads 'over the fence' with very little contextual information.

This is a problem, and if you want to optimize your ability to convert leads into cold hard sales, you need to set things up so that data flows freely.

Luckily, you can fix this problem by selecting the right tracking tools and setting them up ahead of time.

Marketing automation is typically a complex topic because of the large variety of tools available and how widely data components vary from business to business. Given this fact, it's difficult to find a really thorough explanation about how to apply marketing automation to your business.

Recommended reading:



However luckily, **Dan McGaw** put together [this useful resource](#) for you. It's a beautiful explanation of how to integrate your tracking tools and your marketing stack to achieve the coveted "marketing automation" goals of your dreams.

COLLECT DATA

How are you pulling your marketing data together
and where do you store it?

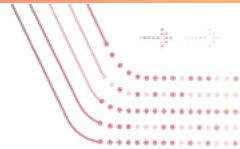
Once all your marketing efforts are properly tagged and tracked with UTMs and pixels in place, you're going to want to start pulling this data together on a daily, weekly and monthly basis. This way, you can monitor your marketing performance over time.

Having all your data together into one place means you can easily use it to build reports and dashboards-- delivering valuable insights for your team. This is how you make intelligent decisions about what's working well, what's not working well, and what changes should be made to optimize and increase ROI.

Here is what data collection looks like at the 3 levels of mastery:

- 1. Beginner at Collecting Data-** Making In-platform Optimizations
- 2. Intermediate at Collecting Data** - Manually Updating an Excel Marketing Dashboard
- 3. Master at Collecting Data-** Automatically Updating Marketing Dashboard in

Now if you're just starting out, that might look something like this...

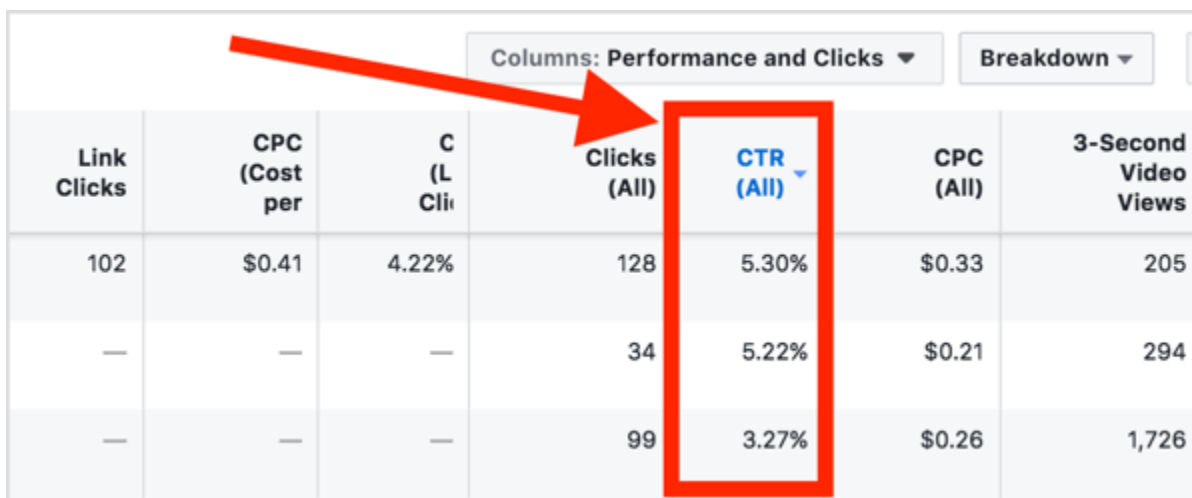


Beginner at Collecting Data

Making In-platform Optimizations

Someone at the beginner level is not **really** collecting data, but just making **in-platform optimizations**. That means they've started running paid marketing campaigns and in order to make optimization decisions, they're logging in to Facebook, Google Ads, LinkedIn, Pinterest etc. and looking at analytics.

When you log into your Facebook Ads Manager for example, you might see that one ad has a higher click through rate than another, or you might see that one campaign is resulting in more sales than another. So you pause ads that aren't working and you shift more money to ads that are.

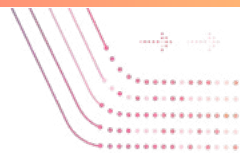


Columns: Performance and Clicks ▾							
Breakdown ▾							
Link Clicks	CPC (Cost per	C (L Cli	Clicks (All)	CTR (All) ▾	CPC (All)	3-Second Video Views	
102	\$0.41	4.22%	128	5.30%	\$0.33	205	
—	—	—	34	5.22%	\$0.21	294	
—	—	—	99	3.27%	\$0.26	1,726	

This is great. However, this is just one small silo of your marketing efforts.

From this vantage, it can be difficult to make decisions about how to spend your overall budget. You can't see whether money is more effectively spent on Facebook or on Google Ads.

In order to compare each channel against each other, you will need to advance



to the next level, where you're pulling all your data together into one place.

Intermediate at Collecting Data

Manually Updating an Excel Marketing Dashboard

There's no one RIGHT way to create a marketing dashboard, which is why it can be so challenging for those just getting started.

So I thought it might be helpful to show you what I do, or what I used to do, before I automated this process at the Master Level.

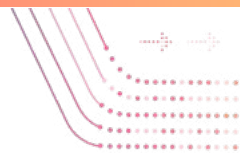
Start out with a Marketing Dashboard Spreadsheet

Now when I'm just getting started, I set up my marketing dashboard on Google Sheets, which is better to use than Excel if you want to give shared access to this document to your whole team.

You can [download my Marketing Dashboard Template here](#).

Once you've downloaded my Marketing Dashboard Template, read on [here](#) as I walk you through how to use it. That way you can play around with the dashboard, take a look at all the different tabs and make a copy of it for yourself to use, if you want to.

Keep in mind: once you download it, please click on "File" and then "Make a copy" so that you have your own version on which to edit and modify the dashboard so that it makes sense for you and your business.



How often to update your Marketing Dashboard

At first I was updating all of this data manually every day, week and month by logging into each platform and manually entering in data into my Marketing Dashboard Spreadsheet.

This was beyond tedious to say the least.

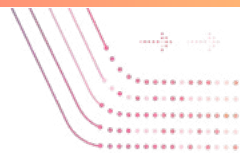
Eventually I got better at Excel and worked with my data analyst so that every week, he would log into each platform, export all the data and then dump all the data into one tab our spreadsheet that would populate other tabs in my dashboard using formulas.

This was much better, but still very tedious to do every day/week. We still didn't have insight into real-time data. But hey, at least we had a way to view all our marketing data in one place.

Today, since I've graduated to the Master level, which means I have real-time access to all my marketing data. Real-time or daily data is ideal, but if you're just getting started, having a weekly or monthly view is a good place to start.

Today, I automate this whole process using [Improvado](#), which I will tell you about in the "Master" section below.

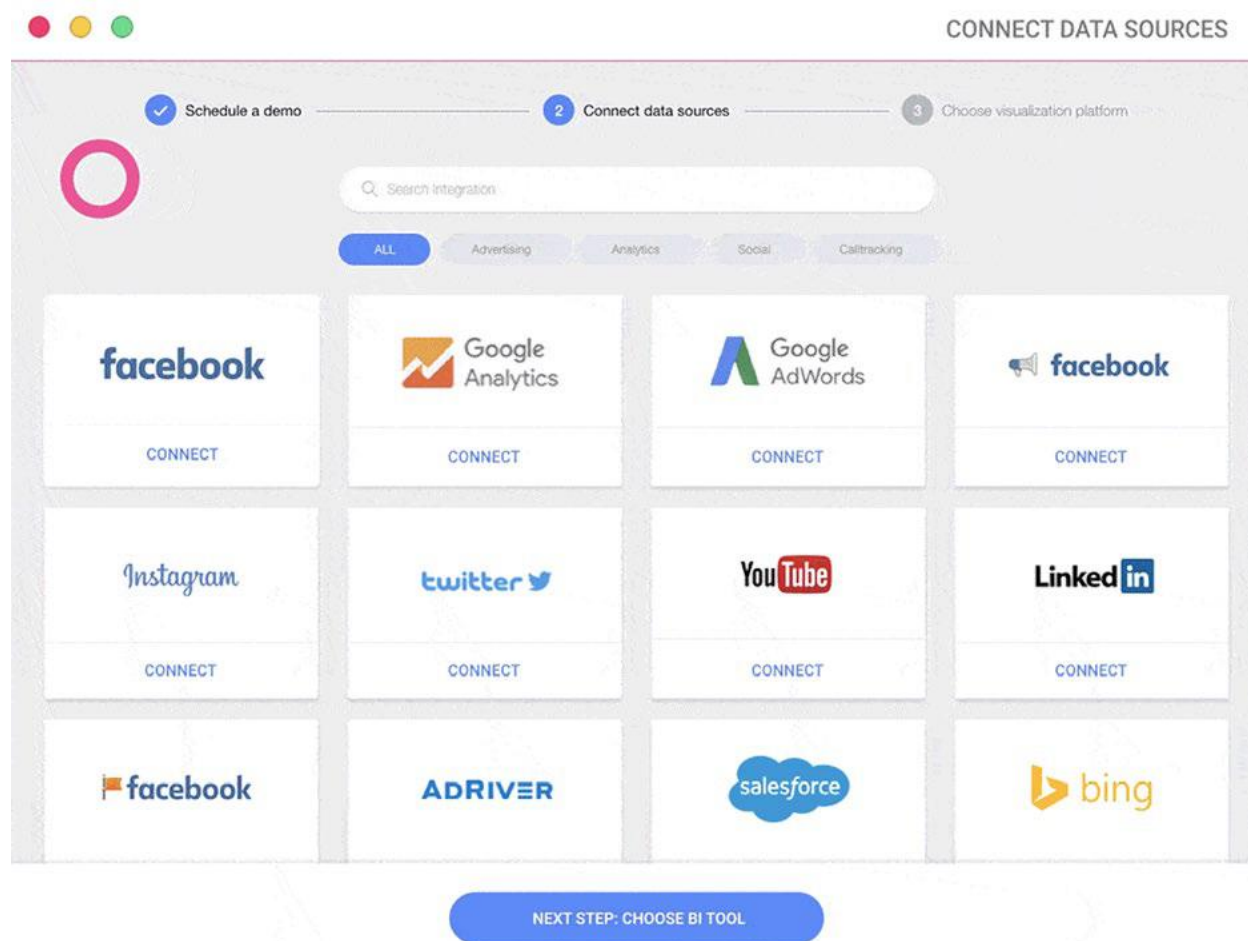
But if you're trying to manually build your first Marketing Dashboard spreadsheet, [read on here](#) to learn how I setup mine...

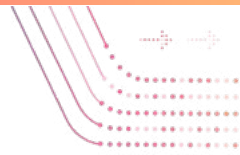


[marketing data aggregation tools](#) have sprung up-- built to make this process much easier and much more automated.

Marketing data aggregation tools like [Improvado](#) pipe your data from marketing platforms and send that data wherever you want it to go-- into a [data warehouse](#), a spreadsheet or straight into your visualization tool.

How to Automate All Your Marketing Data

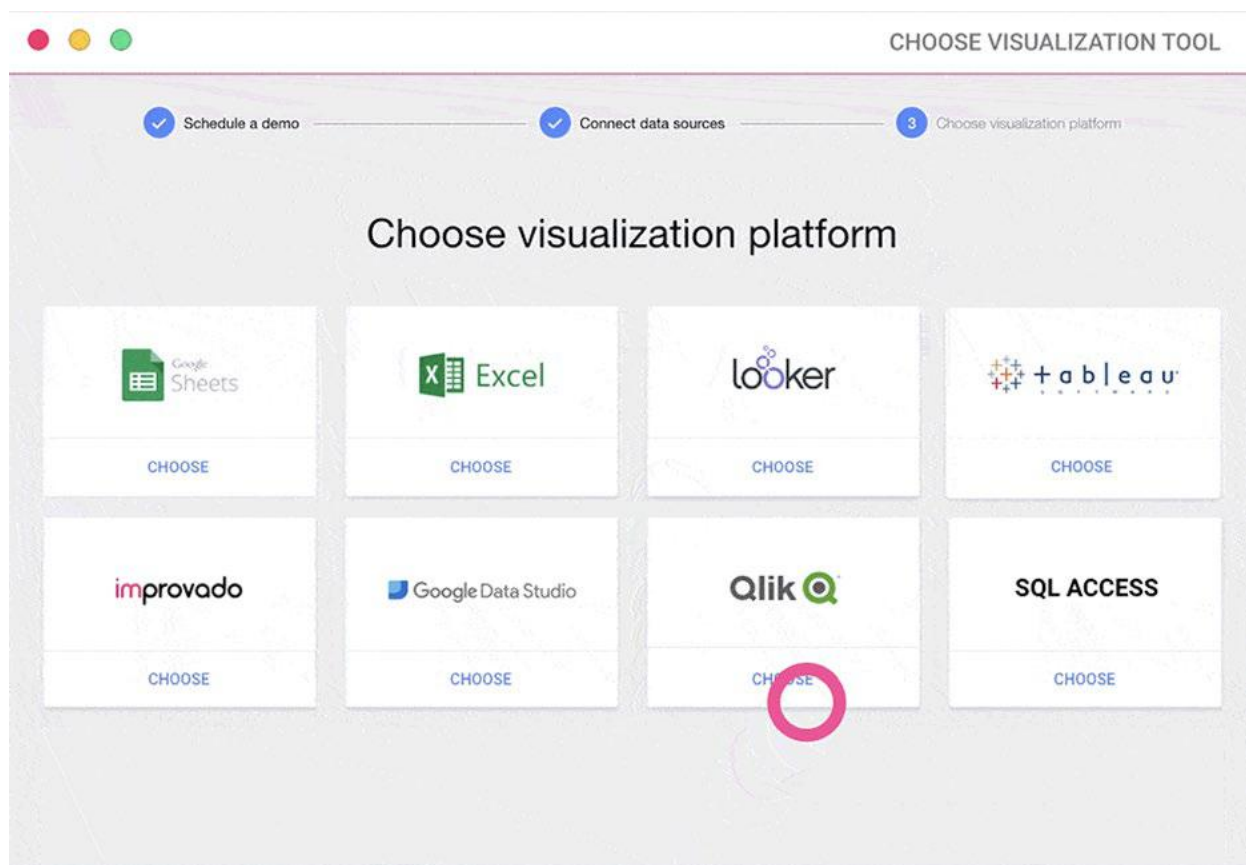
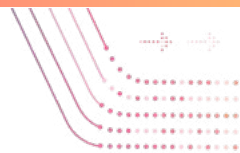




The tool that I use to automate the collection of my marketing data is called [Improvado](#). The image above gives you a little preview as to how it works.

With Improvado, you can create an automated, real-time Marketing Dashboard. Simply sync with all the different marketing platforms that you're using, like Facebook, Adwords, Google Analytics, LinkedIn, Pinterest, Twitter etc.– you name it. They have over 140 different marketing platform integrations, and they can build out any custom integration you need by request.

Once the data has been aggregated, you can use Improvado to build charts, graphs and widgets to analyze your data, OR you can your data to any visualization or business intelligence tool like [Tableau](#), [Looker](#), [Google Data Studio](#) or [PowerBI](#).

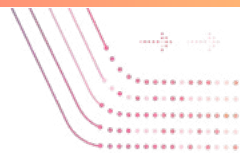


The cool thing about Improvado is that it was built by a team of marketers.

Improvado was actually first a marketing agency. And after talking to hundreds of their clients, they realized that aggregating marketing data was a huge pain point for so many people.

As part of their marketing agency, they had a tool, that they were letting clients use for free, that was automating the collection of all their marketing data into automated dashboards.

And eventually, all the clients said “Hey, you know we would pay just for access to this tool. It’s amazing.”



And so Improvado pivoted from an agency, into a SaaS tool. So that they could help more marketers with data aggregation and reporting.

All the integrations are built specifically for marketers, based on the channels that marketers use.

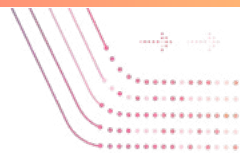
So once you connect all your channels to Improvado, it automatically slurps up all your data, and you can view it wherever you'd like. In spreadsheets, in Improvado or any BI tool to visualize the data.

[Improvado](#) pulls your data from all these places and brings it into one place automatically, so you have real-time insights.

How to View Every Digital Marketing Channel in One Dashboard

High Level View By Partner ⚙								
Platforms	Cost	Imps	Clicks	CPA	CPC	Add to Cart	Lead	Request A Quote
Total	185,553	28,119,135	245,859	2.08	0.84	89,352	90,192	89,242
+ Twitter Client 1	7,168	2,467,688	19,574	36	0.37	198	103	91
+ Google Adwords	8,663	32,276	7,781	1,083	1.11	8	20	5
+ Facebook	12,405	1,074,361	28,525	74	2.84	167	1,090	167
+ Bing	171	20,416	66	0	2.59	0	0	0
+ Amazon Sponsored Products	157,146	24,524,394	189,913	1.77	0.83	88,979	88,979	88,979

Before I used Improvado, if I wanted to know how much money I had spent on a specific channel, or how an individual ad was performing, I had to log into each marketing platform individually and click around until I found the data I needed.



Now, I can see all that data from every platform whenever I want, just by logging into my Improvado marketing dashboard.

You can instantly always see real-time cost data across all the platforms you're running digital marketing ads on.

This includes things like:

- Impressions
- Cost
- Clicks
- CPA
- Leads
- Revenue
- CTR

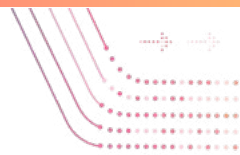
Any data that you can see within an individual marketing platform, you can now see from within one dashboard using Improvado

How to get Granular Digital Marketing Data


Since Improvado was built by marketers– they make sure that you can see everything about your marketing campaigns even at the most granular level.

For example, if you're running an Adwords campaign, and you are trying to optimize your campaigns from within the Adwords dashboard, you'd have to do a lot of clicking as you look for patterns and trends in performance.

However, from the Improvado dashboard, it's easy to see everything displayed for you clearly all in one place. You will be able to see performance right down to

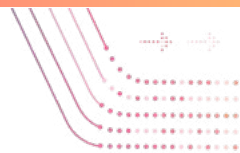


the keyword level or ad copy level.

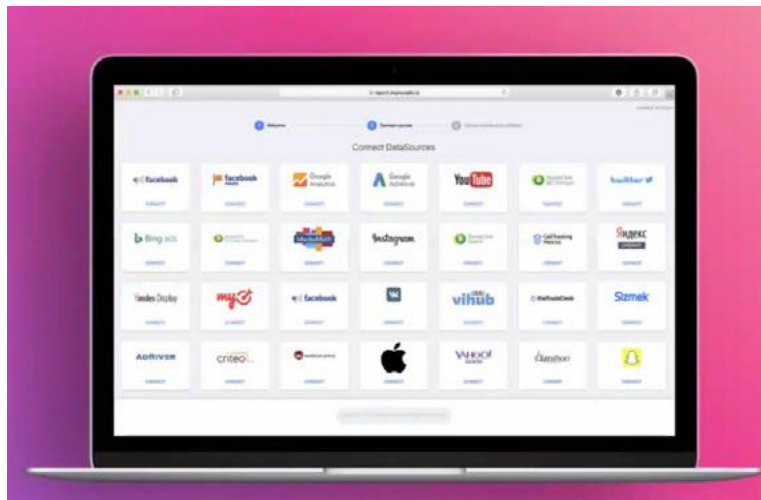
Platforms	Spend	Imps	CPM	Clicks	CPC	Convs	CPA	Convs1
Total	15,810	672,754	23.50	15,161	1.04	265	60	265
—  Google Adwords	12,630	535,796	23.57	14,211	0.89	265	48	265
Search - Competitors - Exact	3,033	38,886	78	654	4.64	57	53	57
Gmail - All Website Visitors	2,664	26,762	100	10,892	0.24	48	56	48
Retargeting_Adwords	1,946	398,482	4.88	616	3.16	65	30	65
Reporting	1,205	11,500	105	202	5.96	9.20	131	9.20
Marketing Data	1,181	16,881	70	109	10.83	14	84	14
API Integrations	1,126	10,436	108	407	2.77	44	26	44
BI Tools	481	17,770	27	185	2.60	1	481	1

Right from your Improvado dashboard.

See the spend in different campaigns, the impressions the clicks, everything.



Sync Data from Every Marketing Channel in Minutes

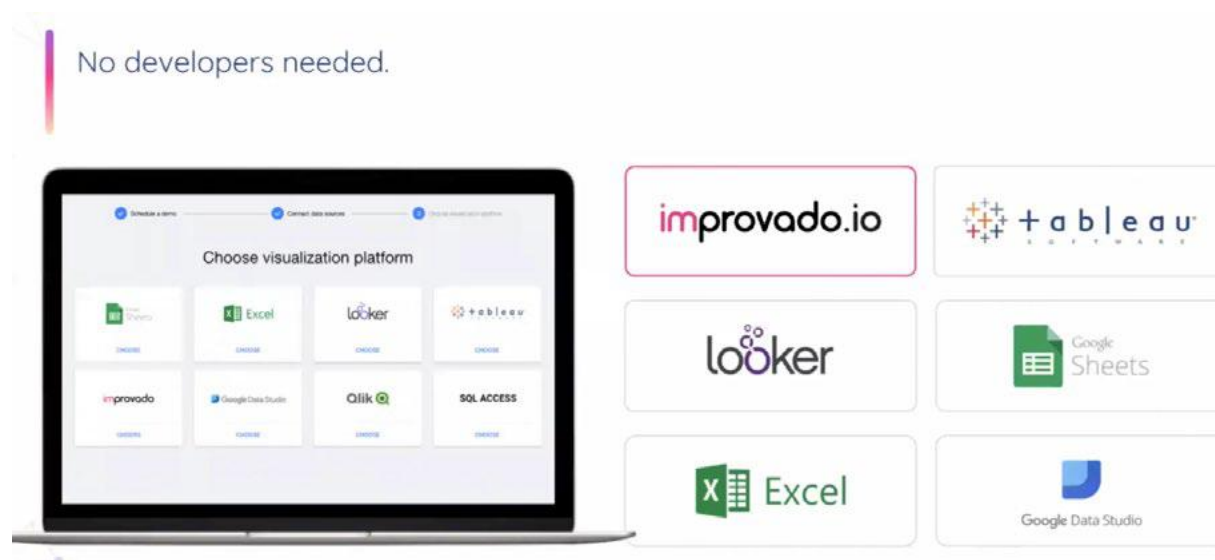


The laptop screen shows the Improvado 'Connect Data Sources' interface. It features a grid of 20 icons representing various marketing and analytics platforms, including Facebook, Google Analytics, YouTube, LinkedIn, Bing Ads, AdWords, Instagram, Twitter, and many others. The interface is clean and modern, with a white background and blue accents.

- 80+ Integrations
- CSV upload
- Google Sheets
- Email integration
- FTP drops
- 500+ integrations by 2019

You can sync data from any marketing channel in minutes, and even if you have offline data in a CSV, Google Sheet or send to you in an email, you can upload that data to Improvado and visualize it alongside the rest of your data.

Send Your Marketing Data to Any Visualization Tool

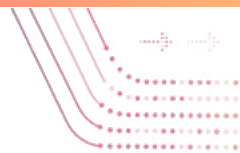


Here's a very important piece-- Improvado will automatically send all your data, in real time to your visualization tool (which we will talk more about visualization tools in the "Master" level section of the VISUALIZE chapter). This is critical because most companies are using their engineering team to do this, which is crazy! With Improvado, you don't need any developers in order to automate your marketing data.

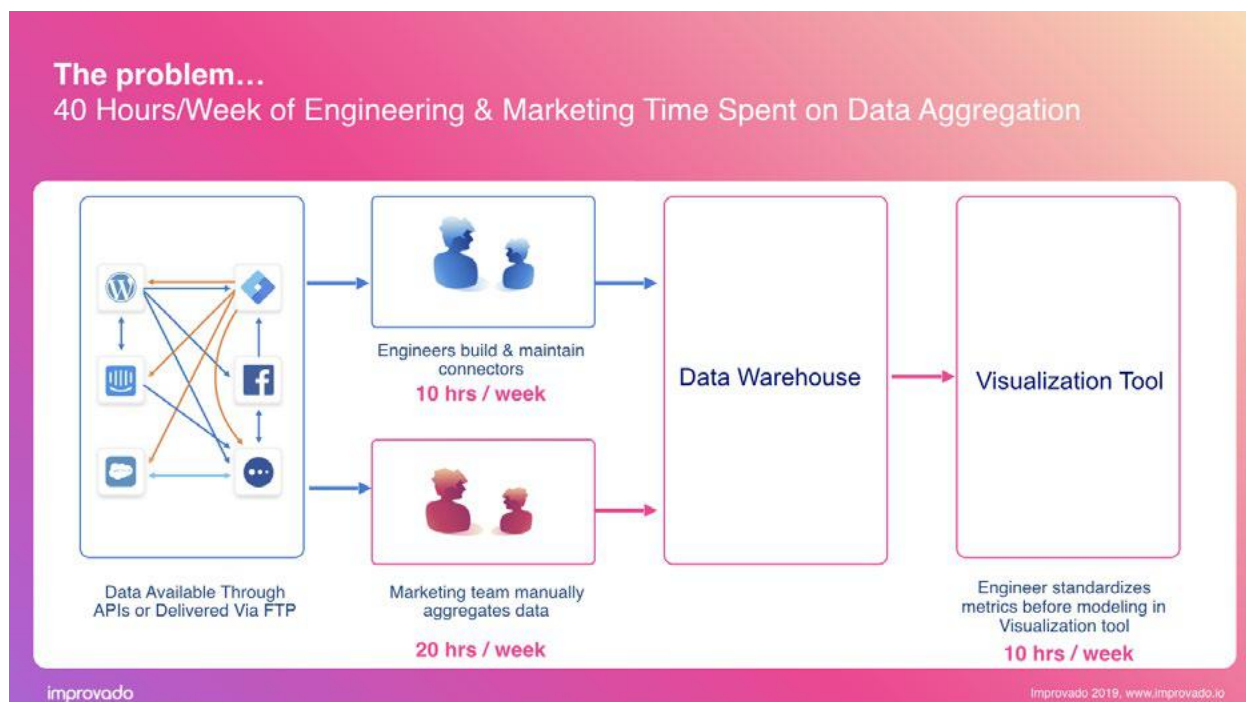
Why is it a bad idea to use your engineering team to automate your marketing data? Marketers often struggle to get attention from the software engineers on their team. Those guys are busy doing important work, like building the product. They have all the other company stakeholders asking them for things like product updates.

The last thing engineers want to get stuck doing is building out API integrations for the marketing team so that they can automate their data. It's just not high on their list of priorities-- nor should it be because there are better plug and play solutions to solve this. There's [Improvado](#)!

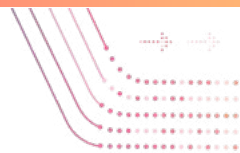
Managing APIs integrations internally can be known to waste 20+ hours per



week of Engineering time. That's because marketing platforms are constantly upgrading and making changes to their APIs, and marketing teams are always testing out new tools which means new APIs to build and maintain. The infographic below gives you an idea of how much of a strain this can be on your engineering team.



Improvado as a solution is way cheaper than having your engineers spending months or even years building out and maintaining these integrations for a marketing team. Look at the infographic below to see how it simplifies things **from 40 HOURS a week to 30 MINUTES a week!!**



Automated Visualizations



- Share via live link
- Download as PDF
- Scheduled reports
- Read-only access

Like I mentioned earlier, you want to create visual, real-time marketing reports for your leadership team so that they can quickly and easily understand marketing performance. You have the option to do that in your own Visualization tool or in the Improvado dashboard.

Improvado allows you to share your real-time marketing dashboard and reports via live link, PDF, sending scheduled reports or providing read-only access for internal stakeholders or external clients in the case of marketing agencies.

Your team/clients don't want to wait every week or every month for you to send them a report that took you 20 hours to make. They should be able to login in real time and get a view of the status of their marketing campaigns- without having to bug you and ask you questions.

Recommended Tool for Mastering Data Collection

[Improvado](#) -- schedule a demo [here](#).

VISUALIZE DATA

How are you displaying and reporting on your data?

Once you're correctly tracking and collecting all your data, it's time to make sense of it all by building reports. Creating reports and dashboards that visually display your marketing performance is critical so that you can share this information with your team and make informed decisions.

Before setting out to create a visualization, keep in mind that the hard work and truth is in the analysis. Many tools make it easy to produce attractive visualizations, but these are of no value if they gloss over the weakness of the underlying analysis. The properly selected visualization will not only convey that information, but it should stimulate additional questions.

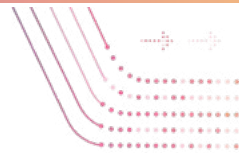
There's no single visualization that will best communicate insights, data and analysis. Choosing the wrong form can leave your audience confused or misled. All the work you've done collecting and analyzing the data can be wasted if you don't present it well.

Most marketers fall somewhere within the following 3 levels of mastery:

Beginner at Visualizing Data - Creating Graphs and Charts in Excel

1. Intermediate at Visualizing Data - Building Powerpoint Deck Presentations

2. Master at Visualizing Data- Using a Visualization Tool



Beginner at Visualizing Data

Creating Graphs and Charts in Excel

As you may have read earlier in the chapter about “Collecting Data” at the Intermediate level, many marketers manually collect and store all their data in spreadsheets like [this one](#).

Creating dashboards in spreadsheets is a great intermediate way for the marketing team to get a wholistic picture of what is going on internally.

However, what I’ve experienced first hand is that -- you can’t show your CEO this dashboard.

Her/his eyes will glaze over.

It’s too many tables and numbers. It’s way too granular.

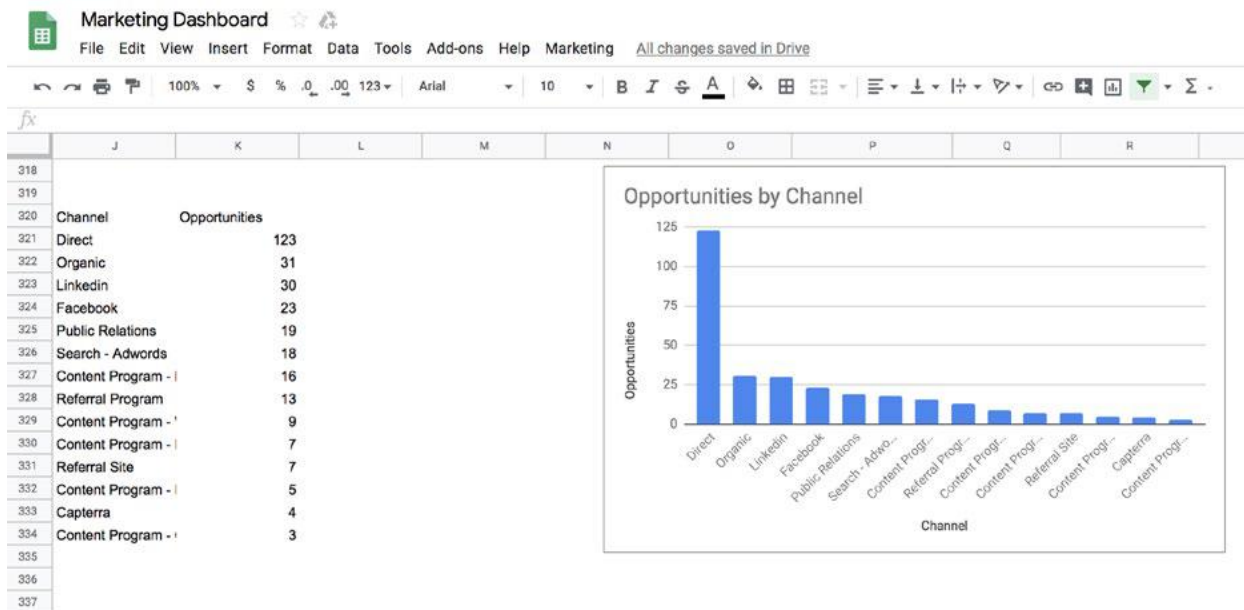
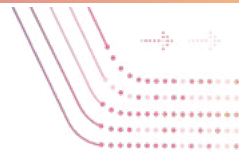
You need to make the data tell a story visually, so that people outside of your marketing team will be able to quickly understand it.

Most beginners at data visualization, begin to tell a story with their data by creating charts and graphs in Excel or a Google Spreadsheet.

In my [Marketing Dashboard Template](#) you can see how I do some beginner level visualizations in a Google Spreadsheet.

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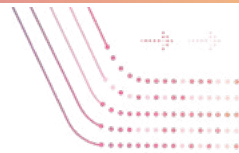


You'll need to make pretty charts and graphs to help you visualize your marketing campaign performance for your CEO or leadership team.

For a high-impact presentation of a key metric such as sales, use single value visualizations.

For understanding a mix of product, customer, channels, you want something that can show percent of total — probably a pie or donut chart. For knowing where people are coming from geographically, you'll want a map.

This is how you create visualizations manually. But if you want to automate your reporting it and have a real-time marketing dashboard that any outside stakeholders can take a peek at, at any time, then that's where [Improvado](#) can help.



Build your report around a goal

Although we can expect to gain focus and understanding as we go, we should know from the outset the goal of the campaign we're putting in place. Are we looking to improve the effectiveness of a sales channel? Bump sales for a particular product or service?

Bring on new customers? Knowing what that is gives us direction for our first round of data collection and visualization. To begin this new effort, we need to establish a benchmark of today to measure against future performance -- for example, did we get the intended or increased new community members from the campaign?

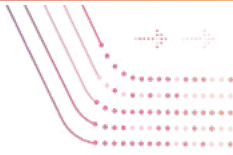
Intermediate at Visualizing Data

Building Powerpoint Deck Presentations

Marketers that are at the Intermediate level when it comes to visualizing data, know that marketing the successes of their team is almost as important as marketing their product.

Like I mentioned in the section above, outside stakeholders will likely lose interest if you whip out your Excel dashboard to showcase performance at a leadership meeting. Charts and graphs will help, sure, but better to really craft a story around your data by putting those charts and graphs into a Powerpoint or Google Slides presentation.

That presentation deck can act as a digital marketing report that you're going to share with outside stakeholders where you call out the big changes each month. The big key takeaways. Each headline should call out a key takeaway so that people can browse your presentation without even looking very closely at the graphs or charts.



Tell your story

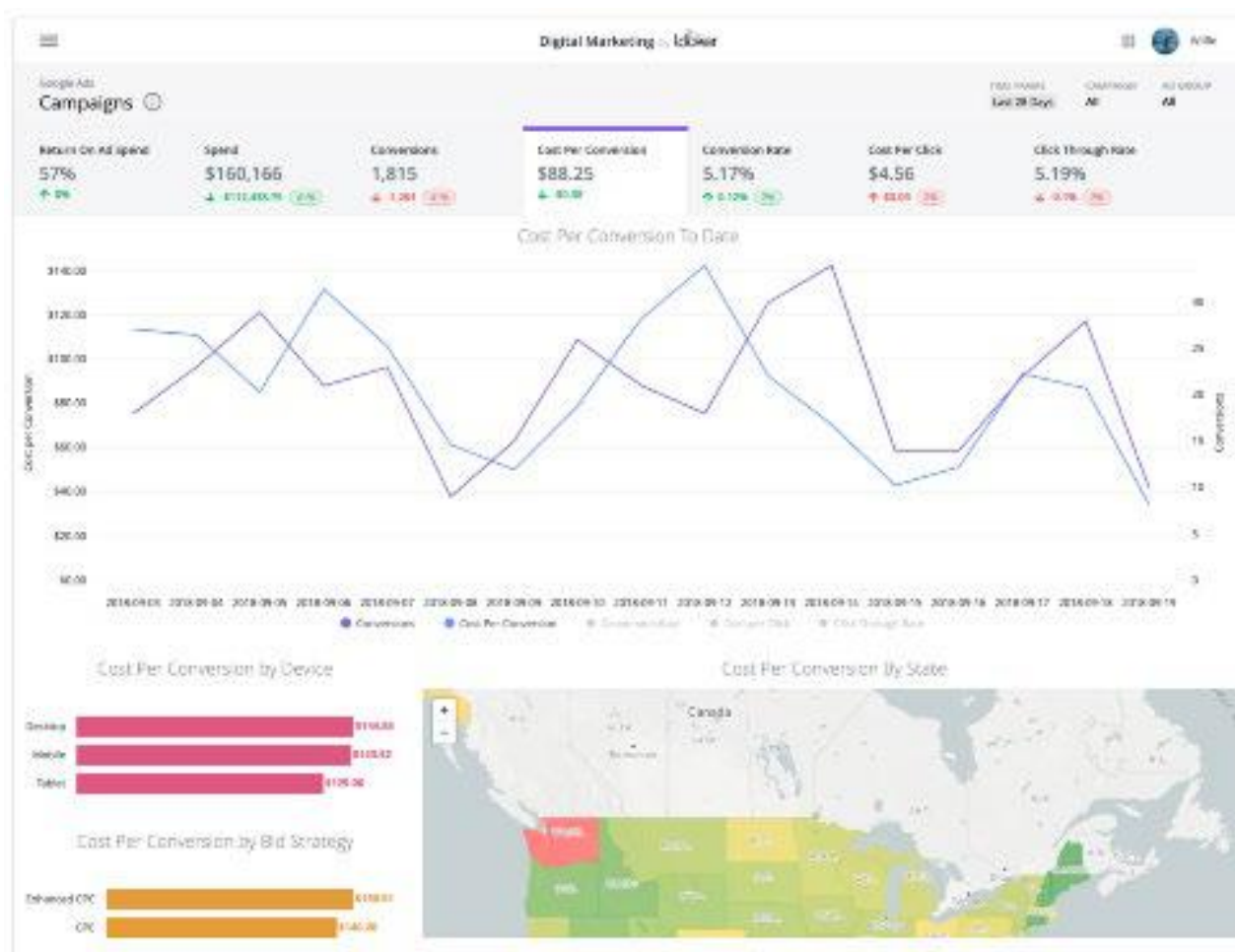
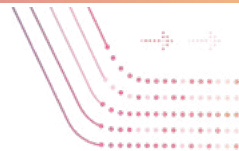
At the end of the day, a well-made report should show the viewer the full picture of your efforts. Perhaps it's only the story of your web traffic, but still, there should be a narrative. You want to sort things in order of importance and then group things by general theme.

If only one person will use a metric, or the metric is not actionable, it probably doesn't belong in your report.

Reports should offer transparency to how results were arrived at. A good report will be a portal into new questions and discovery based on established truth to inform future actions. But to get more advanced, you might want to level up to the Master level and use a visualization tool.

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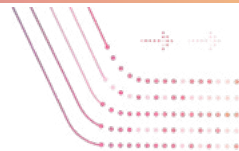


Understand what's driving your KPIs with dashboards built to highlight the contributing factors.

Master at Visualizing Data

Using a Visualization Tool for Real-time Dashboards

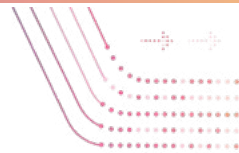
Most marketers at the Master level of visualizing data are using a visualization tool. This allows them to create real-time dashboards.



A digital marketing cross-channel performance overview dashboard presents a singular view of KPIs across several platforms.

A dashboard is a collection of data driven portals into different parts of your business, department, team or individual work. They continuously measure performance (the most impactful with real-time data using a tool like [Improvado](#) to pipe your data into your visualization tools) and should offer an exploratory lens to ask new questions or observed actions. And the holy grail: being able to take instant action within that dashboard to impact future outcomes.

Dashboards can provide a supplement or an alternative to regular reports. Unlike a report, which is static and is provided at a regular interval — hourly, daily, weekly, quarterly — a dashboard is always on, and updated in real time (or as close to it as we can get.) Dashboards are a great way to access and share data. A powerful dashboard not only brings data into the conversation, it tells a story with that data.



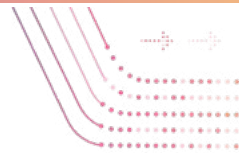
I decided to reach out to our partners in data visualization over at Looker to describe what they're seeing as far as best practices when it comes to building marketing reports and dashboards.

One of the first things they told me was that a marketer at the Master level of visualizing data understanding the difference between Vanity metrics & Clarity metrics.

Vanity metrics vs. Clarity metrics

Vanity metrics are surface-level metrics. They're often large measures that sound impressive to others. Examples might include the number of impressions an ad has achieved or the number of times an app has been downloaded. It sounds great if these numbers are high, but where is the business value? The value of an ad lies in how the people who have seen it respond, not how many people have seen it. Likewise, what's important with an app is whether people are actually using it, not whether they downloaded it.

Clarity metrics are operational metrics, like the number of minutes per day the product actually gets used or how long it takes for a user to get service. Clarity



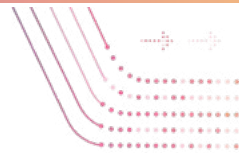
metrics speak directly to business value. They enable predictions. They show how to move the business forward.

A great way to avoid vanity metrics is to focus on customer behavior and on the stream of events that make up the customer journey. If we unify the many puzzle pieces of customer behavior before and after the conversion in a single location, we can more easily enable analysis to construct a clear view and insights to their customer journey. Event streams show how people move through your product and make it easy to analyze their behavior.

Another key indicator of a marketer at the Master level of visualizing data was utilization of the two more advanced forms of marketing analysis, funnel and cohort analysis.

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Conclusion

Marketing analytics can be intimidating.

But it doesn't have to be.

As technology continues to advance, all your competitors are getting smarter.

Don't be left in the dust.

Become a [Marketing Analytics Master](#) today.

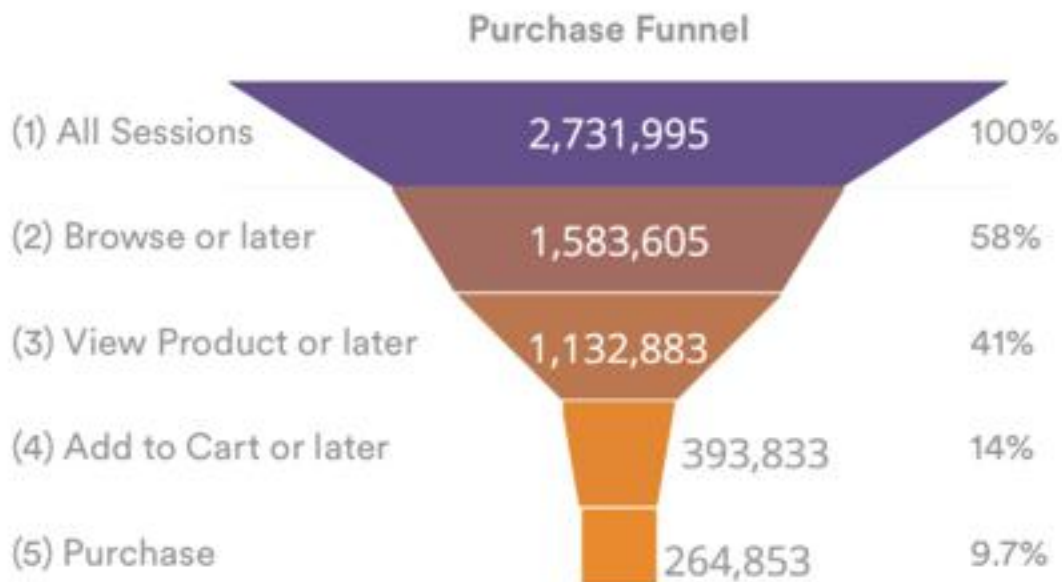
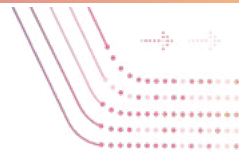
Funnel analysis

With a simple funnel analysis we can quickly get a sense of the customer journey. By tracking certain events, stages, or actions within the customer journey, our teams can build an understanding for points of optimization and success. The image of a sales funnel is iconic and is easily understood both within marketing and in the rest of the organization. With funnel analysis, we look at the customer journey from the perspective of the roadmap.

The map begins with the earliest points of marketing's contact, and works through each of the touch points needed to establish a conversion — also showing each of the potential drop-off points. Once the customer relationship is established, the roadmap shows new funnels as we work to cross-sell up-sell existing customers or to keep them from churning. At any point, we know where customers (both current and potential) are on the path from introduction to conversion.

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Purchase funnel analysis visualization illustrates customer journey metrics through the sales stages.

Cohort analysis

Cohort analysis is a type of behavioral analysis that adds new dimensions to our understanding of the customer journey. By segmenting our customers and potential customers into related groups, (cohorts), we can drive critical insights into demographics, geographies, and behaviors indicating future actions such as churn, purchasing patterns, chance of repeat business, etc.

Cohort analysis allows us to dynamically explore behavior across our lead and customer base. By customizing metrics, date ranges, and timeframes we can identify and focus in on the specific drivers of user retention as well as the triggers for spend behavior. Cohort puts the customer lifecycle map into



perspective. We get a clear idea of what the customer will do, and tactics may work with them, guided by the data collected from many others with similar characteristics.

Many Master level marketers are using [Improvado](#) to send data in real-time to their visualization tool of choice.

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