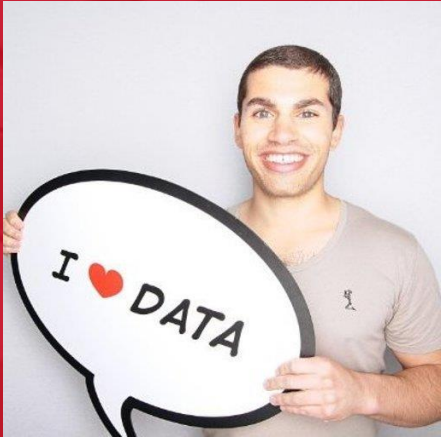




# How Tableau Uses Tableau for Marketing



# John-Paul Rantac

EMEA Marketing Campaigns Manager, Tableau

# Agenda

## 1. Intro to Tableau

- Tableau platform
- Data sources
- Marketing demo

## 2. How Tableau Uses Tableau for Marketing

- Analytics for everyone
- Marketing dashboards

## 3. Getting started with Tableau

- Dashboard starters
- Free resources



## 2. Intro to Tableau



We help people see and understand data







Desktop



Browser

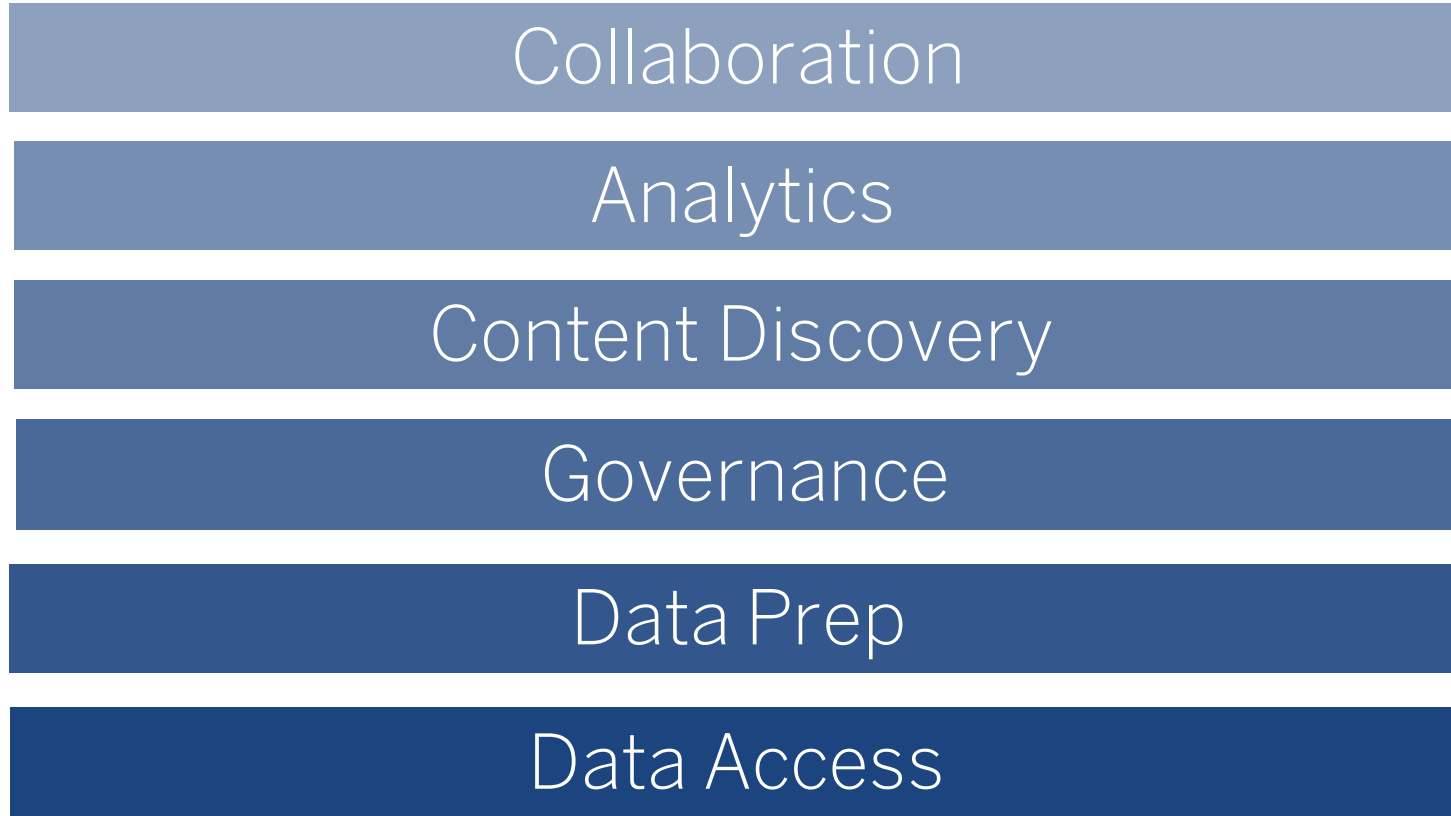


Mobile



Embedded

Security & Compliance



Extensibility & API's

### Deployment



ON-PREMISES



CLOUD



HOSTED



WINDOWS



LINUX

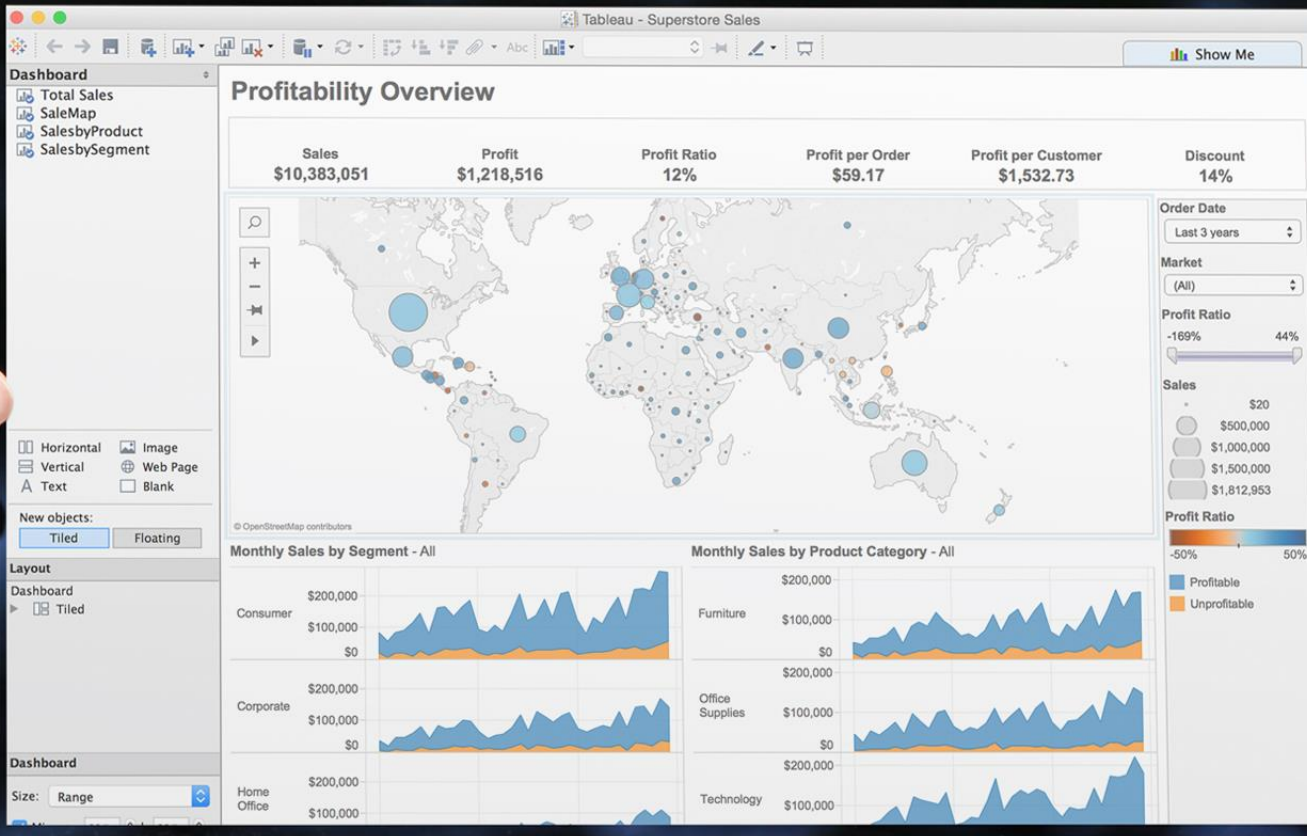


MAC



MULTI-TENANT

Demo





# Google Ads Key Indicators

Date: 1/1/2018 - 9/19/2018 Brand/Non-Brand: (All) Search/Display: (All)

## ACROSS DATE RANGE

## AVG. ACROSS WEEKS

## PACING

\$1,300K

CPC: \$0.87  
 Conversion Rate: 15.2%  
 Cost/Conv: \$5.71

Clicks: 25,704  
 Conversions: 3,907  
 Cost: \$22,314



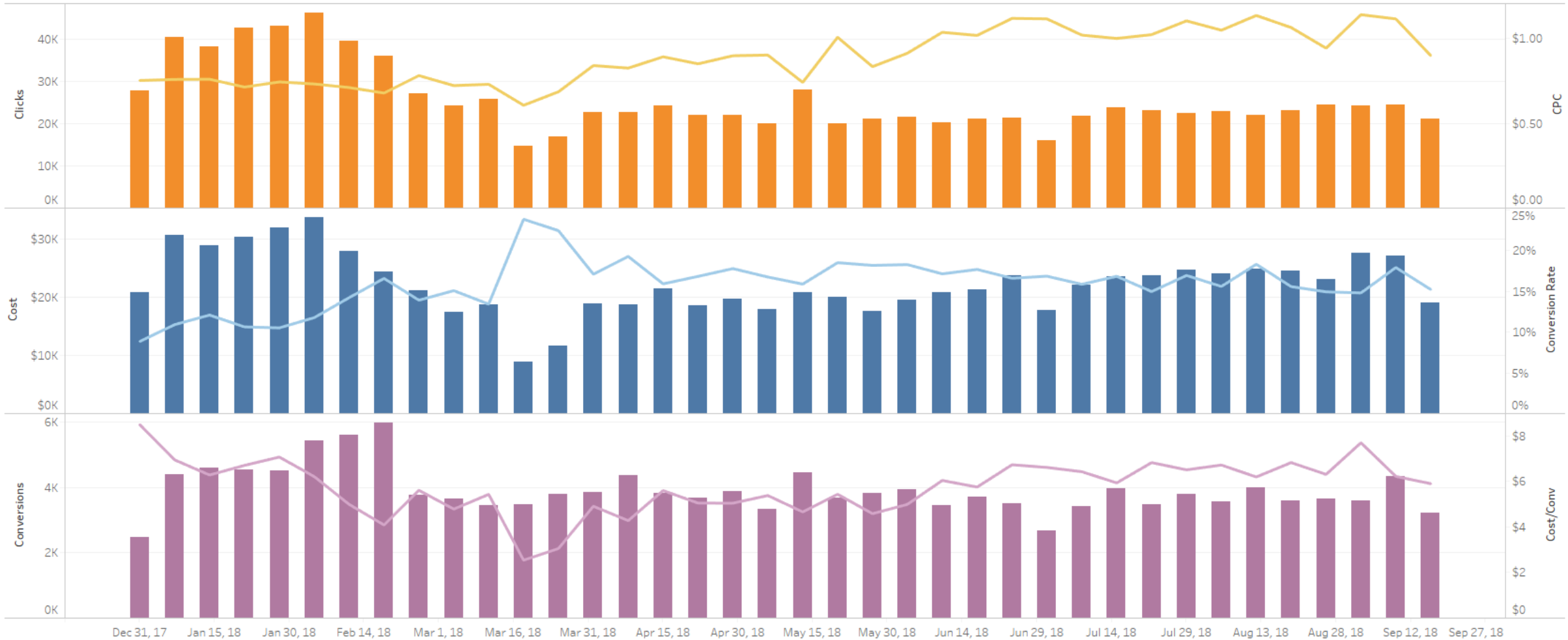
## WEEKLY PERFORMANCE TRENDS

★ Hover for more details

Choose Granularity

WEEK

- Clicks
- CPC
- Cost
- Conversion Rate
- Conversions
- Cost/Conv



## 2. How Tableau Uses Tableau for Marketing

# Analytics for everyone!



Alyssa Peck  
Data Scientist



Emily Betts  
Digital Manager



Briana Evans  
Field Marketing



Jackie Yeaney  
CMO



Dan Miller  
EVP of Sales

Different questions  
Different needs  
Same platform  
Same data

# **Fictional Data, Real Dashboards**



# Marketing Leadership

- Create a data-driven organisation
- Make strategic data-driven decisions



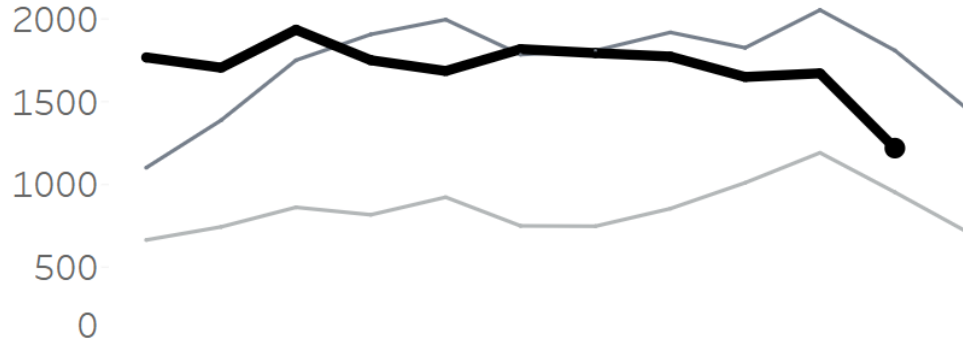
# Marketing Leader KPI Dashboard

[Click here to learn more about Tableau for Marketing Analytics](#)

Leads by month

- Current Year
- Last year
- Two yrs ago

Leads Created



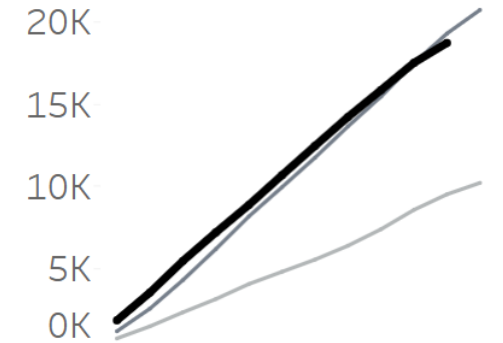
November 2018

**1,213** Leads

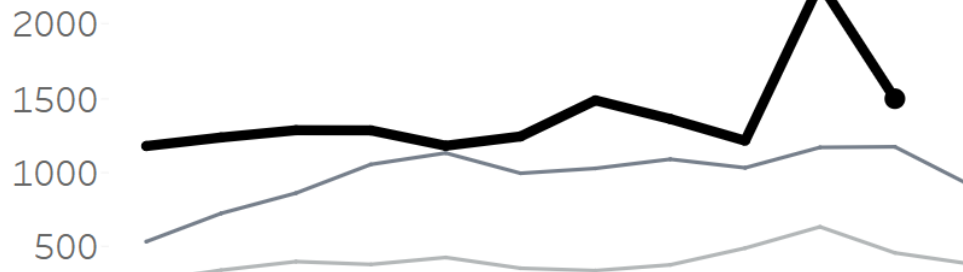
▼ -32.7% YoY

▼ -27.1% MoM

Running Totals



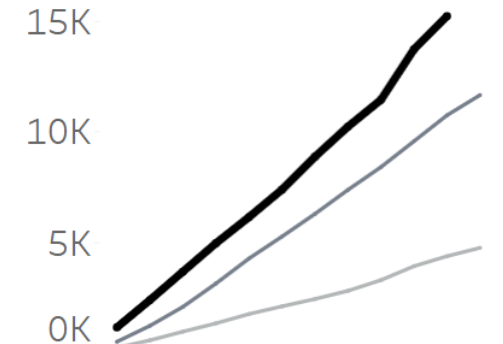
Leads Primed



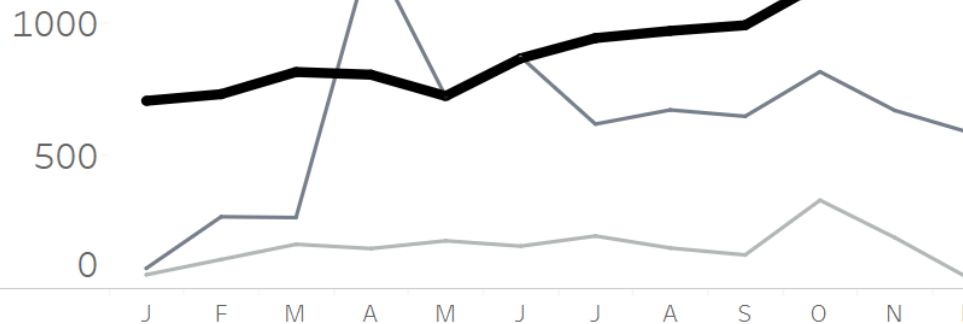
**1,492** Leads

▲ 27.8% YoY

▼ -34.4% MoM



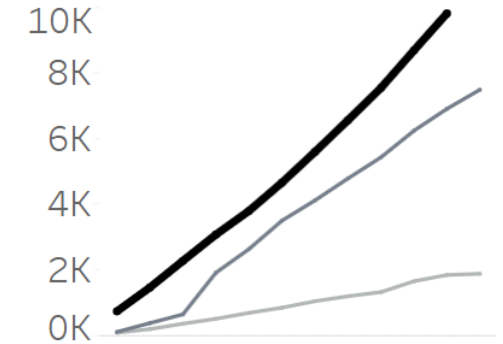
Leads Qualified



**1,128** Leads

▲ 69.1% YoY

▼ -1.3% MoM



# Lead Prioritization Dashboard

## Current MQLs



<b>Hot</b>	Sales Requests, eCommerce, High quality Scores	Immediately
<b>A</b>	Product Trials & Content Consumption Activities	1 day
<b>B</b>	All other qualified leads and contacts	2 days
<b>C</b>	Recently Active Leads/Contacts (non-qualified)	As needed

	Hot	A	B	C
East	19	11	56	39,944
West	21	90	178	11,057
<b>Grand Total</b>	<b>40</b>	<b>101</b>	<b>234</b>	<b>51,001</b>

## Manager List (Click to filter Salesperson List)

Mike Boddicker	5		1	764
Ernie Tyler	5	11	30	357
Dave McNally	5	3	16	557
Phil Itzoe	3	17	30	1,436
Gregg Olson	3		3	1,159
Frank Robinson	3	18	28	891
Rich Dauer	2	4	6	395

## Salesperson List

Charley Taylor	4	9	20	152
Jack Lambert	3	1	3	182
Yale Lary	2	1	9	237
John Randle	2			120
Fred Dean	2	9	10	119

# Marketing Practitioners

- Execute campaigns better with data-driven decisions
- Discover new campaign performance insights

# Email Campaign Overview - Eloqua

[Click here to learn more about Tableau for Marketing](#)

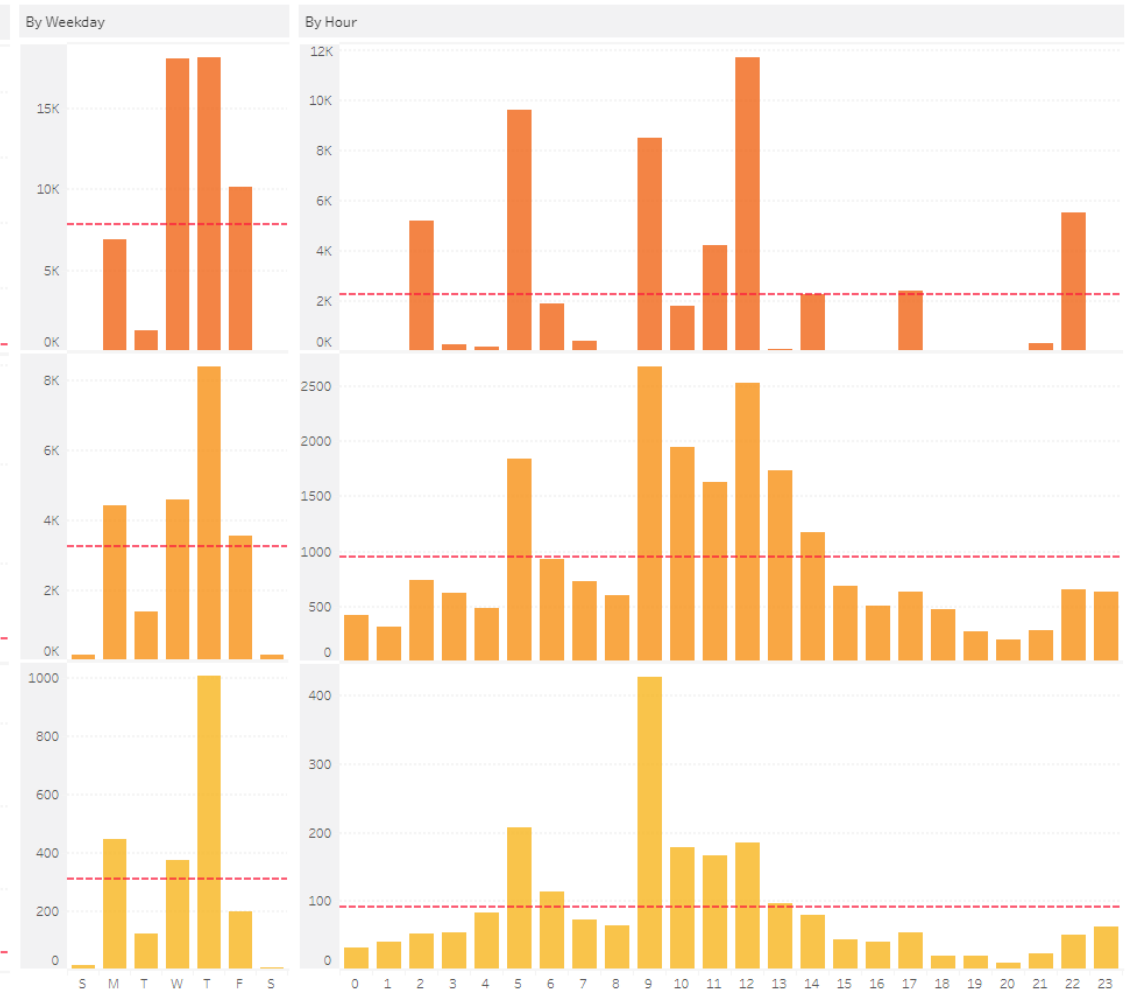
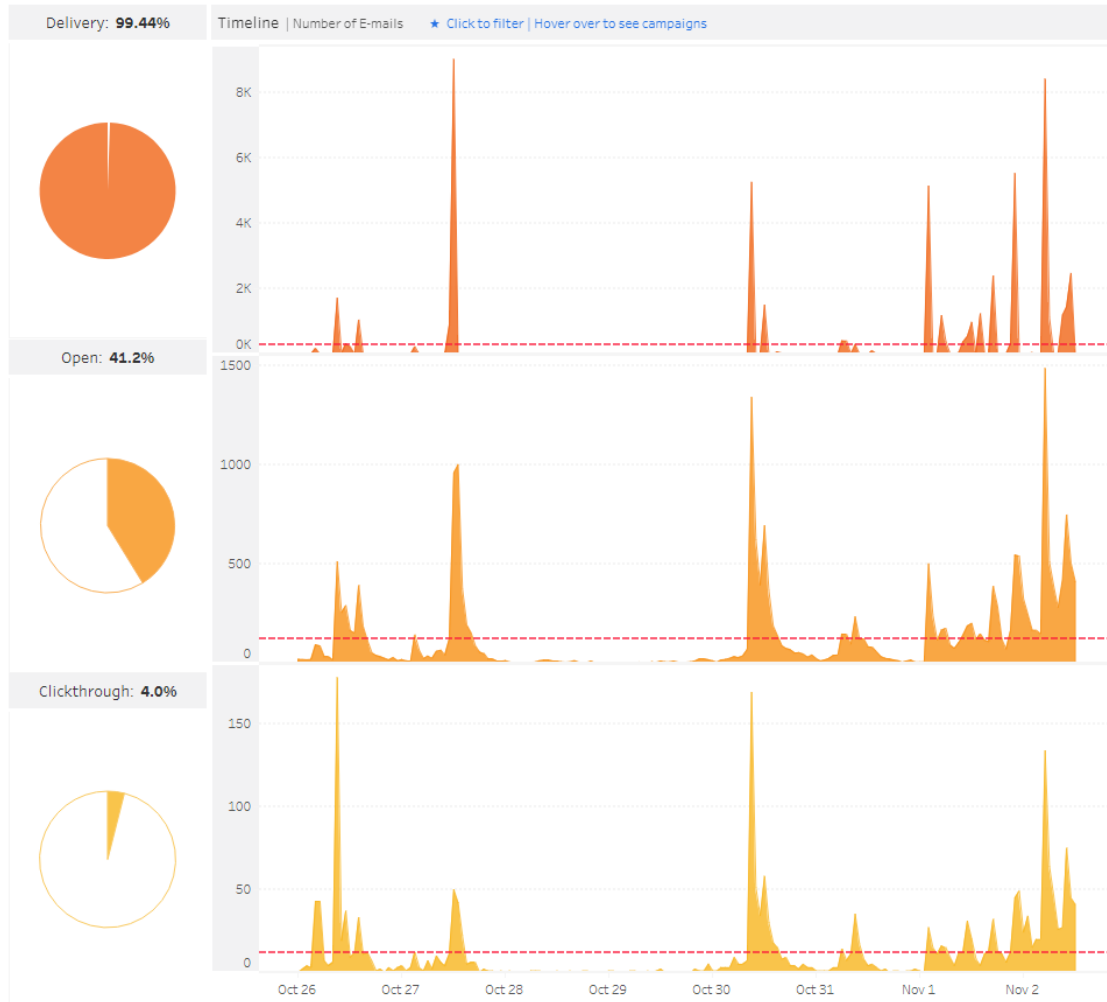
Period: October 26, 2017 November 2, 2017
 Current Status: Active
 Campaign: (All)
 Asset Name: (All)
 Email Subject: (All)

**Total Sent** 55,176

**Click-to-Open Rate (CTOR)** 9.6%

**Top 5 Campaigns | By Sent Emails**

Flower of Netherlands Creo	8,517
Fleet Management	7,647
Network Security	5,579
Enterprise Virtual Array EVA	4,834
Occupational Therapists	3,201

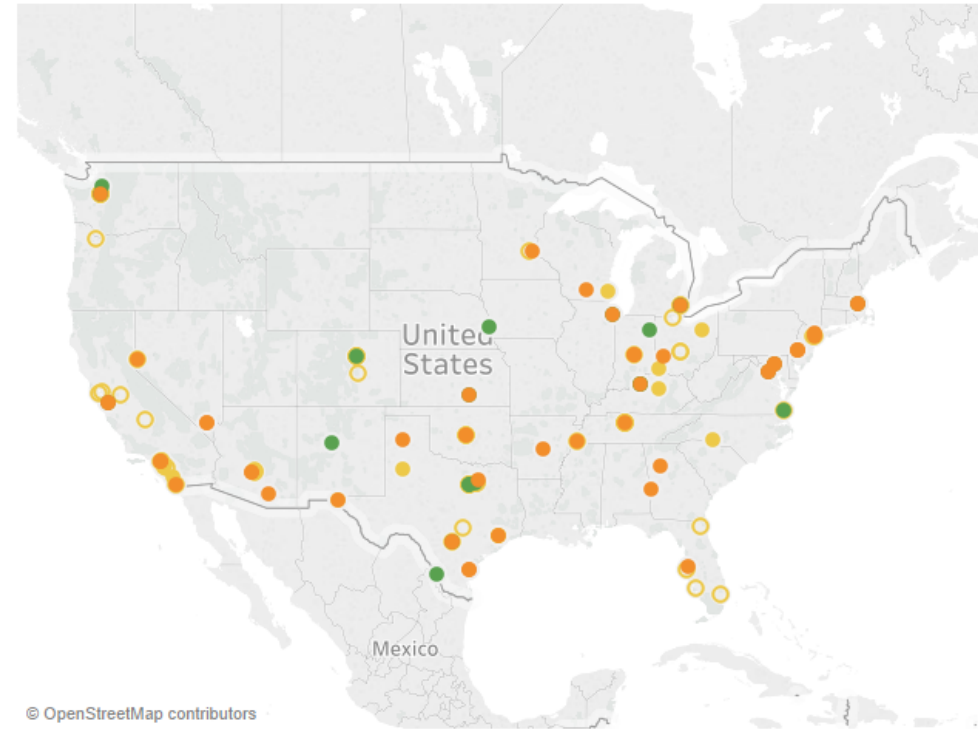
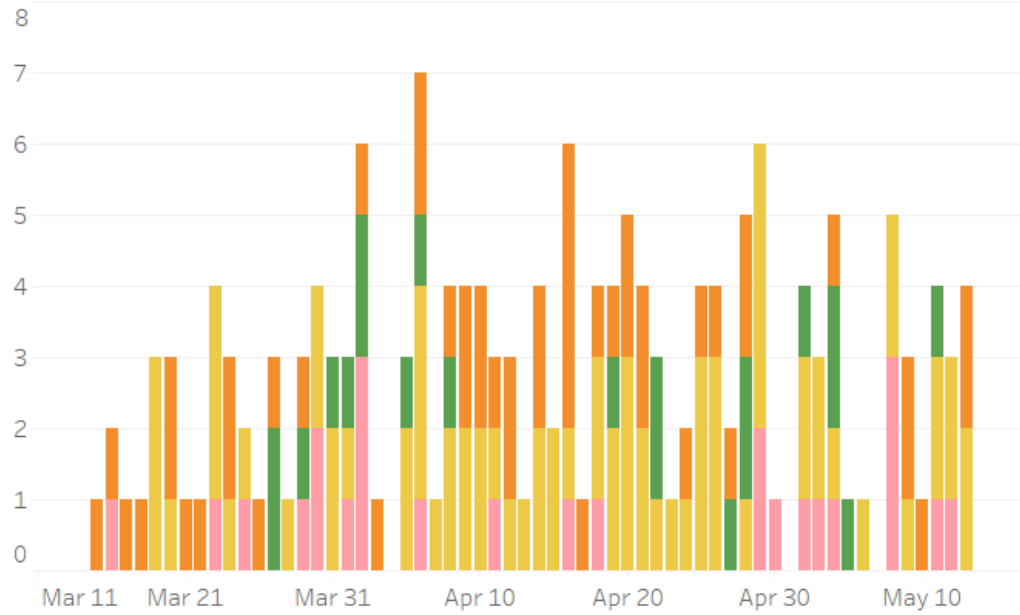


# Marketing Campaign Activity Calendar

[Click here to learn more about Tableau for Marketing Analytics](#)

## Activities by date

Hover for registrations data | [Click for additional details](#)



**DATE**

**CAMPAIGN**

**FILTER BY TYPE**

- Partner Event ●
- Tradeshow ●
- Territory Event ●
- Webinar ●

**FILTER BY STATUS**

- Live ●
- Planning ○

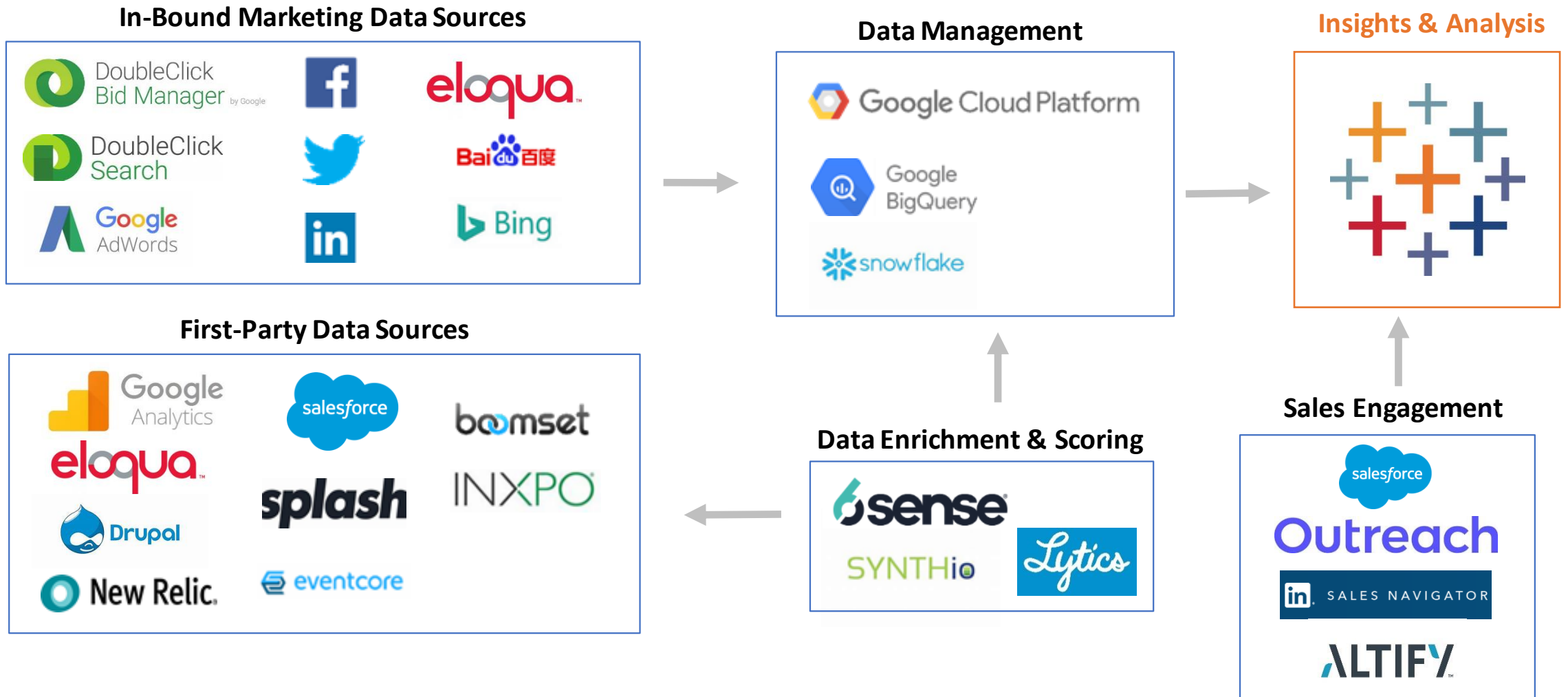
Date	City	Campaign	Activity Name	Partner Event	Tradeshow	Territory Event	Webinar
3/15/2019	Columbus	Developer Analy..	Partner Event Columbus 43539	●			
3/16/2019	Null	Developer Analy..	Webinar 739				●
	Indianapolis	Developer Analy..	Partner Event Indianapolis 43540	●			
3/17/2019	Plano	Developer Analy..	Partner Event Plano 43541	●			
3/18/2019	Louisville	Developer Analy..	Partner Event Louisville 43542	●			
3/19/2019	Dallas	Developer Analy..	Tradeshow Dallas 43543		○		
	Detroit	Developer Analy..	Tradeshow Detroit 43543		○		
	Pasadena	Developer Analy..	Tradeshow Pasadena 43543		●		
3/20/2019	Nashville	Developer Analy..	Tradeshow Nashville 43544		○		
	New York	Developer Analy..	Partner Event New York 43544	●			
	San Antonio	Developer Analy..	Partner Event San Antonio 43544	●			
3/21/2019	Saint Paul	Developer Analy..	Partner Event Saint Paul 43545	●			
3/22/2019	Baltimore	Developer Analy..	Partner Event Baltimore 43546	●			
3/23/2019	Null	Developer Analy..	Webinar 210				●
	Charlotte	Developer Analy..	Tradeshow Charlotte 43547		●		
	Lubbock	Developer Analy..	Tradeshow Lubbock 43547		●		



# Marketing Operations and Analytics

- Empowering a self-service analytics marketing organisation

# Marketing Technology Stack: Lead Funnel Analysis



# How our analytics team supports self service reporting

## Self-Service Dashboards

### Self-Service Data Sources

#### Segmentation Data

*Prospects and customers information*

- ✓ Segment by attribute, account or activity
- ✓ Identify funnel stages

#### Campaign Data

*Interaction with campaigns*

- ✓ Observe lead flow
- ✓ Understand campaign performance & activity
- ✓ Assess lead quality

#### Initiative Performance

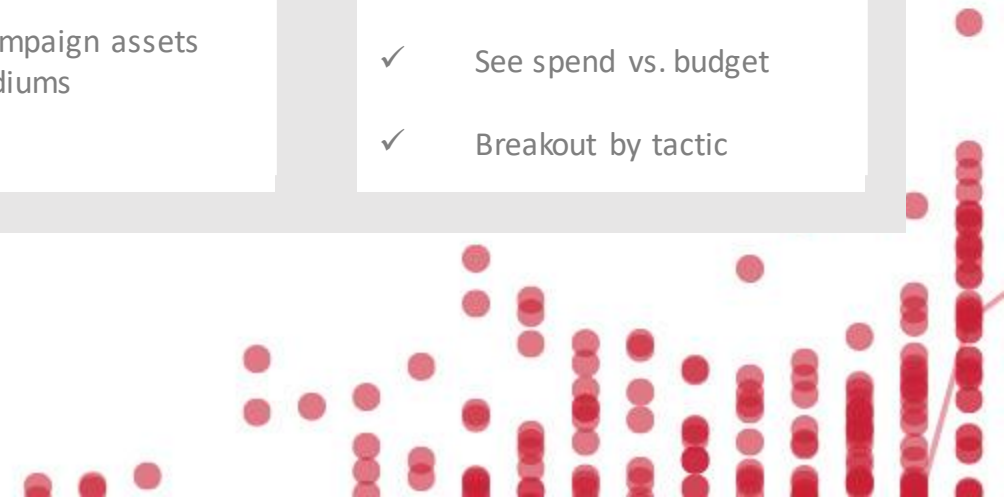
*Influence of marketing initiatives*

- ✓ Evaluate impact on sales opportunities
- ✓ Track campaign assets and mediums

#### Digital Media

*Cross-channel digital media and budget data*

- ✓ Evaluate paid social, programmatic, & direct
- ✓ See spend vs. budget
- ✓ Breakout by tactic



# Digital Marketing Campaign Performance Dashboard

[Click here to learn more about Tableau for Marketing Analytics](#)

Audiences Live (click to filter results)

Campaigns Live (click to filter results)



Dev Cloud Data

Date Range  
Last 5 quarters

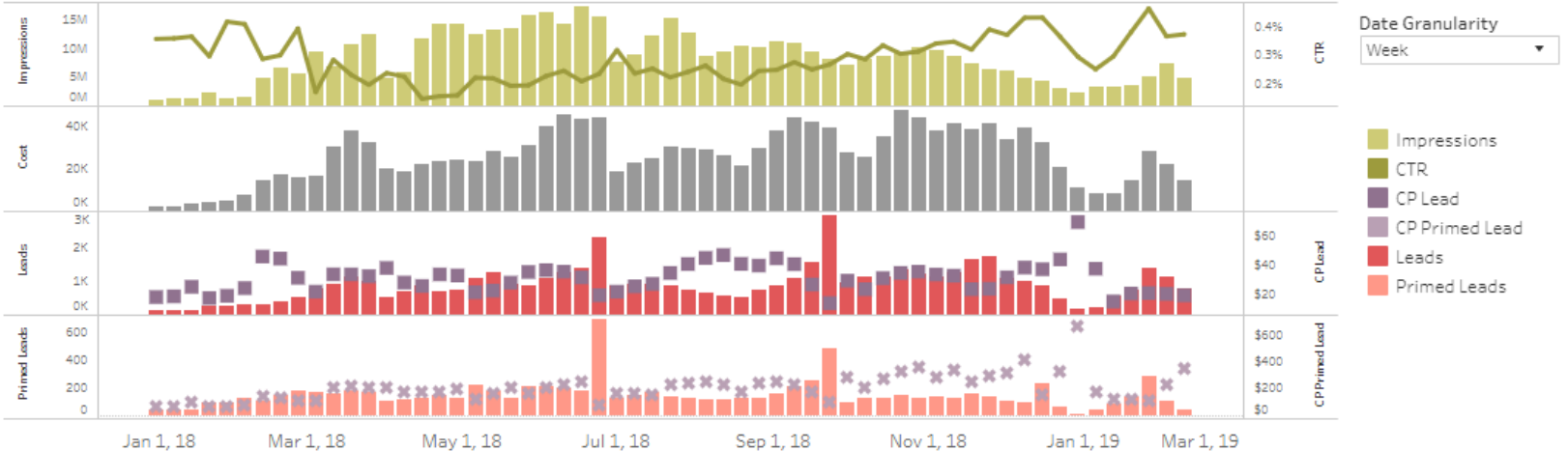
Impressions	CTR	Cost	Leads	CP Lead	Primed Leads	CP Primed Lead
492,821,724	0.26%	\$1,538,725	53,517	\$29	8,987	\$171

Summary - By Quarter (click to filter results)

	Impressions	CTR	Cost	Leads	CP Lead	Primed Leads	CP Primed Lead
2018 Q1	65,312,624	0.26%	\$188,017	6,258	\$30	1,578	\$119
2018 Q2	168,920,753	0.20%	\$386,919	13,826	\$28	2,660	\$145
2018 Q3	135,077,246	0.25%	\$397,551	13,386	\$30	2,335	\$170
2018 Q4	94,314,111	0.34%	\$465,768	15,145	\$31	1,710	\$272
2019 Q1	29,196,990	0.36%	\$100,469	4,902	\$20	704	\$143

Summary - By Channel (click to filter results | hover over channel for performance by source)

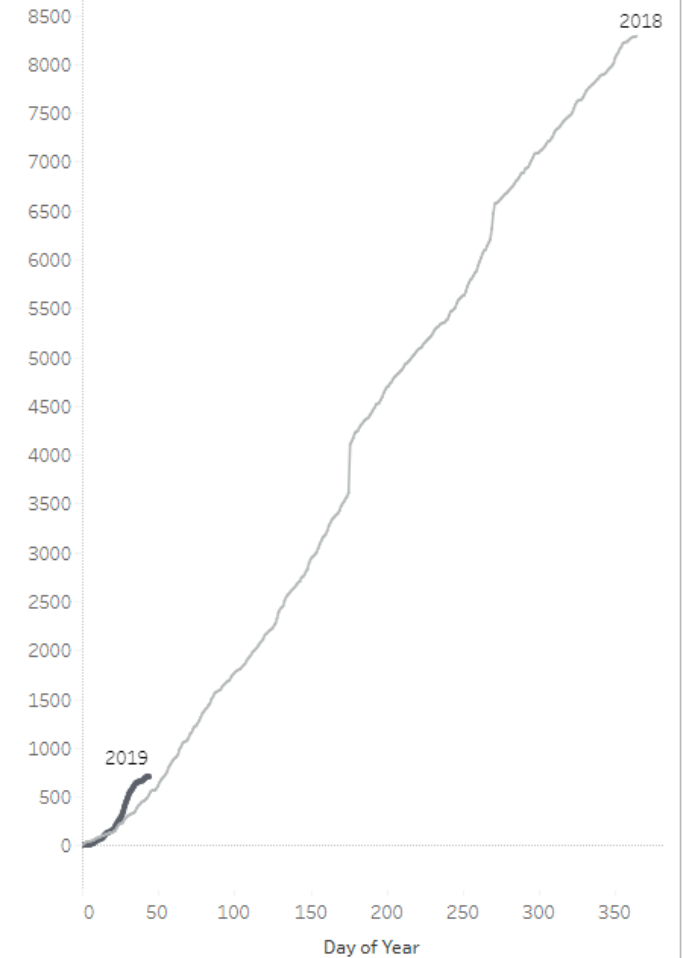
	Impressions	CTR	Cost	Leads	CP Lead	Primed Leads	CP Primed Lead
Direct Media	3,478,830	0.47%	\$212,847	9,096	\$23	1,461	\$146
Paid Search	6,216,087	2.93%	\$143,305	8,550	\$17	2,144	\$67
Paid Social	127,931,727	0.46%	\$947,483	31,683	\$30	4,794	\$198
Programmatic	355,195,080	0.14%	\$235,090	4,188	\$56	588	\$400



## KPI Pacing

Primed Leads by day of year (running total)

Select KPI  
Primed Leads ▲ 28.47% YoY, YtD



# Social Media Engagement and Reach

[Click here to learn more about Tableau for Marketing Analytics](#)

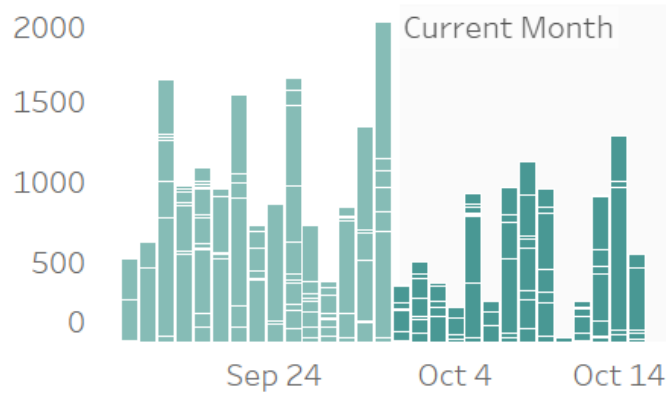
	Posts	Impressions	Likes	Comments	Shares	Clicks	Max Follower..
Facebook	2,125	179M	45K	72K	153K	144K	401K
Instagram	1,056	78M	21K	37K	77K	74K	248K
LinkedIn	669	65M	17K	29K	48K	53K	103K
Twitter	2,562	223M	54K	82K	180K	180K	1,300K
Grand Total	6,412	546M	137K	221K	458K	451K	2,052K

Date

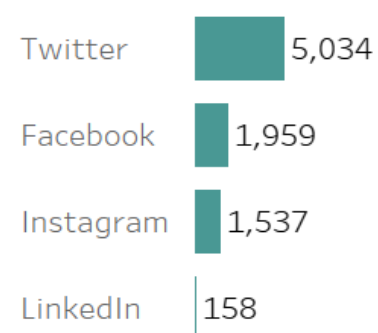
1/1/2015 10/15/2017

## Metric Deep Dive: Clicks

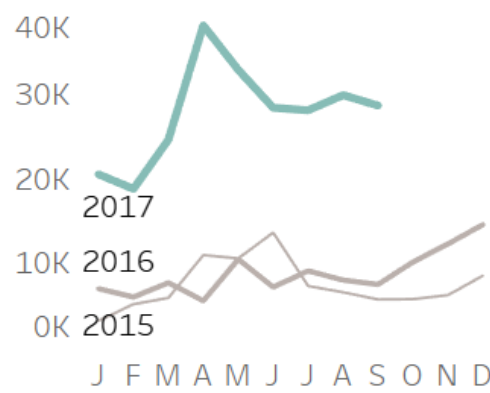
Previous 30-Days



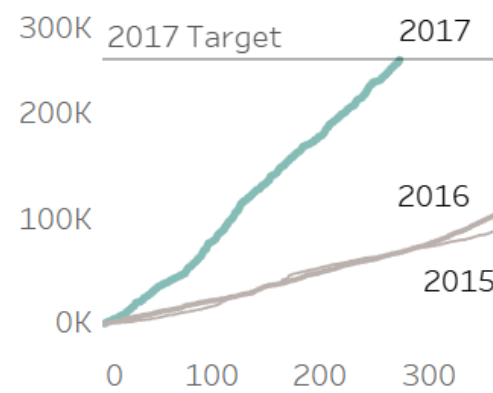
This Month by Channel



Monthly Trend (excludes current month)



Yearly Pacing (excludes current month)



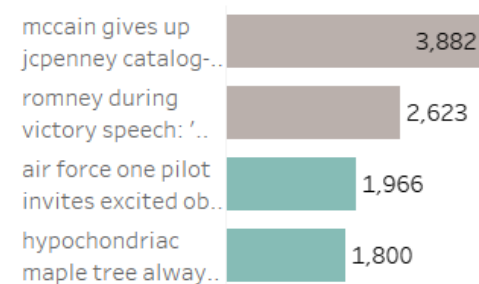
### Select Metric

- Posts
- Impressions
- Likes
- Comments
- Shares
- Clicks
- New Followers

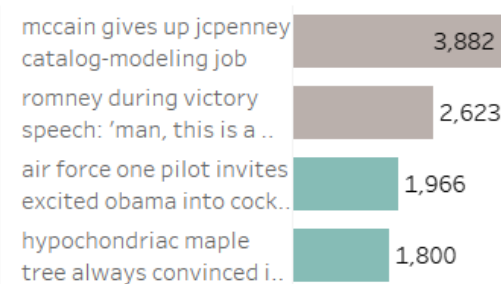
- Clicks, Current Month
- Clicks, Prior Year
- Clicks, This Year

## Metric Deep Dive: Clicks by Post

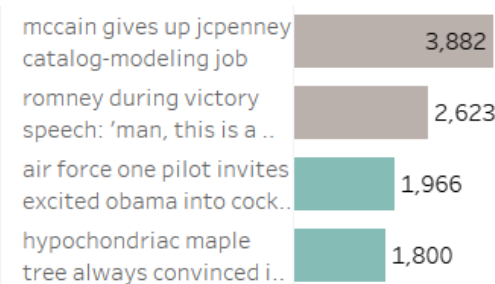
Top Facebook Posts



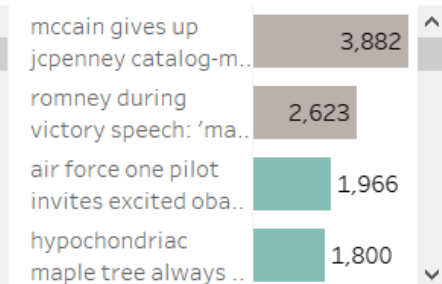
Top Twitter Posts



Top Instagram Posts



Top LinkedIn Posts

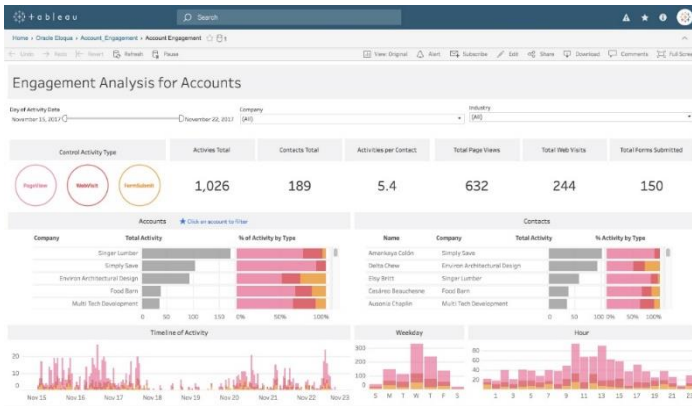




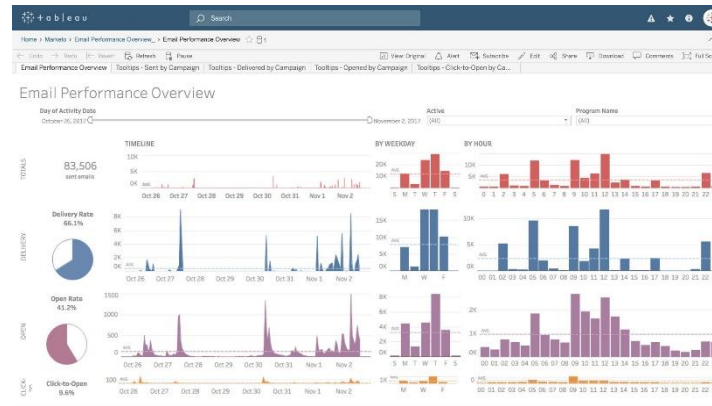
# 3. Getting Started with Tableau?

# Marketing Dashboard Starters

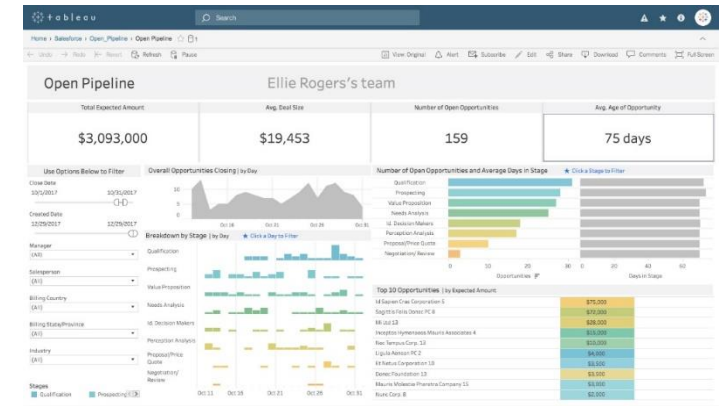
## Eloqua



## Marketo



## Salesforce CRM



## Marketing Data Source Connectors

- Salesforce
- Marketo
- Eloqua
- Google Ads
- Google Analytics
- Google BigQuery
- Google Sheets
- Twitter (web connector)
- Facebook (web connector)
- Microsoft SQL Server
- Microsoft Access
- Microsoft Excel

# Additional resources

## Marketing Dashboard

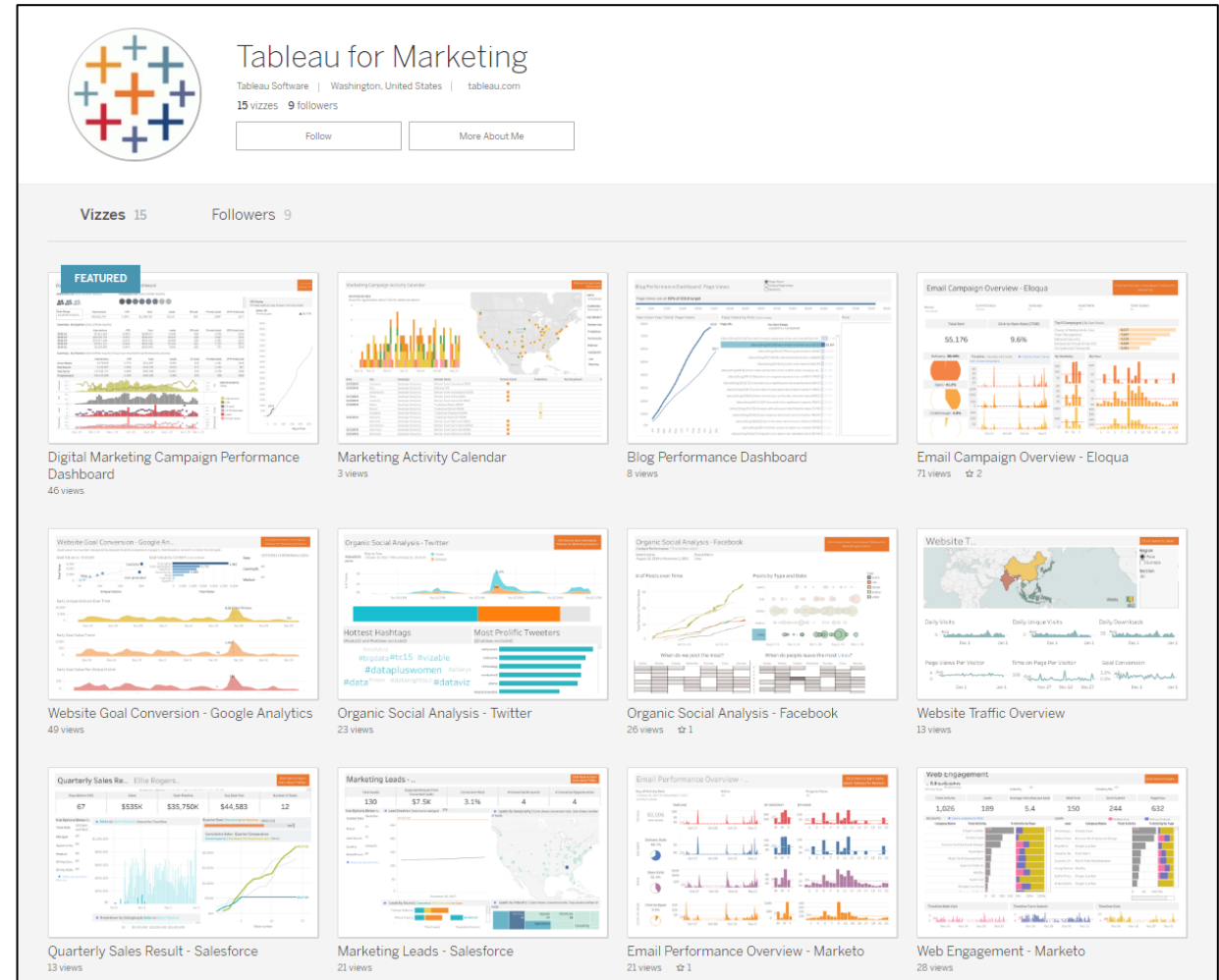
- Access today's dashboards

## Free Trial

- Download now

## Training

- Online Videos
- eLearning



**Q&A**