



# 8 tips for adding analytics

to your marketing mix

Author: Amy Schneider  
Senior Marketing Manager  
Tableau Software

We're surrounded by data. Every click, page view, tweet, response, email open, form complete, and download is generating data that over the years we have done a pretty good job collecting. But now what? For many of us we put aside time each week dedicated to hashing through spreadsheets trying to make sense of it all. But week after week that time gets lost in meetings, changing priorities, and other emergencies – leaving that data to become outdated before you even have a chance to think about it, let alone use it to make intelligent decisions for future marketing efforts.

As marketing departments become more accountable for metrics, ROI, and anything to help justify budgets and spending, many of us have floundered in a desperate search for quick and easy ways to get out of the data rut. It's time to turn things around so that data is driving your decisions and not just along for the ride. This paper will walk you through eight steps for you to incorporate into your marketing plan to help plan for, capture, and quickly get answers from your data – allowing you the information you need to increase ROI and make you a marketing data rockstar.

## WHAT DO YOU WANT TO KNOW?

### Tip 1: Know what questions you want to answer

Let's start at the very beginning. What questions do you have? What questions are others asking about your department, programs, or spending that you don't have good answers for? Or maybe you have answers to those first level questions; how many leads are coming in, how many AdWords clicks are you getting, how many email opens? But you may not have the answers to the more important questions about how many of those leads are engaging, participating in additional activities, or converting to customers?

Start by taking the time to write down all the questions you have and all the answers you want to be able to get from your data. Get feedback from others in your

department and management/executive team to make sure you have a complete set. Don't be intimidated – the list may be a little overwhelming, but this should be a good start to realize the gap between the answers you want versus the answers you have. Take the time to prioritize your list starting with what answers will have the biggest impact to your business and decision making.

## MAKE A PLAN

### Tip 2: Always have a data plan

Armed with your list of priority questions, make sure you are able to capture the data you need in a meaningful and actionable way. If it helps, make a checklist of goals for each type of marketing program you do. Having a plan ahead of time will help to make sure that you are meeting your objectives and setting yourself up for success. Some of the things you should consider when writing your marketing plan:

- What kinds of data do you want to make sure you are capturing?
- Will you be able to access and view that data in a meaningful format to gain insights?
- Will you be able to answer your questions and meet your analytics goals with that set of data?

Thoughtful planning ahead of time will provide you the right information you need and help enable you to meet your analytics goals.

## DROWNING IN DATA

### Tip 3: Focus only on the data you need

It's easy to get caught up in all the data. Clicks, opens, bounces, page views, downloads, oh my! Lots of the information you are capturing is interesting and some of the smaller more activity driven data will be critical to fine-tuning future campaigns. But for now, remember your data priorities by referencing your original list. This will help you narrow down what metrics you will need when planning your programs. These top tier metrics

should allow you to demonstrate ROI and give you the insight you need to make smarter decisions for future efforts.

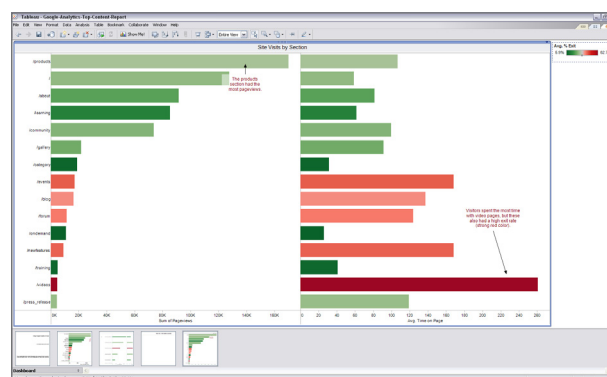
It's okay to start small. It's understandable that you may try to take on too much at first, wanting every campaign and effort to provide brilliant insight. At first, that may not be a realistic goal. Starting with small consumable pieces of information will better allow you to identify what additional questions are really important and get to results faster. These quick wins help give focus to future projects and can keep you motivated towards your overall goal. Always keep in mind why you are doing the analysis and what you are trying to get out of it. If you find yourself spending time on metrics that may be interesting, but aren't providing you with actionable insights, that may not be the most effective use of your time at this point. Each program, campaign, or other marketing effort will have their own unique set of goals and metrics needed to determine success and make improvements. Just stay conscious of what your goals are for each program or effort to avoid digression.

## VISUALIZE IT

### Tip 4: Use visualization to gain faster insights

The mishmash of data marketers have to juggle can often be overwhelming. Exports from tools such as AdWords, various lists from advertising partners, the dreaded database pull from the IT/reporting department, giving you thousands, sometimes millions, of rows of data that we're expected to make sense out of. Not the reason most of us got into marketing in the first place. Most of us are creative, visual thinkers, who understand people better than SQL queries.

So, take those inherent strengths and try visualizing your data. Turning your data into visualizations, such as charts and graphs, allowing you to factor in multiple variables and dimensions, can help you more easily see trends, and spot outliers and patterns. It's these trends and outliers that allow us to gain those valuable insights and find those hidden gems that allow us to do our job better.



**Figure 1:** This view shows website traffic by number of page views and by the amount of time spent on those pages. Color indicates average rate of page abandonment.

The view above was quickly created using exported data from Google Analytics. Taking the .csv data and putting it into a visual display makes it easier to evaluate page performance by looking at pages with the highest number of views in relationship to the amount of time spent on that page and the overall page abandonment rate. Within seconds we can make a good assessment of the overall performance of these pages and quickly spot outliers - such as the page with the most time spent on it also has the highest rate of exit. With these findings we can start testing ways to decrease exit rates on popular pages and to drive more traffic and improve content on high-value pages.

## TRIAL & ERROR

### Tip 5: Make iterative changes and improvements to reach your goal

Set realistic expectations for yourself. Not everything is going to be easy or pan out with your initial efforts. Take what works and rework what didn't and try again. Start by making small iterative changes until you get things just the way you want them. Analysis should be an ongoing and interactive process.

Start new projects small with easy wins. Then use those as foundation platforms to add new dimensions and additional information until your analysis goals are met.

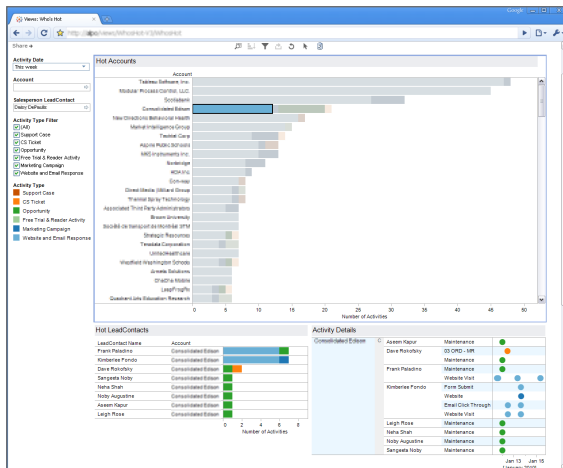
Get feedback from others on your team or those who you will be sharing your findings with. Make sure that everything makes as much sense and is as easy to understand as you were intending..

## SHOW & TELL

### Tip 6: Share your insights and findings

Data trends, results, and insights are useful beyond just your team. Understanding how marketing efforts and spend affect the rest of the company will help you to know which groups to share which types of information with.

For your management or executive teams, they may want to know how your marketing spend will affect overall company goals and planning. More specifically – how does every dollar you spend directly impact the company? Are your results in-line with the company plan?



**Figure 2:** This view of hot accounts allows reps to click on account records with high volume of various types of activities for them to drill down to see who from their accounts is most active and needs a personal follow-up.

For your customer service teams – how is marketing affecting overall customer loyalty or the general customer experience? The metrics your customer service team has interest in is different from other

groups, but your impact and efforts are just as important to share. Going even further, combining efforts to help resolve common customer questions, complaints, or loyalty efforts is just another way for you to leverage your findings in meaningful ways.

Finally, for your often most captive audience, the sales team, proving marketing impact is frequently an uphill battle. Providing sales with meaningful metrics that can help them prioritize their efforts and close sales is a joint win for marketing and sales. When sales teams feel like marketing is providing high-quality, high-value leads, their interest and efforts in nurturing and converting those leads goes up as well.

Take the view to the left. This dashboard is based on activity data, all of which is also available to sales reps in their CRM system. What this view does, that single lead/contact records, or even filtered views in the CRM cannot do, is allow reps to view all lead and contact activity in their territory to see who is the most active and what types of activities are they participating in.

For example, a high number of activities related to website and email response has been occurring within a specific account. The sales rep has clicked on this set of activities to get some more information related to specific campaign activity as well as to see which leads or contacts associated to that account performed those types of activities. If this is a lead record participating in marketing driven activities designed to get leads further down the sales funnel, then that sales rep is going to want to reach out to that person to try to make a sale.

Another rep might notice a number of customer service and support activities related to a particular customer. That rep may choose to reach out and check-in with their contacts to make sure that everything is okay and that all the problems are being resolved.

By giving your sales team an interactive look at what their leads are doing, it can allow them to prioritize the leads you are generating in a way that is meaningful for them. It can also give visibility to dormant leads that have started to regain interest.



## About Tableau

Tableau Software helps people see and understand data. Ranked by Gartner and IDC in 2011 as the world's fastest growing business intelligence company, Tableau helps anyone quickly and easily analyze, visualize and share information. More than 7,000 companies get rapid results with Tableau in the office and on-the-go. And tens of thousands of people use Tableau Public to share data in their blogs and websites. See how Tableau can help you by downloading the free trial at [www.tableausoftware.com/trial](http://www.tableausoftware.com/trial).