

Rachel Shaver, Marketing Manager

The Must Do's of Marketing Dashboards

Gone are the days of go-with-your-gut style marketing tactics. And so it seems gone are the marketing efforts with the ability to simply and quickly differentiate ROI across multiple channels. As big data in business continues to be a big deal, many agencies and marketing teams still struggle to combine and understand the elusive customer, campaign and sales data in one unified, 360-degree view.

Curious how much revenue was attributed to your paid search investments last quarter? Want to prove that some online channels generate higher quality leads than others? Wondering how many web visits that press release contributed? Ever log into Salesforce.com or Microsoft Dynamics? Ever send emails with Eloqua or Marketo? Do you spend hours analyzing your Google Analytics? Need to quickly and easily present all of this information in one place?

More than half of marketers today are using up to nine different channels to target customers in cross-channel campaigns, and successful multi-channel marketers integrate both digital and offline data across multiple systems, according to a recent [report](#) from Aberdeen Group.

To understand the whole picture and make fast, data-driven decisions, marketers need dashboards that can show them what's really happening across all these channels, correlate patterns across multiple metrics, provide a summary and in-depth views of performances and enable them to make effective decisions on the spot. There is a reason marketing dashboards are a thing now.

Dashboards are one of the most important and often overlooked marketing tools, but they can provide powerful insights with regard to program performance and organizational goals—they'll also create departmental alignment simply by getting teams to look at one source of truth.

Dashboards are effective. They work. The questions you're asking now are how can they work for my team and my company?



First, let's quickly define what a dashboard is. In his 2006 book, *Information Dashboard Design*, Stephen Few wrote: "A dashboard is a visual display of the most important information needed to achieve one or more objectives; consolidated and arranged on a single screen so the information can be monitored at a glance." Leveraging that definition, we can define an effective marketing dashboard as one that enables marketers to visually display relevant and current campaign, customer, advertising and/or branding information needed to achieve marketing objectives (such as improve ROI, generate qualified leads, and deliver revenue). It is optimized to speed the evaluation of and reaction to current trends and statistics and to make that information and results accessible to colleagues.

Core to modern dashboarding are these characteristics: objectives-focused, optimized for multiple data sources, visual, interactive, current, and accessible to its audience. So, start your planning by considering the following six best practices in creating and deploying effective marketing dashboards.

1. Choose Metrics that Matter
2. Pull Data from all Sources to get the Full Picture
3. Get Visual
4. Make it Interactive for Collaboration
5. Current and Live
6. Simple to Access and Easy to Use



“People find inspiration in different ways and across different platforms. And so we want to be there where the consumer is. Whether we’re creating a new product, we’re delivering new content, whether we’re making decisions, everything is about data.”

— Stan Pavlovsky, President of Allrecipes



► *Listen and learn how Allrecipes, one of the largest digital food brands in the world, use marketing dashboards to be more responsive and effective with their marketing across all channels.*

I. Choose Metrics that Matter

Above all, the metrics for your dashboards must be metrics that are actually relevant to the goals at hand. Your team should be highly selective in determining which metrics earn a spot on your marketing dashboard.

Consider the following when choosing your metrics:

- What are your organization’s core objectives?
- How do your campaigns and marketing efforts contribute to those objectives?
- Do you have data, either internal or external, that can shed light on the objectives?
- Can you design a meaningful metric that measures those contributions?
- Is this metric truly necessary to explain marketing’s contribution to the objectives?
- Can you build a systematic and on-going means of measurement?

Have a clear understanding of executive objectives and how marketing contributes.

- If your company is in growth mode and new customers are key, then measure your new customer acquisition rates.
- If top-line revenue is high on executive management’s priority list, then measure campaign revenue contribution.
- If you’re operating in a highly competitive market, then incorporate third party market share metrics.

You likely have other specific marketing metrics that are leading indicators of overall corporate goals; these are important to include only if the relationship of those metrics to the corporate goal is clear. For example, if your colleagues understand that the number of daily website visitors is a leading indicator of brand awareness, include it in your dashboard. Be sure you can clearly explain how every metric on your dashboard connects to organization objectives.

“I can pull in my mobile data, I can pull in my Google Analytics data. I can pull in my social data. I can pull in my Salesforce and CRM data and see that 360° view of that prospect and the customer. This is very, very actionable.”

—Feras Alhlou, Co-Founder & Principal Consultant, E-Nor



► Watch and see how E-Nor blends data for a cohesive view of their marketing efforts.

2.

Pull Data from all Sources to get the Full Picture

With so much data from many different channel sources, blending data for dashboard display is critical for putting insight into action.

Data blending, also known as data mash-up, is the ability to combine data from multiple data sources on a single view. The data is blended on a common field, therefore this should be used when you have related data in multiple data sources that you want to analyze together in a single view.

E-Nor is a digital analytics agency headquartered in Santa Clara, California. Founded in 2003, E-Nor has provided web analytics and digital marketing consulting to well-known companies including VMware, ADP, Sony, and MIT. E-Nor regularly uses data blending for more insightful, actionable dashboarding.

“I can pull in my mobile data, I can pull in my Google Analytics data. I can pull in my social data. I can pull in my Salesforce and CRM data and see that 360° view of that prospect and the customer. This is very, very actionable,” said Feras Alhlou, Co-Founder & Principal Consultant, E-Nor.

“We take our customers’ data and we slice it and dice it. And then we can report —say at a geography level. You can then add more context to the data. We then can overlay the population, let’s say in California, and see the percentage of the population that — maybe who are converting at a much higher rate in a specific city, and then maybe target them with a specific promotion,” Alhlou explained. Data blending and dashboards allow marketers to pull any kind of data in together and segment findings by needed measurements—like site traffic, geography, advertising channel and cost per click.



Google Analytics Leads by Channel. [Click to view.](#)

3. Get Visual

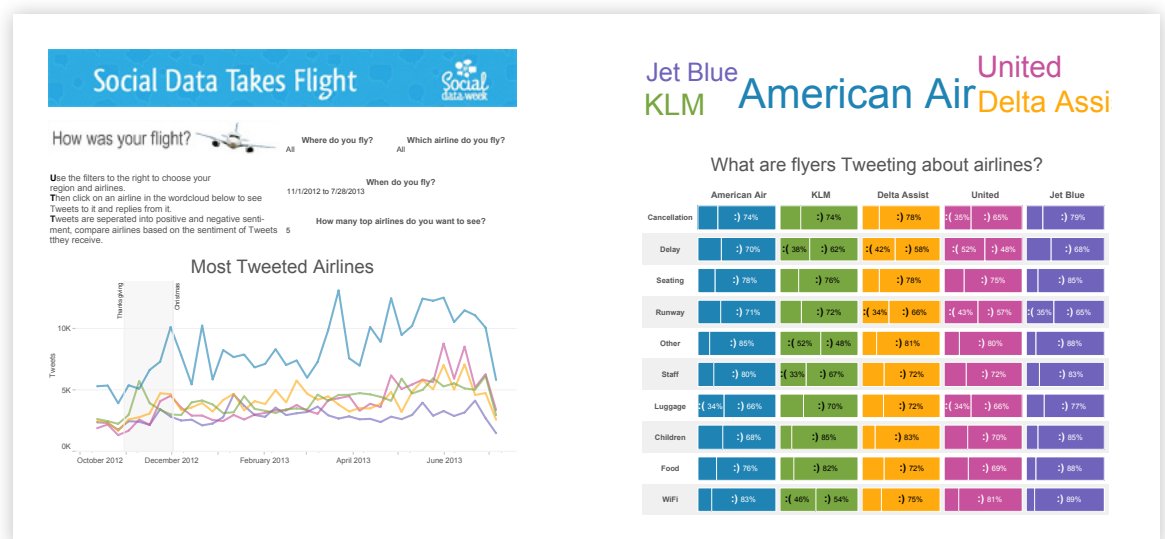
Dashboards are meant to be fast and easily understood—so keeping it visual seems like a no-brainer. Report and text-based tables are simply not easy to gather insight from.

Feras Alhlou of E-Nor noted this hurdle saying, “With websites where you have, you know, millions and millions of hits, it’s really hard to report on in just CSV or in Excel files.”

Understanding marketing metrics is truly a case where a picture really is worth a thousand words. Because the human brain processes a single number, visualization or a picture as single “chunk” of information, the process of comprehension and insight is dramatically faster when data is visually displayed on a dashboard in various graphs and charts.

Instead of users pondering how to read and interpret data made available, they can actually focus on what the visuals in your dashboard are showing them, and generate insight.

A well-designed, highly visual dashboard will be more widely adopted by your audiences. And, because you’ve carefully selected your metrics to map to corporate objectives, visualization will be not only useful in speeding people’s understanding, but also help cross inevitable chasms between departments. Colleagues will finally see the direct translation of the marketing objective into the broader business objectives.



This Airline Tweets Sentiment dashboard utilizes different types of charts and graphs, and bright colors on a single dashboard to enhance the user experience for quick understanding.

4.

Make it Interactive for Collaboration

Dashboards are important because they get everyone looking at the same data visualizations. Once different users are interacting with the same data sets, viewers will have unique questions about what they see. Marketers and even agency clients alike will both interact with the same data to get answers to the specific questions they each have.

Interactive dashboards enable your audience to perform basic analytical tasks, such as filtering views, adjusting parameters, quick calculations, and drilling down to examine underlying data – all with intuitive selections on the dashboard. Providing this interactivity transforms stockpiles of data into actionable insight. Marketers and business leaders throughout an organization become engaged in problem solving and decision making instead of struggling to understand data sets.

Audience Audit, a company that develops custom segmentation research for agencies and corporations, initiated an effort to better serve their customers by using interactive dashboards. Their clients need to get data quickly, understand the story it tells, and be able to share that information (often 100 charts or more) with their own clients.

Using interactive dashboards to deliver insights from their custom research for each client allowed them to dramatically reduce their investment in each project.

Susan Baier, the owner of Audience Audit, said, “I’ve been doing marketing strategy for 25 years. What’s value-added for my clients is the data, my interpretation of it and my assistance in helping them understand it. Building the charts is only one step in the process, but it has to happen for me to see what the data says, and for my clients to see it too.”

She appreciates the interactive ability to allow her clients to dig into their own data through using packaged dashboards and workbooks.

“It’s not a static chart. It’s linked to underlying data, so it’s a conversation we can have and explore together as we go through it.”

—Susan Baier, Audience Audit



- Hear how Audience Audit has cut timelines by 50%, lowered costs by 2/3, and increased revenue by a factor of four.

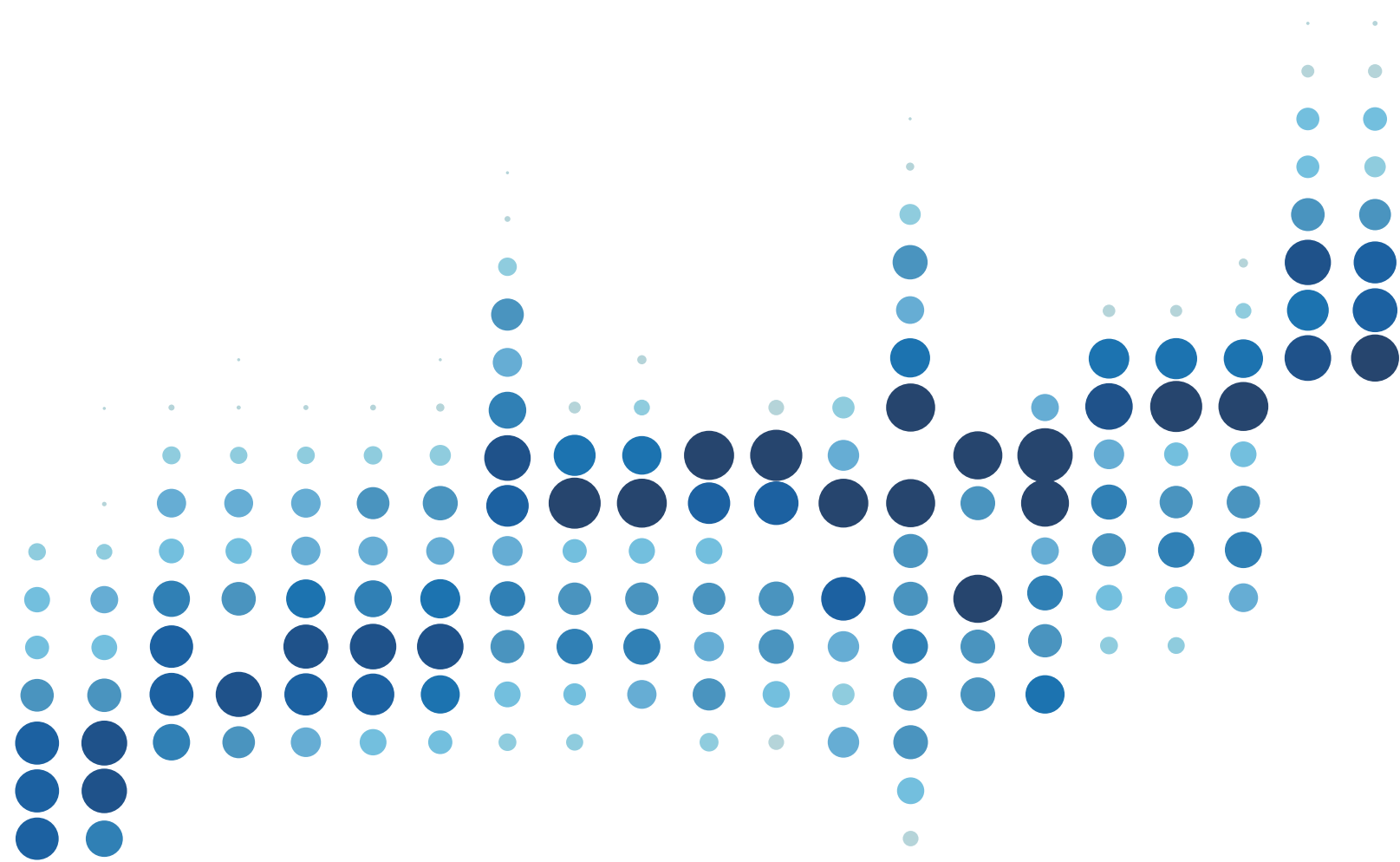
Favorite Brands by Segment												
	One of my favorite brands				Have used				Heard of, haven't used			
	Segment 1	Segment 2	Segment 3	Segment 4	Segment 1	Segment 2	Segment 3	Segment 4	Segment 1	Segment 2	Segment 3	Segment 4
Brand Y	72%	77%	52%	55%	24%	23%	33%	41%	4%		14%	5%
Brand L	60%	70%	33%	41%	36%	30%	48%	41%	4%		19%	18%
Brand V	54%	48%	35%	23%	38%	44%	45%	64%	8%	7%	20%	14%
Brand P	33%	26%	24%	32%	46%	52%	62%	36%	21%	22%	14%	32%
Brand R	4%	4%	5%	10%	54%	38%	52%	33%	42%	58%	43%	57%

While Audience Audit projects are customized for each client, the surveys and results files frequently share similar formats. This has allowed Audience Audit to create some standard visualizations like this one.



I can add filters and give them a workbook that allows them to look at their data in different ways, export chart images for their own presentations, or download crosstabs for their own needs. Inevitably, my clients love it—they love it! Honestly, if I can get clients excited about looking at research data, that's a win.

Susan Baier, Audience Audit



“Today’s CMO doesn’t have six months to wait to make a decision, If he has a question, he wants it answered this afternoon.”

—Bill Engel, Consumer Orbit



- Listen to marketing leaders from Audience Audit, Consumer Orbit and E-Nor discuss the impact of making data-driven decisions quickly.

5. Current and Live

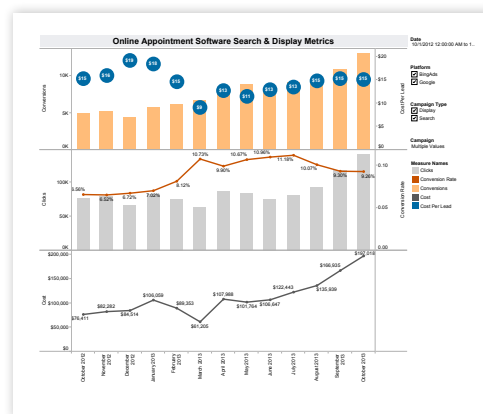
Dated data for marketers means nothing and matters to nobody; it’s a strong statement, but realistically speaking, the only thing old data does is lend a false sense of confidence to decisions. Make sure that the data underlying your dashboards are current and that your selected metrics reflect timely business challenges.

Data can be from this quarter, this week, this hour, or thirty seconds ago—whatever the right timeline is for your business, but there’s no doubt about it, real-time dashboarding will elevate your marketing operations.

Susan Baier of Audience Audit made a point about old-school marketing methodology saying, “In the Mad Men days,” says Susan, “agencies could wing it, and nobody could really tell if what they were doing worked. Agencies now can see the metrics. Their clients can see the metrics. And if you’re guessing, there’s a big chance that one of your guesses is going to be wrong.”

When Baier uses dashboards in Audience Audit client meetings, she makes sure to current and even live data to research time-sensitive questions on-the-fly. When she’s using dashboards interactively with her customers she says, “jaws drop, questions get answered, and we can keep moving forward.”

It’s more than possible that a dashboard of last month’s revenue by campaign source is meaningful enough to help guide and inform this month’s activities. And, sometimes seeing campaign results change by hour is just noise. Almost as important as having current data is having the ability to change and update the metrics represented in your dashboard. You just need to be current in terms of what you’re measuring.



This dashboard showcases an analysis of Bing and AdWords campaign performance for an online appointment booking software company. This dashboard blends third party ad platform data with the company’s CRM data to be able to monitor and compare metrics such as cost per lead and conversion rate.

6.

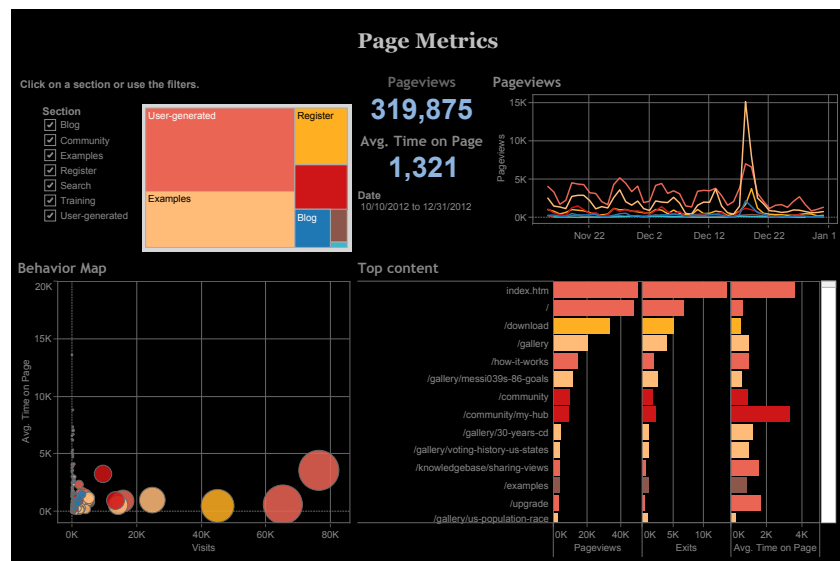
Simple to Access and Easy to Use

Making your dashboards easily accessible is essential. It doesn't matter if you've mastered the list above, no one will interact with a dashboard if they can't readily get to it.

Depending on the needs of your team, try using simple browser-based distribution to publish your dashboards, especially if dashboards can pull current or live data, and adhere to security. Make it easy for people to select a link and go right to the dashboard, whether they're at their desk or on a tablet or mobile device. Your agency may also want to embed dashboards in existing reporting tools, intranets and other internal web-based resources.

Also consider creating a prototype, distribute it through your planned means and ask for feedback. Just as in direct marketing, the key is to test, test, test. As you gain experience and learn what marketers are using, you can enhance the actual dashboard as well as your distribution approach.

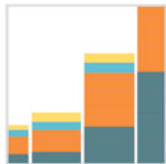
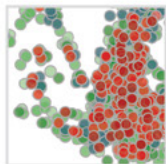
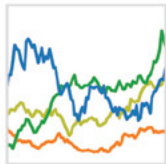
The need to deliver consistent marketing messaging across multi-channel touch points is here to stay—and so is the need to see and understand every win and loss of those marketing efforts. If you're already engaged in dashboarding, take note of these six best practices and evaluate how your data insights measure up. If you're not yet using dashboards, it's not only time to ask yourself why not, but also consider if using these best practices will help give better visibility to your marketing objectives.



This dashboard is directly connected to Google Analytics data. It makes it simple to monitor page views and visitor behavior overtime, with the ability to drill down by content type and page to determine your best performers and make data-driven decisions.

About Tableau

Tableau Software helps people see and understand data. Providing rapid-fire business intelligence with a consistent experience from the PC to the iPad, Tableau solutions generate fast, easy marketing dashboards with no programming skills required. See the impact Tableau can have on your marketing organization by downloading a free trial at www.tableausoftware.com/trial.



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