

Course 6 - Dcode Masterclass

Automating Marketing Reporting with Unified Data

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Automating Marketing Reporting with Unified Data

01

The importance of measuring marketing metrics

03

Overview of Analytics and Reporting Stack

02

Current Reporting and Analytics Challenges

04

How to Create Insightful Marketing Reports with Unified, Accurate, and Real-time Data

Importance of Measuring Marketing Metrics

Why Marketing Depends on Metrics

Today's C-Suite rates marketing's performance on their ability to quantify how marketing campaigns deliver value in line with company revenue objectives. Measuring the right marketing metrics establishes accountability, provides insightful reporting and makes the marketing team more effective and efficient.

What are some key metrics to keep track of?

- Cost per lead
- Revenue by channel
- Website traffic to lead ratio
- Lead to closed-won opportunity
- Customer lifetime value

Current Reporting and Analytics Challenges

Before You Get Started

Metrics are used to drive improvements and help businesses focus their people and resources on what's important. By focusing on metrics that align with company goals, it provides a window on performance and helps you understand what success will look like.

Establishing core metrics/analytics gathering can help you:

- Define the metrics that indicate success
- Secure buy-in from senior mgmt./ other teams
- Understand what data is needed and how to get it
- Develop a reporting cadence to share results

Identify what metrics matter to your business

1. Set expectations

Start by setting expectations about what impact you expect your marketing program to have. It's important to assign up-front goals, benchmarks, and KPIs for each marketing program.

2. Define objectives

When planning your next marketing campaign, define your objectives and then pick measurable metrics to support those goals.

Identify what metrics matter to your business

3. Measure metrics you can act on

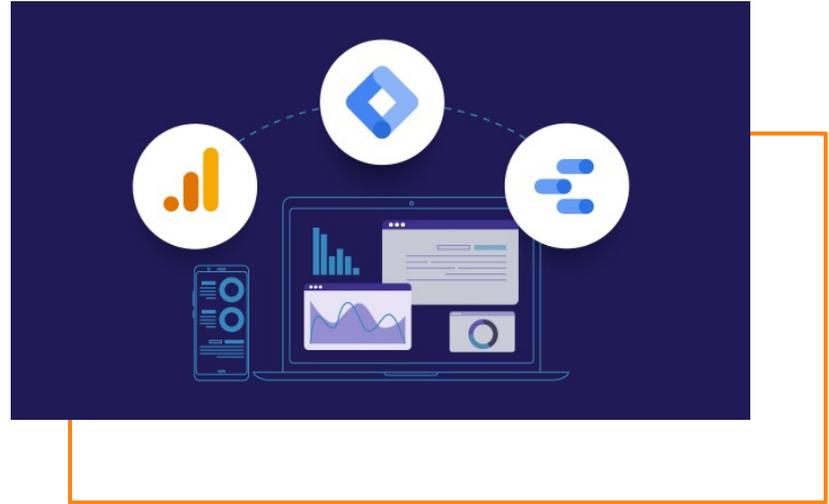
Don't measure things just because they are measurable. Choose metrics to measure that will guide you towards the decisions you need to make to increase company profitability.

4. Determine if metrics align with company goals

Determine if the metrics you're measuring speak to things like revenue growth, profit, ROI or customer/account growth.

Finding data in the tools you already have

We all have existing data within our organization. Start by collecting data and analytics reports from each martech tool, CRM, Google Analytics, finance, or customer service queues.



Filling in the gaps

Why

- Affects marketing campaigns
- Affects reporting

How

- Internal Sources
- Web Scraping
- Company Events (like Tradeshows)
- Data enrichment tools

Tools

- Excel
- Tableau (Tableau Prep)
- Alteryx
- Zoominfo

Data Hygiene

“

**Data Scientists Spend 45% Of Their Time
In Data Wrangling**

By Anaconda, Inc. “2020 State of Data
Science Survey Results”

Data Hygiene

Set rules

- Only allow trained colleagues to import
- Document the process and have a standard template for importing
- Know which fields are required for syncing with other systems like CRM

Maintenance

- Create reports to monitor database health
- Strict adherence to import rules
- Identify and rectify duplicate data
- Standardize profile data

Starting to build a report?

Excel might be used in the initial data gathering and transformation phase before reporting



Overview of Analytics and Reporting Stack

Why analytics are the core of demand gen and a critical feedback loop for product marketing

Effectiveness

- Qualifying and nurturing marketing-qualified leads
- Improve MQL-to-SQL conversion
- Shows success of marketing campaigns

Deficiencies

- Highlights a need for better qualification criteria
- Highlights needs for better alignment across marketing and sales

Engagement

- Proves the value of persona related targeting criteria
- Highlights customer engagement

Balancing budget for tools vs. budget for lead gen

- Your Industry
- Company size
- Position in the market
- Target market
- Industry averages
- ROI



MVP Tech Stack

What do you need at a minimum to see the data you need?

- Data management tool
- Data orchestration tool
- Data visualization tool

Martech Landscape

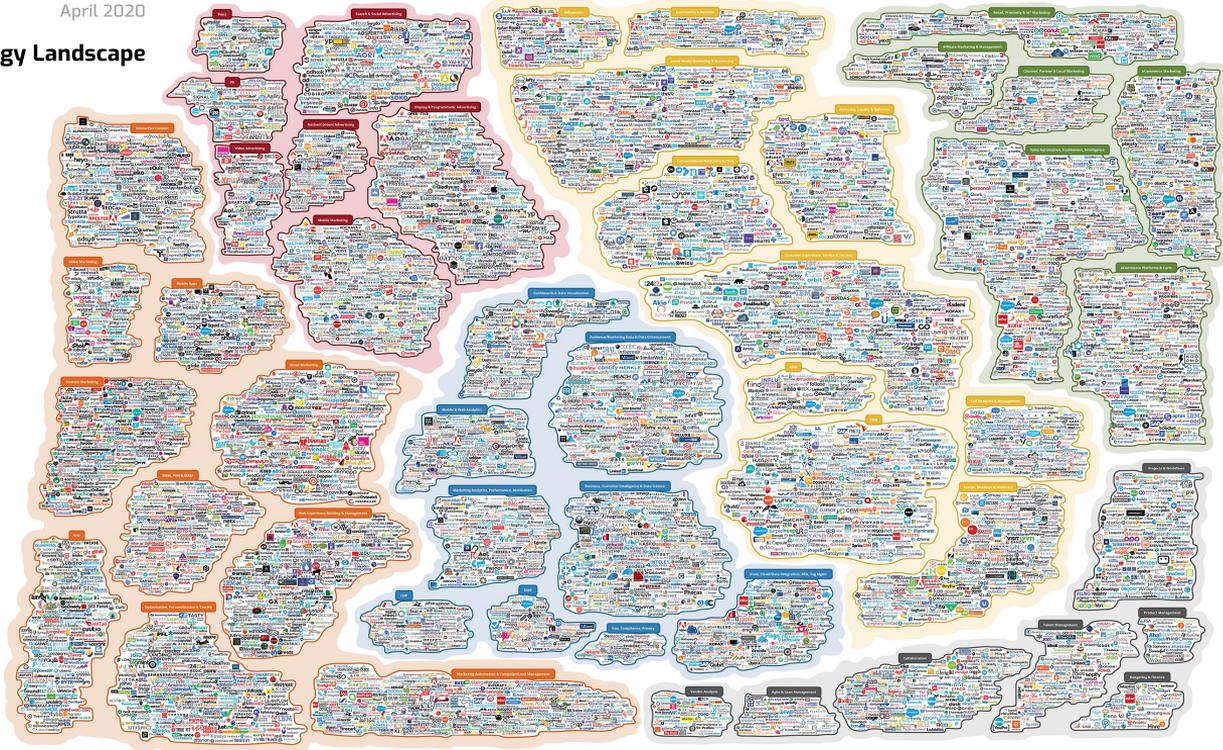
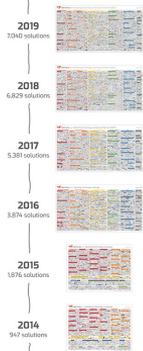


April 2020

Marketing Technology Landscape The Martech 5000

Total Solutions	8,000
Advertising & Promotion	922
Content & Experience	1,936
Social & Relationships	1,969
Commerce & Sales	1,314
Data	1,258
Management	601

Access all the data of this landscape & more at martech5000.com



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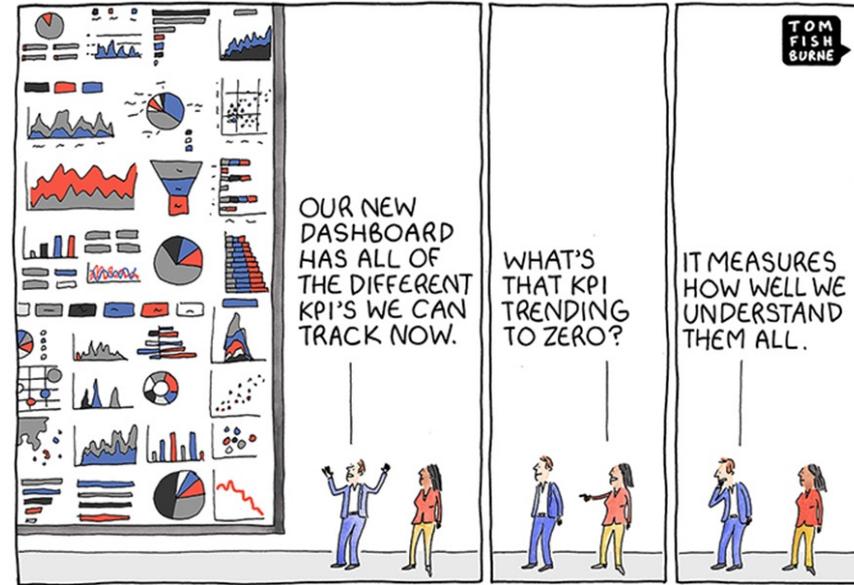
Produced by Scott Brinker (@chiefmartec) and Blue Green Brands (@bluegreenbrands).

Key Performance Indicators

Start by working with your stakeholders. Listen to requirements, feedback and provide recommendations.

Begin by providing basic metrics first. For example, for email reporting include:

- Sent
- Delivered/Delivered Rate
- Opens/Open Rate
- Clicks/Click Rate



Evolve from Key Performance Indicators

Closed loop reporting

- Lead journey from marketing automation to sales
- Adding data from CRM
 - Lead generation
 - Opportunity data
 - Sales funnel

Attribution reporting

- Which sources are driving leads to engage with your content?

Engagement reporting

- What content are your customers consuming and engaging with?

The Value of Operations

Getting budget and prioritization

- Compile existing data to understand what it does and why it's insufficient.
- Bring a real life example of an existing problem in your company that needs a solution
- Give your recommendation on what's needed to solve the problem
- Get info from the vendors you're interested in on how their solution can help solve your problem

How to Create Insightful Marketing Reports

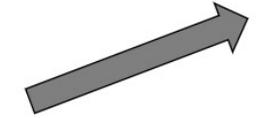
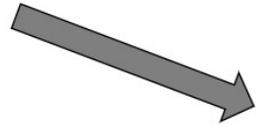
Datasource 1



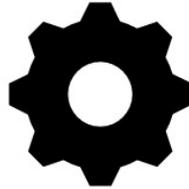
Datasource 2



Datasource 3



ETL Tool



Report Design



Report Distribution



Closing Remarks

Summary

- How to identify important metrics for your business and reports
- Discussed how to handle data issues like gaps, data hygiene
- How to identify and budget for tools you need
- Creating insightful Marketing reports

Connect with us!



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[linkedin.com/in/vandhana-sridhar-44836068](https://www.linkedin.com/in/vandhana-sridhar-44836068)

THANK YOU

Title

“

By Marvin McKinney
Head of Growth [@Microsoft](#)

Mapping Customer Journey Through Attribution

Real-life Case study

Join us for Dcode where you will learn the latest marketing analytics trends, tips, and strategies directly from the global marketing thought leaders. There will be 7 on-demand video courses covering 26 different topics and 1 live Q&A session at the end of this course.

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Decode Your Marketing and Growth Analytics Skills

Join us for Dcode where you will learn the latest marketing analytics trends, tips, and strategies directly from the global marketing thought leaders. There will be 7 on-demand video courses covering 26 different topics and 1 live Q&A session at the end of this course.

Book your seat today and get ready to discover your integrated marketing insights using the modern marketing analytics stack.

[Click here →](#)

