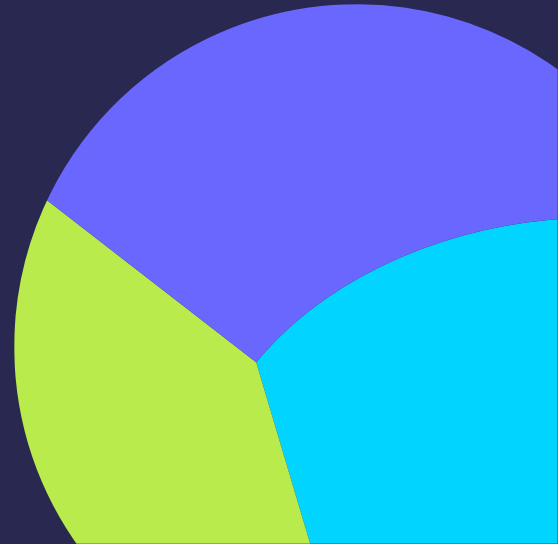




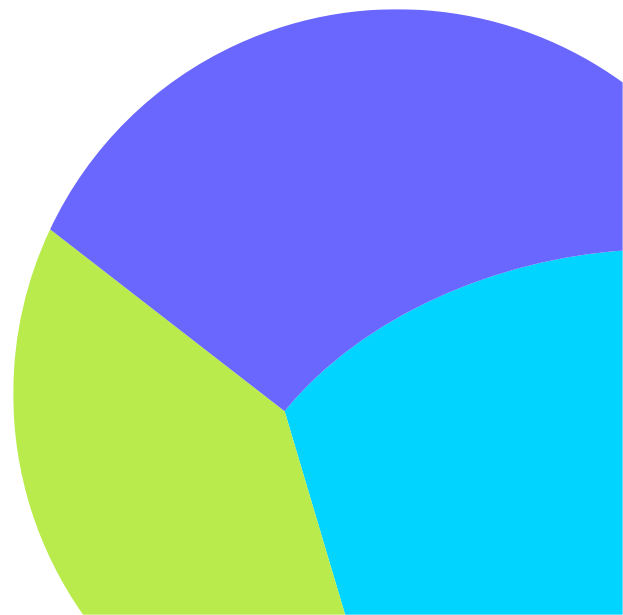
DG Reporting & Benchmarks

Building reports, dashboards
and using data for decision making



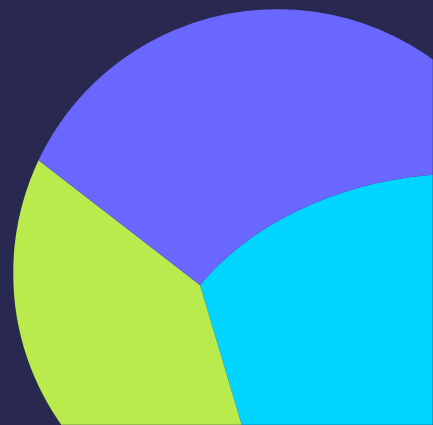
Rule 1: Always keep the end user in mind

- What question do they need to answer?
- What metrics can they influence?
What metrics can they not?
- Are they technical/non-technical?
How advanced can the report be?
- Do they need a descriptive, diagnostic, predictive or prescriptive report?



Rule 2: Make your reports flexible and scalable

- Be agile; always think of your final report as a version 1 to be improved
- Strategies and teams change; make sure your reports aren't set in stone
- Accept feedback and iterate
- Make reports that can be added to, can be easily replicated and aren't just managed by one person



Rule 3: Know when your report is finished

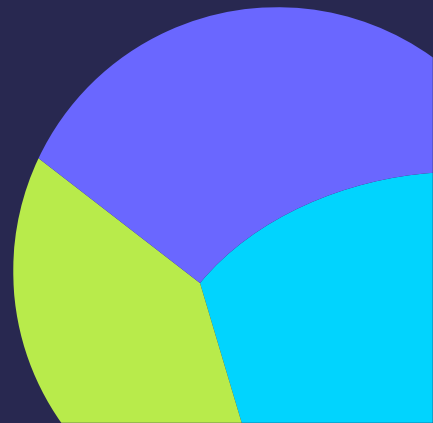
- Scale your reports but don't overcrowd them; know when your report is finished and know when adding new metrics will add distractions
- Understand when new analyses should be answered by new products
- Don't be afraid to push back when you are asked to add visualisations that don't add value!
- E.G. If you have created a report to track spend against budget to know when to reallocate budgets or turn off campaigns, don't overcomplicate it by adding spending trends over time

Final Rule:

Make your reports **accessible**

You can build the best reports in the world but if no one can find them then they're useless!

- Create a centralised place for reporting
- Publicise it- make sure everyone knows it exists!
- Have clear and concise documentation explaining what the report does, who the intended user is and where the data is from





Example:
**The marketing team wants to
understand if their pivoted
marketing strategy has been
successful**



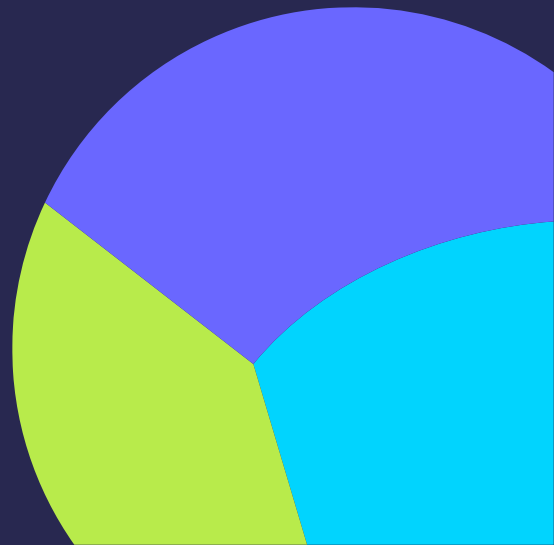
Who is the audience?

The entire marketing team

This means we want:

- An **overview** of performance
- **Non-specific** to a team
- Only metrics that are **relevant** to marketing

The overall KPI for the business is revenue - think how marketing as a whole can impact this.



What is “good” performance?

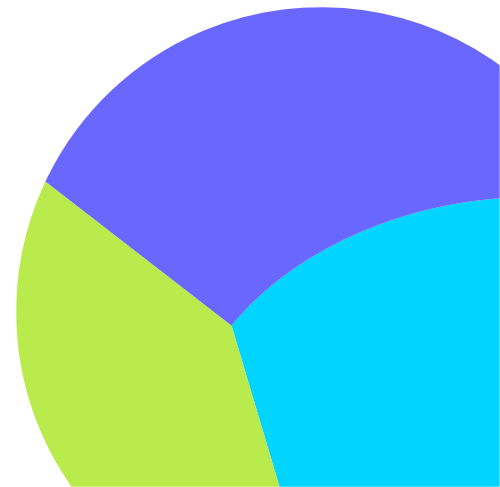
What is “good” performance for your business?

£1,000 daily revenue is big for a corner shop and tiny for Amazon, you need to understand what is good **for you**.

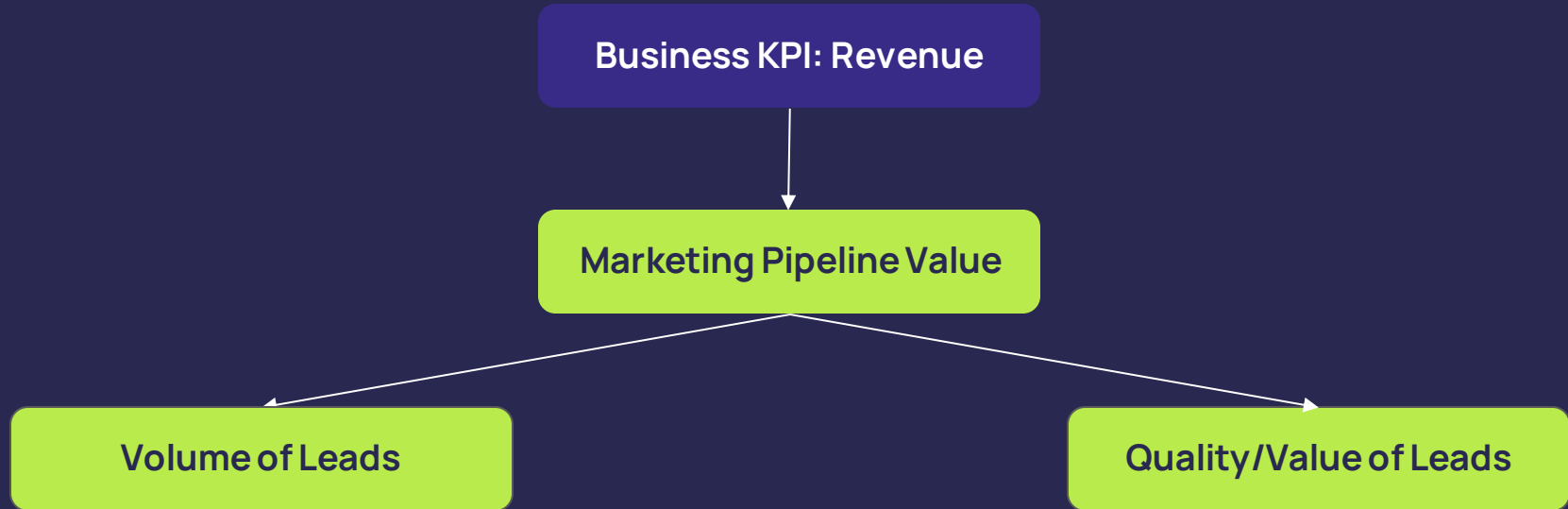
Benchmark your performance:

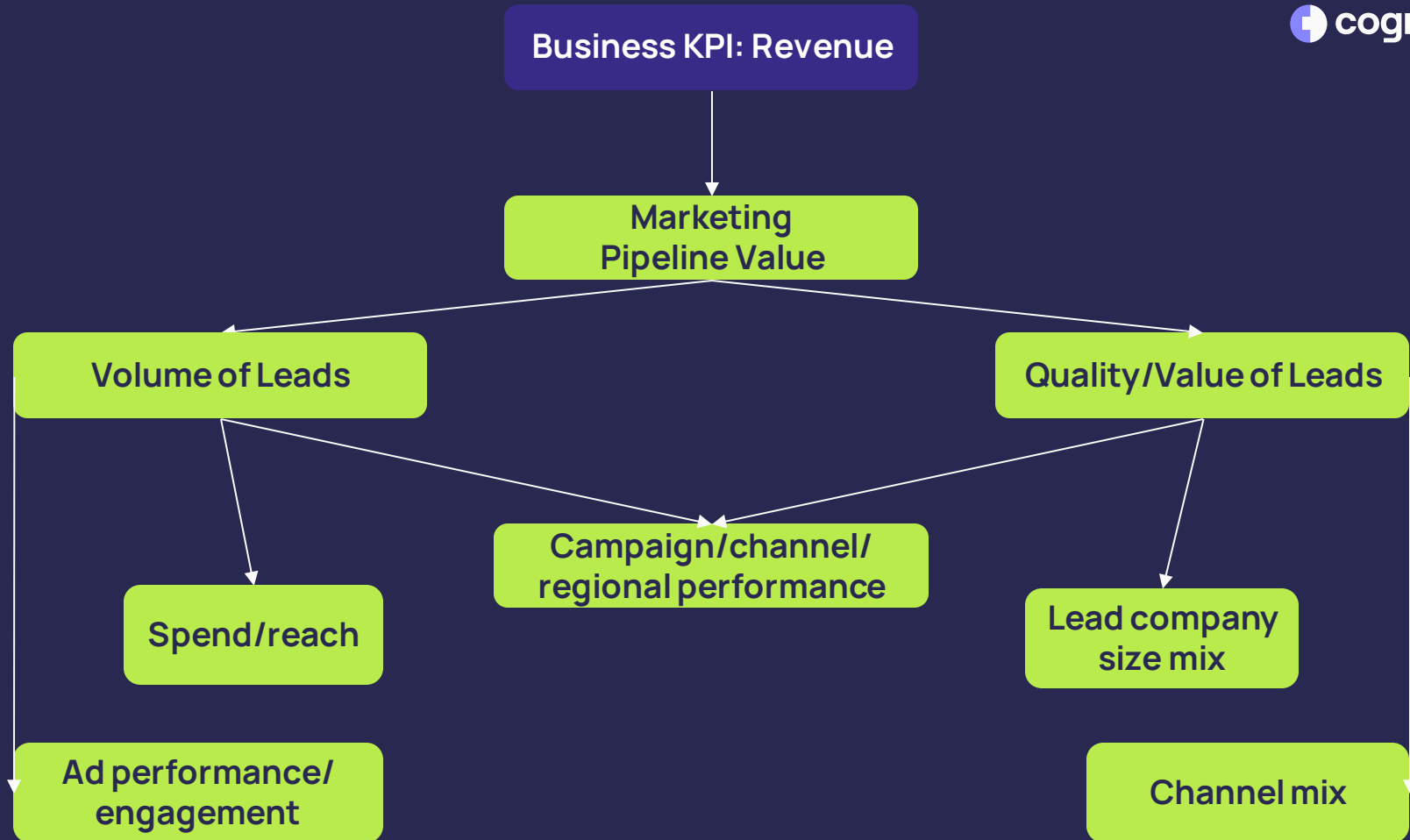
- Understand **average performance**
- Know your growth targets
- Be aware of seasonality

Refer to these when you are classifying performance.







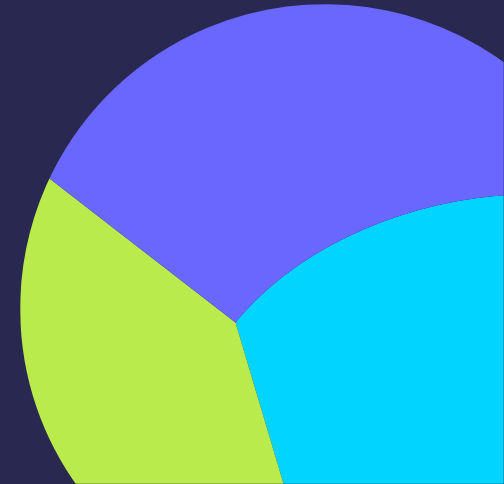


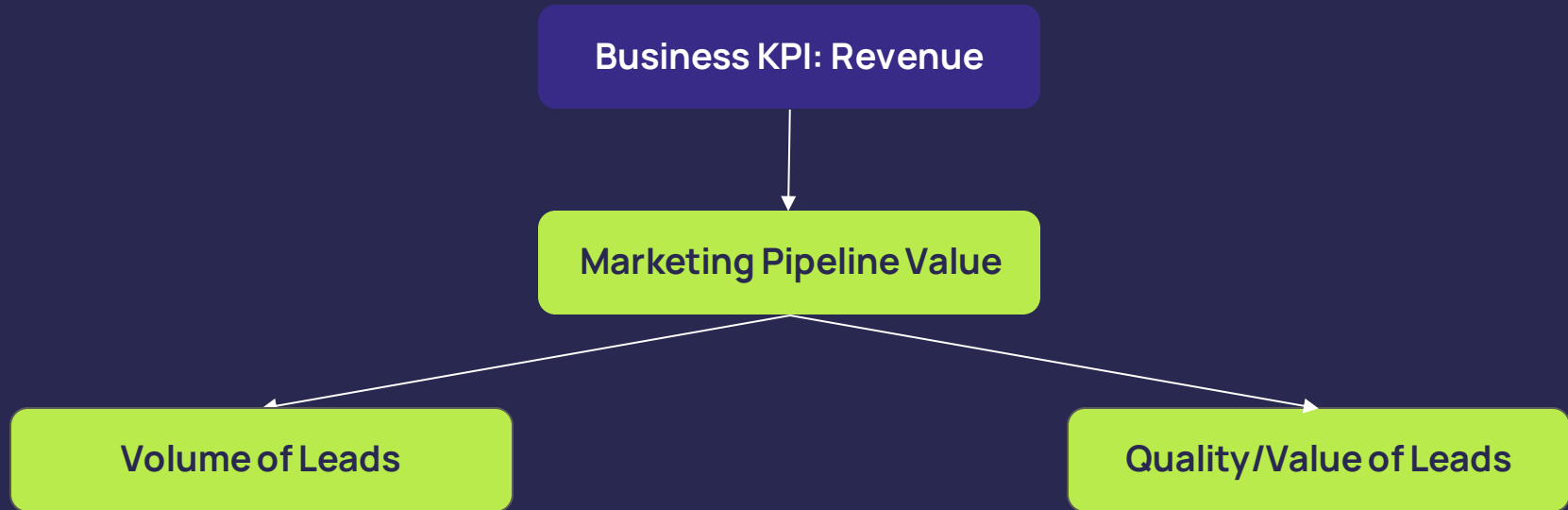
Business KPI: Revenue



Marketing Pipeline Value

Marketing pipeline value
is "bad" - why?





Volume of leads is down -
why?

Business KPI: Revenue

Marketing Pipeline Value

Volume of Leads

**Ad
performance/engagement**

e.g. CTR is down
Possible action: iterate on
highest engagement ad

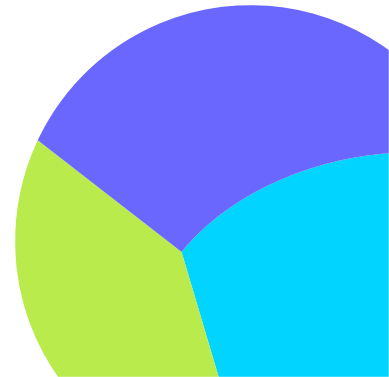
Spend/reach

e.g. Reach is down
Possible action:
increase bids

**Campaign/channel/regional
performance**

e.g. Campaign volume is down
Possible action: pause low
volume campaign and
reallocated budget

Campaign volume is down - what next?



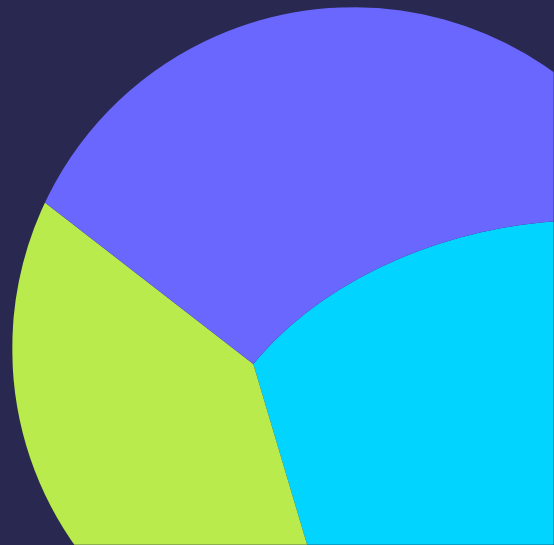
Who is the audience?

The campaign manager

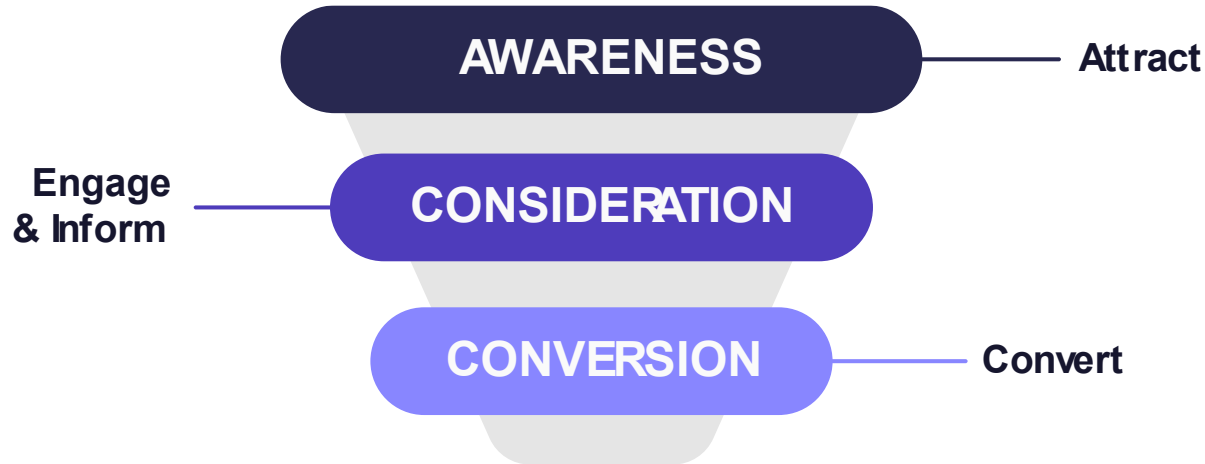
This report can be a lot more detailed as campaign managers are actioning specific changes within the campaign.

You need a more in depth understanding of the goals and KPIs for the **specific** campaign to create a tailored report.

Having tailored diagnostic reports means that descriptive reports can be streamlined.



Understand campaign goal – are campaigns performing badly?



Let's take a campaign targeting awareness

We want more people to know about our product/brand

Primary metrics to report on:

- Impressions
- Reach
- Cost per Impression

Secondary metrics to report on:

- Click through Rate
- Engagement Rate
- Conversion Rate

Let's take a campaign targeting awareness

If a campaign focused on building awareness is assessed against its ability to convert, performance will almost always look bad.

A low converting, high reach awareness campaign is successful; you're not targeting a high intent audience!

Tailor your reports to the campaign; if your goal is awareness, focus on awareness metrics but use the same approach:

1. **Define your KPIs**
2. **Understand which metrics impact those KPIs**
3. **How/why have these metrics changed?**

Make your reports flexible and scalable

- Make sure new data automatically shows in the report; **minimise the need for manual intervention**
- **Streamline your datasource** so that it runs as quickly as possible and can be built upon
- **Seek feedback** so as the audience's need change your report does too!
- **Make templates** where possible so that reports can easily be replicated and adapted to specific business needs

Make everything accessible



- **Create an easily navigable hub** where all reports can be found
- **Document** what the report can be used for, where the data comes from and who maintains it so that any troubleshooting is swift
- **Publicise it!** Make sure everyone knows where to go if they are looking for insights so that you aren't being asked for the same things over and over!





Your next module: DG Tech and Tools