



A 7-Step Analytics Reporting Framework

Marketing Optimization Whitepaper

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Marketing Optimization

Imagine that you just attended a conference on digital marketing and analytics. You're pumped up and determined to make this a banner year for your organization. Back at your office, you write out big analytics and marketing goals:

- Better understand your customers
- Improve your site performance
- Squeeze every bit of ROI from your marketing initiatives
- Provide insight and recommendations to the business

Are these goals achievable? Yes, they are — if you follow the seven-step analytics reporting framework below.

But even before you reach the first of these goals, your company is already, right now, further along than most. You're actually committed to measurement and analysis and seeing data for what it is: a strategic asset.

I'm surprised that more companies don't see it. The signs pointing to the importance of analytics are clear.

- Lots of tools. Millions of companies, from start-ups to Fortune 25, use enterprise-class analytics solutions like Google Analytics to improve site performance.
- Plenty of know-how. Analytics literature is abundant. Do a quick search for "analytics" and "web analytics" on Amazon and you'll get hundreds of results.
- Heavy bets on even greater importance. Big companies can't acquire analytics companies fast enough.

Take your company to the next level with this tried and tested framework.

The 7-Step Analytics Reporting Framework

1. Define your requirements.
2. Know your channels.
3. Trim your metrics.
4. Segment for context.
5. Put intelligence at your service.
6. Integrate reporting.
7. Automate.

1. DEFINE YOUR REQUIREMENTS

Clearly identify what you need to measure. This is the foundation for all following steps.

Gather all your key stakeholders together from business, marketing, product support, IT, and others to determine requirements. Listen to what's important to each group. Understand what will help each one make better decisions, and identify current and anticipated data sources, processes and people or skills. Then map it all to business objectives.

We encourage you to commit your time and effort to assess and identify the key performance indicators, KPIs (or business drivers) that are important to the business. Encourage your stakeholders to make a similar commitment.

Don't try any shortcuts. It's tempting to just insert your provider's tracking code, check out a few blog posts, create few a dashboards and assume you are done. But more often than not, your analytics implementation will fall short, your data will miss key elements, and your results will be unusable. You will have wasted your time.

Most organizations and analytics users try to skip this step. But when organizations commit to it, it pays off handsomely.

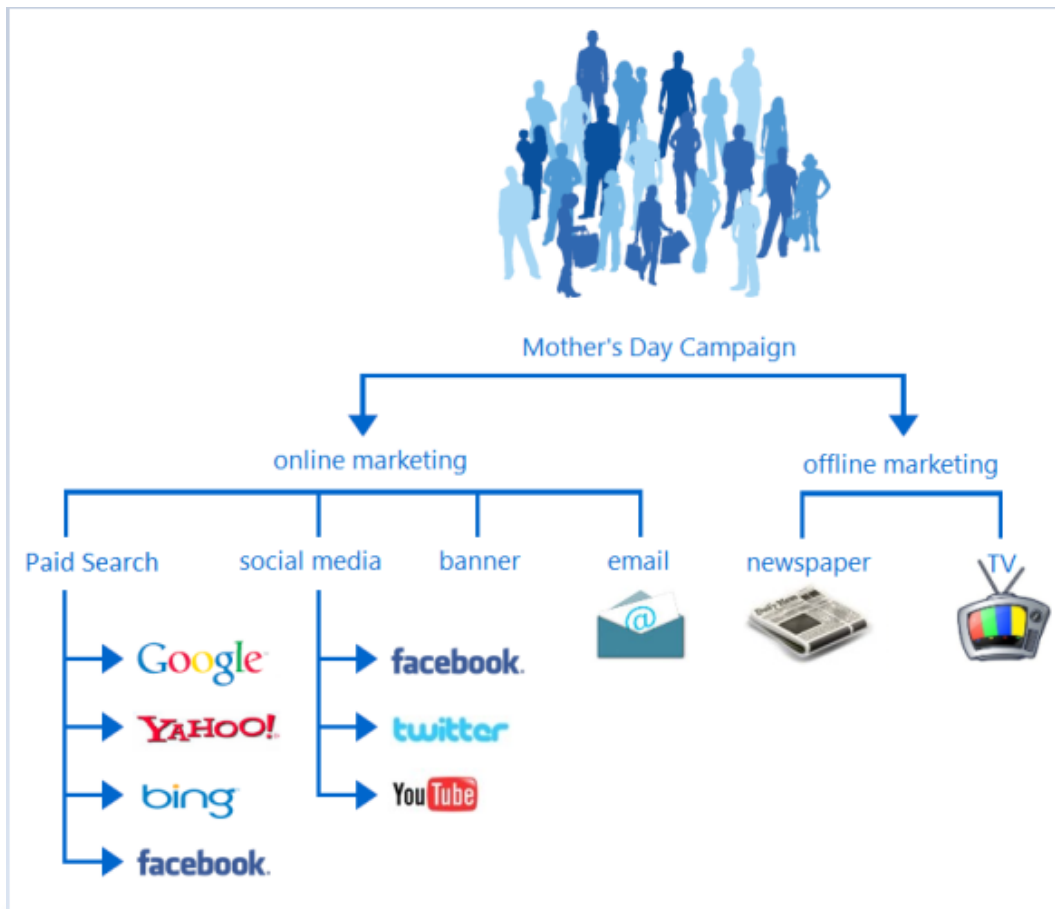
2. KNOW YOUR CHANNELS

Understand the characteristics of your channels and how to track each of them.

Your traffic is skyrocketing and you don't know why. Not a good thing! But you're smart and up-to-date, so you know you can't measure every channel using old metrics and with just one tool. Good old pageviews won't cut it anymore.

Your skyrocketing traffic started somewhere — possibly on Twitter, possibly a video on YouTube, and possibly something you've never heard of. Hello "multiplicity"!

Because channels are constantly evolving — did you know of anyone measuring "tweets" three years ago? — you must understand the characteristics of each channel and identify metrics that are specific and meaningful to each.



For example:

- If you run a content site, and you are busy producing videos, you want to measure the success of this digital content. Look at user behavior and events (play, pause, forward, etc.) and understand where and when your audience is most engaged with your content.
- If blogging is your forte, measure number of comments, average words per post and average words per comment. Successful blogging is comprised of an engaged audience. We use WordPress' Blog Metrics.
- If you're one of the millions on Facebook, listen to the conversation through comments, "likes," shares, etc. Today, conversations happen outside of your own site. For example, in the Facebook Insights chart below, you see the number of new 3763 "likes" and 3783 instances of "Post Feedback." Not only did people "like" your page and posts, but the number of "likes" and "comments" shows they were actually engaged. If you think social media is about having a Facebook page and updating your status once week, you are still thinking Stone Age marketing (you shout and they come!). Instead, you must invite conversation with relevant, interesting content. Your fans might even evangelize on your behalf.

Blog Metrics

Full Stats

Raw Author Contribution

2.2 posts per month

Avg: 619 words per post

Std dev: 779 words

Conversation Rate Per Post

Avg: 2.2 comments

Std dev: 5.2 comments

Avg: 129 words in comments

Avg: 0.2 trackbacks

Full Stats

Author(s): 9

Posts: 141

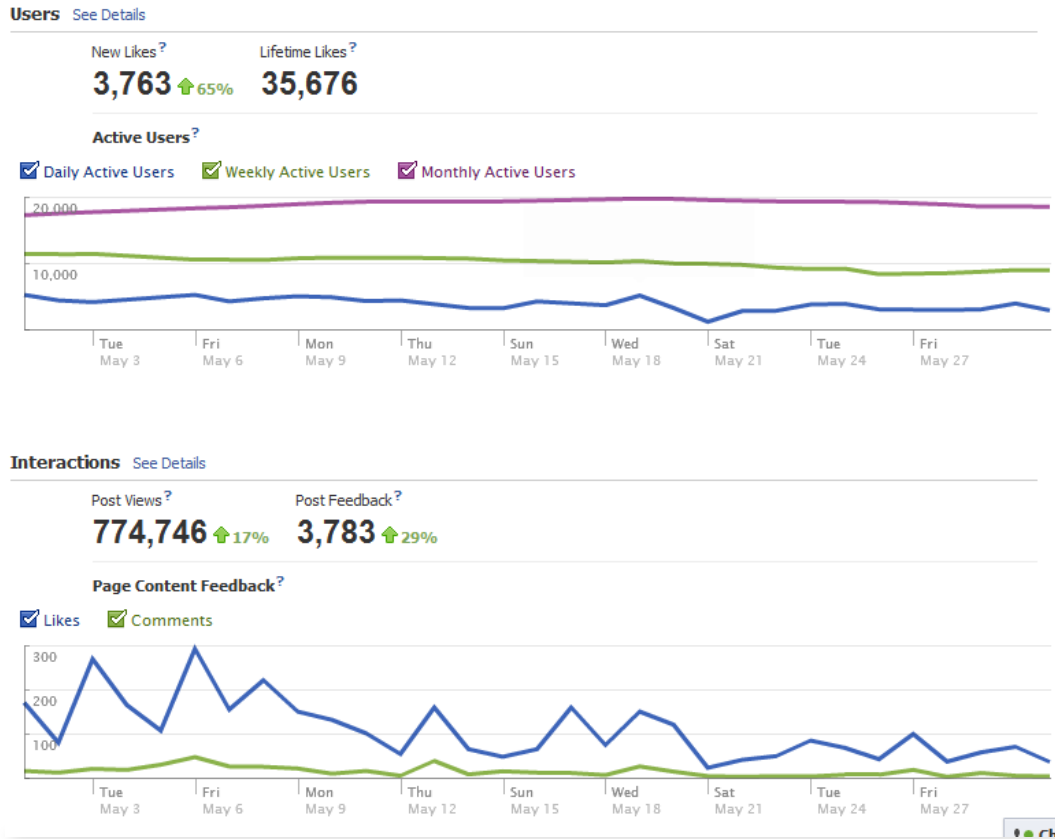
Words in posts: 87333

Comments: 317

Words in comments: 18224

Trackbacks: 35

Months blogging: 65



Power tip: Identify all your channels and document the engagement and outcomes you expect and want to measure.

3. TRIM YOUR METRICS

Just because you can have lots of data doesn't mean you need it all.

One new E-Nor client recently showed us his collection of metrics — but first we waited a full minute for his Excel file to open. Inside, there were dozens of tabs, each with row upon row with every imaginable metric. It was hard to know what to look at first or even what the questions were in the first place. We knew that almost no one ever looked at the data.

Are you drowning in data? Repeat to yourself “less is more” as you choose what’s meaningful, then discard the rest. Just focus on what keeps your CEO awake at night, and what makes him jump for joy. Here are some examples:

- For e-commerce sites: Report revenue, ROAS (return on advertising spend), which you compare with expected outcomes.
- For B2B business sites: Report on qualified leads and cost per lead.
- Report on conversion rates and which channels are strongest and weakest performers.
- If you are just starting your analytics journey and you don't have your analytics solution fully implemented, report on a basic yet powerful metric such as bounce rate. It will help you identify your worst offenders (campaigns and pages).
- If you're really advanced, develop your own custom KPIs. For example, check out how philly.com has done it. This newspaper website is measuring engagement on a new (and slightly complex) level. They are asking thoughtful questions to help them understand their users' behavior.

Power tip: Identify and track two or three metrics for each of your stakeholders (for example, in business, marketing, IT, product and support).

4. SEGMENT FOR CONTEXT

Context gives your data meaning.

Let's say that you had one million visitors to your site last month. Sounds good, but is it? Not if you had three times that many two months ago. So always give your data context. For that, you need segmentation.

One recent month, one E-Nor client's traffic doubled while the ecommerce conversions tanked. Why? We segmented the visits and found that most of the flow came from existing subscribers. When we separated those out, the true conversion rate — that is, new visitors actually starting subscriptions — was actually better than the previous month.

With many of today's analytics solutions, you can apply advanced segmentation to slice and dice your data in almost every way you need to (e.g., paid vs. non paid searches, engaged vs. non-engaged, geography, visitor type, browser, time comparison, etc.). If you are the deep-dive type, you should then zoom in on your segments for more meaningful data and whatever makes sense for your business.

- If you have an ecommerce site, report on sales this month, planned sales, sales last month and sales during the same month last year.



Power tip: Review your current dashboard and assess where to add an additional dimension to each report

5. PUT INTELLIGENCE AT YOUR SERVICE

Let computers crunch the numbers. Let reports detect and flag significant changes in your key performance indicators automatically.

Automatic alerts saved the day for one of our clients after an ad snafu killed traffic. A few days before what was always the website’s busiest day of the year, the manager of online advertising swapped ads. Or at least started to. The old ads stopped running, but the new ads got stuck in the approval pipeline. A heart-stopping drop in traffic occurred, but Google Analytics’ alerts sounded the alarm. The manager contacted the search engine and fixed the ads. They had lost a day of traffic, but it could have been much worse without the automatic alerts.

Let automated alerts signal any anomalies and devote yourself to more strategic work.

Metric	Segment	Period	Date	Change	Importance ↓	
1. Avg. Time on Site	All Traffic	Daily	Aug 1, 2011	449%		Details
2. E-mail Click (Goal2 Conversion Rate)	Country/Territory: United States	Daily	Aug 14, 2011	>500%		Details
3. Avg. Time on Site	All Traffic	Weekly	Jul 31, 2011 - Aug 6, 2011	145%		Details
4. % New Visits	All Traffic	Daily	Jul 31, 2011	-12%		Details
5. Avg. Time on Site	Country/Territory: United States	Daily	Aug 8, 2011	211%		Details
6. Visits	Source: (direct)	Daily	Aug 10, 2011	99%		Details
7. Engaged_>2 P/V (Goal17 Conversion Rate)	Country/Territory: United States	Daily	Aug 7, 2011	93%		Details
8. Avg. Time on Site	All Traffic	Daily	Jul 31, 2011	212%		Details
9. Avg. Time on Site	Visitor Type: New Visitor	Daily	Jul 29, 2011	253%		Details
10. Engaged_>2 P/V (Goal17 Value)	Source: google	Weekly	Jul 17, 2011 - Jul 23, 2011	71%		Details

Power tip: Set Google Analytics custom alerts for each of the KPIs on your dashboard

6. INTEGRATE REPORTING

The previous five steps will make reporting more effective and much easier than before.

You know where your site fits within the universe. You have offline data sources, campaign cost data, mobile applications, competitive data, surveys, etc. You've segmented your traffic, making it easier to interpret patterns. Automatic alerts have freed you from your moment-to-moment traffic watch. Now you want to blend the data for a meaningful presentation that offers insight and actionability. For your analytics dashboards, bring in data from different sources and organize it under one framework.



Some think you have to be a Fortune 500 with a seven-figure budget to afford data integration. Yes, that might be the case, depending on factors such as how much data you have, the complexity of your marketing channels, attribution modeling, and your analytics needs. But that shouldn't stop you. You can start small with available tools.

Almost every reputable solution — including Google AdWords, Google Analytics, Bing, Salesforce and Facebook — offers an API to extract data. And if you don't have the technical expertise or resources to develop and integrate data, you have many easy-to-use tools to turn to. For example, we like ShufflePoint.

Power tip: Trend and report on those two or three KPIs you identified earlier.

7. AUTOMATE

Automate your reports. This gives you more time to do proper analysis.

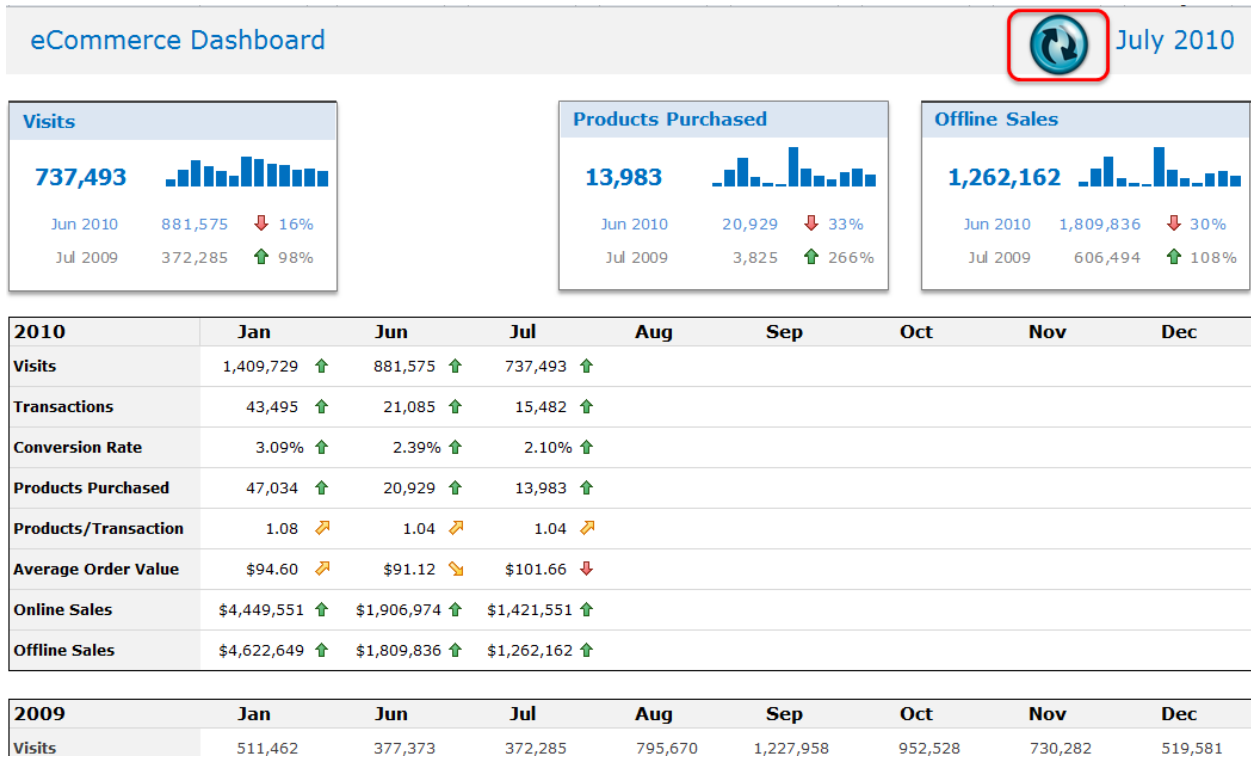
Many tools are available to send data to your inbox or dashboard. So once you have selected your key performance indicators, automate your report generation as much as possible. Why? You'll have much more time to act on the data.

Channel Metrics

				Start Date	July 1, 2011		
				End Date	July 31, 2011		
				Refresh Data			
Row Labels	Values						
	Y	Visits	Orders	Conversion Rate	Gross Units	Sales	Avg. Order Value
+ paid search		675559	15508	2.30%	16897	\$813,359.82	\$48.14
+ affiliate		222981	5288	2.37%	5765	\$295,573.24	\$51.27
+ email		95444	8077	8.46%	9084	\$447,497.92	\$49.26
+ direct		33442	665	1.99%	747	\$41,284.44	\$55.27
+ offline-newspaper		37	5	13.51%	5	\$145.45	\$29.09
+ organic		386591	8962	2.32%	9855	\$464,852.64	\$47.17
+ referral		205251	5889	2.87%	6169	\$301,319.13	\$48.84
+ social media		4613	106	2.30%	117	\$6,811.62	\$58.22
+ offline-tv		2153	57	2.65%	63	\$3,922.58	\$62.26
+ banner		13931	10	0.07%	10	\$348.80	\$34.88
Grand Total		1641239	44567	2.72%	48712	\$2,375,115.65	\$48.76

If you use Google Analytics, find a tool in the [Google Analytics Application Gallery](#) to transfer your data into Excel or another application.

- Of all those listed, we think ShufflePoint is the best. We are impressed by what they have done, and we recommend their solution to our clients. Shufflepoint uses the Google Analytics API to export data into Excel and PowerPoint — eliminating cut and paste. Voila! One click and your data is in Excel. You can then use simple trending and charting options, advanced pivots or more elaborate dashboards. (See examples in the snapshots.)
- Getting reports should be a piece of cake. Now, spend your time wisely on important things.



BONUS - CHANNEL ATTRIBUTION & MULTI-CHANNEL FUNNELS

A typical marketing mix, even for a small enterprise, consists of numerous channels such as search (paid and organic), email, display, etc. The default conversion attribution in many analytics solutions is based on the last interaction with your site. If a visitor came to your site from paid search, then later came from organic search, then email, and they converted during that last visit (from email), the analytics solution will attribute the conversion to the email channel. You have no visibility into the previous interactions and they get no credit. Your reporting framework should include Channel Attribution (aka Multi-Channel Funnels in Google Analytics) reporting and analysis.

Your analysis should explain how the interaction between these channels is impacting your business and how users' first interaction with your brand affects conversion. If your business focuses primarily on advertising on a single channel, analysis of the last credit might just work for you. For the majority of marketers, however, leveraging solutions similar to Google Analytics' Multi-Channel Funnels reports is a must to assess how marketing channels interact, leading to sales and conversions.

Direct > Email	47	\$15,748.00
Organic Search > Email	42	\$11,753.00
Paid Advertising > Organic Search	36	\$10,195.00
Paid Advertising > Paid Advertising > Paid Advertising	32	\$5,634.00
Referral > Email	31	\$8,936.00
Organic Search > Paid Advertising	30	\$13,333.00

Conclusion

There you have it, seven practical steps to supercharge your analytics. It all starts when you prioritize your needs, understand your marketing mix, understand how to measure each channel, integrate your reporting and, where possible, automate. All of this helps build your team's confidence, which helps build passion for analytics. You're then much more likely to find insights, take action, and most important, build on your bottom line.