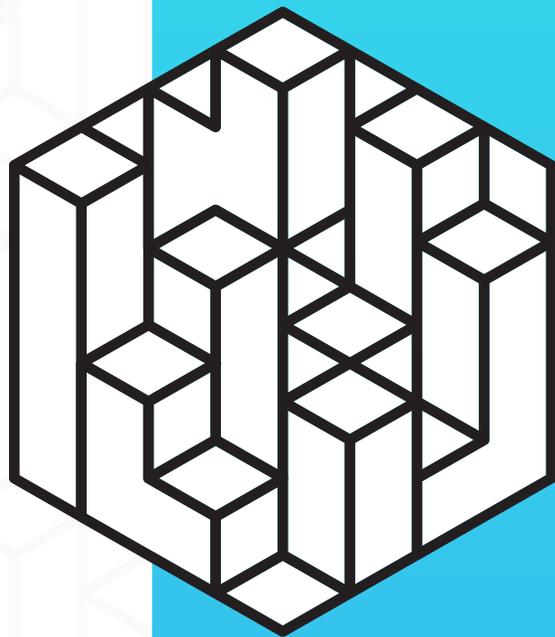


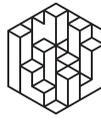


datorama  
A Salesforce Company

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# 7 Steps to an Integrated Marketing Analytics Strategy





## Introduction

**The customer journey is seamless. From end to end, today's customer has everything they need at their fingertips to find, understand, and acquire what they're looking for. Along the way, there can be dozens of touchpoints that help inform their decision. For them, finding the right information is easy.**

Your marketing analytics should be the same — ideally. But while the customer only gains easier access to information, the marketer's dilemma compounds. In the last several years, there has been a massive increase in the number of expected tools a marketer should use. What's more, as features multiply, these tools are providing more and more data. The result is that the seamless journey from the customer's perspective looks instead like a series of fragmented data views for the marketer.

**Key performance indicators (KPIs) are a great way to benchmark success. Unfortunately, hitting a few KPIs out of the park doesn't matter if your marketing organization as a whole is missing its baseline targets — and often it can be difficult to understand why this is happening without an integrated data approach. How do different digital channels contribute traffic to your website? How do your offline channels influence your digital engagement? Which campaigns drive the best conversion on your web forms and foot traffic? Which programs drive the most revenue and ROI across product lines, regions, and customers? The true value in your KPIs is understanding how they weave together to complete the bigger picture of the customer journey.**

To see this bigger picture and manage marketing holistically,  
you need an integrated marketing analytics strategy.

What's at stake? McKinsey reports that companies using an integrated marketing analytics approach can free up 15% to 20% of marketing spend. Furthermore, companies can improve their analytics efficiency by 90% while lifting campaign conversions by 25%, according to a new study by Forrester and Datorama. There's a compelling business case to work smarter by getting the most out of all of your data.

**This paper will share the seven steps to get there successfully.**





## The Process

These are the seven steps necessary for planning and implementing an integrated marketing analytics strategy. Read more to understand how to execute on these steps — and what questions to ask before you do.

1

**1. Determine stakeholders:** Map out your users, or anyone who needs access to your data to support their decision-making and collaboration — from marketing to agency partners to your CEO. Also build a list of any gatekeepers of the technologies that supply your data. Avoid delays in the future by identifying these relationships in advance.

2

**2. Data integration:** Create a list of your customer touchpoints and the related tools that generate your data. Which systems and partner help you attract, engage, convert, and retain your customers? Data integration is where a lot of time can be lost, and confusion can arise. Therefore, when it comes to vendor consideration, choose a platform where the brunt of this work falls on the technology.

3

**3. Set your KPIs:** Gather (or determine) the KPIs, trends, and correlations of your various marketing functions. This will help you determine what dashboards to build, and what views people need to see to measure their success. This section covers some essential marketing KPIs, and how to define what you need.

4

**4. Analytics implementation:** Use visual analytics to build dashboards based on your core KPIs and segmentations, beginning with marketing's highest-level goals. Then, break down your views. We'll share examples of this in a CMO dashboard, a digital marketing dashboard, and an offline/online synergies dashboard.

5

**5. Data governance and IT:** Is your data secure? Ensure you have a relationship with IT, and you can work together to determine who gets access to what, and how. We'll cover the best practices of data governance and how you can engender one of the most key cross-departmental relationships in the modern business — a happy marriage between marketing and IT.

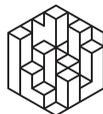
6

**6. Measure your success:** With properly integrated data, you can use methods like an ROI calculator to measurably prove the business value of your solution. We'll share a few examples of how to tell a clear and concise before-and-after ROI story to show leadership the value of your integrated analytics approach.

7

**7. Vendor considerations:** To get the ideal omni-channel view of marketing analytics, you need technology that prioritizes automated data integration and harmonization so you can spend more time on decision-making and less time in technical limbo. You also need an expert team to partner with the right mix of assistance to ensure your short- and long-term success. In this section, we show how our platform is the right choice for integrated marketing analytics.





## 1. Determine stakeholders

**Who needs to access your data? Mapping out stakeholders in this process feeds every other part, because at the end of the day it's people who run your business. It's people who plan and execute your marketing campaigns, bringing their creativity and ingenuity to the table every day. An omni-channel marketing analytics strategy will help these people do their jobs better and more efficiently.**

Map out a list of who needs access to your data. Who needs to make decisions? Who needs to collaborate? Include any teams, but also include all individuals for laying out data governance later on. Consider marketing's operational roles as well as leadership — and consider departments impacted by marketing such as finance, sales, and IT.

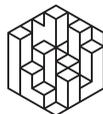
In addition, you'll want to list the gatekeepers of your data — often those who lead the integrations of tools into your organization (for example, Salesforce, Google Analytics, internal customer databases).

In larger enterprises, your gatekeepers can be individuals, teams, or even external agencies. Mapping these relationships in advance will save you a lot of time in unexpected delays, denials, and hunts for data sources in the future. The larger your organization, the more likely it is for these kinds of delays to occur.

### Key questions to answer

- Who needs access to your data?
- Who are the owners of the tools that generate your data (for example, Salesforce, Google Analytics, AdWords, social listening)?
- Who are the gatekeepers of the tools that store your first-party data (for example, sales or customer data in SAP, Oracle, SQL, Hadoop, Redshift)?





## 2. Data integration

**First, you'll want to determine what sources of data you have. Often, in today's marketing departments there are so many tools coming and going that a single individual may not be aware of them all. Consider all of the touchpoints your brand has from the customer journey perspective. This can include marketing, sales, service, and loyalty programs.**

**A pro tip is to review your budgets, and then reach out to stakeholders and budget owners to ensure every crucial tool has been accounted for. These can include tools under marketing's budget, free tools, as well as tools not under your department's budget.**

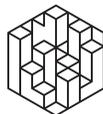
Data integration can be an incredibly time-intensive process — but it shouldn't be. To offset increasingly limited IT resources and ever-shorter deadlines to manage marketing data's messiness, you'll want to ensure the platform you choose for marketing analytics has smart data integration and harmonization capabilities designed for marketers.

These are the capabilities that will turn your disconnected “apples and oranges” data into one “apples to apples” single source of truth. Technical difficulties, or the need to enlist the help of — or hire — specialized data scientists can hamstring the rest of the project, lead to data blind spots, and leave you second-guessing the veracity of your single source of truth. Make sure to prioritize data integration and data harmonization capabilities designed for you as a marketer.

### Key questions to answer

- What are all of our important customer touchpoints, both online and offline?
- Which tools and partners are producing data across the customer journey?
- Where is this data being stored? Is it in the cloud or on premises? Who “owns” it?
- Can my integrated marketing analytics solution handle data integration and harmonization for me?





### 3. Set your KPIs

How do your various marketing groups (or individuals) measure their success? The answer should be threefold — and all are quantifiable: KPIs, trends, and correlations. A defining feature of the integrated marketing analytics strategy is the unification of KPIs, trends, and correlations across views, for a seamless understanding of your marketing efforts. But in order to unify something, you have to start with its parts. Since you've determined your stakeholders, briefly outline for each what their group does and how they measure success. Keep in mind the following types of KPIs, trends, and correlations for each team member:

- **Volume KPIs** and trends across channels and the customer journey such as total awareness, total engagement, total conversions, total marketing spend, total marketing-impacted revenue
- **Efficiency KPIs** and trends such as cross-campaign conversion rates, cost per lead, and marketing ROI
- **Correlations** such as the relationship between offline and online activity, web traffic and leads, social activity and form completions, and ratios of lifetime customer values and customer acquisition costs per segment

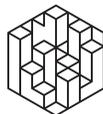
It's important to note that if you can't easily blend your data sources, you can't unify your KPIs and therefore will be stuck in the past decade of siloed marketing analytics. A smart analytics platform will help you transcend your siloed and disparate data, to bring your KPI metrics together without you having to think about it.

Whereas KPIs blend your data on the metric level, classifications blend and join your data at the dimensional level. Document how your team will need to look at the data, filter it, and drill into it. This is the second key factor in how your dashboards will be created. In the next section, we'll look at some examples in context.

#### Key questions to answer

- How do my marketing team members measure their success?
- Which KPIs, trends, and correlations do they need to see to support their decision-making?
- What dimensions does our team need to filter the data to make comparisons and gain insight?





## 4. Analytics implementation

Now that you have your KPIs and your data sources, and understand who needs access to that data, you can build your dashboards.

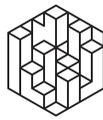
**Visual analytics is essential to seeing insights in your data; human brains aren't designed to spot trends in endless tables of numbers. To keep things simple, it's important for your analytics platform to not only make data integration easy, but come equipped with powerful and cogent visualization capabilities so actually building the dashboards is something any business user can do.**

These days, most marketing tools offer some kind of stand-alone analytics pane where you can see how your efforts are performing. A step further, there are dashboarding tools that can bring these views together so you're looking at data from multiple tools in one place.

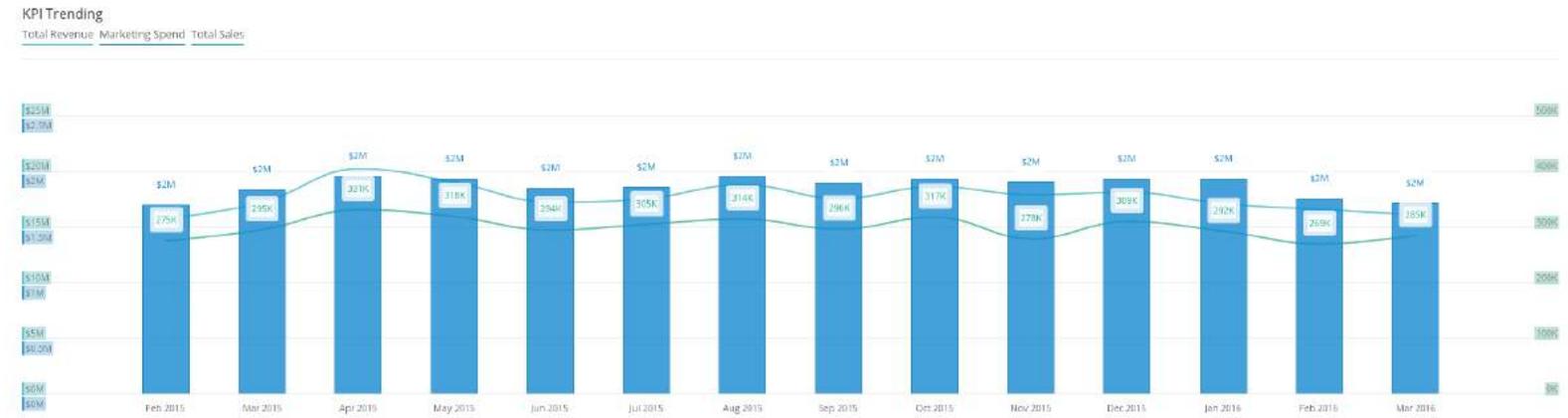
But even with a visualization tool, you're still only halfway to omni-channel marketing analytics. Looking at siloed reports of your various marketing initiatives is little better than what you get from the built-in analytics in the tools themselves.

**You need an analytics solution where blending and joining fields is easy — and fast. If you want to be thinking big-picture with your marketing efforts, you need to be able to instantly pull up any KPI metric you can think of, and easily combine multiple metrics into one visualization.**





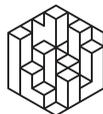
To illustrate the importance of unifying your KPIs, here are three examples of views that rely on blended data to tell big-picture stories:



**CMO View of Total Marketing Spend, Sales, Revenue, and Marketing ROI**

**The image above shows a CMO-level view of marketing data.** This is an essential view that brings together all sources of marketing spend and revenue to display these as KPIs and trends and to calculate the marketing’s overall ROI. For marketing spend, this will include all investments to date across digital and offline channels, and can include your human capital costs, partner fees, and technology costs. For revenue, this can include all of your sales data from your owned and operated locations and ecommerce sites, as well as partner sources online and at brick-and-mortar locations. These combinations underscore the importance of being able to seamlessly connect to data so your KPIs and the resulting marketing ROI figure will be 100% accurate.

Each of these KPIs is put into context using goals. Goals are a great way to not only check your status but know whether you’re on track, allowing you to answer “what does success look like?” and “how are we pacing toward our goal?”



In addition to managing marketing's impact to date, CMOs need to predict their performance. New capabilities in predictive analytics like Datorama's "One-Click Forecasting" allow leadership to easily look ahead to understand next quarter's performance.

### Forecasting

Marketing Spend Total Revenue

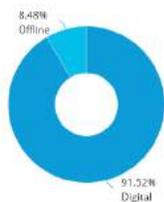


Equally valuable is the ability to drill below the surface of KPIs and trends to see breakdowns by your key data dimensions, such as channel, product, region, and business unit. Using the power of data harmonization, an integrated marketing analytics approach allows these comparisons to be easily visualized to understand the key drivers (and detractors) of the top-line KPIs, such as these CMO views of investments and outcomes by channel and product.

### Channel Analysis

#### Marketing Spend Channel Breakdown

Marketing Spend



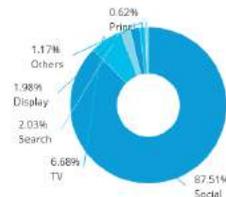
#### Marketing Spend by Channel and Product

Marketing Spend



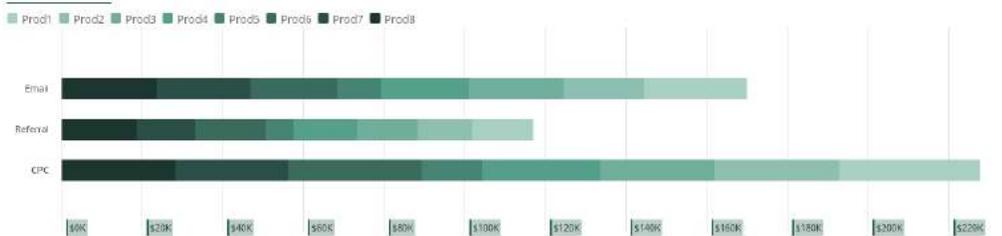
#### Marketing Spend Channel Breakdown

Marketing Spend

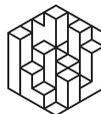


#### Online Sales by Channel and Product

Online Revenue Web



### CMO Channel Analysis View of Marketing Investments and Sales by Product



Next, the dashboards below show visualizations appropriate for a digital marketing director. To understand total digital marketing efforts, and where to invest or cut back on spend, you need to amalgamate your digital marketing data — across the numerous teams, tools, and technologies in this space — to get a holistic view across search, display, social, and other channels in the mix.

## Publisher Performance

### Display

### Search

#### Sales by Publisher

Marketing Spend Digital Marketing ROI Digital Advertising Sales

Site5 Site4 Site3 Site2 Site1



#### Sales by Publisher

Marketing Spend Digital Marketing ROI Digital Advertising Sales

Google Bing



#### Heatmap Table

Site Name	Marketing Spend	Digital Advertising Revenue	Digital Advertising Sales	Digital Marketing ROI
Site3	\$1,857,248	2,906,633	98,428	100 %
Site4	\$1,574,414	2,660,730	89,684	169 %
Site3	\$1,956,902	3,023,228	99,435	154 %
Site2	\$1,749,766	2,886,893	95,650	165 %
Site1	\$1,650,744	2,877,480	95,790	174 %
Google	\$1,238,520	5,380,620	175,611	434 %
Facebook	\$4,303,000	0	0	0 %
Bing	\$1,235,148	5,420,335	182,254	439 %

Digital Marketing Director View of Display and Search ROI by Publisher

**Facebook Media Spend**  
\$15.77M

**Facebook Cost/Likes**  
\$2

**Video Plays**  
236.61M

**Fans (Daily)**  
11.85M

**Twitter Media Spend**  
\$250,927.00

**Twitter Cost/Follows**  
\$11

**Twitter retweets**  
2.37M

**Twitter follows**  
2.36M

**YT Media Spend**  
\$544.30K

**YT Cost/Views**  
\$4

**YT subscribers Gained**  
2.56M

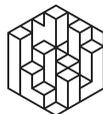
**YT Views**  
1.29M

**Fan/Follower base growth**  
Facebook Fans

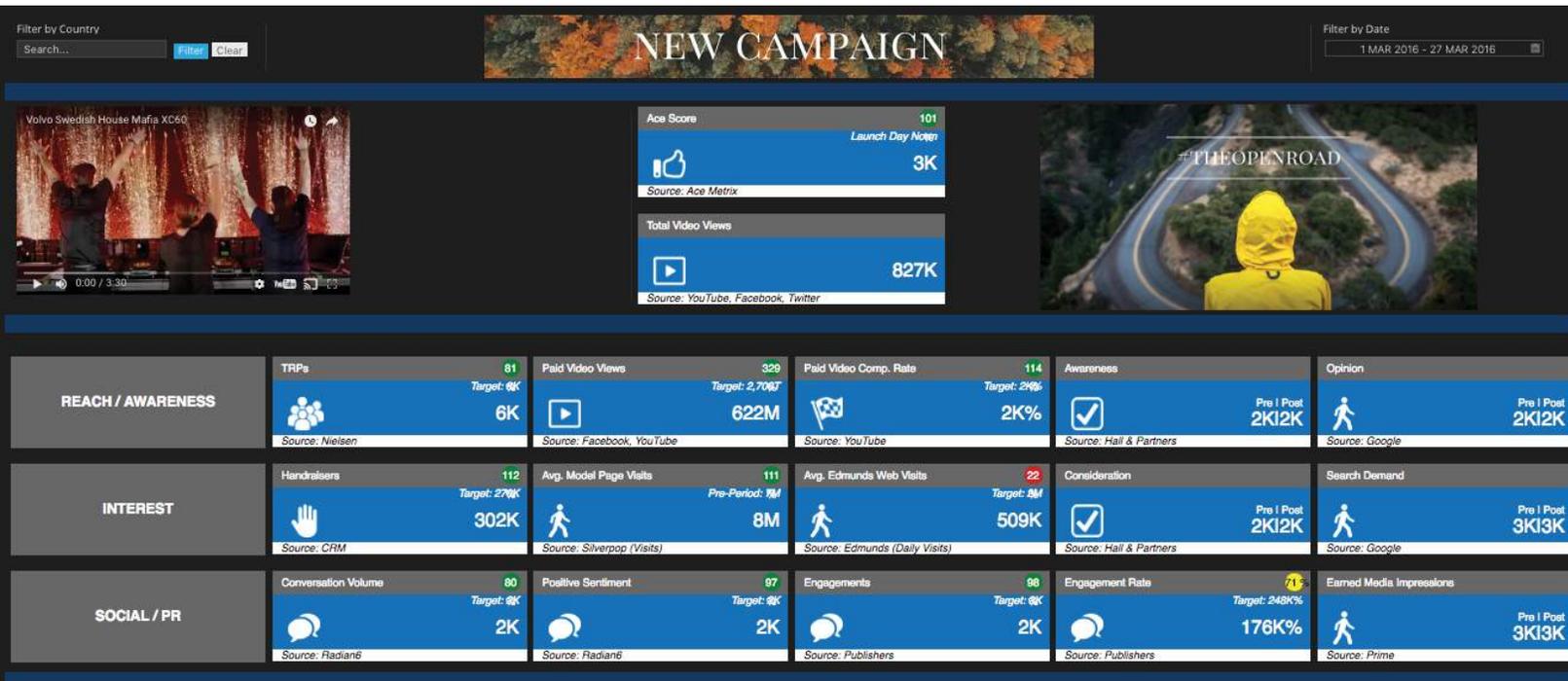
**Fan/Follower base growth**  
Twitter follows

**Fan/Follower base growth**  
YT subscribers Gained

Digital Marketing Director View of Cross-Platform Social Performance



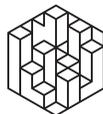
Now that we've seen our data organized across all activities and by channels, the next logical view is to view campaigns across all of their channels. In this example below, data from online and offline sources converge into one, presentation-ready view, with built-in benchmarks and embedded media for total context into the campaign.



Digital Marketing Director View of Cross-Platform Social Performance

Finally, the dashboard example below shows the power of correlations, unifying often siloed worlds together in one view — such as online and offline marketing. An integrated approach helps you connect TV and paid search activity or social buzz, as examples, to show how they are (in fact) connected.

Connecting offline and online data helps marketers work together across teams to coordinate on spend, campaigns, messaging, and goals with a seamlessness that mirrors the customer journey.



# Marketing Synergies Lens



Business Unit:

Product Name:

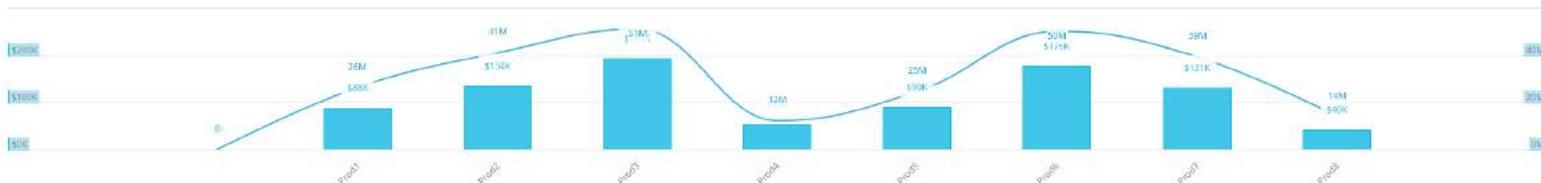
Region:   
 Aberdeen City  
 Aichi  
 Alabama

DMA/Metro:   
 Adelaide Hills  
 Albert County  
 Amajubo District Municipality

## TV / Search Synergies

Media Spend on TV - Impact on people searching for our product online

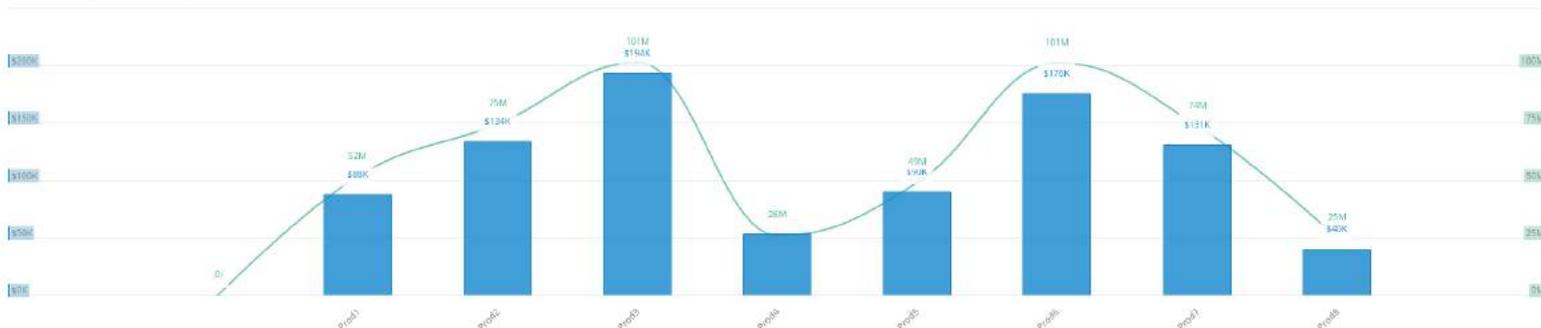
TV Media Spend | Paid Search Impressions



## TV / Video Views Synergies

Media Spend on TV - people watching Videos online

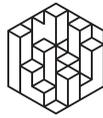
TV Media Spend | Video Fully Played



These are just several examples of the elevated views an integrated marketing analytics approach can give your organization, but there are many more. These extend to other parts of the customer journey as well as deeper levels of granularity such as the placement and creative levels.

As you plan your strategy, consider for every stakeholder how a connected view of their data can help monitor, measure, and manage every marketing investment, performance, and outcome. If you need help connecting the dots, inquire about your solution provider's implementation methodology.

Datorama's Decision Lenses framework, for example, helps marketers plan out each view to ensure their deployment supports smarter decision-making from day one through a simple step-by-step process.



## Tips on dashboarding

The intention of this paper is not to teach visual analysis best practices (although exploring this science is immensely valuable). However, visual analysis is a necessary step in the journey to an effective omni-channel marketing analytics strategy.

**Beyond eye-catching dashboards, to ensure your dashboards are useful, remember that every dashboard should support decision-making and collaboration for the team member(s) it serves.**

By considering how each element of your dashboard helps to answer a question, you will ensure that it is actionable and supportive of driving real value in your business through data.

## Key questions to answer



- What individuals, teams, and external groups will be using this dashboard?
- What KPIs, trends, and correlations do they need to see?
- What kinds of filters do they need to drill into the data?
- How can goals and alerts help them focus on the right data in the moment?
- What other ways can data support them besides dashboards, such as scheduled reports, embedded versions, and new IoT integrations such as Amazon Alexa voice-powered queries.





## 5. Data governance and IT

**Data is increasingly considered one of the most important resources a business has. You need to ensure your data meets legal, compliance, and regulatory requirements before you scale, so you don't end up creating a growing problem. Check with your solution vendor and validate with IT to ensure your implementation meets all of these requirements.**

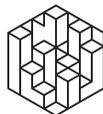
Though marketing team members should be able to easily access and make sense of marketing data, it's important that the data governance approach of your platform provides for efficient management of user access to the platform's capabilities and the data itself. On both fronts, you need to be able to restrict permission for users, teams, and potentially external groups such as agency partners. You also need to ensure your solution provider's infrastructure is certified and secure. Look for standardized certifications such as ISO 27001 and partner with IT to include them in the vetting process.

**Do your marketing leaders work with IT leaders? Based on the stakeholders you assembled in step one, kick-start these relationships to let both parties know they will be working together in some capacity. Staying aware of what tools are in use, and the utilization of these tools, is not only useful for data integration but also for identifying who needs access to what data.**

### Key questions to answer

- Who should have access to the platform's capabilities for data integration, harmonization, KPI creation, dashboarding building, and dashboard viewing within your organization?
- Are there security restrictions by stakeholders either at the source level or the row level (for example, a metric within a data source)?
- Is there specific data that only specific stakeholders can have access to?
- Are there specific data sets that partners can only have access to?
- Does your vendor partner's data security meet your company's user access and data security requirements?
- Are there security enablers you can leverage in your deployment, such as single sign-on (SSO)?
- Do your marketing leaders already work closely with your IT leaders?





## 6. Measure your success

Even if it's obvious to you, as a marketing leader you'll need to credibly prove the business impact of your solution. The precursor is illustrating the structure you've now set in place using this guide, with anecdotes about overcoming roadblocks and bottlenecks by making marketing better aligned in its data usage — both internally and with external groups like IT and agencies.

For measurable proof, there are standardized methods for quantifying the business value of a solution. In a recent study in coordination with Forrester Consulting, Datorama conducted a total economic impact (TEI) study with one client, a \$15 billion telecommunications and media company. The results of its integrated marketing analytics deployment using Datorama showed significant ROI in following key areas:

- **Total Business Impact:** \$9.8 million in total economic impact
- **Marketing Performance and Impact Optimization:** The direct profitability impact of a 25% increase in campaign conversion rates
- **Marketing Analytics Efficiency Optimization:** The time and cost savings of 2,600 hours reclaimed from data preparation tasks
- **Marketing Budget Optimization:** 14% budget savings and reallocations due to smarter decision-making across internal and agency partner programs

These represent three key areas where you can quantify your investment in an integrated marketing analytics approach. To learn more about this success story and its underlying quantified ROI methodology, we invite you to read Forrester's Total Economic Impact study.

### Don't forget to show numeric changes in these areas

- Improved campaign profitability through creative- and placement-level optimization
- Total awareness, engagement, and conversion growth
- Lead, MQL, and SQL growth
- Marketing return on investment (MROI) growth
- Marketing as a percentage of total revenue improvement





## 7. Vendor considerations

Many of these steps are made easier by — or are even contingent on — having the most cutting-edge marketing analytics solution available. Because the reality is that the number of necessary data sources for marketers is compounding. Technologies are increasing. The greatest constant in marketing is change.

**The key is making sure you have everything you need in one centralized seamless environment that's easy to use and easy to manage. You need a solution that does all of this, and provides a platform where you can execute your integrated marketing strategy from top to bottom.**

That's why you need a platform that takes the smartest approach possible beneath the dashboard level to make sure your data is always connected, clean, and organized. For this you need a platform that automates the traditionally onerous and time-consuming parts of your analytics implementation, like data integration, harmonization, and data modeling. Simple management of these steps will be the foundation of maintaining a reliable single source of truth regardless of how much your data changes or grows.

**To that end, beware of services-mandatory implementations and maintenance plans that will slow you down, incur unexpected costs, and open up the possibility of data gaps in your single source of truth. Instead look for speed, scale, and agility in your platform, powered by smart technology that simplifies the most time-consuming and expensive aspects of your integrated marketing analytics.**





**Datorama is the leading cross-platform marketing intelligence and analytics platform for marketers. Make smarter decisions by connecting and acting on all of your marketing data, investments, and KPIs.**

Our Marketing Integration Engine uses recent breakthroughs in machine learning and AI to carry the load of traditionally time-consuming steps in the process, like data integration and harmonization.

**To see how Datorama can help with your integrated marketing analytics, visit <http://datorama.com/demo>**

And if you're ready to get the next level of detail on how to compare integrated marketing analytics vendors, read our new **Buyer's Guide** now.

## **Connect. Unify. Analyze. Visualize. Act.**

Datorama, a Salesforce company, provides the leading cloud-based, AI-powered marketing intelligence and analytics platform for enterprises, agencies, and publishers. Marketers use Datorama to bring together all of their data and take action on insights, optimizing every marketing investment and activity. More than 3,000 leading global agencies and brands — including PepsiCo, Ticketmaster, trivago, Unilever, Pernod Ricard, and Foursquare — optimize marketing campaigns, automate reporting, and make data-driven decisions faster with Datorama. Datorama integrates the myriad technologies used in today's marketing and consumer engagement ecosystem so you can deliver exceptional, intelligent experiences across the entire customer lifecycle.

Learn more at [datorama.com](http://datorama.com)

