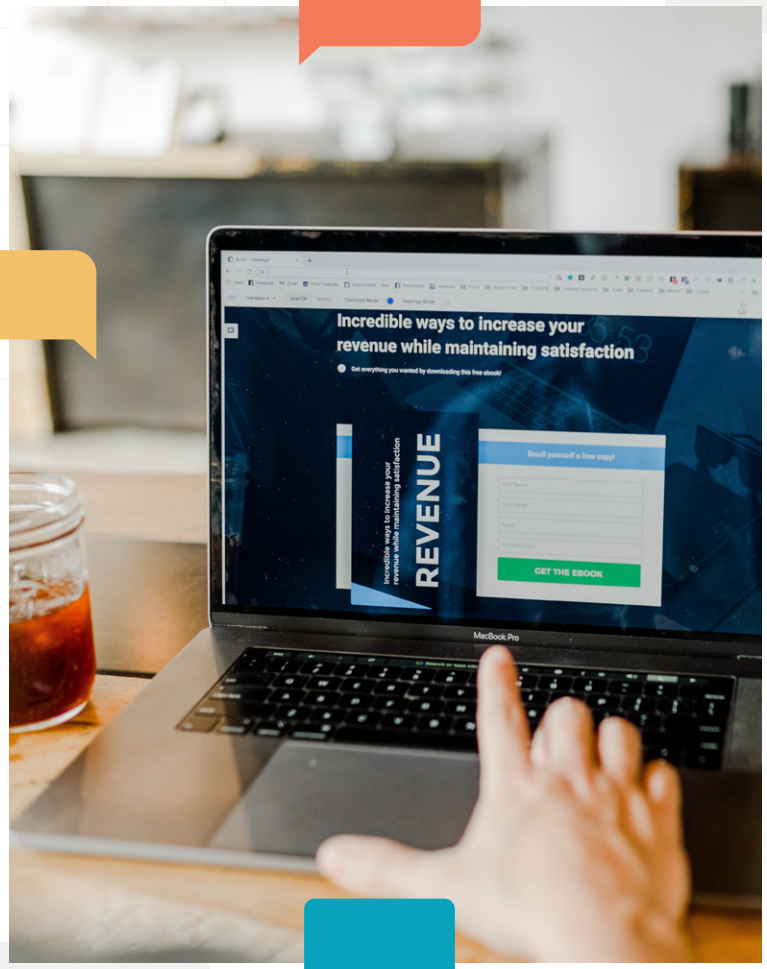
HubSpot SUPERMETRICS

The Data Driven Marketer's Guide

& Templates For Analytics & Reporting Automation





Introduction

In the last 20 years, marketing often involved throwing some messages out there and hoping for a return. Back in the early days of TV and radio, this was actually quite effective. Most people were captive audiences who didn't have a lot of distractions. The ads were more like novelties and not the overwhelming number that we see today

Dial that forward a few decades, and now your audience is being bombarded with all types of messages – from their phones, tablets, streaming services and – yes – still TV and radio. So, messages might not be as effective. Yet, as marketers we can't just say that we spent this much and potentially got these many impressions anymore. Our stakeholders and clients want real results.

Why Become a Data-Driven Marketer?



Luckily, despite and because of all the ways that your audience uses data, you actually have quite a lot of information about your users, including their online activity, buying patterns, interests and browsing history. There are many more marketing platforms designed to capture high-quality user behavior and consumption—this is part of Big Data analytics. Nowadays, we have instantaneous data on our customers, their demographics and buying habits. This means that you have insights into exactly what audiences would be attracted to your products and advertising.

You need quality reporting to analyze all of this data to make smarter decisions about your campaigns and how to market to your customers. Data can help you create personalized and human marketing campaigns to actually add value to your audience. So how do you make your reporting more data driven?

The first step is to ensure that your marketing goals match your business goals, which means having an in-depth business plan in place. Once your business goals are set, it's quite easy to create your marketing goals for yourself and your campaigns, and you need to create meaningful reports. Meaningful reports mean that you can actually gather insights that you can turn into actionable goals. But how do you create reports that provide you with useful data? Reporting for reporting sake isn't worth your time—or your stakeholders and clients.

Importance of Data Analysis

Data analysis is a large part of reporting. This includes using statistical tools to gain more in-depth insights into your data. You do this by clearly defining your objectives, determining what data needs to be collected and adequately capturing that information and effectively analyzing to gain meaningful insights.

It's important to understand the difference between data analysis and reporting. Some people think that reporting is a pointless, waste-of-time process of copying and pasting. Yet, the real goal of a report is not to just input a bunch of numbers. Those numbers should work for you to find valuable, actionable data that you can use to actually improve your messaging and campaigns, and better connect with your audience.

These visually stunning reports, however, don't need to be done by hand. Instead, you can invest in reporting automation platforms that can reduce the amount of time needed to create the reports. One missed or mis-entered piece of information can result in major disruptions to your data. Plus, all the calculations are done automatically, and most reporting tools refresh the data automatically. No need for you to go in and refresh it every time that you want new numbers. Since you have to make decisions fast, not being able to have up-to-date reports should be a dealbreaker.

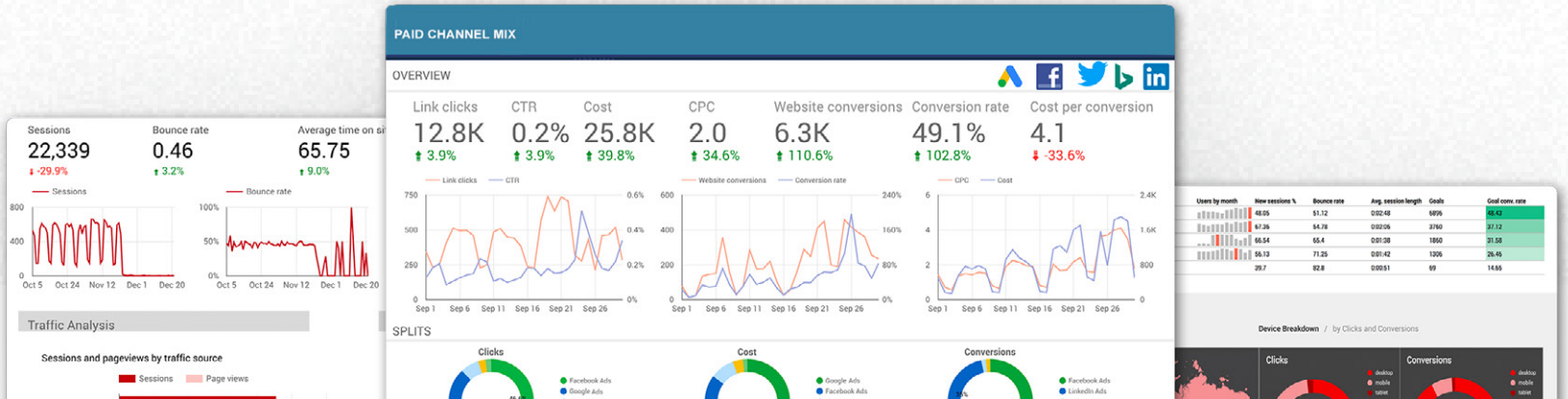


Modern Challenges of Data-Driven Marketing

Data-driven marketing can be extremely effective since you can use the insights that you gain from congregate information to better align your marketing strategies with actual consumer behavior. But that doesn't mean that it doesn't come with its own challenges. The greatest challenge you might face is combining all your different data sources into a single platform.

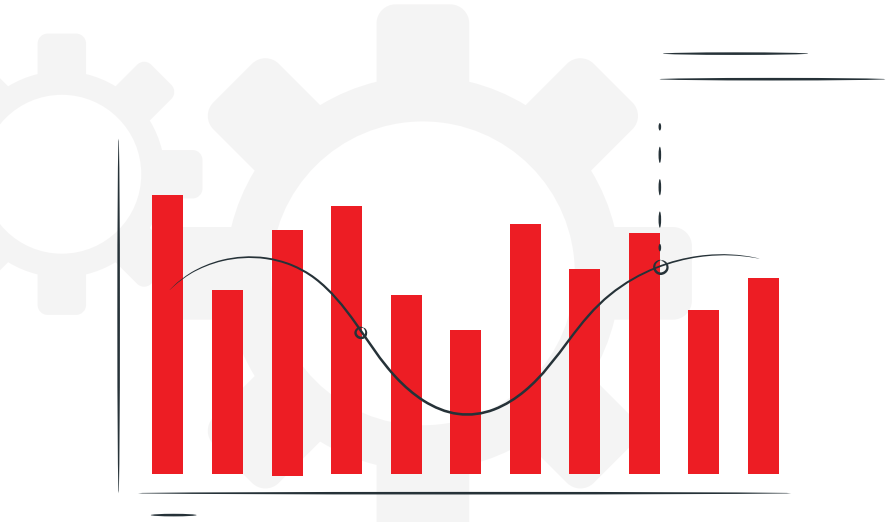
For example, Google Analytics is effective, but only for Google products. So, many people resort to Google Sheets or Excel to pull together all their campaign data. This often means pasting the data into spreadsheets from different sources manually or by inserting CSV files from different platforms. This data must be completely clean and comprehensive to be useful.

Your data must be apples to apples—sets of metrics should be calculated in the same way to avoid confusion or bad data. These are a few of the greatest issues that you might encounter. Others include investing in tools that cause more headaches than solutions, not knowing your goals and picking the wrong KPIs on which to focus.



Data-Driven Framework

Becoming a data-driven marketer may not be as easy as it sounds. For some marketers, it might be a completely new mind-set. For others, they might be doing bits and pieces of the framework, but not the full push. Here are some tips to ensure that your team is moving in this direction:



DETERMINE WHO YOUR AUDIENCE/TARGET IS.

Making a buyer's journey map or comprehensive buyer persona can help you better focus on what makes your target audience truly tick. Market research can set you up for success every step of the way. Make your personas for free using HubSpot's Make My Persona tool.

WHICH GOALS DO YOU WANT TO ACHIEVE?

You must have a full understanding of your goals and objectives before launching into your data-driven strategy.

DETERMINE WHERE YOUR ORGANIZATION IS FAILING

Look at your current collection and analysis tools. Are they providing you what you need? Are there areas for improvement? Are your data analysis platforms providing you with everything that you need?

WHAT NEEDS TO BE COLLECTED?

Determine what data will fully support your goals and objects, and address any questions from your stakeholders or clients. Are they only interested in conversions? Maybe your stakeholders want to see the whole buying cycle—from consumer behaviors to messages that were the most effective to final sale.

ENSURE THAT YOUR DATA COLLECTION PROCESS IS ADEQUATE.

If your tools aren't capturing the right or enough data, then it's not worth keeping. If you have an older program that few people in your organization have effectively used (because lack of training or confusion), it might be time to upgrade to a more comprehensive collection and analysis platform.

CREATE PERSONALIZED CAMPAIGNS.

You now have all this information about your target audience—both from data insights as well as the buyer personas. Now, you must create offerings and messages that directly address their pain points and wants.

EVALUATE YOUR CAMPAIGNS.

Look at what worked and didn't work. Identify opportunities for future success. Leverage this data to create a hypothesis about what will work in the future, and start the process over again.



How to Report Across the Customer Lifecycle

Your customers will act differently throughout the buying lifecycle. It's important to keep track of how they behave as they move through the different stages. For example, the goal of the attraction phase is to cookie them and get them to take an action on your site, i.e. fill out a contact us form or download a white paper. During this stage, you'll want to track the following metrics:

- Impressions/Reach
  (how many people are you reaching)
- Clicks
- Click through rate (CTR)
- Cost per click (CPC)
- Bounce rate
- Average time on site
- Conversions (form fills, etc.)

These metrics are important because they tell you how effective your ad or website copy is and how well your visitors can navigate your site. You want to make sure that you're connecting with your target audience—and that you're attracting the right audience.

Once your potential customer is aware of your business, now it's time to try and get them to truly become a customer. This stage is mainly going to focus on your main conversion wants—actual sales, appointments, directions to the retail location, calls to the store, etc.

- Add to cart
- Shopping cart abandonment rate
- Conversions
- Conversion rate
- Cost per acquisition (CPA)
- Average order value
- Return on ad spend (ROAS)

You finally have a customer. Many companies often leave their metrics and tracking here. They made the sale, so what's the point of going any further? The thing is that you want to have a customer for life—not just for a single product. This means that you need to ensure their happiness while using your product or interacting with your business. At this time, it's important to track the following metrics:

It's important to engage with your customer after they've purchased your product or service. While these analytics probably won't be tracked through something like Google Analytics, you should send out customer satisfaction surveys to help you understand happiness. Reviews are also a good way to keep track of how customers are reacting to your offerings.

Email unsubscribes:

This shows that your customer is no longer interested in your product or service.

Usage:

Are they actually using your product or service? Or, did they buy it and never use it? Or, maybe they had a bad experience?

Customer lifetime value (CLV):

How much will you get out of the entire relationship with your customer? Do you have a healthy relationship with the customer? Is the customer still ordering from you?

Upsell:

Has the person upgraded his/her service?

Repeat customer rate:

This is the percentage of your customers that come back to buy something else.

Purchasing frequency:

Is the customer buying more than one product over time?

Reporting Your Results

You should keep track of metrics on a daily basis, but for most companies, you only need to report on a biweekly or monthly basis. For stakeholders higher up (management), this will probably be monthly. Your own marketing team most likely will want to see stats on a biweekly or weekly basis. For yourself, you can set up reports to be delivered to your inbox so you can see how well the campaigns are performing without needing to go into the platform.

Typically, key managers are going to want to see trends and the overall landscape of how things are going. Your team probably won't need such in-depth data. Instead, they'll just want to see progress reports or ad hoc reports that particularly pertain to something that they're working on, i.e. investigating some issue. Higher-level management might also just want to see the overall picture: are campaigns working or not, and how many leads/conversions you're getting.



Marketing Reporting and Analytics Tools

There are multiple tools which help you create marketing reports: from data visualization to BI platforms to spreadsheets.

Data visualization tools help you better visualize all the data that's being collected so you can better understand it. This includes creating charges and graphs. The most commonly used data visualization tools include Tableau, Google Charts, Leaflet, Google Data Studio, Sisense and more. These sometimes have a learning curve, but once mastered, you can dramatically improve the overall look and feel of your reports – and potentially impress your stakeholders.

But more than that, you, yourself, will be able to quickly pull actionable insights without the need to manually scour through your raw data. This saves you time and headaches, and increases the visual appeal of your reports.

The more in-depth reporting tools are business intelligence platforms. These include Microsoft Power BI, Looker and Qlick. The goal of these programs is to automate repetitive processes as well as compile data into digestible snippets so you can gain better insights into how your campaigns are doing.

While they can be quite comprehensive, many do lack some features, which means that you might still need to pay for other tools to fill the gaps. The major hurdle to these, however, is the cost. Most require a monthly fee, oftentimes per user. For smaller agencies or companies, these might be too large to overcome.

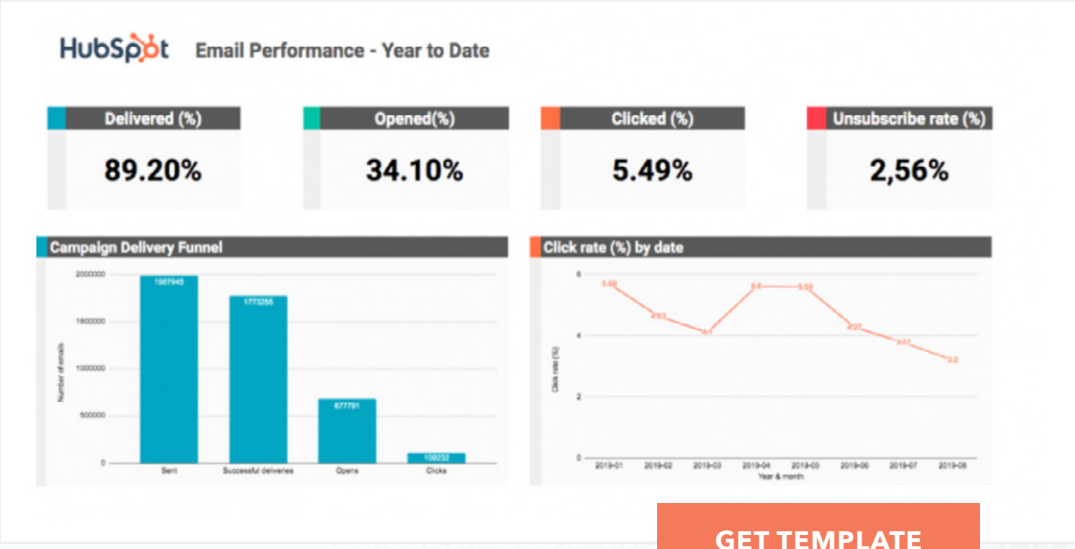
Most organizations default to either Google Sheets or Microsoft Excel. For one, they're compatible with most of what companies have on hand. On the other, there's little to no learning curve since everyone uses these on a daily basis. The problem with both of these tools is that you run the risk of inputting numbers wrong or misapplying functions. But they're easily shareable and editable. Read on to find out how you can create a HubSpot dashboard in Google Sheets for yourself in minutes.

Create your first automated HubSpot marketing report with two free plug-and-play Google Sheets templates

In order to make HubSpot reporting easy, accurate and human error free, Supermetrics has created a collection of free Google Sheet-based reporting templates, which seamlessly work with its native HubSpot connector.

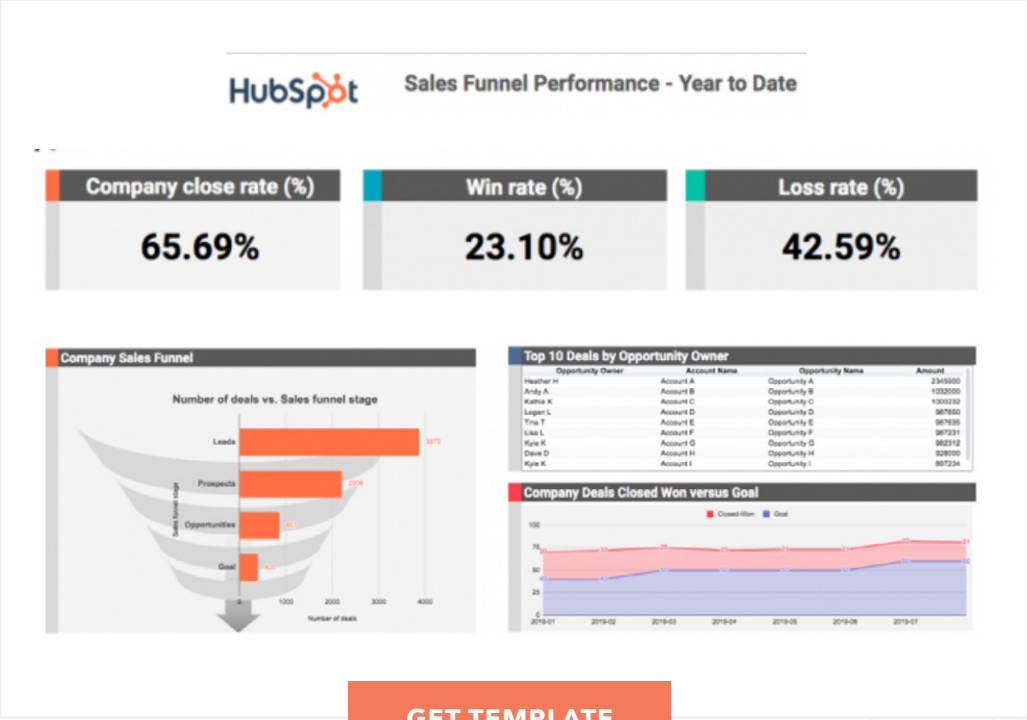
HubSpot Email Performance Reporting Template

This dashboard will help you assess the performance of your HubSpot email campaigns with ease. The template shows email delivery, open, click and unsubscribe statistics. You will also see the campaign delivery funnel as well as the click rate by date. Head over to the next tab for a more detailed breakdown. You can grab the template here.



HubSpot Sales Funnel Reporting Template

The Sales Funnel dashboard allows you to monitor your close, win and loss rates. With the help of this report you can see how your contacts move down the funnel as they go from Leads to Opportunities to Customers. You will also see who your team's top performing sales reps are. In addition you can track your progress towards the set goal. Just like with the email template, head to the next tabs if you want to see more detailed numbers. You can get the template here.



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Takeaways

While it might seem overwhelming to start building your data-driven framework, once you get the process in place, it's extremely automated, saving you hundreds of hours of data upload. Plus, insights can be quickly pulled and transformed into actions you can take to dramatically improve your results and better connect with your audience.

There are multiple reporting solutions available, however we recommend you to start your journey with free tools like Google Sheets. See marketing automation in action and jumpstart your HubSpot reporting with free plug-and-play Google Sheets reporting templates provided by Supermetrics.

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Save time and get more organized with your marketing strategy. Get started with HubSpot's free marketing tools.

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Automate your marketing reporting and become more data-driven: start your free 14-day trial of Supermetrics today.

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