

Marketing Dashboards Primer

What is a marketing dashboard?

A one-screen display that converts marketing data into actionable insights.

- A dashboard compiles marketing metrics from multiple sources on one comprehensive screen.
- It distills large volumes of data into understandable visual insights.
- Like a car's dashboard, it provides real-time feedback on marketing performance.



What are the benefits?

Data-driven decisions that align marketing activity with the objectives of your business.



Demonstrate marketing effectiveness and ROI to leaders, partners and stakeholders.



Reduce time and effort required to extract and analyze data, create insights, and build reports.



Improve relevance of marketing performance reports by revealing patterns, correlations and leading indicators.



Help the marketing team focus on what's most important; creating a data-driven culture.

What questions can a dashboard help me answer?

It depends – on your business strategy, the data available, and the effort you invest.

Metric Type		Example Business Questions
	Client	• How many decision makers do we know at client X? How close is our relationship with each?
	Business	• How many qualified leads has Marketing delivered to Practice Y over the last 12 months? How many have turned into matters?
	Brand	• What is our firm's overall Net Promoter Score (a measure of our clients' willingness to recommend us)?
	Efficiency/ Effectiveness	• How much does it cost the firm to deliver its events or email newsletter program? How are we bringing the cost down?
	Capability	• What marketing/sales content is available for each of our practices? How frequently is that content updated and accessed?

How do I create a dashboard Key Performance Indicator?

Start with the business question – then gather data to visualize the answer.



Question

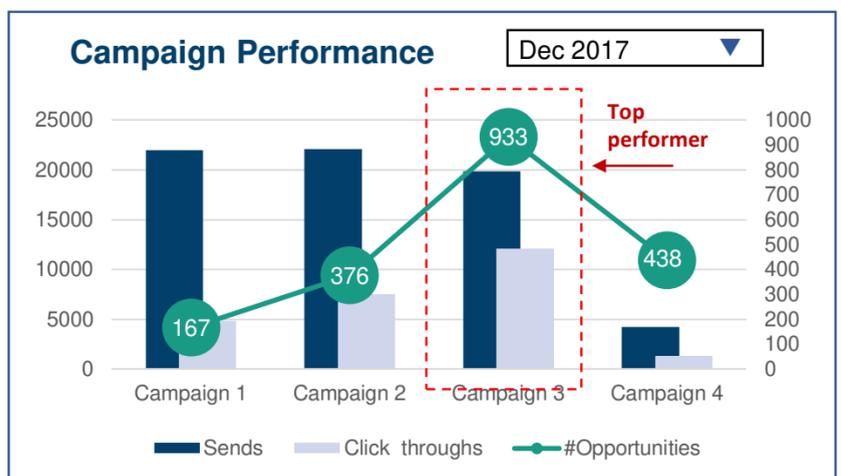
Decision

Data Available

Which campaign contributed the most to revenue last month?

Allocate time, effort and resources to campaigns that perform better.

- Contact list
- Campaigns sent
- Email opens and clicks
- Web page visits
- Form requests
- Opportunities created and won



Where do I start?

Your dashboard project will require an integrated approach.

Leadership Buy-in

Ensure support from the top by building and communicating a strong business case to stakeholders.

Clear Goals

Be specific and realistic about what the dashboard project will accomplish. Define your project plan carefully.

Data Sources and Gaps

Understand the nature and quality of the data available for your dashboard. Don't try to measure unreliable data.

Well Defined Metrics

For each measure you create, define data source, calculation, visualization and the decisions that it will support.

Systems and Technology

Start small with the built-in dashboarding features of Excel and Microsoft Power BI. Move to dedicated dashboard systems after proving the value.

Change Management

Think carefully about the human element of your dashboard. How will you launch and communicate? How will you seek feedback and measure adoption?

Converting data into actionable insight will transform your work. Look to an expert to help build your dashboard right.