



Don't fall in love with a pretty (inter)face...

**Make Marketing  
Dashboards Actionable**

# ABOUT THE AUTHOR



► **Roy Wollen**

President,  
Hansa Marketing Services

► Follow us on Twitter @HansaMarketing

---

Hansa gets to the essence of a marketing problem then takes action with campaigns and content. Roy Wollen is President of Hansa Marketing Services and has led some of the top marketers in country in consumer products, financial services, biotech, b2b and multi-channel retail.

Roy has also been a client. Roy worked for Federated Department Stores and Hewlett-Packard. Roy began his career at Ogilvy & Mather, the global agency.

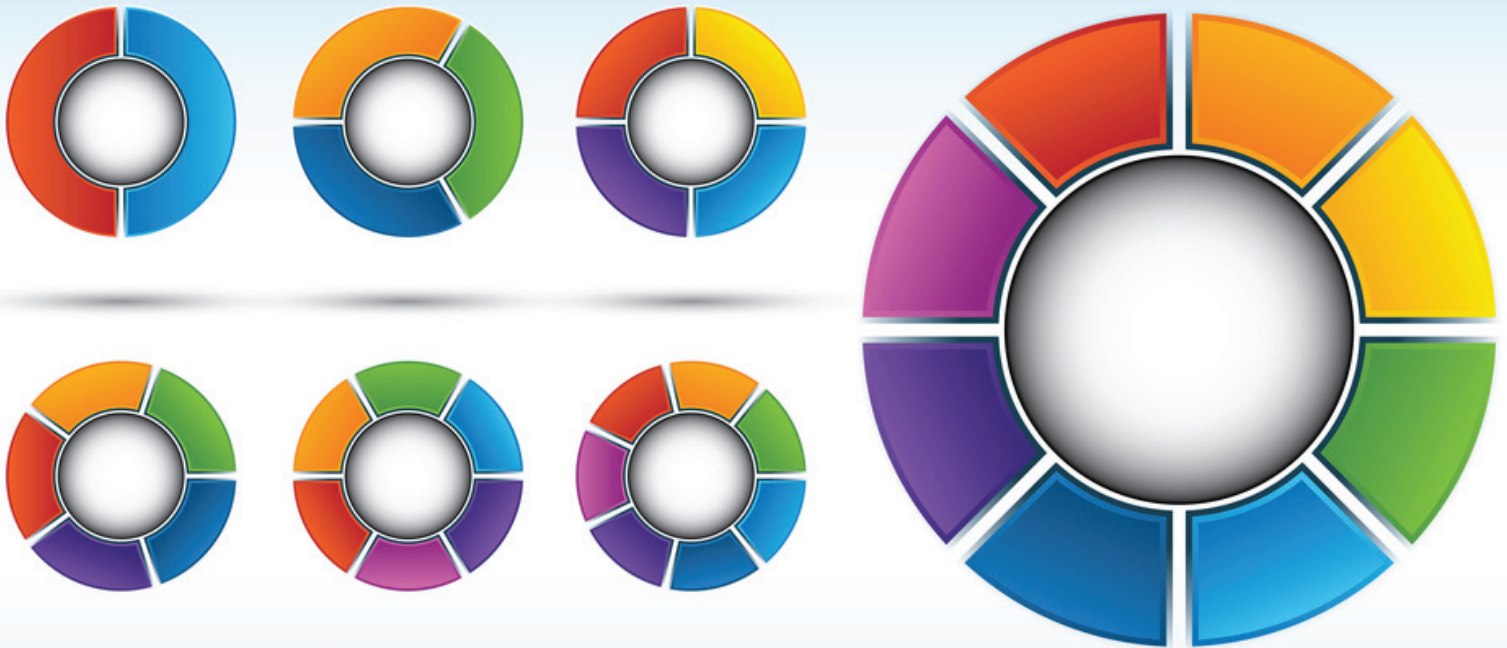
Roy has a Master of Science degree from Northwestern University's Medill IMC program and is an adjunct professor at DePaul University teaching Digital Marketing, Omnichannel and Marketing Planning. Roy has authored a book on data-driven marketing and speaks at industry events and webinars.



# TABLE OF CONTENTS

- ▶ INTRODUCTION | 4
- ▶ KNOW YOUR AUDIENCE | 5
- ▶ INTEGRATE INTO THEIR WORK | 6
- ▶ PUT DATA IN CONTEXT | 7
- ▶ TELL THE STORY | 8
- ▶ TAKE ACTION | 9
- ▶ TEN WAYS TO MAKE DASHBOARD ACTIONABLE | 10

# INTRODUCTION



What is it about dials and gauges on today's marketing dashboards? Why the fascination with airplane cockpits? If dashboards are supposed to be about learning why do we focus so much on the interface?

With this Thoughticle™ I hope to give you the benefit of my 25 years of experience to get to the essence of the marketing problem - what the dashboard is supposed to show- then help you recommend action which is what the dashboard is supposed to do.

With dashboards, you know you're off to a bad start if you hear people say "so what?", "that's nice to know", "what am I supposed to do next?" But with some work, marketing dashboards can be something that brings people together. The best dashboards invite collaboration, get referenced in important meetings, disseminate learnings and lead to ideas. They become indispensable.

# KNOW YOUR AUDIENCE



As you conceptualize your marketing dashboard, you'll be tempted to begin with the tool. Don't start with the interface; start with your audience. Meet with them and ask them to bring their favorite reports and dashboards. Ask them what decisions they made. Take good notes - playback what you hear. Survey your audience.

You'll not only end up with a useful dashboard, you'll earn support along the way. You should be vetting all the Key Performance Indicators (KPIs) before they're published (especially with finance). Less is more; don't use visualizations indiscriminately. Incidentally, what are your firm's top five KPIs?

Show dashboard sketches to your stakeholders ahead of time. This back and forth will lead to a better solution. Don't make the dashboard about you.

# INTEGRATE



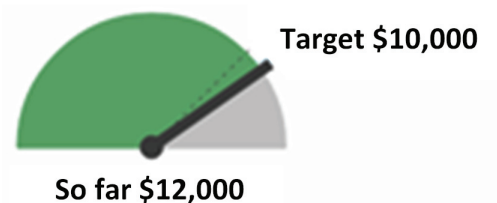
Your dashboard is a conversation starter. Don't think of it as the end product – it is not meant to be spellbinding, finished, spectacular. It's not a piece of art. A dashboard is meant to integrate into other people's work. Encourage them to reference it in marketing plans and extract the findings most relevant to them. Your dashboard should facilitate this. Don't fear Microsoft PowerPoint; embrace it.

Dashboards are a natural for Quarterly Business Reviews (QBRs) and other strategy meetings. Enlarge your thinking beyond daily readouts on marketing performance and design your dashboard to provide high level metrics on customer movement, personas, marketing programs, strategies and ideas. Think big thoughts – the bigger the thought, the more executive adoption.

# PUT DATA IN CONTEXT

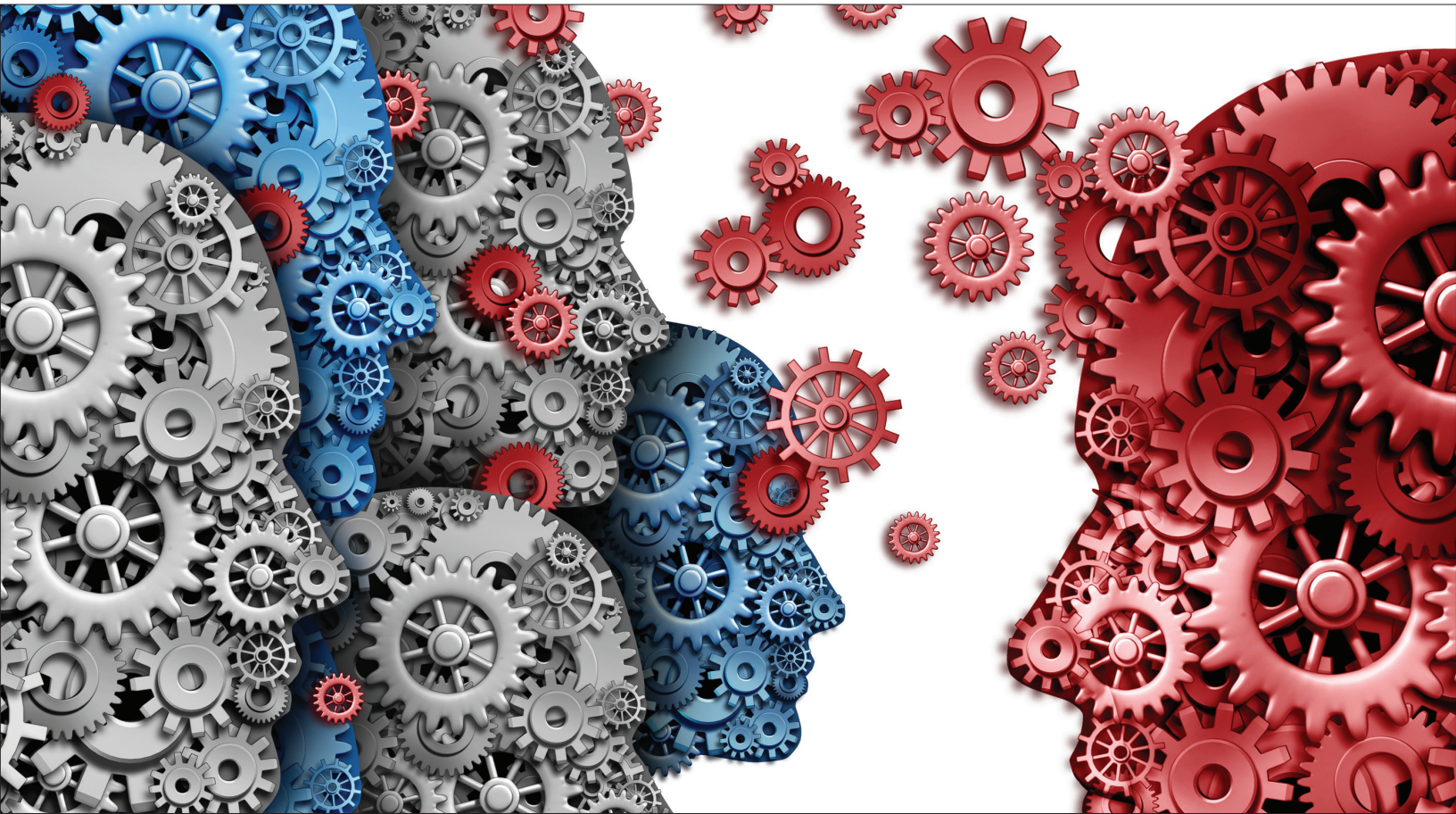


**Always put numbers into context.** This is a best practice of marketing scientists who always compare observations to expectations. This comparison could be to an industry benchmark or a budget target. This could reflect rhythms in the data (such as Year over Year comparisons or “comps” if you prefer marketing speak). If you provide context, you see beyond raw data (“nice to know”) and into trends (“going up”, “getting worse”, “stabilized”, “needs intervention!”). Do you see how these words can lead to competitive responses, offer adjustments, tactics to either attack or defend?



The best dashboards allow users to define time periods. Give people the ability to aggregate up to a summary level or drill down to the details. Marketing people are happiest when they can iterate the questions themselves, so promote self-sufficiency, not dependency. Leave room for commentary and a link to the campaign creative.

# TELL THE STORY



**Don't be boring.** If visualizations help tell the story, use them - but don't distract your audience in the process. Repeat the goal of a given program and the strategy to reach it. The dashboard can show you how far you have to go.

**Tell the truth.** Don't build vanity dashboards that are propaganda tools and always have good news about marketing investments. If there is a credibility gap, adoption will suffer no matter how visually engaging the dashboard.

**Be brave.** Make recommendations. What do you want to try next?

**Be a historian.** If something worked, the dashboard can keep track. Market research is always welcome on the dashboard. Your dashboard can link to studies that deepen the understanding of why customers behave the way they do. The dashboard can also centralize definitions and provide a glossary to demystify jargon. What do you mean when you say "customer"? (That's today's aphorism – a simple question much deeper than you think).



# TAKE ACTION

If you built an actionable dashboard, “so what?” becomes “now what?” Dashboards let you revisit your marketing communication plan; it will help you optimize marketing investment by channel or media vehicle. Dashboards should be a lead player in your test & learn ensemble. Actions to try new things, scale things that are working or reduce things that didn’t pan out.

**Think customer strategy.** Can you spot new customers that are off to a great start? Call these “new and hot” and show them on the dashboard and promote action – how can we get more of them? How can we get them to visit again? You may develop a different welcome stream actions for customers who begin at different trajectories.

	% of New Buyers	How many will visit again?	Avg. spend when they do
New and Hot	10%	45%	\$600
New and Not	90%	33%	\$325

**Dig deeper.** Explain what’s going on over time. For example, your dashboard might say you have 30,000 advocates in one period and 30,000 in another. Identical totals could be hiding important customer movement. In the example below, notice 100 advocates left the segment while a different set of 100 joined. What actions can you take to keep advocates singing your praise at the same time you attract brand new ones?

Segment (conceptual)	Operational	Period 1	====>		Period 2	Comments
		Customers	Joiners	Leavers	Customers	
Advocates	0-3M 3x+ \$51+	30,000	100	100	30,000	Looks like nothing happened
Repeat buyers	0-3M 2x \$51+	45,000	200	300	44,900	Welcome stream on steroids
New and Hot	0-3M 1x \$51+		10,000		10,000	
New and Not	0-3M 1x \$50 or less		25,000		25,000	Normal welcome stream
High dollar, loyal fans, nearing attrition	4-6M 3x+ \$51+	30,000	1,000	5,000	26,000	
High dollar, trial byrs, nearing attrition	4-6M 1x \$51+ etc.	75,000	5,000	10,000	70,000	
Dormant buyers, worth reactivating	25M+ 3x+ \$51+	150,000	5,000	10,000	145,000	Best bets for winback
Low dollar, trial byrs who went dormant	25M+ 1x \$50 or less	250,000	5,000	9,900	245,100	Let them attrit
<b>total</b>		<b>580,000</b>			<b>596,000</b>	

# CONCLUSION

You don't need fancy dials and gauges to create dashboards. Your focus should be on solving business problems and building consensus – not on the tool. Would you rather have a pretty dashboard that sits on a shelf or an effective dashboard that people use all the time?

## TEN WAYS TO MAKE DASHBOARDS ACTIONABLE

1. Plan effectively, know your audience, get their support ahead of time, survey them afterwards
2. Vet all KPIs before they're published (especially with finance), centralize definitions
3. Don't be afraid of PowerPoint, promote dashboard's ability integrate into someone else's work
4. Show screenshots of the creative
5. Drill down for more detail; but be able to aggregate up for the overview
6. Less is more; don't use visualizations indiscriminately, what are your top 5 KPIs?
7. Always put the numbers into context (e.g., trends, YoY comps, benchmarks)
8. Leave space for user commentary, reactions, disagreements; but start the ball rolling with your recommendations
9. Tell the story; don't be boring
10. **Every section should have an associated action**

# REQUEST A DEMO

I hope this Thoughticle helped you see dashboards as more than a pretty (inter)face. If you liked it, you can explore other topics by visiting [www.HansaMarketing.com/blog](http://www.HansaMarketing.com/blog). And if you would like a demo on how to customize dashboards for your business contact [Roy.Wollen@HansaMarketing.com](mailto:Roy.Wollen@HansaMarketing.com)

To get you started, ask us for a free template in MS Excel (pictured here).

