

The logo for Madison Taylor Marketing is centered in the upper half of the page. It features the company name "MADISON TAYLOR" in a bold, white, sans-serif font, with "Marketing" in a smaller font size directly below it. The text is enclosed within three concentric white circles of varying thicknesses. The background of the entire page is a complex geometric pattern of triangles and squares in shades of blue and grey.

**MADISON
TAYLOR**
Marketing

MARKETING RESOURCE
DATA AND ANALYTICS

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INTRODUCTION

DATA AND ANALYTICS

The digitization of the marketing world has completely changed the way we do business. It wasn't so long ago that marketers would place a TV ad and wait to see if sales numbers went up in the weeks after the ad ran – in terms of ROI, that was the best they could do.

Now, every element of your marketing and your business is analyzed and quantified.

The wealth of data can be extremely powerful, **informing your strategy and execution to maximize the efficiency of your business.**

The challenge with all this data is sifting through the noise for useful information, finding patterns and actionable insights for more efficient and effective campaigns.

While writers often pair them together, it's important to distinguish between data and analytics. Data is raw information. There's no limit to the amount you can gather, but data collection is only half the picture. Analytics is the examination of that data and the ability to draw conclusions about patterns, predictions, and cause-effect relationships. To succeed in today's data-driven marketplace, marketers must be competent at both collecting and analyzing data to drive results.

CHAPTER 1

USING DATA TO INFORM STRATEGY

Starting with a clear marketing strategy is essential to ensure that your efforts will not be inefficient, wasteful, and ineffective. Before you launch any campaign, a firm grasp of your goals, audience, and marketing channels is required. From there, data and analytics are the most powerful tools you have to inform the way you communicate with your customers.

DATA TO INFORM STRATEGY

CUSTOMER JOURNEY

Analyzing the steps between discovery and decision.

BUYER PERSONAS

The right messaging for the right people.

SEGMENTATION

Dividing your customers into useful groups.

CUSTOMER BEHAVIOR

How and why people buy.

SEO OPTIMIZATION

Putting your results front and center.

Customer Journey Analysis

Your content strategy should evolve depending on which stage of the buyer's journey your prospective customers occupy. Early in the research process, customers need information about their problems and potential solutions, while customers on the verge of purchase need hard numbers like pricing and specifications.

With the collection of thousands of customer interactions, you can start to [narrow down the most common paths that your customers take](#) toward purchasing your product. Every customer is different. Some prefer to do research online, while others prefer live demonstrations. Some want to read about your product on your website, while others prefer third-party reviews or testimonials from your existing customers.

With enough information, you can start to find patterns in the way that people discover, consider, and decide to make a purchase.

Once you've established these patterns, you can adjust your approach to focus on the channels that your customers use to conduct research. If your customers like to read blogs expounding the features of a product before they buy, for example, you can ramp up investment in your blogging efforts. If your customers prefer the word of other buyers, you can put more effort into soliciting feedback and reviews from your most satisfied customers.

Evolution of Buyer Personas

[Buyer personas are valuable tools that provide a picture of the type of customer you want to engage](#) – if your marketing department doesn't know who your ideal customer is, you can't create messaging that appeals to that person's unique pain points and needs.

Buyer personas are not static. You might build a buyer persona for a new product, then find once launched that you made erroneous assumptions about the people to whom the product most appeals. Environmental shifts in your industry might completely change the picture of your average consumer – millennials have fled Facebook in droves after initially comprising its core user base, for example.

Your customer data is the most useful tool you have for adapting or expanding your buyer personas.

Analyze who's buying which products, how long they stay subscribed, whether they refer new people, and whether they become repeat customers. Find what your most successful customers have in common, then look for that in future customers.

We often find that a more in-depth analysis of the data lends itself to the creation of multiple buyer personas. You might notice that the people paying for your premium service aren't the same as those paying for the basic tier. Repeat buyers may have different behaviors or characteristics than one-time buyers. You may find that this analysis leads to the creation of different personas for each path along the buyer's journey, expanding your understanding of your current customers.

Customer Segmentation

[Segmentation starts with essential characteristics](#) – demographics, job titles, income, location, and similar high-level data. You can find this

information through social networks, order forms, and lead generation forms.

Once you start gathering some sales records, data collection and analysis can generate far more nuanced segmentation. Identify patterns that connect specific segments to unique sales behavior. For example, you might find that people or companies over a particular range of income are more likely to buy a particular product or that some segments of your customer base are more receptive to specific marketing materials.

Customer Behavior

Understanding how your customers interact with your website is crucial for optimizing your site and other materials. With tools like Google Analytics and HotJar, a heatmapping tool, you can dig deeper into how far your customers scroll down individual pages, which buttons and links they click, how long they linger in certain areas, and where their attention goes first.

As you gather more data about how your users interact with your site, you can adjust your site to accommodate your users. In one case study, we found that users were clicking on an unclickable header in a block of text. In response, we made the text clickable, directing them to another relevant page.

SEO Optimization

[Any SEO strategy](#) will start with educated assumptions about the search terms that your users are employing to find your content, but as user data starts to accumulate, you can refine your technique. Tools like Google Analytics will show you the search terms that lead users to your site to optimize strategies to match your target audience's pain points and priorities.

CHAPTER 2

USING DATA TO INFORM EXECUTION

Execution goes hand in hand with strategy. While the previous chapter addressed how data collection and analysis can change the way you approach your process, savvy marketers also use their data to adjust and evolve their campaigns on the fly. As you intake user data, be on the lookout for adjustments to your content execution.

DATA TO INFORM EXECUTION



A/B Testing and Multivariate Testing

[Testing multiple variables is one of the most accessible and most useful tools](#) in a marketer's toolbox. Every form of content that you publish can benefit from testing:

- Your website and landing pages: iterate different copy, headlines, and imagery, then analyze user data and heat mapping to see which formats and content drive users down the funnel toward a purchase.
- Emails: test subject lines to determine which versions generate more opens, clicks, and conversions. Don't underestimate the value of such a small change. The Obama campaign was famously obsessed with A/B testing — in one instance, a simple change in subject line brought in 530 percent more donations.

- Social media posts: test images, copy, and CTAs to see which versions draw the most engagement and clicks. Social media success can snowball – the more attention a post gets, the more likely it will appear in front of more viewers.
- Paid ads: test copy, headlines, CTAs, and search placement to find the most effective combinations.

As you iterate and test your content, you'll start to recognize patterns about what kind of language, tone, images, and formats appeal most to your customers. These patterns can even inform sea changes in your branding – the brand image that you thought was most appealing to your ideal customers might need to adapt to reflect the reality of how your customers see you.

Website Personalization

One of the advantages of modern website technology is [serving a different version of your website to individual users based on what you know about them](#). The simplest version of website personalization might show a different page to users based on their location, while more complicated executions can customize every aspect of your user's experience.

Think about what you see [when you access Amazon.com](#). For users signed into their accounts, Amazon changes almost the entirety of the homepage to reflect your browsing and shopping history. A quick check at the time of writing this article showed more than ten sections inspired by the specific history of the logged-in user:

- Get yourself a little something
- Related to items you've viewed
- Review your purchase
- Buy again
- Recently viewed
- Video: recommended for you
- Epic daily deal
- Inspired by your shopping trends
- Inspired by your purchases

- Based on your search history
- Gift ideas inspired by your shopping history

Amazon is at the end of the personalization spectrum, but the principle still applies. The idea is to provide the website viewer with more relevant and helpful content to keep them engaged. Examples include:

- Timely offers: a clothing retailer might scrape weather data from the visitor's IP address to serve them specific recommendations.
- Better CTAs: a CTA that offers customers a free trial of your premium service tier might convert well, but it's no use to customers who have already upgraded. For logged-in customers, customize your CTAs and offers to reflect the offers they've already used.
- Behavioral cues: many websites won't show a pop-up until a user has spent more than a few seconds on a given page. The pop-up engages users who are more invested in the content but doesn't irritate those who are merely browsing.

Personalization opportunities will be different for every customer and user base. The important thing is that you pay close attention to the behavior and intentions of your users. When patterns start to emerge, you'll be able to take advantage of them.

Online Surveys and Feedback

One of the most effective ways to determine whether your content is serving your customers well is to ask them. For decades, one of the most popular survey systems has been the Net Promoter Score (NPS), which asks your customers to answer a question on a scale of one to ten. Generally, the question asked is some variation of "how likely are you to recommend our product to a friend or colleague?" If most of your answers are a seven or above, you can consider your content to be relatively successful.

Marketers can learn a lot by adapting the classic NPS question to fit their specific inquiries. Rather than asking about the company as a whole, ask specific questions about more granular aspects of your company. For

example:

- How easy was it for you to find what you were looking for?
- How easy was it to navigate our website?
- How informative did you find the information on our site?
- Do you think the pricing for this product is fair?
- How satisfied have you been with the service you've received from this product?

These questions will give you deeper insights into what is and isn't working about your website or other marketing content. When you find a piece of your site that receives a consistently negative score, start testing and iterating new versions to incorporate feedback.

You can also ask for feedback through social media or email surveys. A simple question on Facebook or LinkedIn like "how can we improve" will boost engagement, bring in a deluge of opinions, and make your customers feel heard and appreciated.

Renewal and Churn Analysis

If your business operates on a subscription basis, [maximizing renewal and minimizing churn is your top priority](#). Analytics can help. Examine the customers that have churned before renewing a single time to see what they have in common. Look for features they never used, onboarding tutorials they never took advantage of, or usage statistics around how often they logged in or visited their dashboards.

Do the same for your most loyal customers. Find the features and usage characteristics they have in common. Once you find patterns, focus on directing your existing customers toward the features and resources that result in renewals.

Content Calendar Timing

Every social media post, blog post, and email you publish will generate a wealth of data on viewership and engagement. Look for trends in engagement that correlate with the time of week and day when the

content was published and look for trends. Some customers prefer to check their email first thing in the morning. Some users browse social media while they're at work – the exact manner in which your customers interact with your content will depend on the people as much as the content itself. Look for content management tools that can generate this analysis for you – a few tools will automatically schedule posts based on when previous posts have seen the most engagement.

C H A P T E R 3

DATA REPORTING BEST PRACTICES

Using your data and analytics to inform your strategy and execution is only half the story – the other half is presenting the data effectively. Fair reporting is essential to both illustrating the value and justifying the purpose of your marketing campaigns, either with internal teams or external clients. When it comes time to report on your campaigns' successes, there are several best practices you should keep in mind.

Consider Your Audience

Reports generated for you, the digital marketer, should contain the most detailed information. You need to know what to improve for your next month of campaigns so you can take all the data-based actions we've mentioned above, so your reports from your employees should be as detailed as possible.

The marketers who work underneath you – SEO researchers, content creators, PPC ad buyers, and social media managers – all need to see the low-level data that helps them do their jobs. However, it's a good idea to give them a high-level overview of the strategies and performance of other departments and their own. They'll want to know general success metrics so they can help each other integrate strategies across campaigns.

Look for Quick Wins

A quick win is a pronounced increase in a significant number like lead

generation, conversion, or sales. Some of the numbers generated by your reporting will be obscure and difficult to parse without more detailed analysis, so start your reporting with the most intuitive highlights.

Quick wins are often best expressed as percentages rather than raw data. For example, Client A may have reported 20,000 social engagements this year. Unless the person reading the report has additional context, they won't know whether that number signifies a noteworthy improvement. Expressing the same result as a "75 percent year-over-year increase" has a much more immediate impact.

Compare your campaign reports to both previous years and previous campaigns when appropriate. Your campaigns will vary in their goals and execution, but it's worthwhile to examine whether focusing on social engagement or email conversion has a better effect on your bottom line.

Put ROI Front and Center

The exact metrics that you report will vary considerably, depending on your business goals and the nature of your company. Regardless of the metrics you prioritize, make an effort to [frame every marketing campaign in terms of return on investment \(ROI\)](#). ROI is likely to be a priority for the people that set your budget, but it can also be instrumental when deciding the most efficient uses of your marketing department's time.

When calculating costs against returns, don't forget to distinguish between organic and paid marketing. Organic outreach isn't free. You might not pay to boost organic posts on social networks or appear in organic search on Google, but the time spent engaging with those channels and optimizing your on-page SEO is still expensive. Examine organic and paid media separately, but don't lose track of the way they interact.

CHAPTER 4

REPORTING TO THE C-SUITE

One of your most critical responsibilities is effectively illustrating your marketing campaigns' value to the executives that approve your channel plans and set your budget. Executives are busy people, and they're generally not concerned with your marketing team's day-to-day operation.

Focus on results. Find out what the c-suite at your particular client or company cares about, then craft your reporting around those key metrics. For some, the priority will be sales numbers. For others, lead generation or customer retention might be more important.

Once you know what the executives care about, focus on hard numbers. Marketing is often subjective. Some metrics, like social

DATA SOURCES IN MARKETING

CUSTOMER INFORMATION

- Demographic data
- Interests and preferences
- Customer lifetime value
- Propensity to purchase

FINANCIAL DATA

- Customer acquisition cost
- Historical pricing
- Price earnings ratio
- Monthly recurring revenue

CAMPAIGN PERFORMANCE

- Churn rate
- Conversion rate
- Engagement rate
- Clickthrough rate
- Bounce rate

STRUCTURED
EXTERNAL
QUALITATIVE

UNSTRUCTURED
INTERNAL
QUANTITATIVE

CUSTOMER BEHAVIOR

- Transaction history
- Website behavior
- Mobile app usage
- Spending patterns

CUSTOMER FEEDBACK

- Social media feedback
- Ratings & rankings
- Inbound calls
- Chatbot interactions
- Call center notes
- Survey data

MARKET RESEARCH

- Market forecasts
- Industry benchmarks
- Competitor data

media engagement or positive online reviews, don't translate well to dollars and cents. It's your job to turn the more ethereal gains of your campaigns into precise results.

In general, we advise updating the executive team monthly, focused on high-level performance trends. Each report should include a comparison to the previous report, either week-over-week or month-over-month, for analysis. Be considerate of season trends — if you often run promotions around the holidays, back to school, or tax season, for example — it's useful to generate year-over-year comparisons as well.

Present Marketing as a Strategic Asset

As marketers, it can be challenging to convince the people in charge that [marketing is more than just window dressing](#).

Data and analytics are your most powerful tools for doing so.

Your goal should be to demonstrate the value of your marketing initiatives by showing both what you're doing and why. Your data collection and analysis details precisely who your customers are, how they think, and what they value most. You've employed that knowledge and created timely, relevant, useful information that has addressed their pain points and turned them into loyal customers. All that remains is to show the c-suite how well it's working.

Be ready for challenging questions. The c-suite may ask why one channel or another is worth pursuing, even if they had no involvement in the initial strategy meetings. If the CEO asks you why you're spending \$50,000 a year on Facebook ads when no one he knows uses Facebook anymore, you need to have the data that shows that your customers are very active on Facebook and have generated \$200,000 in revenue since that ad campaign started.

Finally, remember that presentation matters. Pure numbers are dull and

obtuse, so take the time to add graphs and other visualizations to more intuitively represent the data you've been collecting.

Add in narrative imagery and customer perspectives. Tell the story of a hypothetical customer who tried to make a purchase on your old website, only to be turned away by a flawed navigation system. With the updates that your team has implemented, the menu is much easier to navigate, and John Doe can find the exact products he needs. Don't forget to tie in hard numbers — finish your story by adding that cart abandonment is down 50 percent.

If you have them available, incorporate customer testimonials and specific case studies. Mention a large client struggling with inefficiencies in their internal processes until they read your blog and purchased your product. Add a quote from that customer explaining how useful the product is. If you can show that your marketing has tangible results with real people, your reporting will be far more compelling.

THE BOTTOM LINE

Data is only as useful as your ability to glean actionable information from it. Every company is gathering troves of data on their customers' behavior, browsing, and purchasing habits. What matters most is your ability to turn that data into action by informing your strategy and execution. Customer data can be extremely valuable, as long as you use it intelligently.



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We are **innovative thinkers**
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