



# MARKETING KPI

# DASHBOARD CHECKLIST

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If you want to build a useful marketing dashboard, let technology do the heavy lifting. Instead of sifting through piles of data every time you need a report, have your marketing platforms do the work for you.

When you construct your dashboard to generate reports people can act on, your reports get noticed. Data-driven arguments can help authorize budgets, approve projects, and even increase salaries!

Follow along with this guide and learn the five keys to building an effective KPI dashboard for your marketing reports!

## Why use a dashboard to build marketing reports?

What's the difference between a dashboard and a comprehensive marketing report? The depth in which you display information to your audience. A dashboard acts as a quick-hitting benchmark of performance. With dashboards, your audience typically only pays attention to a few key highlights. A full-on report is a much more comprehensive and formal way to convey information.

Building a KPI dashboard may not replace the need to create a well laid out Powerpoint presentation for your company or clients. But it is a great way to find quick answers to your most pressing questions.

Identify the audience for your report, provide them with the information that matters most to them, and draw conclusions that allow them to take action.

Here's how to build your marketing KPI dashboard and reports.

## SECTION 1: UNDERSTAND WHO YOUR REPORTING AUDIENCE IS AND WHAT INFORMATION ARE THEY SEEKING.

### STEP 1

#### IDENTIFY THE TEAM MEMBERS WHO WILL RECEIVE REPORTS OR HAVE ACCESS TO YOUR KPI DASHBOARD

If you want your marketing reports to get noticed, then your reports need to speak your audience's language and provide your audience with data that will allow them to make decisions.

- Write down the names and roles of the team members receiving your report, so that you can focus your reporting on their needs.

My audience for this report includes:

NAME	ROLE

### STEP 2

#### KNOW YOUR AUDIENCE'S OR ORGANIZATION'S PRIMARY GOAL

What's the number one performance indicator your report needs to explain? Is it profit, customer acquisition, or sales conversion rate? Identify the metric that matters most to your audience before you start building your dashboard. Your audience's primary goal needs to be the centerpiece of your reporting.

- Write down your audience's primary goal.

My audience's primary goal:

**STEP 3****DEFINE YOUR REPORTING OBJECTIVES**

Define why you are delivering your report and what you need your dashboard to accomplish before you start putting together any material. Outlining your reporting objectives will help keep your report focused on information that will allow your audience to take action.

Here are some examples of reporting objectives:

- I need to make my managers/clients aware of how our PPC marketing is performing so that they can authorize the budget we need to grow our campaigns
- My report needs to show my team how our content marketing is performing so that can we adjust/improve our strategy and hit our targets.
- Our purchasing department needs to see how our product categories are performing so that they can make informed buying decisions.

Write out your reporting objective before you start creating your dashboard.

My reporting objective:

**STEP 4****IDENTIFY THE KPIS THAT NEED TO BE IN YOUR DASHBOARD**

Based on your audience's primary goal and your objectives, which KPIs need to go in your report?

- Identify the KPIs that need to be in your report.

KPI #1	
KPI #2	
KPI #3	

**PRO TIP**

Make sure the KPIs you choose for your reports are relevant to your audience's primary goal, and that they help support your reporting objectives.

## SECTION 2: LOCATE AND ORGANIZE THE KPIS FOR YOUR REPORT

Determine where each metric you need is located, so that you know which marketing systems you need to access to build your dashboard.

- Identify the data source for each KPI in your dashboard

My organization's KPIs can be found in the following systems:

KPI	DATA SOURCE

## SECTION 3: CHOOSE WHICH PLATFORM WILL YOU USE TO BUILD YOUR KPI DASHBOARD

Recommendation: If you don't have a reporting tool in place, we highly recommend using Google Data Studio.

To start building your KPI dashboard in Google Data Studio, follow these steps:

## **STEP 1** SETUP A FREE GOOGLE DATA STUDIO ACCOUNT

You can sign directly into Google Data Studio when you're logged into your Google Account.

## **STEP 2** CREATE A NEW REPORT

After you've signed into Data Studio, you can select a reporting template, or create a new (blank) report.

## **STEP 3** CONNECT GOOGLE DATA STUDIO TO YOUR GOOGLE ANALYTICS ACCOUNT (OR OTHER MARKETING PLATFORMS)

Once you have a new report in place, you need to connect your report to a data source. You can select a data source for your dashboard by accessing your reports settings under the "File" menu.

From the settings menu on the right-hand side of your screen, you can connect to an existing data source, or create a new data source for your report.

## **STEP 4** ADD VISUALIZATIONS TO YOUR DASHBOARD

You can select these visualizations for your report by clicking on them in the header menu, and then drawing them in your report.

## **STEP 5** ADJUST YOUR METRICS AND DIMENSIONS TO DISPLAY YOUR KPIS

You can change the metrics and dimension in any of your visualizations by clicking on that visualization and using the data menu on the right-hand side of your screen.

In the data menu, you can also adjust the data source for your visualizations.

## **STEP 6** ORGANIZE THE KPIS THAT WILL GO INTO YOUR DASHBOARD

A good reporting dashboard is like a picture book. It uses charts and graphics to form a narrative about how your business is performing. Use GDS to organize your KPIs in a manner that will help you tell the story you need convey to your audience.

Build & organize your KPI dashboard in Google Data Studio

## SECTION 4: ANALYSIS: WHAT DOES THE DATA TELL YOU AND HOW WILL THAT INFLUENCE YOUR ORGANIZATION?

Audit and analyze your finished product before sharing it with others.

Review the information in your reporting dashboard and ask yourself:

- Does this report provide valuable information to my audience?
- Is the information in my dashboard cohesive and easy to understand?
- Does my report show my audience what their efforts, or the efforts of others in the organization, are accomplishing?
- What's the most logical conclusion I can draw from the data in my report?
- Can my audience use the information in this report, and my analysis, to take action?
- What action do I hope to inspire others to take based on the information in my reporting dashboard?

## SECTION 5: FUTURE REPORT DELIVERY AND AUTOMATION

Here some automation solutions that can help you reduce your reporting workload:

- Data Collection

Having a dashboard allows you to automate the data collection process. Once you get the hang of using Google Data Studio, you'll find that you can use the third-party data connectors and API calls to take your automation even further.

- Data cleaning/data formatting

You can use filters and segments in your Google Analytics views to help refine and clean the data you import into your dashboard. You can also use the Google Analytics API to manipulate your data before it enters your dashboard.

## Chart generation

After you get the right visualizations in place and save your Google Data Studio dashboard, your charts and graphs will automatically populate with your data. All you have to do is adjust your date settings, and your report will be ready to go.

## Date Comparisons

In your Google Data Studio charts, you can also set automatic date comparisons.

## Sharing insights and report delivery

Google Data Studio doesn't have an internal automated dashboard delivery setting, like Google Analytics. But you can use your own email service to automate report notifications for your team, clients, or stakeholders. As long as you don't change the URL of your dashboard, your team members will be able to view and interact with your report via their Google account, or the link you send out in your emails.

## Analysis

The analysis is the most challenging part of reporting to automate. There are tools like Quill Engage that will generate basic automated analysis (like the report below) based on your Google Analytics data. But high-level, contextually analysis is still a human job, and likely to remain that way for the foreseeable future.



Want to turn your Google Analytics data into marketing reports you can use to increase your budget or grow your business?

Join us in Analytics Course!

The first step to creating great reports is collecting the right data. In Analytics Course, we'll teach you everything you need to know about configuring your Google Analytics account to track, organize, and filter your data.

The lessons in this course provides you with an over-the-shoulder, step-by-step view of how to work inside Google Analytics. Not only that - the majority of students who complete this course receive their Google Analytics certification directly from Google.

Click below to learn more about how to get started with Analytics Course today!

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