

Creating Compelling Dashboards for Marketing Professionals



Chaitanya Sagar

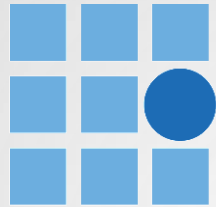
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Perceptive**Analytics**

Data Analytics | Web Analytics | Spreadsheet Solutions

New York | Miami | Hyderabad

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Web Analytics

Spreadsheet Solutions

Marketing

Marketing Mix Modeling
Segmentation

Price Promotion Analysis
Market Profiling

Catalogue Optimization
Churn Analysis

Risk Management

Credit Risk Management
Collateral Management

Liquidity Risk Management
Fraud Detection

Capital Allocation Analysis

Supply Chain

Inventory Optimization
Demand Analytics

Sourcing Analytics
Freight Lane Analytics

Distribution Network Optimization

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Analytics

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Traffic Generation Strategy
AdWords Analytics
Search Engine Optimization

Conversion Optimization
Revenue Analytics
Customer Behavior Analytics

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Spreadsheet
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Dashboards
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Predictive Modeling

Spreadsheet Applications
Performance Tracking
Contract Negotiation
Litigation Modeling

#Dashboard

facebook®



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Want us to Review Your Dashboard?

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Questions?

Use ask a question feature in GoToWebinar

Rate your knowledge of Dashboards

- Beginner
- Intermediate
- Expert

Which industry do you work in?

- Banking, Financial services & Insurance
- E-Commerce
- Healthcare
- Media & Entertainment
- Others

DASHBOARDS

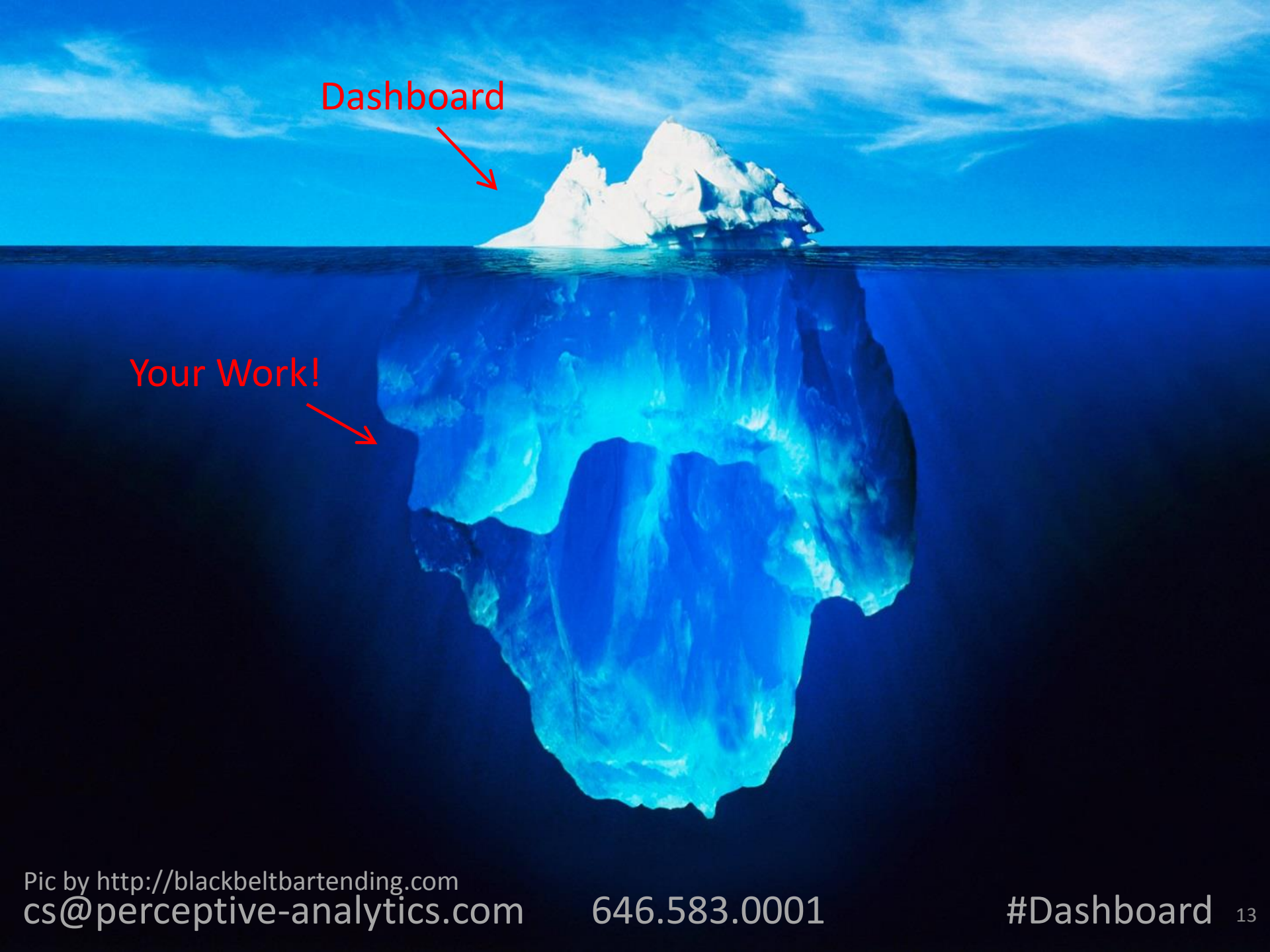


What audience see



Your Work!





Dashboard



Your Work!



It's a Communication Tool



Priorities

Performance

Insights

Action Items

A Dashboard Increases Your Visibility

The invisible you



A Dashboard Increases Your Visibility

The invisible you



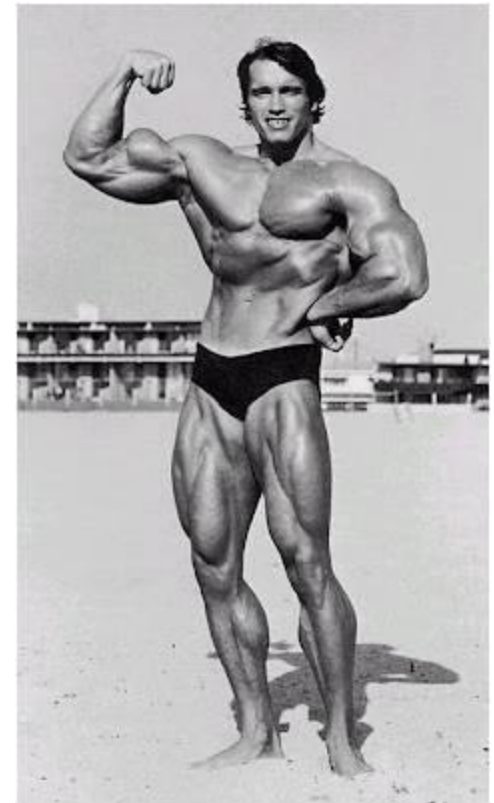
Good Dashboard



Craigyc



The real you



Good Dashboard can Speed Up Your Career



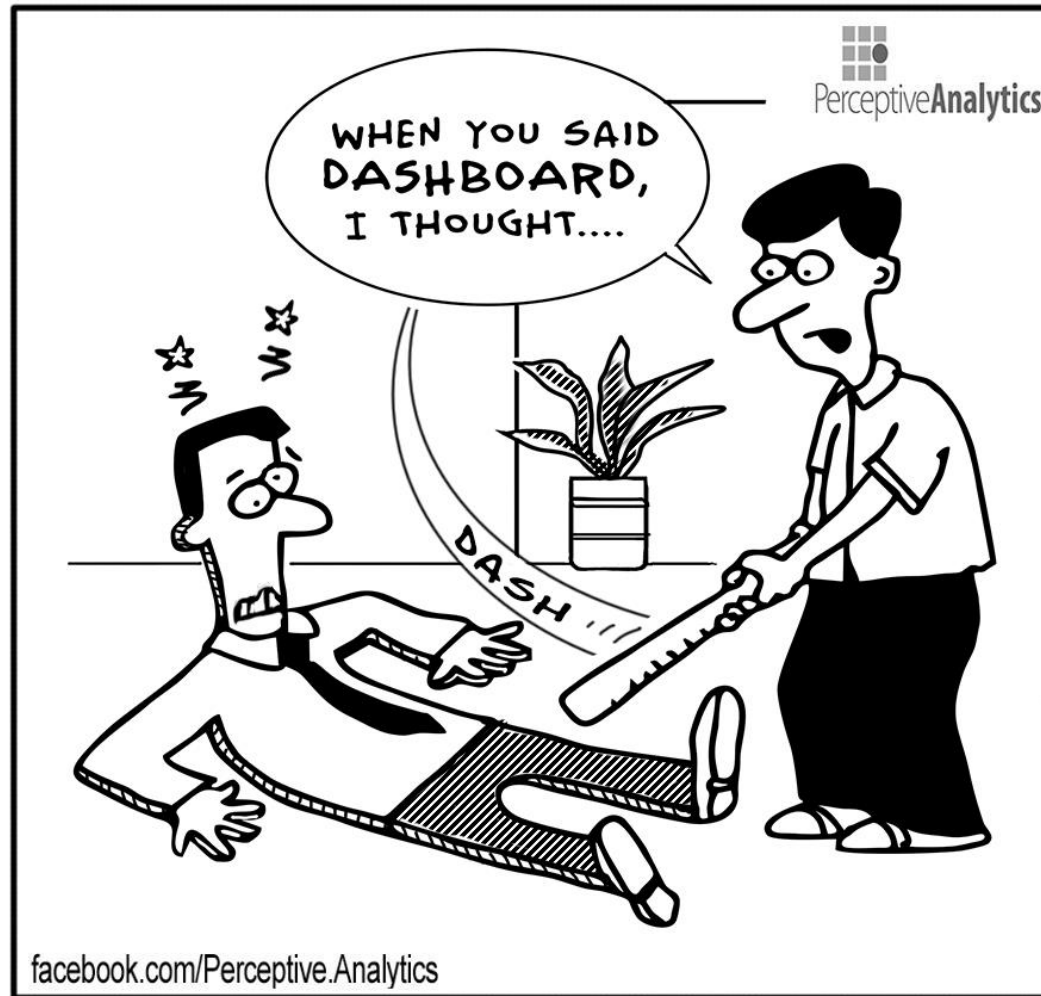
Pic by Official U.S. Navy Imagery

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#Dashboard

What is a Dashboard?



Background Pic Bev Goodwin

At-a-glance



Pic mhawkin2

Key Performance Indicators



Pic by plaits



Graphical

Pic Yossari

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#Dashboard



How to Make a Dashboard

Pic by Toolstop

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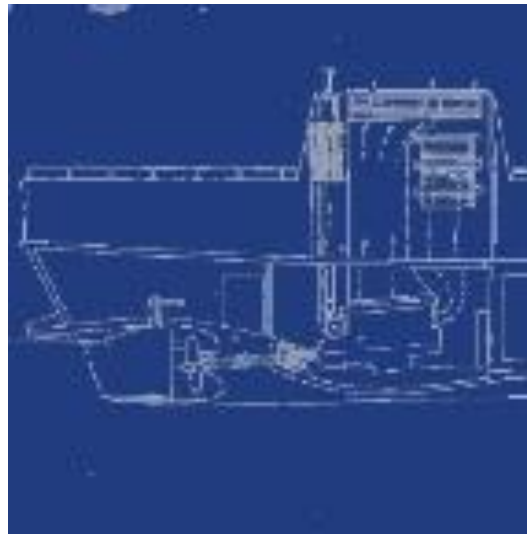
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#Dashboard 22

Purpose



Structure



Design



Purpose

Audience



Value Add



Scope



Target Audience

What is the role of the person?

Will the person have an overview or deep dive?

What would be the context of usage?

Are the audience heterogeneous?

What are their goals?

What questions will they ask?

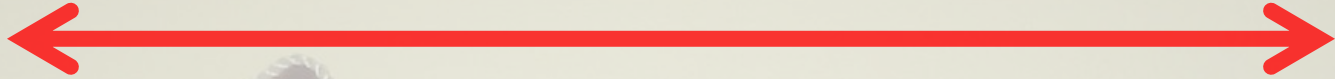
What Value Add?

- Help management stay on top
- Help management make a decision
- Set goals for individuals or groups
- Highlight exceptions
- Track progress
- Inform important information to teams



Pic by MDGovpics

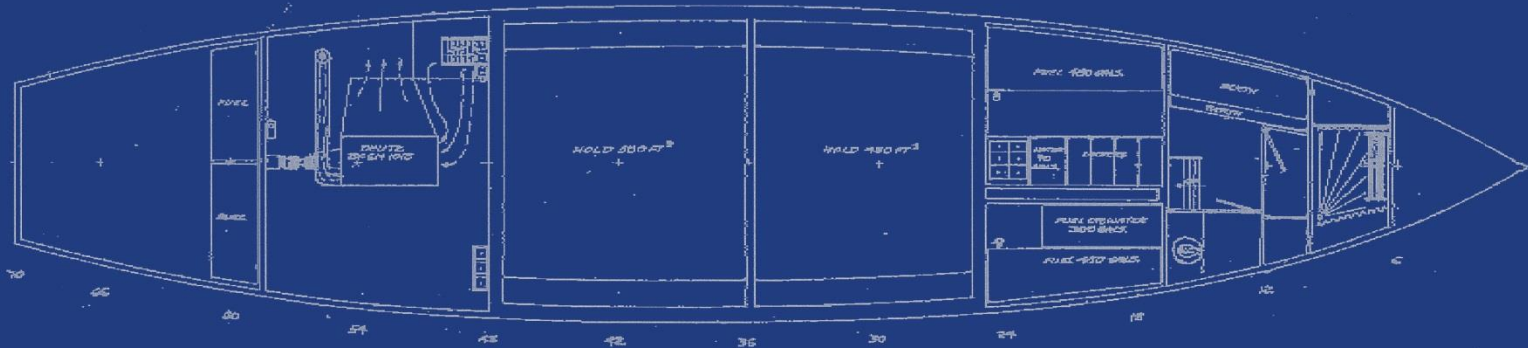
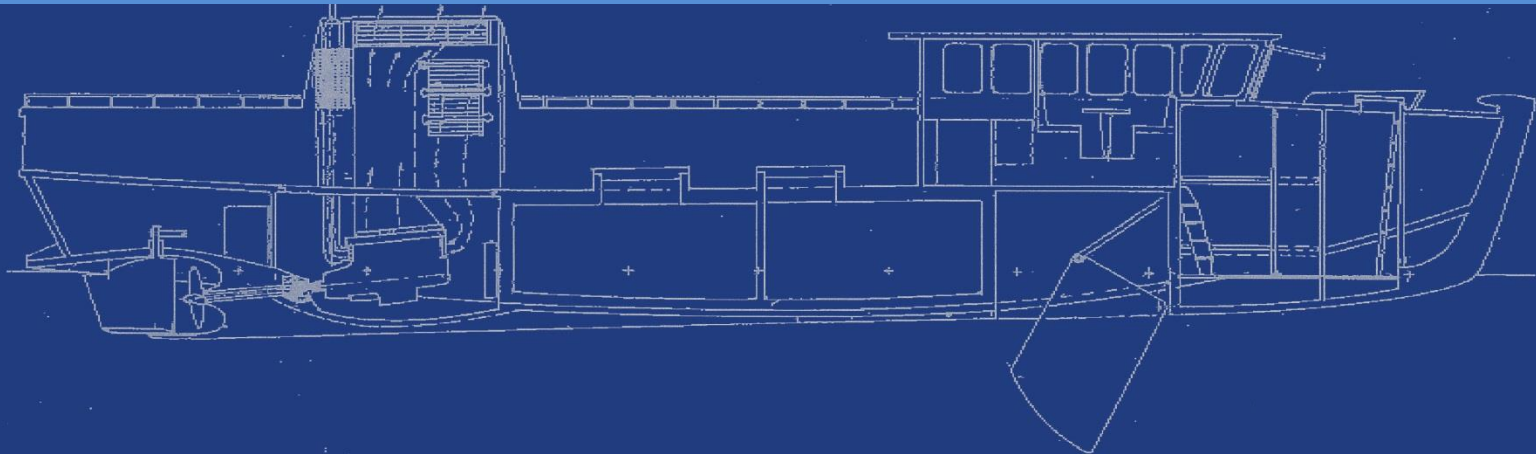
Scope



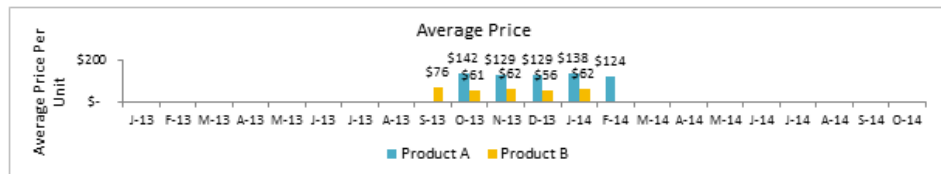
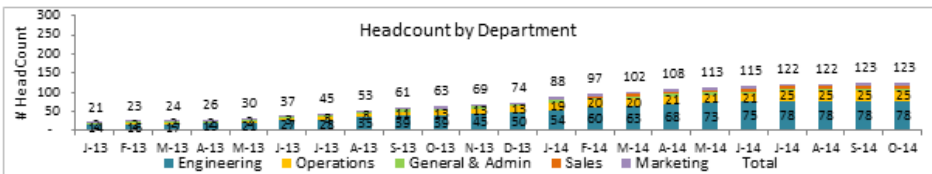
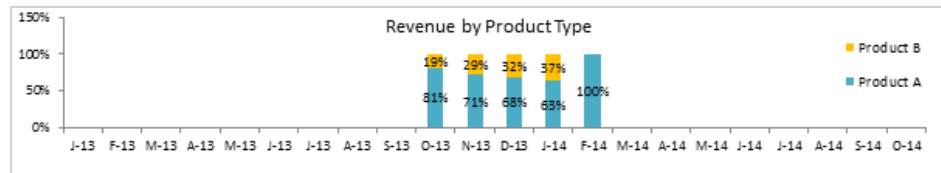
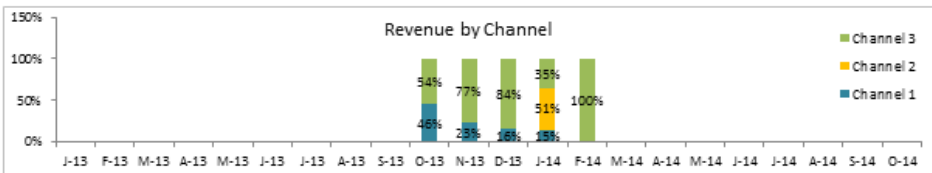
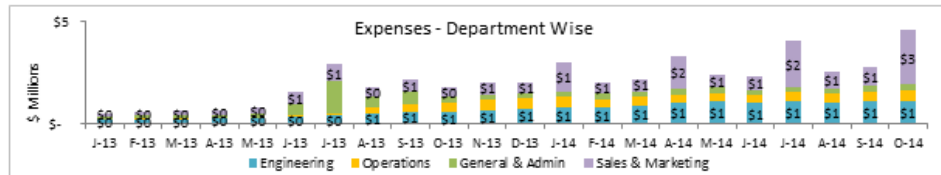
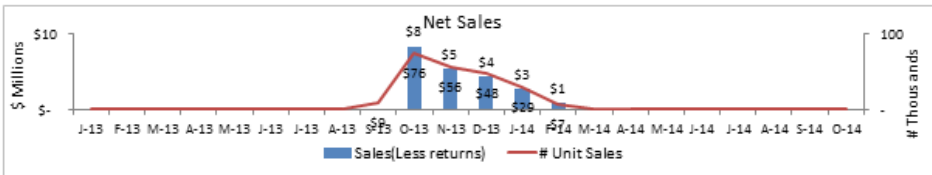
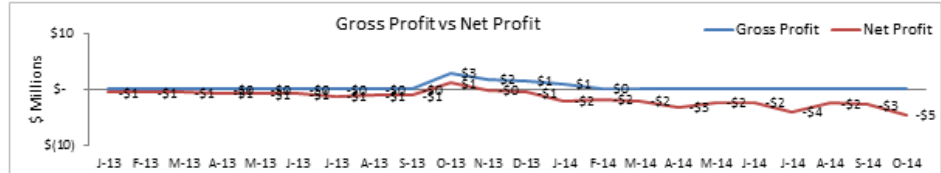
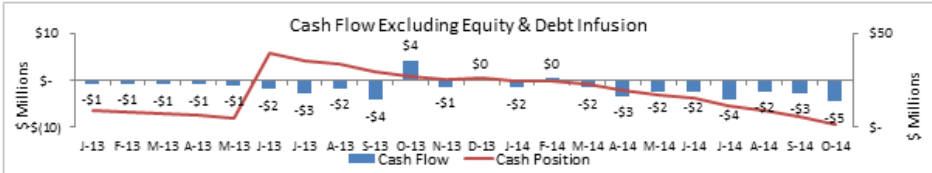
Pic by futureatlas.com

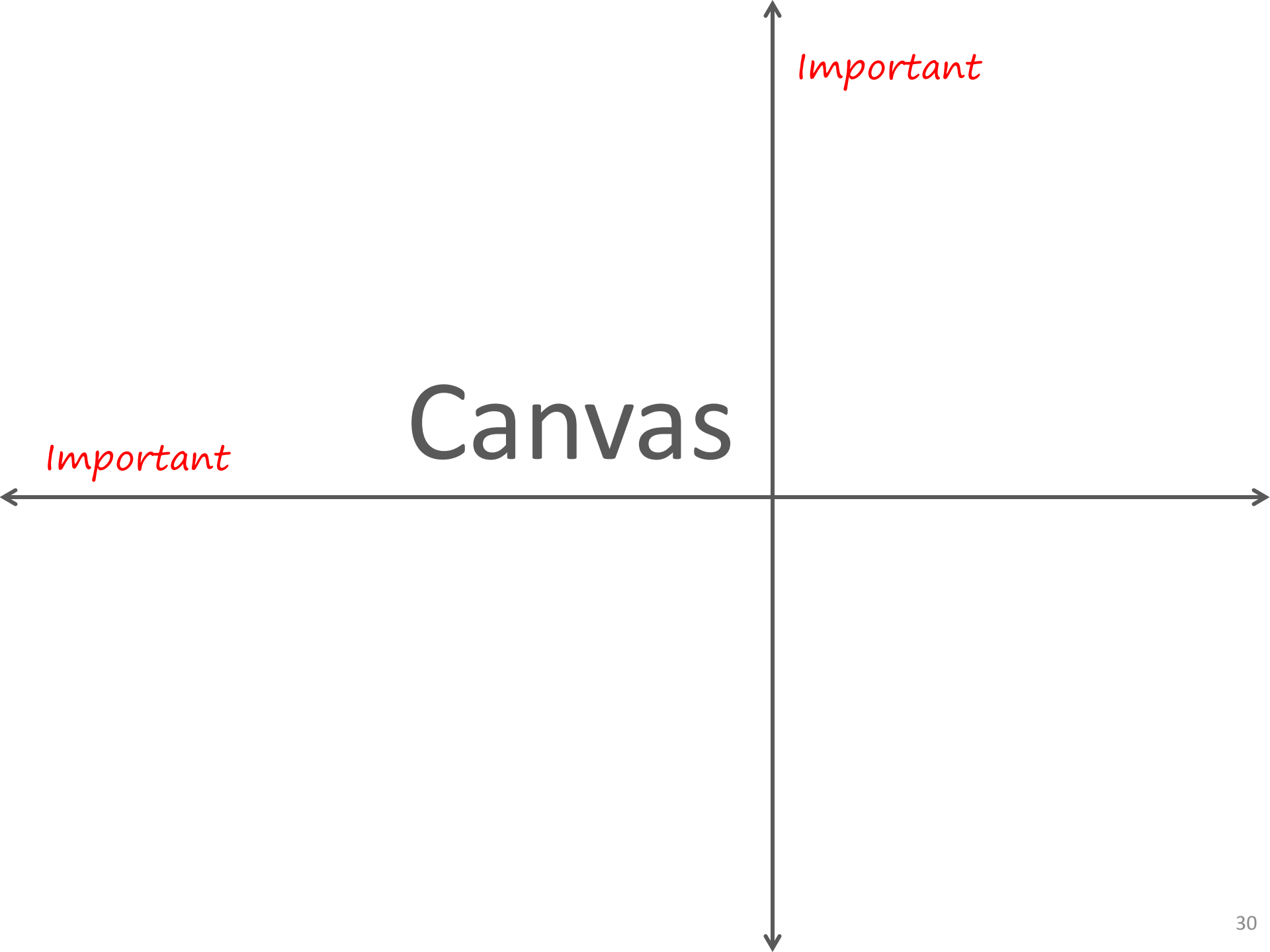


Structure



DASHBOARD





Canvas

Important

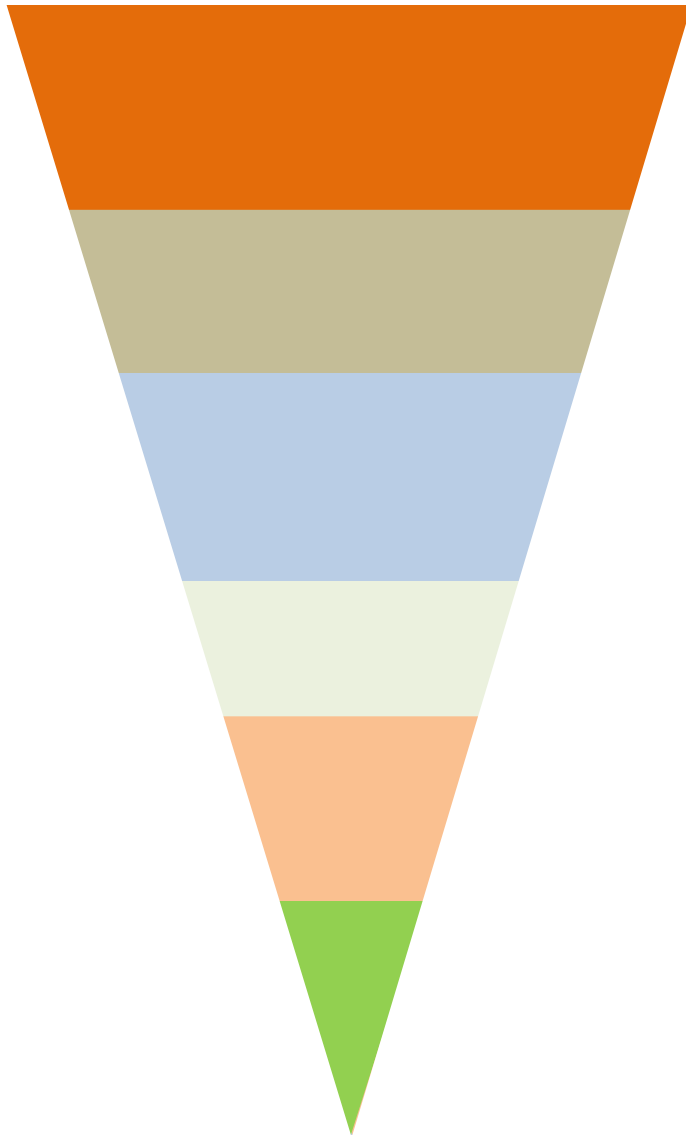
Important

1

2

3

4



Impressions

Clicks

Landing Page Visit

Form Fill

Qualified

Converted

Step 1



Step 2



Step 3



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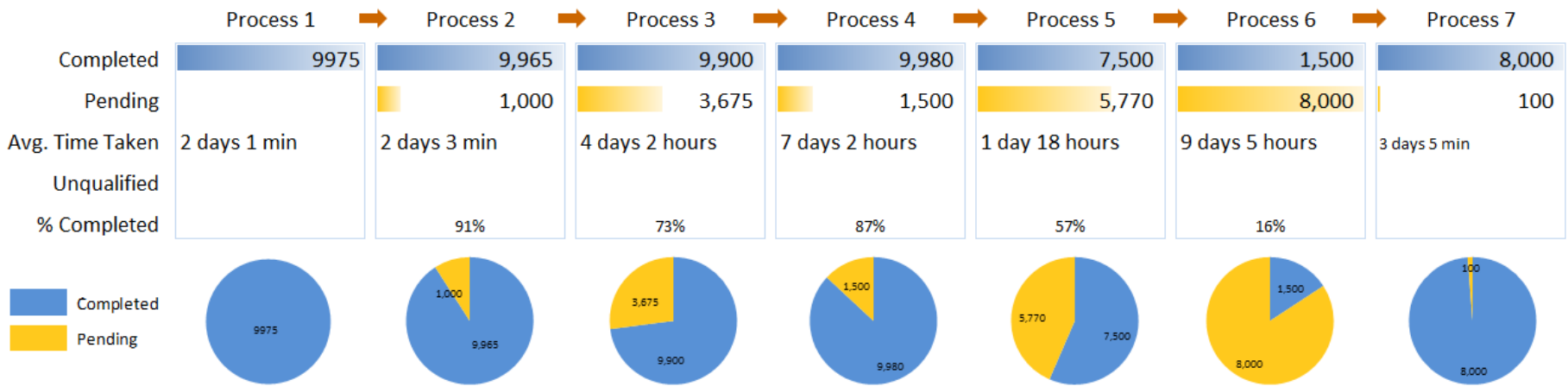
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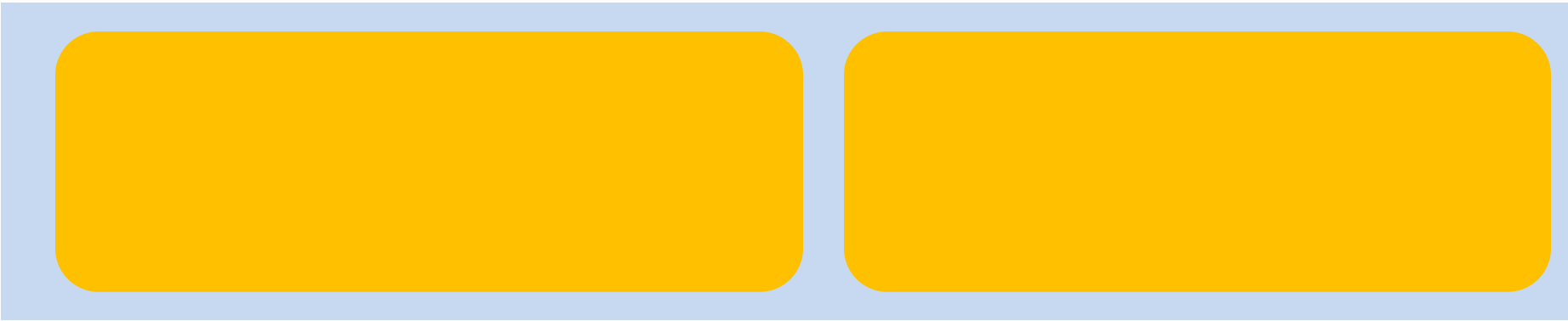
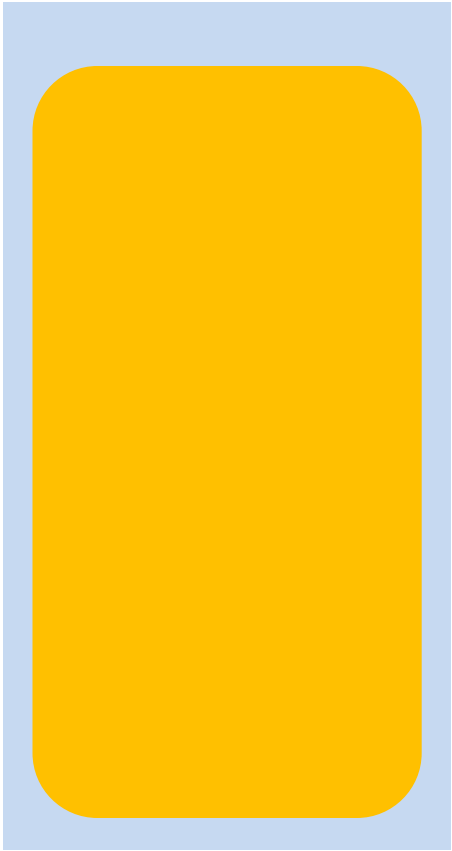
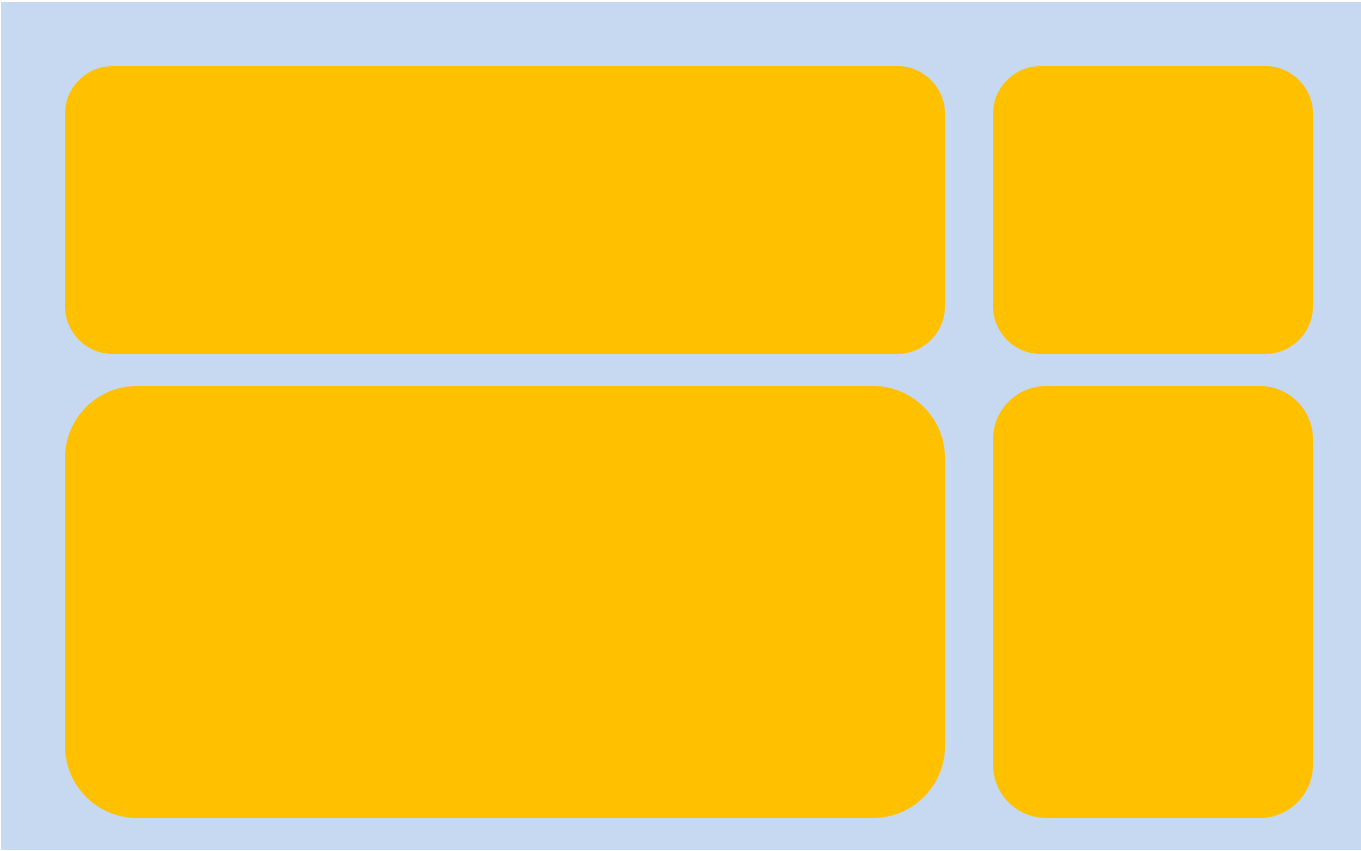
#Dashboard

Dashboard

1

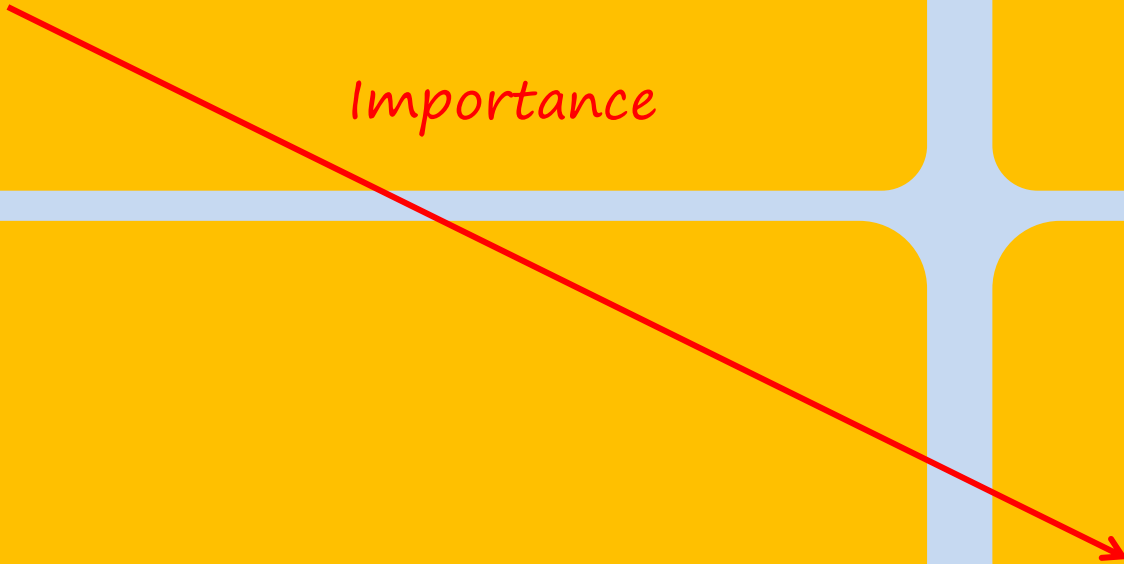
2





Important

Importance





Importance

Inputs

Outputs

Design

One page or more?

The 5 step process

How to choose elements

Colors

Perceptive's Step Process



1. Create a laundry list of KPIs
2. Prioritize. Choose the top 20% that has 80+% impact
3. Allocate the 20% to most visible areas
4. Choose elements wisely
5. Make the dashboard look great

1

2

3

4

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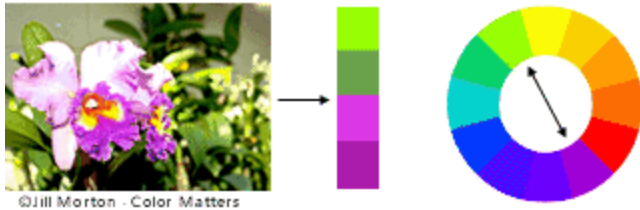
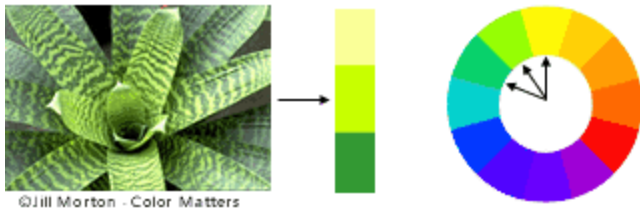
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#Dashboard 40

Colors



Color Harmony



Limit colors to 3

Limit font faces to 3

Decrease visual noise

Examples and Critique of Dashboards

Joe's Diner Feedback Analytics

What, will the line stretch out to th' crack of doom?



Entries by Region

September 2010



Top Countries

United States	72.61%	517
United Kingdom	5.62%	40
Australia	4.07%	29
Canada	3.79%	27
Netherlands	1.26%	9

Top Cities

New York	1.83%	13
London	1.40%	10
San Francisco	1.40%	10
Atlanta	1.40%	10
Brooklyn	1.12%	8

Entries by Software

September 2010

Internet Browser

Firefox	42.13%	300
Chrome	19.24%	137
Safari	15.73%	112
Opera	0.14%	1
Internet Explorer	20.79%	148
Other	1.83%	13

Desktop Operating System

Linux	0.84%	6
Mac OS X	36.80%	262
Windows	60.39%	430
Other	0.00%	0

Mobile Operating System

iPhone OSX	0.70%	5
Unknown Platform	1.12%	8



+ Add a Klip

Layout

Key Metrics



\$775.5K

... total revenue MTD, compared to \$1,095.0K last month.

\$14.17

... avg revenue per lead, compared to \$15.00 last month.

Funnel



	Metric	On Target	Past 30 Days
	Visits	64%	775,539
	Site Eve...	51%	100,200
	Leads	70%	54,750
	Opportu...	29%	5,010
	Wins	35%	2,491

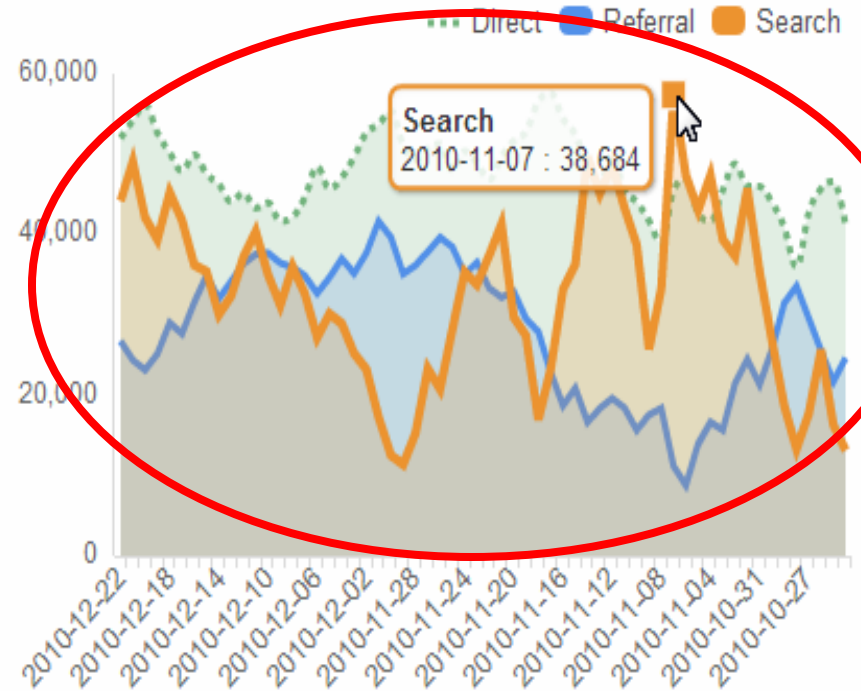
Leads this Month

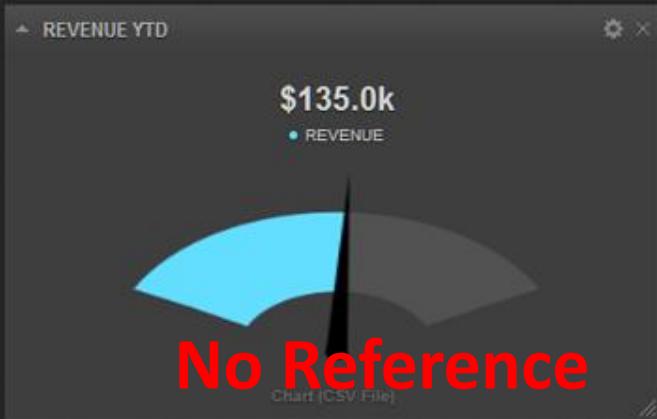


Leads last month: 54750

Leads today: 1,825

Traffic Sources (past 60 days)





No Reference



No Index

LATEST TWEETS

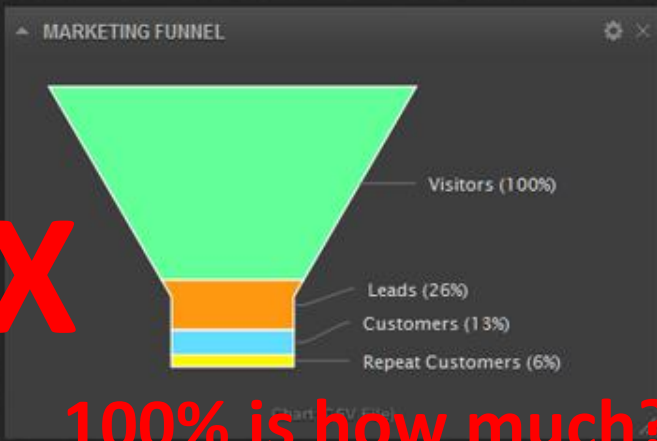
MODsocket
How to Stack your competitors on #SocialMedia: <http://t.co/YkwqnRji>
Wednesday, May 29, 2013 8:47:10 PM

cwills
Mary Meeker's Newest Internet Trends Report a Must-Read for Marketers <http://t.co/JKzEcdWd1N>
Wednesday, May 29, 2013 8:46:42 PM

webwz_mrkting
New Facebook Verification Badges Highlight Dire Need for Disruption <http://t.co/HGIboRjKKJ>
Wednesday, May 29, 2013 8:45:34 PM

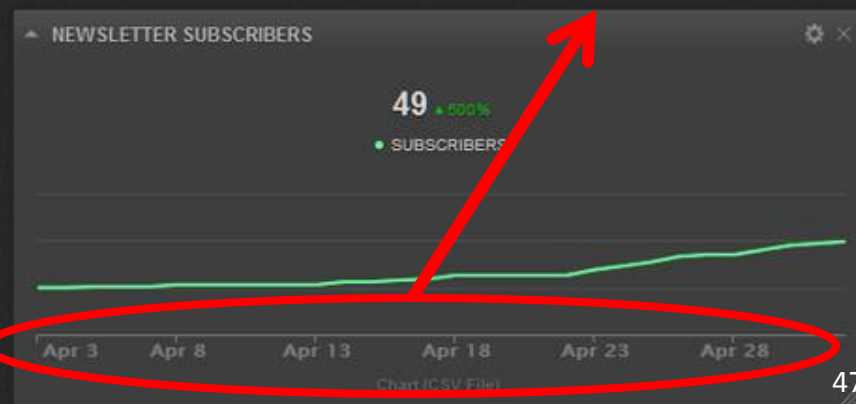
AsiyuB
Insightful piece. The 5 Social Media Metrics Your CEO Actually Cares About <http://t.co/aUHKu4nAbW> - #marketing #smrt
Wednesday, May 29, 2013 8:44:50 PM

Different Periods



X

100% is how much?



Executive Overview

KPI Trends

Last 31 Days Ending 4/2/2010

	Yesterday	High	Low
Sales	163,548.3	179,999.2	117,562.4
Unique Visitors	65,663.0	85,828.0	65,663.0
Average Order Value	109.9	111.3	97.3
Orders	1,489.0	1,595.0	1,181.0
Page Views / Session	17.9	18.7	17.0

Real Time Sales

April 3, 2010 thru 6:05AM CDT

Sales Today: **\$15,102.71**

Sales Heatmap

4 Week Avg Endin...28/2010 - 4/3/2010

	Su	Mo	Tu	We	Th	Fr	Sa	Avg.
AM	Low	Low	Low	Low	Low	Low	Low	Low
PM	High	High	High	High	High	High	High	High
Avg.	Low	Low	Low	Low	Low	Low	Low	Low

Conversion Benchmark

Last Month | Mar 2010

Orders / Session: **1.64%**

vs. US:Retail: **5.89%**

Percentile: 51

Visitor Purchase Funnel

Yesterday | 4/2/2010

All Unique Visitors

Step	Percentage	Count
Visit	100.00%	65,494
View Product	60.53%	39,643
Add to Cart	11.48%	7,517
Buy	2.22%	1,453
Buy 2+ Times	0.05%	31

Top Natural Search Engines

Yesterday | 4/2/2010

Sales 30

Search Engine	Sales
google.com	~\$1400
yahoo.com	~\$400
bing.com	~\$400
google.ca	~\$200

Bounce Rate Trend

Last 93 Days Ending 4/2/2010

Bounce Rate

Top Marketing vendors

Yesterday | 4/2/2010

Sessions

Top Changing Marketing Channels

Yesterday | 4/2/2010

Marketing Channel	Sessions	% Change
All Other MMC Vendor	8,022	4.53%
Google	10,570	-1.98%
Performia	6,180	-3.05%

Prospects for Lifecycle Stage

Home / Reports / Lifecycle

Date Range: Last 30 Days

Comparing to: Oct 15, 2012 - Nov 14, 2012

2,594

-2.4%

Net New Prospects

127

+1.7%

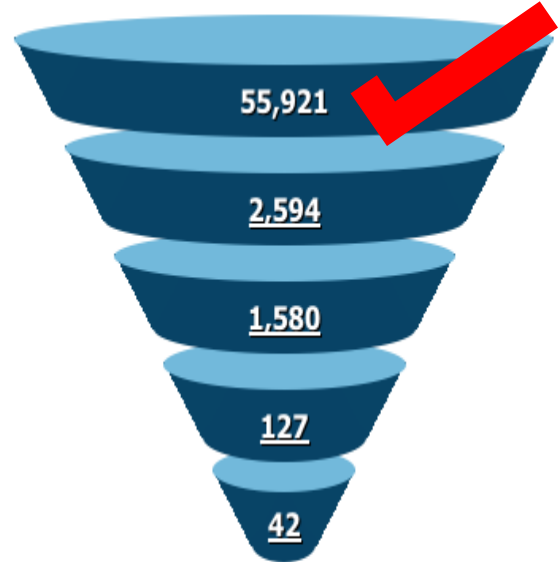
New Opportunities

42

-5.3%

Won Opportunities

Pipeline



\$58,263.15 Total Revenue

Velocity

Average Transition Time

Visitor to Prospect

9 days

Prospect to MQL

3.5 days

MQL to SQL

10.3 days

SQL to Won

21.3 days

Total:

44.1 days

▲ +10.9%

▼ -2.4%

▲ +10.9%

▲ +1.7%

▼ -5.3%

Resources

Juice Analytics

A Guide to Creating Dashboards People Love to Use

Color Harmony Crash Course

colormatters.com/color-and-design/basic-color-theory

Perceptive's Dashboard Tool Kit

<http://www.perceptive-analytics.com/creating-compelling-dashboards-marketing-webinar/#dbtk>

(link will be sent to you via chat)

Your Feedback on this Webinar

- Below Expectations
- Met Expectations
- Above Expectations

Thank you!



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