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How to **Automate** Marketing Metrics + Analytics

The page features several decorative blue curved lines. A large arc starts from the top left, curves down and right, and then continues as a horizontal line across the bottom. Another arc starts from the top center, curves down and right, and then curves up and right. A third arc starts from the top right, curves down and left, and then curves up and left. These lines create a modern, abstract background.

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Marketing metrics

Digital marketing metrics: **What you need to know now**

In this chapter, we'll discuss exactly how to use digital marketing metrics to measure marketing success for your digital campaigns using three distinct classes of metrics: Awareness, engagement, and performance.

Articulating marketing goals as specific, measurable key performance indicators (KPIs) and measuring campaign performance against those KPIs helps marketers get a clearer picture of how their digital campaigns are doing over time, and ultimately, whether they make sense in the grand scheme of things.

Digital marketing metrics are **essential** for at least three key reasons:

1. **Insights**

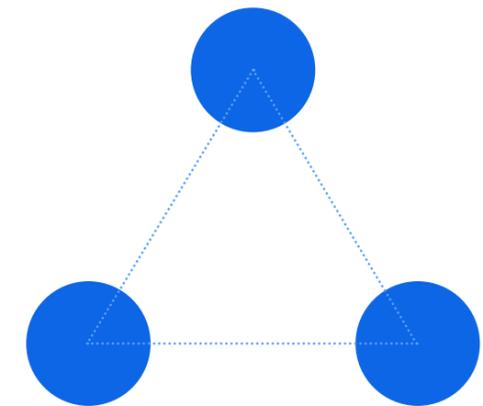
Most obviously, digital marketing metrics are a measure of success. By understanding how well or how poorly a campaign or channel is performing, marketing teams can make better business decisions and optimize their budgets. They can spend more on what's working ("Let's run more webinars featuring award-winning actors") and less on what isn't ("Let's stop sending 50,000-page eBooks to C-level executives who are too busy to read them").

2. **Strategy**

Digital marketing metrics also help marketers ensure, in a broader sense, that what they're doing fits in with their overall goals, such as a focus on driving more first-touch leads at the top of their funnel, driving more conversions, or some other target.

3. **Alignment**

The insights from digital marketing metrics can help marketing teams stay aligned with other departments, such as sales, growth, and support in the context of their company's larger goals for revenue, sales, and even customer retention and account expansion.



The 3 types of **digital marketing** metrics

There are many different types of digital marketing metrics, so to keep track, we'll group them into three categories:

1. **Awareness**

These marketing metrics measure what happens the first time you come in contact with a lead, typically via a visit to your website through a specific channel, such as a paid ad, a field event, or through organic search results.

2. **Engagement**

These metrics represent what happens after that first touch. After leads become aware of your company and product, engagement metrics measure how frequently and quickly top-funnel leads convert into qualified leads and eventually into sales opportunities.

3. **Performance**

These metrics measure the actual dollars and cents of marketing success. Performance metrics track return on investment (ROI) of marketing campaigns, comparing costs to results.



Digital marketing metrics track performance-based channels like Google AdWords.

Awareness metrics

Website traffic

Your company's website is typically the first point of contact between your business and any prospective customers. All things being equal, website traffic is a metric that marketers always want to increase across the channels they use, including unpaid organic sources such as from search engines augmented by search engine optimization (SEO) or from social channels along with paid sources such as paid search advertising and paid social ads. It's also worth noting that many digital marketers not only segment traffic by channel, but also by new vs. returning visitors.

New visitor sessions show a growing awareness of your brand to net-new audiences and ideally signal potential for growth of your company's revenue funnel. With a healthy influx of net-new visitors, it then falls to the marketing team to convert those new visitors to qualified leads, after which they'll hopefully convert to sales opportunities and closed-won deals.

Returning visitor sessions show how frequently previous visitors to your website return. It is crucial to virtually any business with either a business-to-consumer (B2C) or business-to-business (B2B) focus to track and understand user behavior on their website and how return visits figure into the customer buying journey.

Returning traffic is especially vital for B2B firms since more than 60%^[1] of B2B buyers develop selection criteria and a vendor list online before even contacting sales. Returning traffic is also an important metric to follow for retargeting campaigns—programmatic ad campaigns that marketers use to “follow” leads who have visited their website across other websites via cookies with relevant ads to keep their brands top-of-mind.

Keyword ranking

Because so many buyers perform research online before even considering a purchase, your company's placement on search engine results pages (SERP) is more important than ever, particularly for keywords that are specific to your business. Example: A company that sells a sales analytics platform will want its website to appear on SERP whenever anyone runs an internet search for the term “sales analytics platform” or any related keywords.

A high keyword ranking means your company's website appears at or near position #1 on the first page of SERP. Also, marketing teams want an optimal position distribution to ensure your website is ranking at or near the top for all the keywords that are most relevant to your business.

SERP impressions

In addition to ranking #1 on SERP, it's also helpful to drive high SERP impressions - the number of times searchers view the excerpt of your website that appears on SERP. Improving SERP impressions will make your site more distinctive and compelling on SERP even if you aren't in position #1, and can potentially drive more clicks to your website as well.



Website traffic is frequently a function of how well your site is set up for SEO.

Engagement metrics

Clickthrough Rate (CTR)

CTR is one of the most commonly-measured digital marketing metrics for engagement and with good reason. It measures how often people click on your offers, either from an outside location (organic SERP, ad, video) to your website or from a top-level page on your website to deeper-funnel offers or sales-focused pages.

With every click, your visitors advance themselves one step deeper into your funnel. All things being equal, CTR is something that marketers are always looking to increase.

Bounce rate

Bounce rate measures the percentage of instances that visitors leave after viewing a single page. In the most general sense, marketers want to see a relatively high number of page views per visit as visitors click through multiple pages on their company's website, accompanied by a low bounce rate. The first instinct of most marketers is to view a high bounce rate to mean that the page is problematic, and its content isn't compelling enough to draw in your prospects. High bounce rates also tend to be a cause for alarm since they can incur SEO penalties from search engines.

Marketers frequently combine bounce rate with the time-on-site metric, which measures how long an average viewer stays on your website before leaving. At a glance, most marketers consider it a poor sign when pages on your website have both a high bounce rate and a low time-on-site. High bounce rates can be the result of a disconnect between your ads and your landing pages—your online ads, for instance, may look and feel too different from their landing page offer, causing leads to click away. However, given the higher amount of online research that buyers perform before ever contacting sales, it's possible that high bounce rates aren't always a sign of trouble. Your prospects may be clicking away because they're in early research stages and looking for quick answers as they formulate a list of potential vendors.

Social engagement

These are the reactions (including "likes", shares, and comments) you receive on your company's posts to social media channels such as LinkedIn, Twitter, Facebook, Pinterest, Instagram, and elsewhere, including "views" and "listens" on alternate media channels such as video on YouTube and audio via podcast.

Different types of businesses tend to focus on different channels—direct-to-consumer brands, for instance, may find consumer-

focused social networks such as Facebook, Pinterest, and Instagram to be mission-critical channels to build a brand following. B2B firms may find themselves using channels like LinkedIn to promote offers to drive website visits that kick off sales conversations.



Metrics like bounce rate can help you track website engagement.

Performance metrics

Conversion rate (CR/CVR)

Conversion rate measures the frequency with which leads move from one funnel stage to the next - such as an early-stage lead converting to a sales-qualified opportunity. "Conversion rate" can encompass leads from web forms, phone calls, live chat, ads or organic channels, and engagement with marketing offers such as webinars and eBooks.

Regardless of how it is defined, CR itself is one of marketers' most significant day-to-day metrics and is something marketers are always looking to increase. A higher CR means more leads can become sales opportunities, and more opportunities can become closed-won deals. A higher CR also means a more-efficient marketing funnel that costs less for new user acquisition.

Cost per acquisition (CPA)

Cost per acquisition measures the total cost of acquiring a new customer, though marketers frequently break this metric down into more-granular metrics based on funnel stage, such as cost per lead.

In a perfect world, CPA would be as low as possible as your company magically signs on new, paying customers. In the real world, acquiring new customers is a costly, time-consuming

process that requires marketers to build awareness, capture the attention, and convert them to opportunities that become won deals.

Return on investment (ROI)

ROI is typically a metric used to measure performance both for aggregate marketing spend as well as for individual channels. (For instance, performance marketers frequently track their return on ad spend, or ROAS.) While marketers will use ROI to compare their spend against a variety of goals (such as leads generated, opportunities generated, or dollar amount of sales pipeline introduced), ROI is a figure that marketers are always trying to increase.

Lifetime Value (LTV)

LTV isn't always exclusively a marketing metric. Growth, sales, and finance teams also use this metric to project the total revenue value of an individual user (or a B2B account) for as long as that person or account remains a customer. Companies use LTV for longer-term forecasting, so it frequently touches budgets across many departments in a company, not just marketing.

Revenue Per Lead

This metric, is typically associated with ecommerce and other direct sales businesses, measures how much revenue each lead represents. It's effectively another way to view LTV, but from a top-of-funnel point of view that directly ties together new leads to revenue earned.

Average Order Size / Revenue Per Order

This direct-sales metric measures the average size of a customer order. Ideally, average order size should increase over time as customers discover more of your company's products and purchase more product each time they place an order.

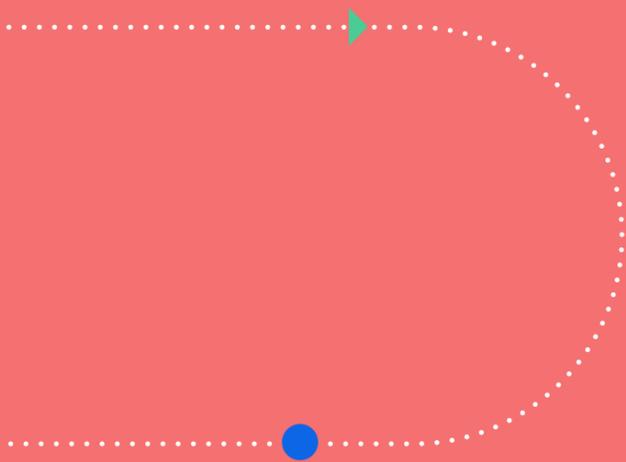


Your company may need to track performance metrics on paid channels like LinkedIn.

Analytics for marketing

What are web analytics?

How do web analytics help marketers win?



What are web analytics?

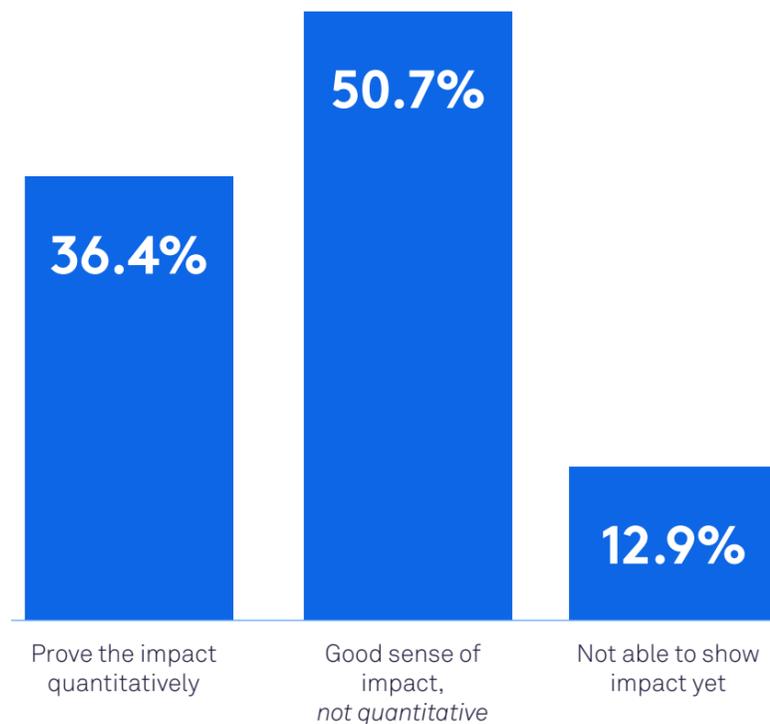
How do **analytics help marketers win?**

“Web analytics” for marketing is different from, but related to, [marketing metrics](#). Quick data analytics definition: analytics is different from metrics, which measure key performance indicators (KPIs), while analytics aggregate those metrics for a specific purpose. In other words, web analytics for marketing combines metrics (such as website traffic, cost per lead, and conversion rates) into a single view, frequently a visual one, such as a dashboard. (For more details on the basics of marketing metrics, see our previous [digital marketing metrics blog](#)).

This visual gathering of marketing data gives you the ability to gauge your campaign performance at a glance, compare campaigns against each other, and use these insights to plan your future strategy. (And of course, you should also be able to use these at-a-glance web analytics to quickly articulate your progress to the rest of your organization, including executives at a board meeting.)

As it happens, web analytics for digital marketing has never been more popular. Companies report using it 43.5%^[2] of the time to inform marketing decisions and will double their spend on analytics within the next two years. However, only 36% of companies report being able to prove the quantitative impact of their marketing budgets.

How companies demonstrate the impact of marketing spending over the long run



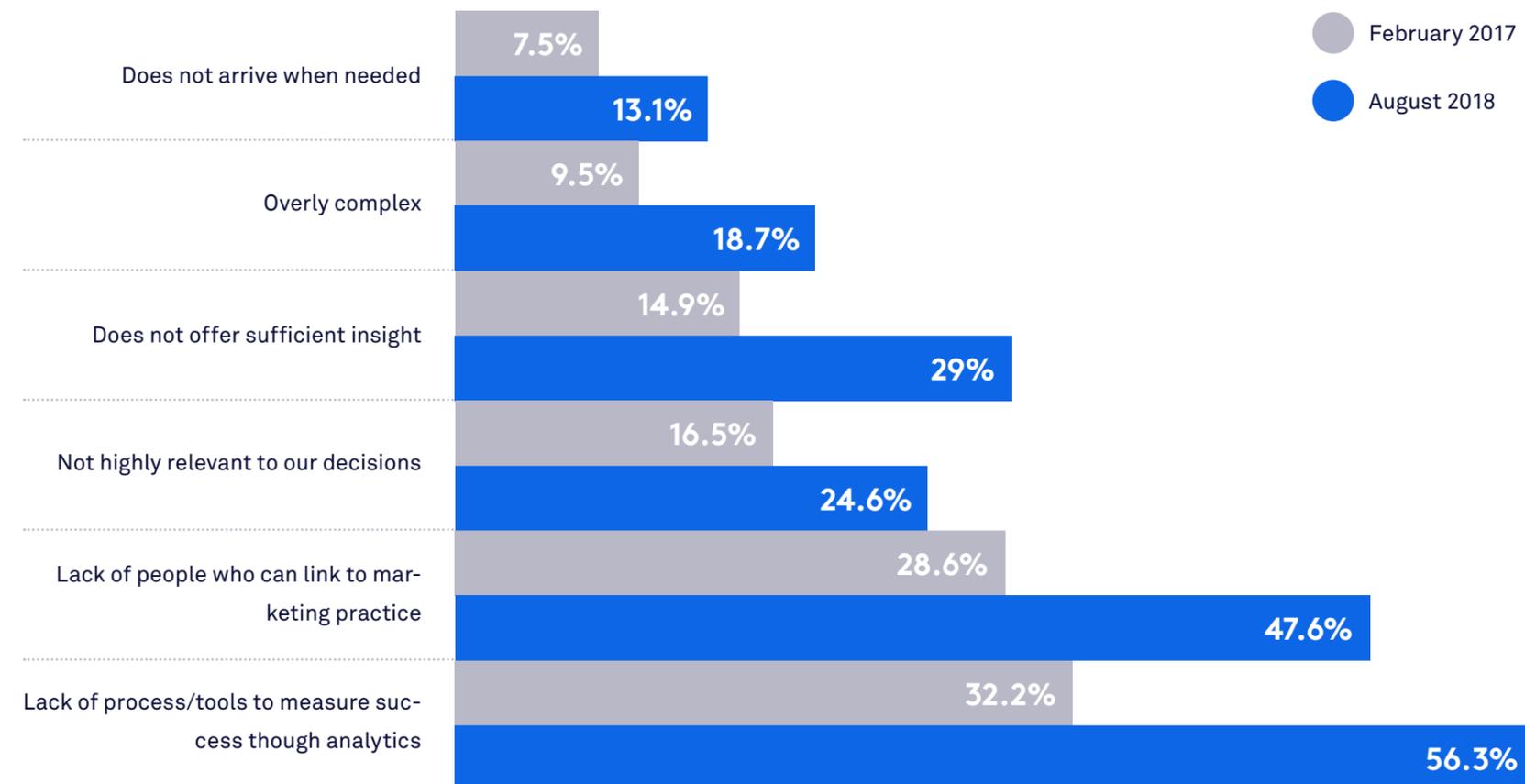
CMO Survey.

Why do companies struggle to use web analytics to inform their marketing decisions? Reports suggest that 56%^[3] of companies don't have the processes or analytics tools in place to measure success through web analytics, while 47% of companies don't have teams who can make the direct link between observed analytics and marketing practice.

Only 36% of companies can prove the quantitative impact of their marketing budgets.

Bridging the web analytics gap with automation

What factors prevent your company from using marketing analytics more often in decision making?



CMO Survey.

The primary factors in keeping companies from using web analytics is a lack of process and tools.

To deliver digital marketing analytics that provides insights marketing teams can use, companies are turning to one of the newest web analytics tools—automation. Automation eliminates the tedious busywork of compiling metrics from multiple sources. And when you combine automation with **API integrations**—which connect different apps and data sources at the software level to seamlessly flow data—automation can solve both the process gap and the tools gap to deliver web analytics for marketing that paints a clear picture of how your marketing campaigns are doing.

Four components of automating analytics

1. Data

Data is the fuel that powers web analytics for marketing. The first piece of the analytics puzzle is pulling data together from the sources you need (such as specific marketing channels). You might source data directly from specific marketing channels, from your customer relations management (CRM) tool, or a customer data platform (CDP) like Segment.

2. Data warehouse

At the simplest level, databases store data. A data warehouse is a particular type of database explicitly built to handle data from multiple sources and serve data in response to queries for analytical purposes. Popular data warehouses are Amazon Redshift and Snowflake.

3. Business intelligence (BI)

BI provides the analytics layer on top of the data warehouse and helps visualize the data into understandable, digestible dashboards. (Popular BI solutions include Periscope, Tableau, and Chartio.)

4. General Automation Platform (GAP)

A GAP can create API-level connections to a marketing data source (such as from sales reports in Salesforce, ad data from sources like AdRoll, web traffic from Google Analytics, or social media channels including LinkedIn, Facebook, or Twitter) and integrate the data directly into your data warehouse. A GAP can also automate the process of data calls to provide the web analytics reports you need for every channel, when you need them.

Using these components, you can create your own customized, automated web analytics system and instantly share with your team.

How to automate web analytics for marketing

Crafting your own automated analytics involves the following steps

- 1. Set web analytics definitions** - Your data analysis definition should include all the parameters against which you're measuring, such as marketing data to track (leads, qualified leads, conversions, and website traffic, etc.) and timeframe (daily, weekly, monthly, quarterly, or annually).
- 2. Create operational reports for each data source** - By creating reports within original data sources, such as within paid search or paid social campaigns, marketers have a reference point to validate their analytics.
- 3. Integrate data sources to your data warehouse with a GAP** - Using a GAP, you can directly integrate each of your data sources to your data warehouse at the API level.
- 4. Automate data flow with a GAP** - Once you've built out the integrations, a GAP can also automate processes, such as calling data for marketing metrics from each of your data sources and flowing it to your data warehouse. A GAP offers the flexibility to pull data at set intervals or in real time.
- 5. Visualize web analytics with BI** - Once you have marketing data set to flow into your data warehouse automatically, if you have a BI tool, you can layer it onto your data warehouse to help visualize the data. (Note: You may need some knowledge of SQL (Structured Query Language) to build tables in your data warehouse to flow into your BI solution.)

For steps 1 and 2, you'll obviously need to create your own definitions with regards to timeframes and specific data to track, then set up the appropriate reporting within whichever channels you track. We'll walk through steps 3-4 next:

With the right tools, you can put all your marketing performance data in one place.

Integrating data sources with a GAP

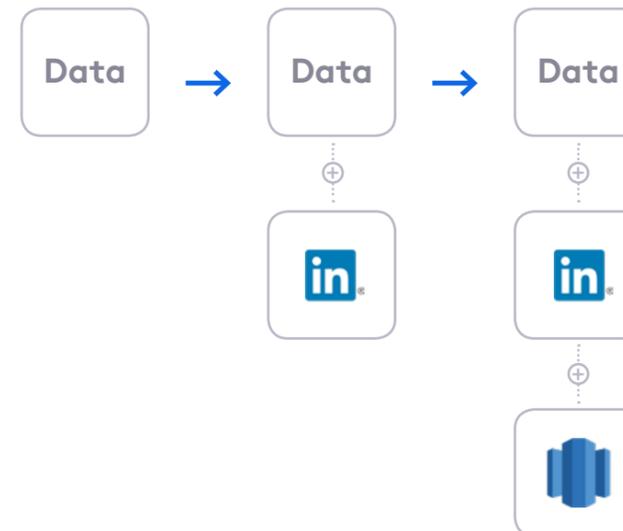
General Automation Platforms let business users in any role connect any cloud-based apps at the API level with a user-friendly, clicks-or-code interface that allows for full use of scripting, but doesn't require any. In fact, many business users, including marketers who automate their metrics and analytics, use no code at all and simply integrate their applications and channel data by dragging and dropping components together with a few clicks:

Fortunately, GAPs aren't just limited to simple, point-to-point connections. They can scale without limit to let business users not only integrate their various apps, but also automate processes among them with:

1. **The ability to add multiple connectors without limit** - Unlike simple point solutions, GAPs let users integrate dozens of apps within the same automated workflow to flow, collect, transform, and output data to and from any number of data sources simultaneously and in real time.
2. **Powerful logical operators** - GAPs include flexible logical operators such as If/Then Boolean conditionals, nesting and branches, and loops. These operators let users automate sophisticated and highly-detailed processes, like retrieving and transferring data row-by-row from a marketing report.

3. **Useful automation Helpers** - GAPs also include additional "Helper" functions for GAP users to further customize the data they need to process, whether that includes transforming data by methods such as performing calculations (like using Math Helpers to calculate percentages) or setting parameters for specific data quantities (like using Date Helpers to set timeframes for metrics calculations).

Next, let's cover how GAPs let you not only integrate the data from your various marketing channels and apps, but also automate the process of collecting and generating analytics.



GAPs let you connect various cloud apps and data sources with a few clicks.

Part 1

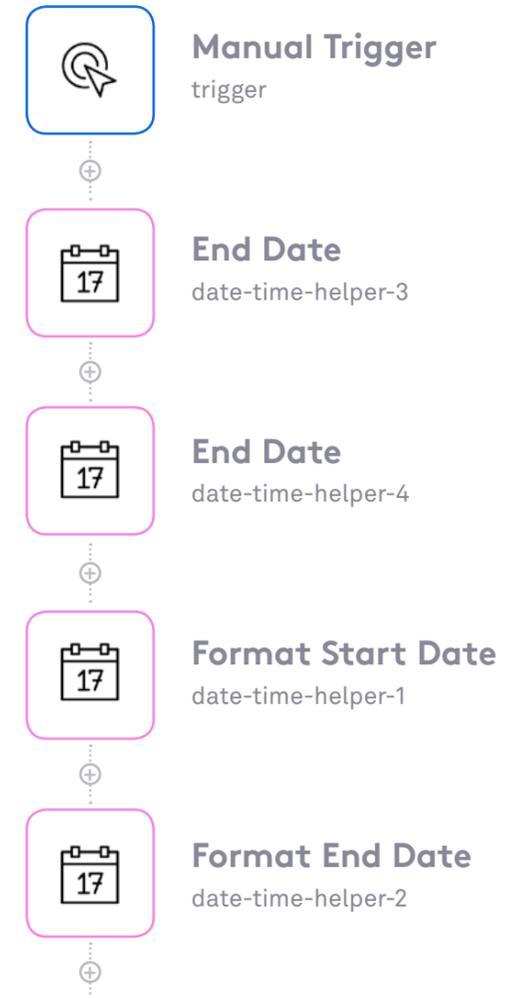
Automating the flow of data for analytics with a GAP

Now that we've figured out how to integrate different data sources and apps with a GAP, it's time to automate the process of flowing data from each channel into your data warehouse to prepare it for collection and analysis. We'll start with a sample automated workflow that integrates LinkedIn and flows data from that channel into Redshift.

Kick off automated workflow and calculate date timeframe

The first part of this automated workflow kicks off the process of collecting LinkedIn data from an on-demand trigger, then sets the date parameters for pulling data from that channel, allowing for access to historical data:

1. **Manual trigger** - This step manually kicks off the process on-demand. (GAPs offer a variety of triggers that let users automatically kick off workflows on a regularly-scheduled basis, or in response to a trigger event, such as a webhook connected to your website).
2. **Calendar Helper** - This Helper gives users the ability to set dates to be used for specific calculations within a specified timeframe. The Helpers in this workflow set start and end dates for the analytics reporting period and properly format timestamps for use in the workflow.

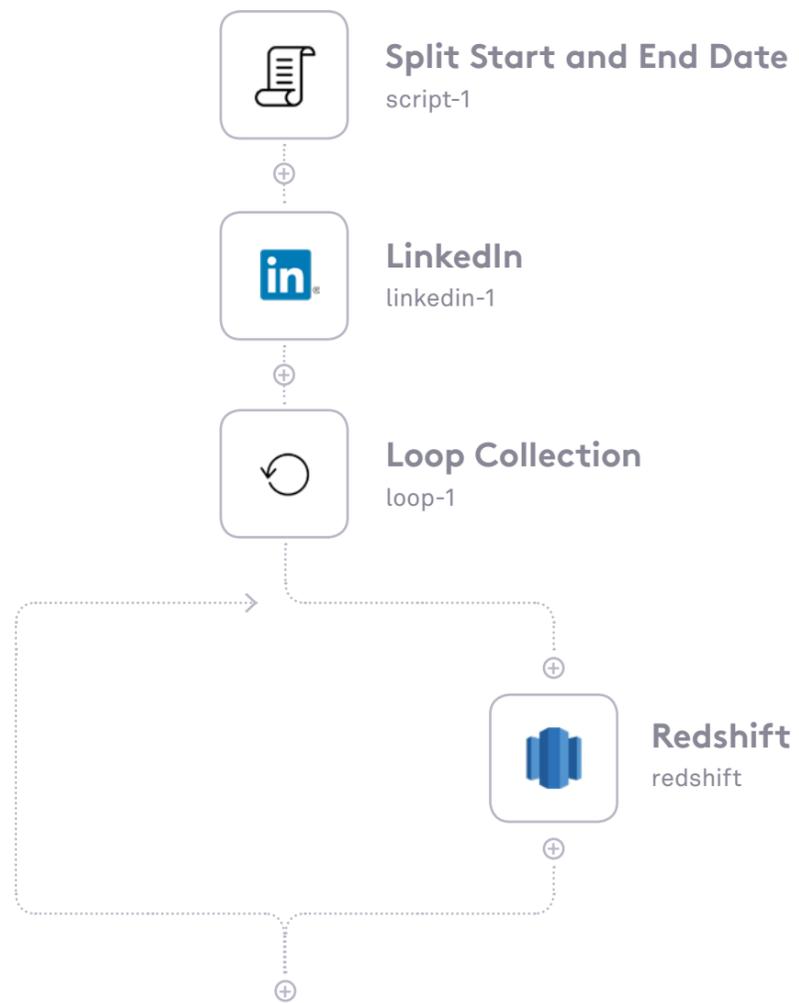


Part 2

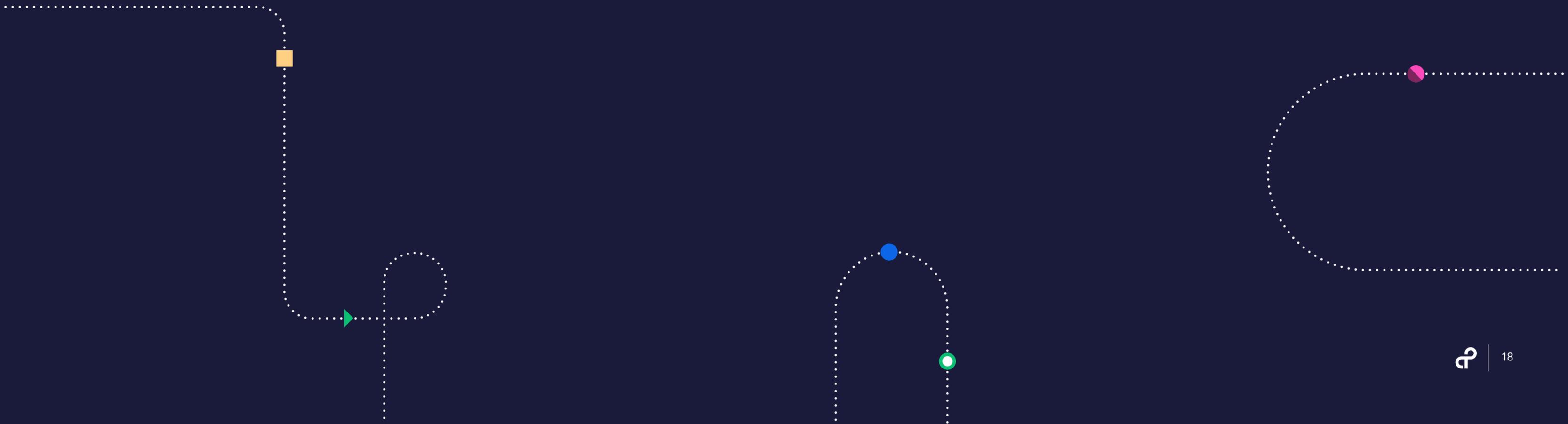
Segment data by timeframe, pull from LinkedIn, and flow to Redshift

The second part of this workflow actually pulls the data from LinkedIn and flows it to our data warehouse:

1. **Split Dates** - This workflow step parses previously-set Calendar Helper date parameters as a framework for LinkedIn data.
2. **LinkedIn** - This step pulls LinkedIn Ads data from the associated account to be collected and stored in data warehouse.
3. **Loop Collection** - This step iteratively loops through the LinkedIn data, row-by-row, to collect the data contained in each line.
4. **Redshift** - This final step collects all collated LinkedIn campaign data into Redshift.



How to automate marketing **metrics**



Part 1

Automating marketing analytics

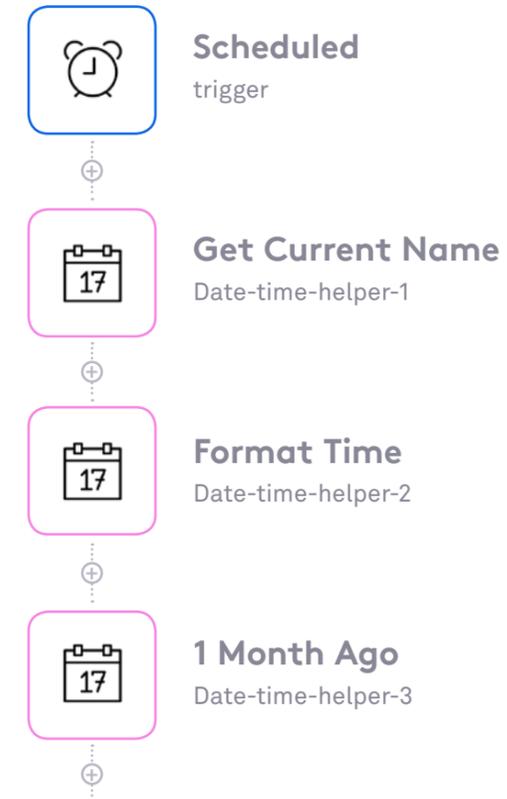
As it happens, you can also automate marketing metrics reports so that they deliver regular snapshot reports on marketing campaigns to inform better decisions in the future - namely, which campaigns performed well and are worth the investment. This example covers how to automate and track metrics from social media channels, but could easily include additional channels such as organic website traffic acquired via SEO, traffic from paid search, or other sources. (It's also possible to up-level this type of dashboard to give higher-level, aggregate metrics such as total traffic, total conversions, and overall pipeline influence.)

Rather than logging into and hunting around individual metrics dashboards for campaign performance, or even digging into your CRM for leads recorded from specific sources, smart marketers use automation to instantly and regularly pipe campaign performance reports directly to their teams via email or internal chat solutions like Slack. To the right is a blueprint of exactly how to build an automated Slack dashboard for marketing metrics using a GAP.

Kick off automated workflow and calculate date windows

The first part of this automated workflow kicks off the process on a regularly-scheduled timer then records today's time and date and calls the previous month's date as well. The workflow will use these dates to calculate performance to date as well as to compare against the last month's performance:

1. **Scheduled trigger** - This step kicks off the metrics report process at a regularly-scheduled time, such as one or more times per day at set intervals, once a week, once a month, or whatever custom timeframe you need.
2. **Calendar Helpers** - These Helpers record the following date and time information to create a framework for the report:
 - Capture current time at which the workflow runs
 - Properly format timestamps for use in the workflow
 - Pull in date and time from exactly one month prior



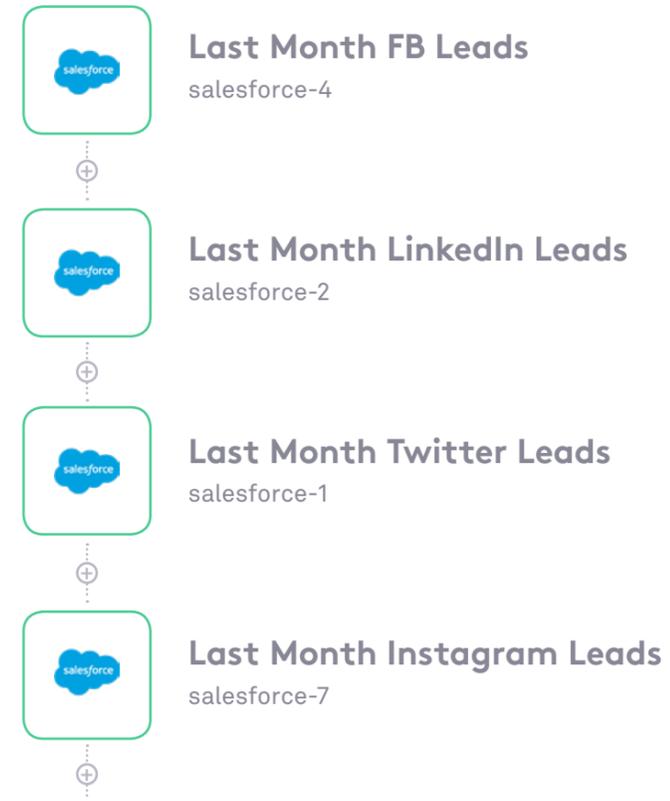
Part 2

Pull in the **previous** period's channel leads from Salesforce

The next part of this automated workflow calls all lead data recorded in Salesforce for the specified period (in this case, from the previous month), with leads properly tagged by source channel:

Salesforce - The automated workflow includes a series of Salesforce data call steps in which it calls up all leads recorded in Salesforce tagged from a specific channel source:

1. Call up all leads in the past month sourced from Facebook
2. Call up all leads in the past month sourced from LinkedIn
3. Call up all leads in the past month sourced from Twitter
4. Call up all leads in the past month sourced from Instagram

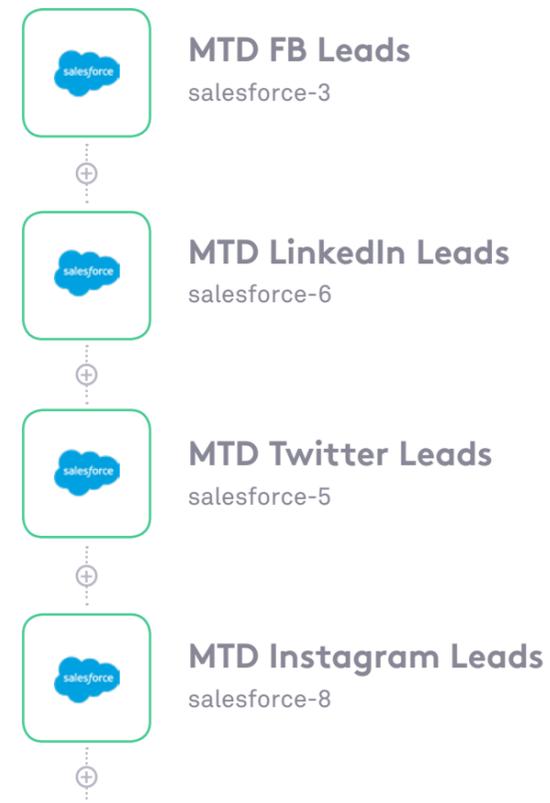


Part 3

Pull in the **current** period's channel leads from Salesforce

The third part of this automated workflow calls all lead data recorded in Salesforce for the current period (this month), again, with leads properly tagged by source channel:

Salesforce - The workflow calls up the number of leads sourced by each channel in the current period (this month).

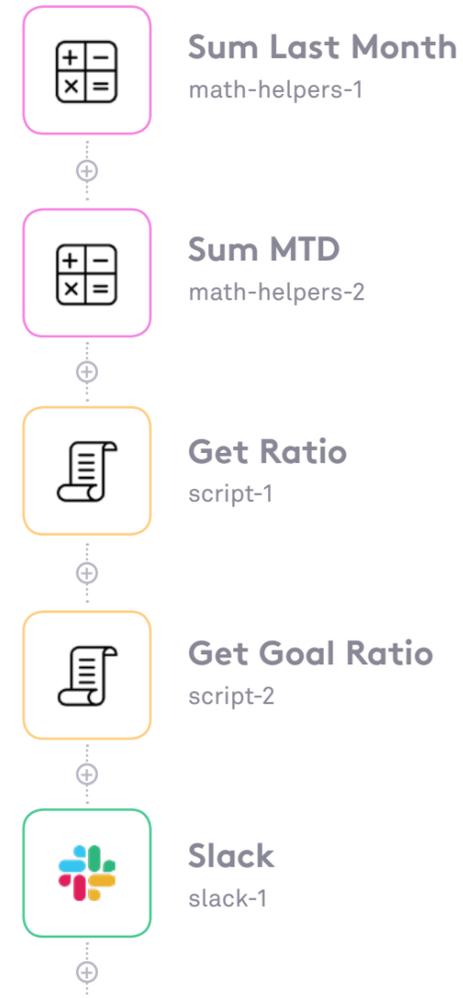


Part 4

Calculate relative totals and % to goal, then broadcast to Slack

The final part of this automated workflow aggregates the number of leads from each channel for each period, calculates the relative percentage delta between the two periods, also calculates the current period's percent to goal, then instantly delivers all metrics via Slack:

- **Math Helpers** - The next two steps in the workflow calculate the aggregate sums of leads generated by each channel for the previous month and the current month.
- **Ratio calculation** - Then, the workflow runs through two additional steps to calculate the ratio of the current month vs. the previous month, as well as progress against the current month's goal.
- **Slack** - Finally, the workflow outputs the metrics snapshot to the marketing team's Slack channel. Which looks something like the image on the right.



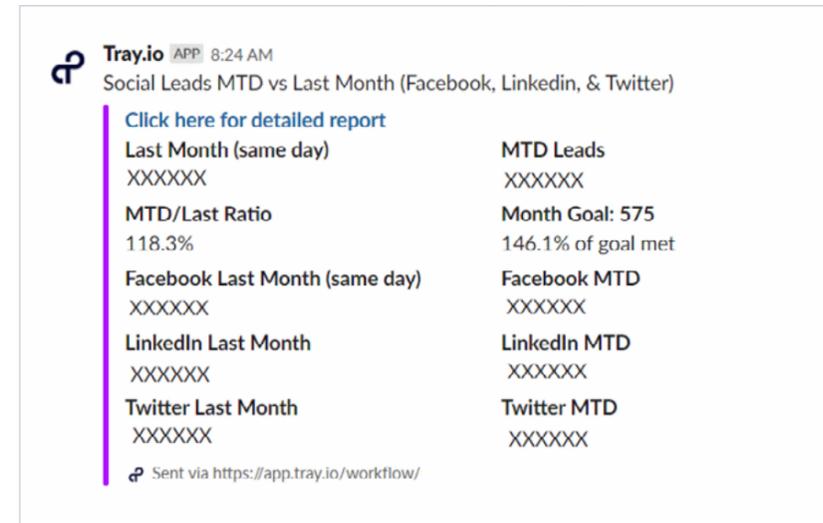
Summary

Automated reporting for control, transparency and success

While a report like this can be useful as an ad-hoc snapshot, you can probably see the ongoing value of regular Slack dashboards delivered for a variety of metrics, such as performance of additional channels including organic or paid search, or for other cross-team metrics like sales teams meeting their quotas, or for metrics from a variety of different departments.

These types of alerts can also be useful as diagnostic reality checks on newly-launched campaigns. A metrics report that shows a new campaign isn't delivering expected baseline performance after launch could be an early warning system of a technical/logistical problem for your marketing team to address.

Open-source technology leader [ApolloGraphQL](#) uses a GAP with BI to not only visualize analytics on-demand but also to automate the sharing of analytics dashboards with its team throughout the day via Slack to not only monitor revenue metrics but also as a diagnostic tool to ensure full technical uptime for its services.



The screenshot shows a Slack message from Tray.io. The message content is as follows:

Tray.io APP 8:24 AM
Social Leads MTD vs Last Month (Facebook, LinkedIn, & Twitter)

[Click here for detailed report](#)

Last Month (same day) XXXXXX	MTD Leads XXXXXX
MTD/Last Ratio 118.3%	Month Goal: 575 146.1% of goal met
Facebook Last Month (same day) XXXXXX	Facebook MTD XXXXXX
LinkedIn Last Month XXXXXX	LinkedIn MTD XXXXXX
Twitter Last Month XXXXXX	Twitter MTD XXXXXX

Sent via <https://app.tray.io/workflow/>

Takeaways

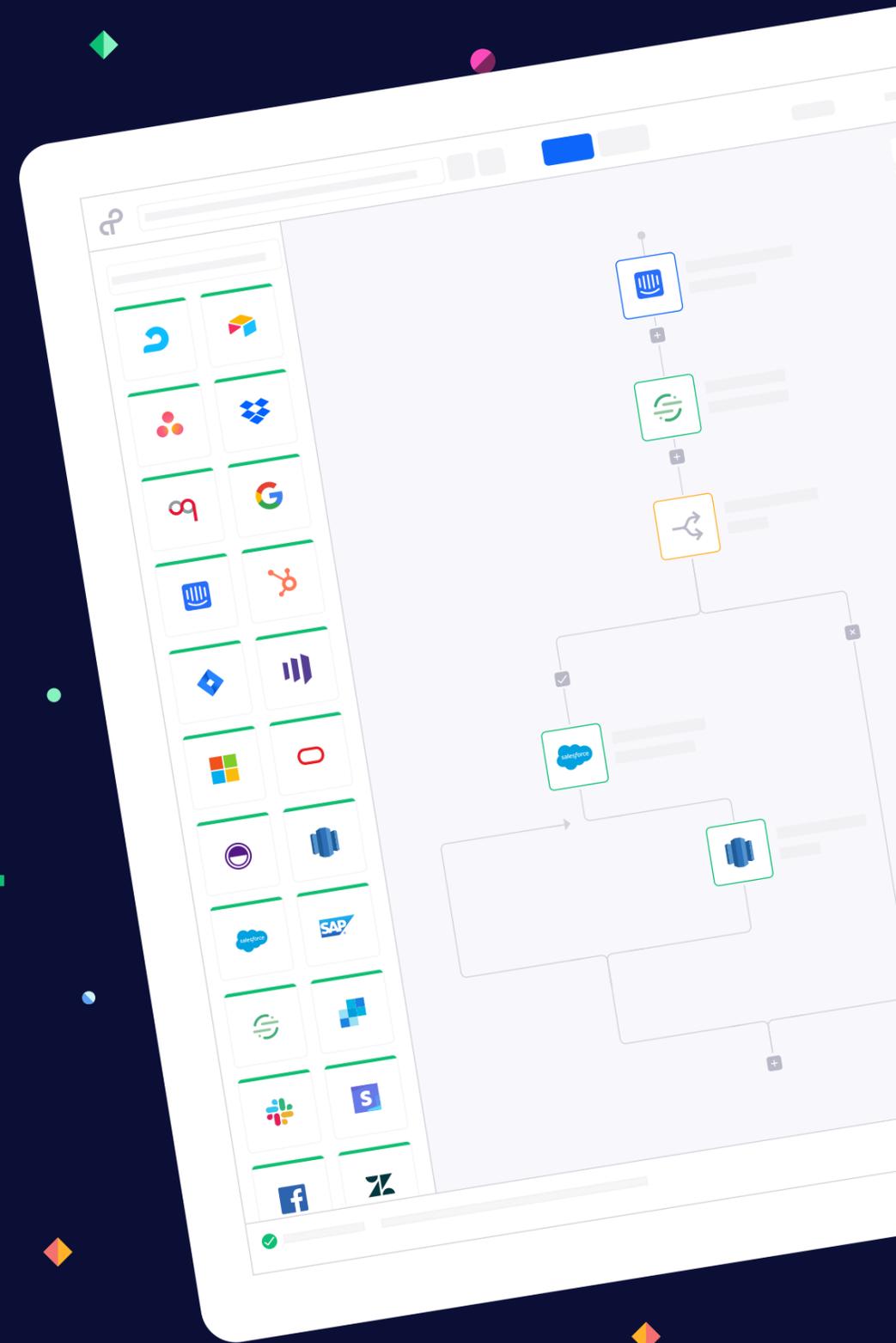
Use automation to **integrate your processes** and **own your data**

Instantly collating baseline web analytics and metrics and delivering them to your inbox is just the beginning of how marketers are using automation to better track, understand, and achieve their goals. Marketers are also using automation to expedite lead management for a variety of operational use cases, including lead list uploads, data enrichment, lead-to-account matching, lead scoring, lead routing, and many more. Learn how to use automation to speed up marketing processes for metrics, analytics, and many other use cases by joining a weekly group demo.

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Do more faster!

Integrate your web stack,
automate your processes,
and **start innovating today.**





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Sources

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