



# Dashboards & Analytics

## Bloomreach Engagement Best Practices

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# Team Introduction



## Matej Cambal

*Senior Business Consultant*

[matej.cambal@bloomreach.com](mailto:matej.cambal@bloomreach.com)

CEE based

- Business Consultant for 5+ years, working in UK, WE, CEE
- Emailing specialisation
- Managing a team of consultants in CEE



## Gabrielle Couzin

*Customer Success Manager*

[gabrielle.couzin@bloomreach.com](mailto:gabrielle.couzin@bloomreach.com)

UK based

- CSM on CDP & Marketing Automation Product  
4years +
- Ex business analyst & Campaign Coordinator
- Data Junky



# Slido

- Go to [slido.com](https://slido.com) and enter **#bestpractices**
- OR click on the link in the chat
- OR scan the QR code
  
- **Polling**
- **Q&A Session** – at the end of the session, Slido only





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# 5 Questions to ask before Starting a Dashboard



# Get Answers First

## WHAT ARE THE 3 MOST IMPORTANT METRICS?

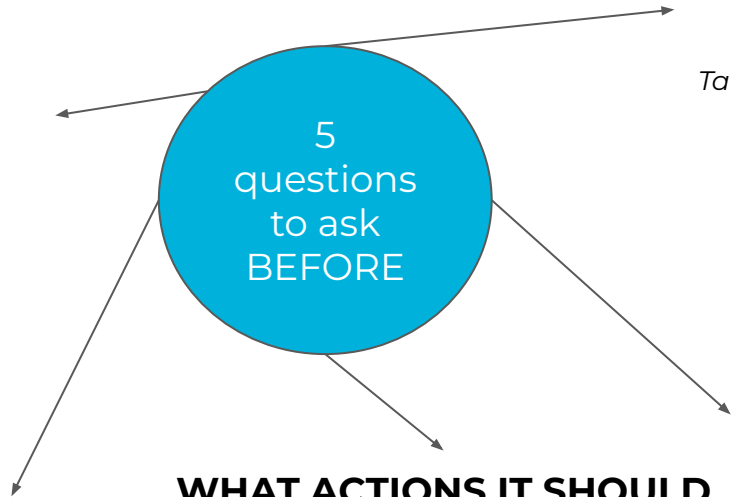
Number of customers, revenue, click rate

*Use goals and target kpis to*

## HOW OFTEN?

Once, every week, every year

*It is more a reporting exercise or an insight piece?*



5 questions to ask BEFORE

## WHO?

Me, operational teams, executives

*Take into consideration how savvy are your audience will be*

## WHAT IS THE PERIMETER?

Lifetime, last 2 years, only US

*Take in consideration your data and business history, structure to help determine best limits*

## WHAT ACTIONS IT SHOULD INFORM?

Strategy making, continuous improvement, investigation etc...

*Try the question: How will you use the dashboard?  
What is the purpose of it? After reading the dashboard what will you do?*





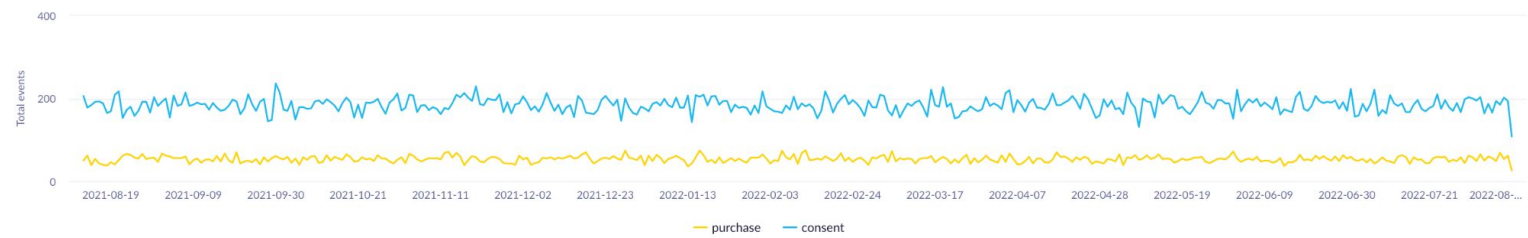
# Still Unsure? Propose a Wireframe

Purchasers & Subscriber Insights - last 365 days

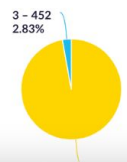
Edit Refresh

<b>Nb Subscriber (non buyers)</b> <b>308,277.00</b> <small>All history</small>	<b>Nb Customers</b> <b>308,277.00</b> <small>All history</small>	<b>Nb 1 time Purchasers</b> <b>308,277.00</b> <small>All history</small>	<b>Nb Customers Opted In</b> <b>308,277.00</b> <small>All history</small>
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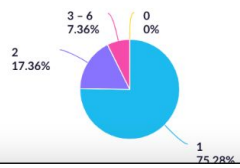
Purchase & Consent Trend



Customer Per Nb of Purchase - last 365 days



Revenue per Customer - last 365 days





# What a Good Dashboard Looks Like





# Let's look at an example





# Recap

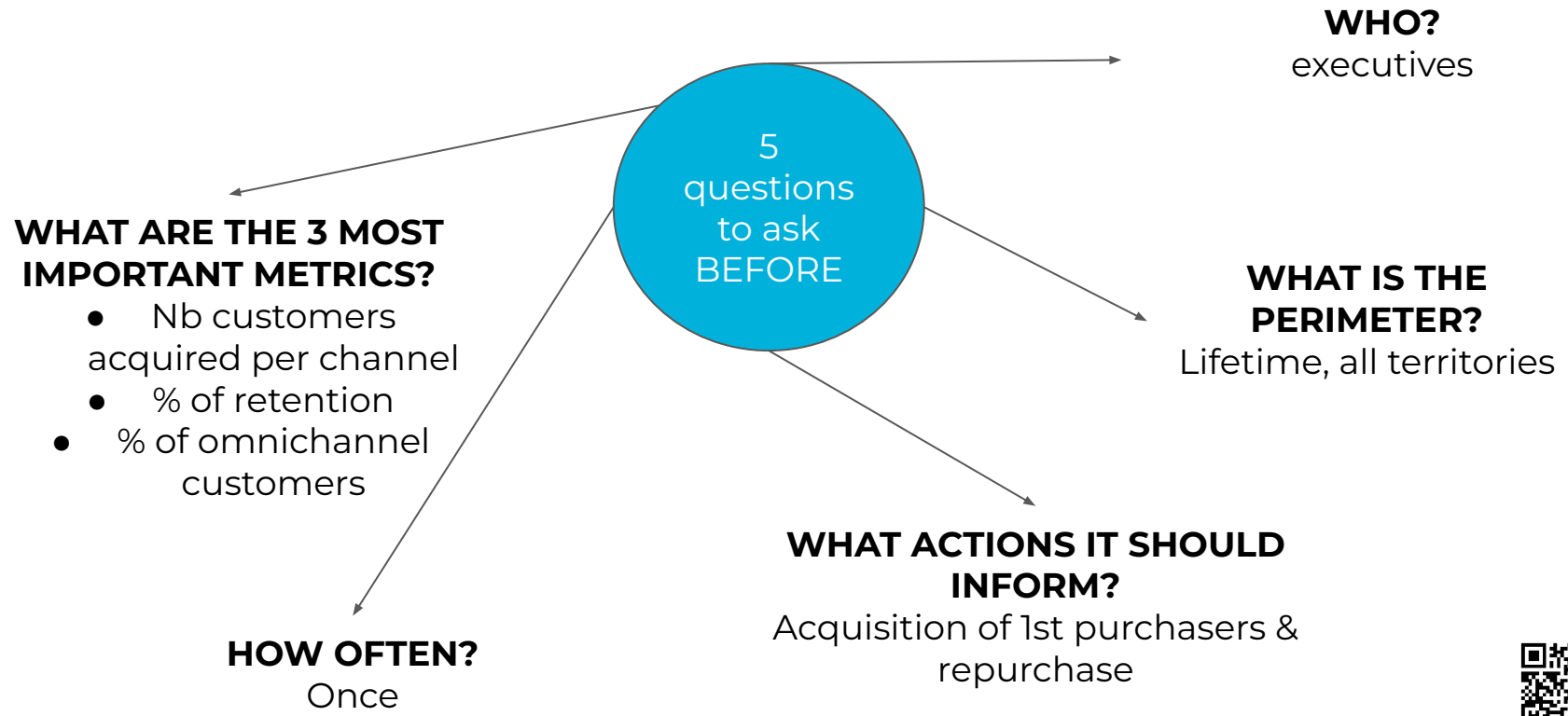
- It goes **from general numbers to more detailed**
  - Using metrics as first row helps
- It **breakdown the general numbers** to uncover finer information
  - Per segments/ time/dimensions
- It uses **different type of analysis and visualization**
  - Leveraging the best type of visualization for comprehension
  - Breaking the monotony
- It has helps for the **reader to understand the content**
  - Text, sections title



# Practical Dashboard example



# Get Answers First





# Lets build a GREAT dashboard together.. in 10min





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# Time saving & scaling



# Scaling - reasons why

- We built a beautiful dashboard that you want to apply to different campaigns / weblayers / experiments
- We want to analyze different time periods or markets in the same dashboard
- Multiple stakeholders might require different filters or time periods in the same, standardized dashboard
- We want to avoid updating X similar dashboards when a change is needed
- We want to provide a nice way for users to find the right dashboard

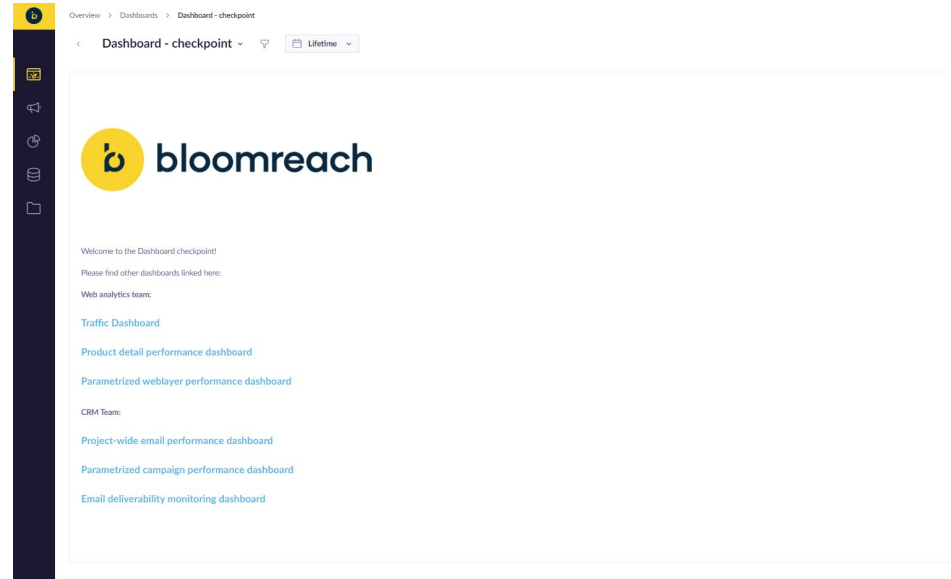






# Scaling up dashboards for more users

- You can use a “Home” dashboard to provide a guide for your colleagues to find the right dashboard
- You can add images, links to the dashboard, explanations, step-by-step guides
- Helps to avoid clutter and reporting with incorrect definitions





# Time filters

- Apply "Lifetime" filter in all your metrics and reports to enable Dashboard Time Filter

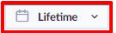
Simple metric   Formula   Format   round to 2 digits

count   event   session\_start   ×

WHERE   + Add an event attribute

CUSTOMER FILTER   No active filters   Fill from template   Save filter template   Discard filters   SHOW >

406 829.00



Overview > Dashboards > Traffic dashboard

<   Traffic dashboard   >   Last 30 days

## Overall Metrics

Unless stated otherwise in the name of the metric/report, all data is reported over a lifetime. You can use dashboard filters to limit the time range of reports to e.g. last 30 days.

[ATAD] Total visits (last 30 days)

**3 588**

All history

[ATAD] Unique visits (last 30 days)

**3 496**

All history

[ATAD] Average session duration in minutes (last 30 days)

**01**

All history

## Traffic Evaluation

You can see a general overview of your session courses in the four reports below. This helps you evaluate what devices or user categories are the most common and what...



# Customizable dashboards

- Apply the new parametrization (Controls) value in metrics to enable dashboard-wide filtering
- Applicable in all types of analyses

The screenshot displays a dashboard configuration interface. At the top, there are tabs for 'Simple metric', 'Formula', and 'Format', with 'Format' set to 'round to 2 digits'. Below this, a filter bar shows 'count', 'event', and 'campaign' with a close button. To the right, there are buttons for 'All', 'First', 'Last', and 'Lifetime'. The main filter area is labeled 'WHERE' and contains 'campaign\_name' with a dropdown arrow, followed by 'equals' and a text input field containing '[[campaign\_name]]' with a close button. A red box highlights this input field. Below the filter bar is a 'Refine more' link. The next section is 'CUSTOMER FILTER' with 'No active filters' and buttons for 'Fill from template', 'Save filter template', 'Discard filters', and 'SHOW >'. The final section is 'PREVIEW FOR PARAMETERS', which contains a red box around a preview of the filter: 'Attribute: campaign - campaign\_name' followed by a dropdown menu showing 'campaign\_name' and 'Select a value'.





# Customizable dashboards

- Example use case - campaign evaluation dashboard applicable to all your campaigns

Overview > Dashboards > Dashboard - email campaigns > Edit

Dashboard - email campaigns

Analyses

- Trend
- Funnel
- Report
- SQL Report
- Retention
- Segmentation
- Geo analysis
- Flow
- Other
- Metric
- HTML
- Simple text

PREVIEW FOR PARAMETERS

Attribute: campaign - campaign\_name

campaign\_name Birthday campaign

Campaigns sent

277.00

All history

Dashboard - email campaigns

Analyses

- Trend
- Funnel
- Report
- SQL Report
- Retention
- Segmentation
- Geo analysis
- Flow
- Other
- Metric
- HTML
- Simple text

PREVIEW FOR PARAMETERS

Attribute: campaign - campaign\_name

campaign\_name Post-purchase NPS flow

Campaigns sent

2 463.00

All history





# Q&A





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