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Dashboards & Analytics

Bloomreach Engagement Best Practices

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Team Introduction

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Senior Business Consultant

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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

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UK based

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

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5 Questions to ask before Starting a Dashboard

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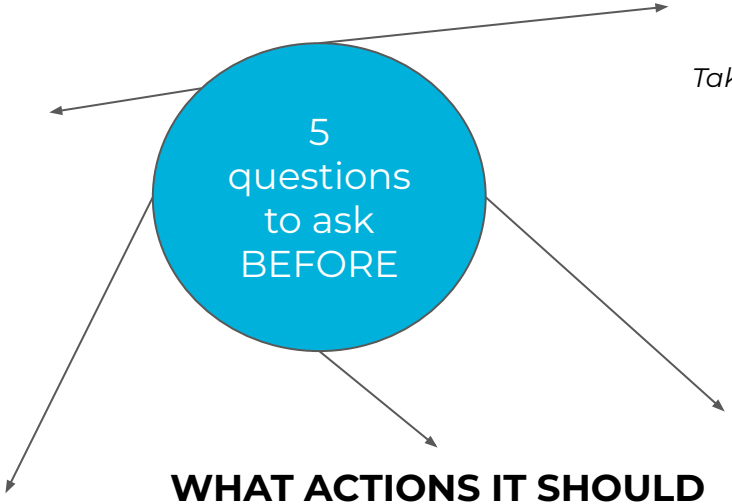
Get Answers First

WHO?
Me, operational teams, executives

Take into consideration how savvy are your audience will be

WHAT ARE THE 3 MOST IMPORTANT METRICS?
Number of customers, revenue, click rate

Use goals and target kpis to



WHAT IS THE PERIMETER?
Lifetime, last 2 years, only US

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

HOW OFTEN?
Once, every week, every year

It is more a reporting exercice or an insight piece?

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?

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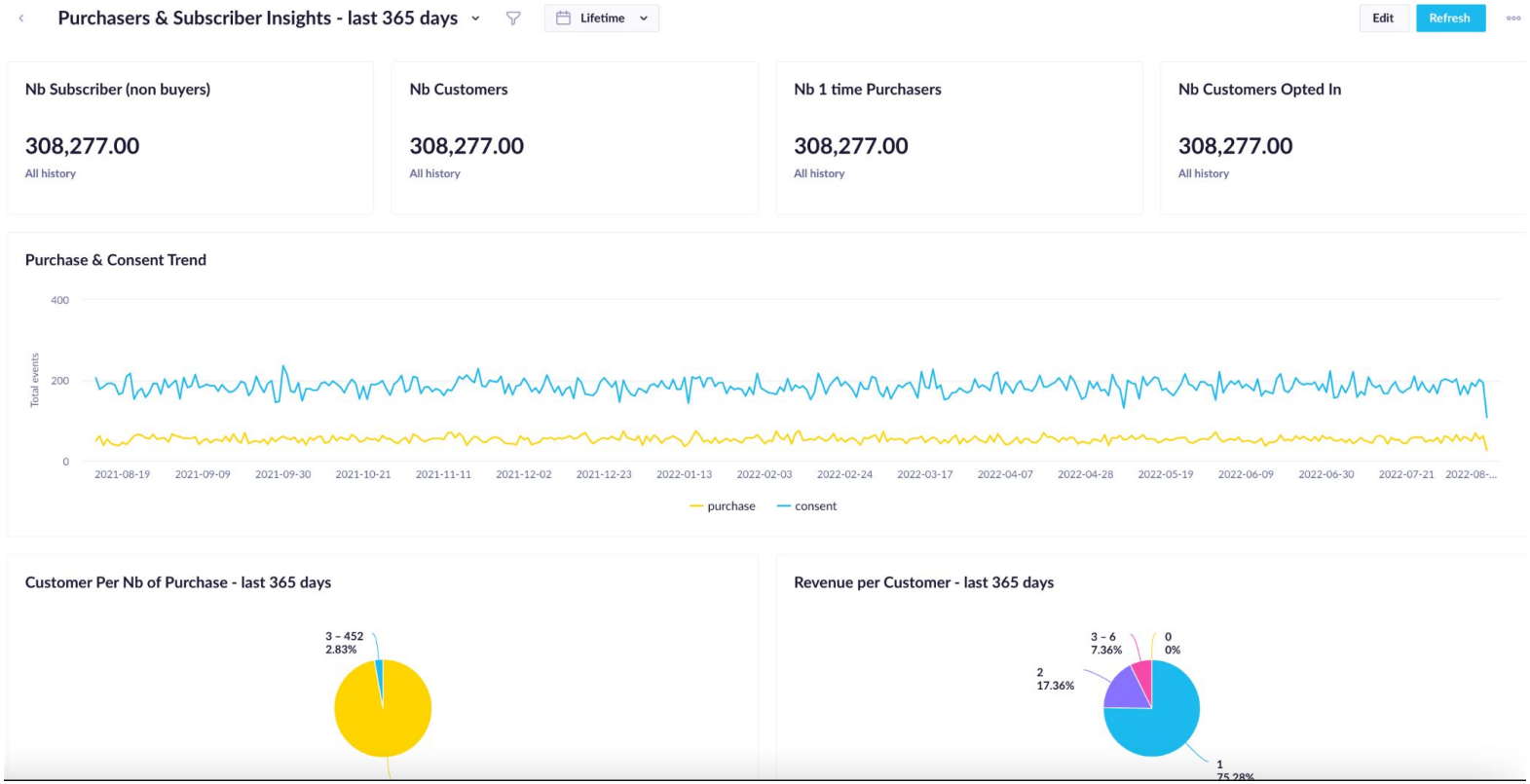
Still Unsure? Propose a Wireframe



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What a Good Dashboard Looks Like

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Let’s look at an example

Demo

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

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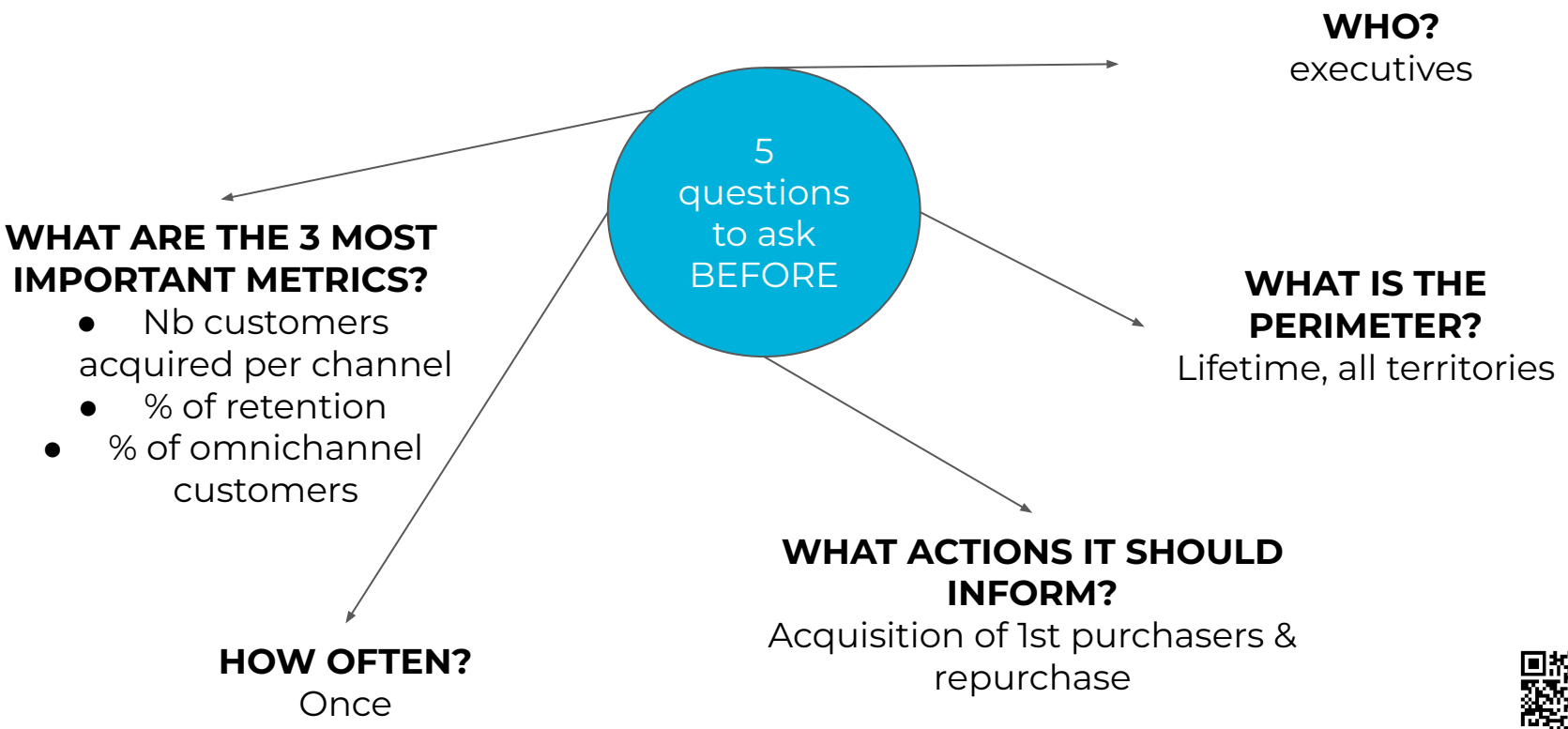
Get Answers First



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

Demo

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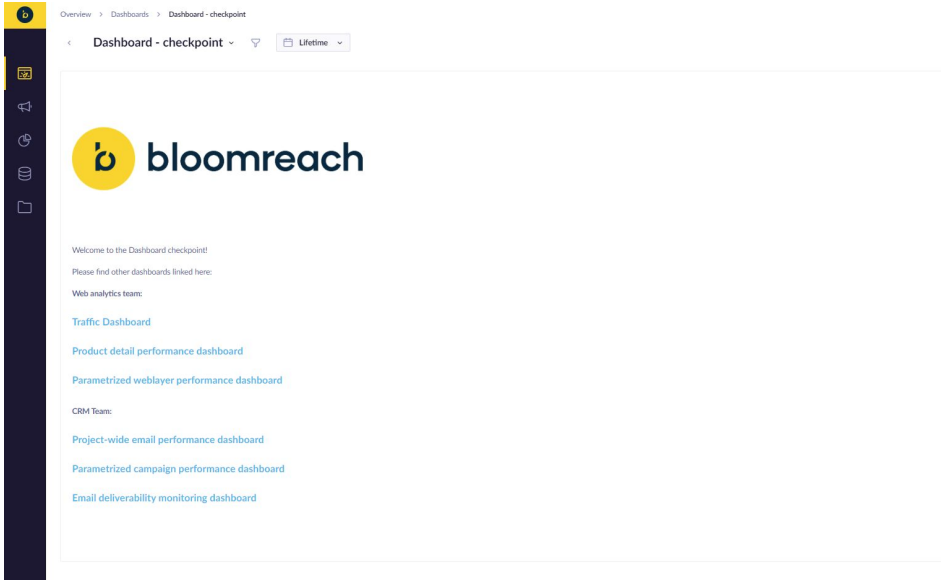
Time saving & scaling

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

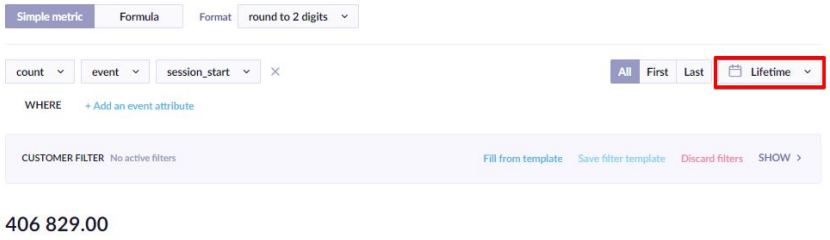
Scaling up dashboards for more users

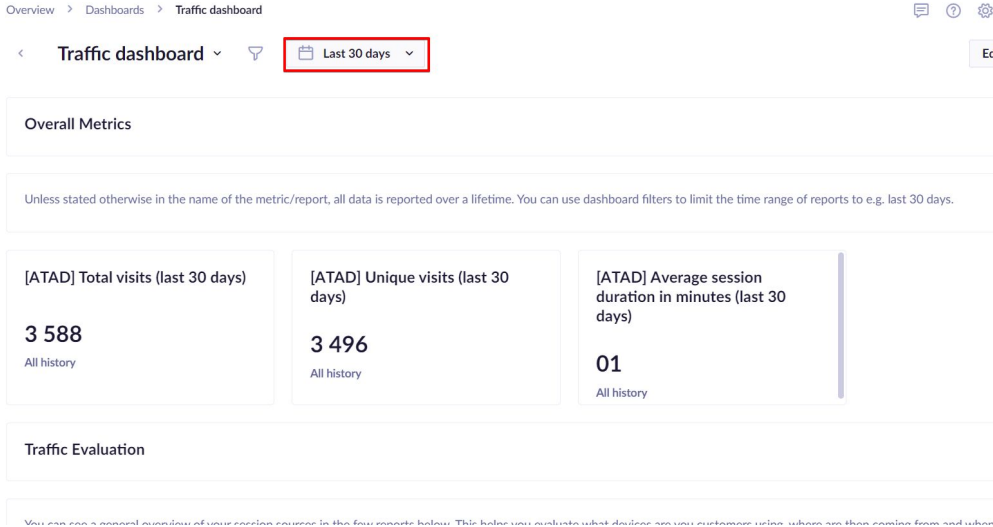
- You can use a “Home” dashboard to provide a guide for your colleagues to find the right dashboard
- You can add images, links to the dashboard, explanations, step-by-step guides
- Helps to avoid clutter and reporting with incorrect definitions



Time filters

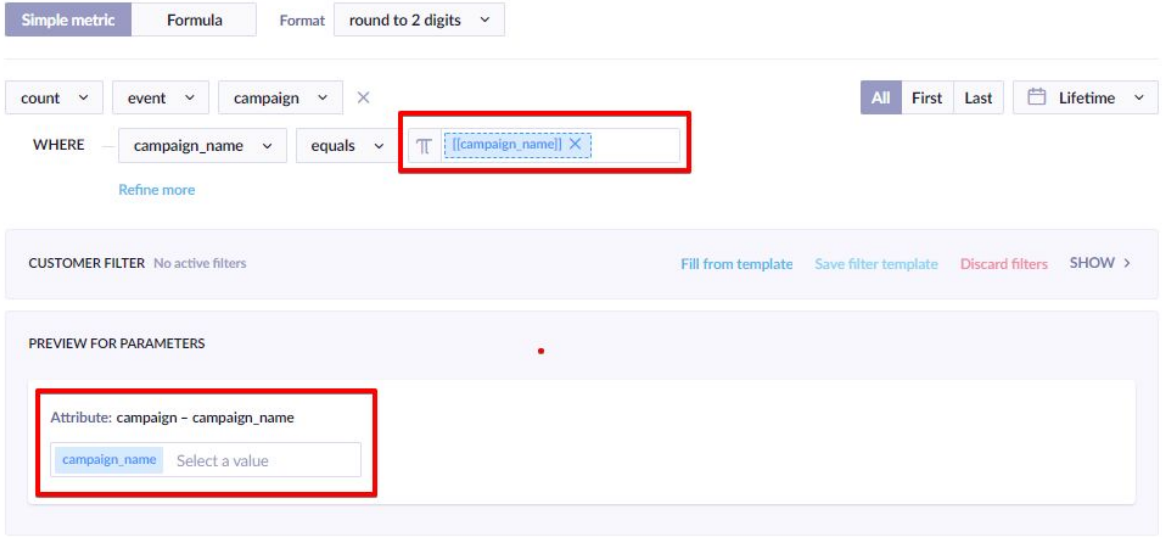
- Apply “Lifetime” filter in all your metrics and reports to enable Dashboard Time Filter





Customizable dashboards

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



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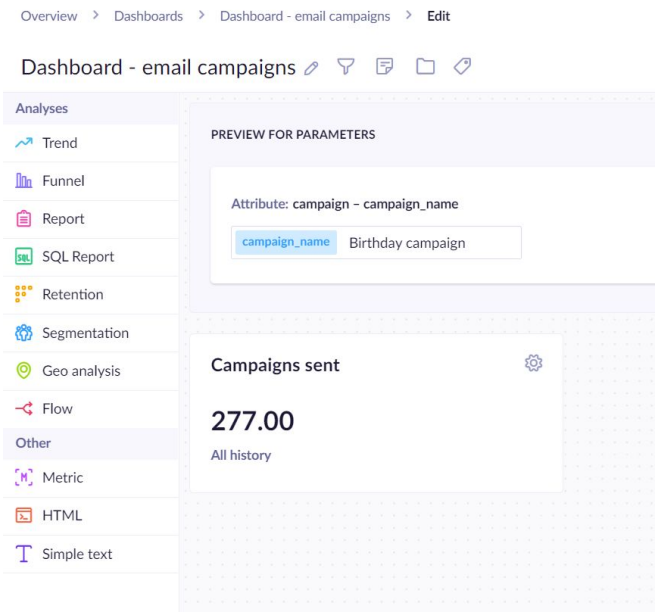
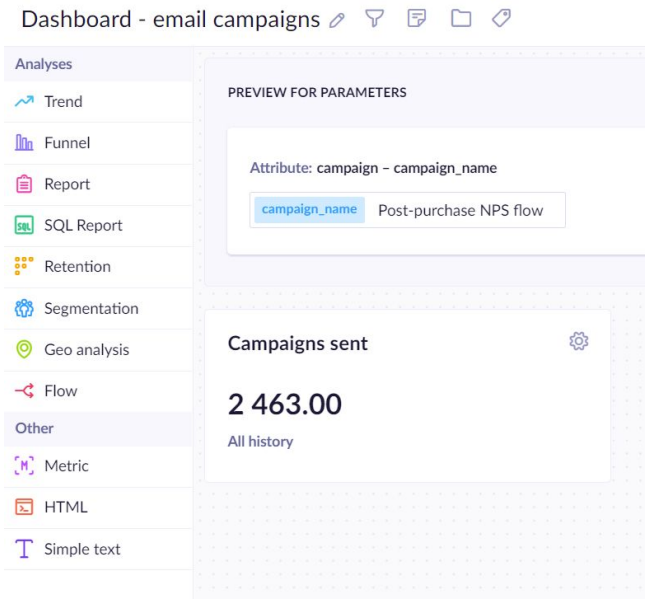
Customizable dashboards

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





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Q&A

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