# The Agency Series: For the Data Driven Marketer

Volume One

**Klipfolio**®

# What this handbook has in store for you

# So what's in it for me?

Data matters in the ever-changing world of business now more than ever.

There's no doubt that it is an exciting yet challenging time for agencies, who are faced with navigating an increasingly competitive landscape. Marketing is fast-paced; becoming an expert in the field is key now more than ever, as expectations of agencies are at an all-time high.

So, how do you stand out from your competition?

Getting serious about your data does wonders for your KPIs, your projects and overall workload. The same holds true for your valued clients. By going beyond standard monitoring and reporting, you're able to see more, learn more and do more.

This handbook will show you and your team how you can leverage the power of agency reporting to work smarter, stay in-the-know, and make quicker, better decisions for your agency and your clients. Happy clients mean a happy agency right?

Be data-obsessed, think forward.

> **"**
>
> Everyone knows the importance of data. The biggest piece of advice I would give is not to wait for your clients to ask for it. Be proactive and use Klipfolio to show them how impressive their data looks. It'll empower them to do more."
>
> Jason Wolfson, VuPulse

# Agency Reporting: Achieving More Together

Would you agree that agency life is organized creative, fun chaos? That a regular part of your job is drowning in customer requests and figuring out how to stay afloat?

*We feel you.*

On top of your day-to-day mayhem, you need to prioritize reporting. On one hand you're accountable to report to your core team and executives with performance updates, and on the other you're who your clients rely on for killer campaigns, market insights, and data analysis.

I think we can agree that although it may seem as though you are juggling a million different things, the best approach is harmonization between agency and client reporting.

We know, reporting isn't the most enjoyable part of you job, it's usually tedious and time-consuming, taking you away from creative projects you do best. In fact, you've probably wished that you could just skip your reporting altogether.

Here at Klipfolio, we work with hundreds of agencies who report on a regular basis to their clients... and surprisingly enough, that feeling of dread that arises on a monthly basis around reporting time has disappeared for them.

The truth is, your reports can really make you shine when it comes to your client relationships. By being transparent with your performance data, you give your clients more confidence and position yourself as a trusted advisor. Take the time to nail down your reporting processes, which not only saves you time and money, but provides you the opportunity to showcase your creative flair.

How? By building a dynamic dashboard.

One thing that is so important for agencies to understand is that reporting should be collaborative effort, one that takes into account the strengths of all of your team members. By working alongside all departments with everyone inputting their own metrics and klips, you can create a dashboard report that gives your clients a full view of their data and business processes, allowing them to make better, more informed decisions.

*And you look like a rockstar.*

Not only do you look good in the eyes of your clientele, you now have a deeper understanding of your clients, giving you a full picture view of their business and objectives. Simply put, you can now do better work. Your boss will probably appreciate this too!

"Great things in business are never done by one person"

- Steve Jobs

Without a doubt, each member of your agency has individual responsibilities, so naturally, they should each contribute different metrics making building the dashboard a joint effort. The final product will display a full picture for the client, proving that teamwork makes the dream work.

## Account Coordinator

An Account Coordinator is all about organization. They are responsible for support and overall day-to-day customer service in order to ensure the client's objectives are being accomplished through the creative projects and work done by your agency. This includes administration tasks, project tracking, budgets, and research. Some metrics they should consider in the dashboard reporting include:

- Clients Won
- Account by Type
- Revenue and Wins by Type
- Hours Spent on Projects
- Client Balance Summary
- Quickbooks Income and Expenses
- Accounts Receivable and Payable

## Director of Marketing

The Director of Marketing is all about innovation and imagination. They are responsible for the development and implementation of marketing strategy.

This includes overseeing campaigns, digital marketing and communications. Some metrics they should consider including in the dashboard reporting process include:

- Return on Marketing Investment
- Incremental Sales
- Cost per Lead
- Keyword Performance
- Customer Lifetime Value
- Customer Acquisition Cost
- Click-Through Rate
- Net Promoter Score
- Social Traffic and Conversion
- Traffic by Device
- Referred Traffic

## Content Creator

The content creator creates. Simple right? But what isn't as simple is ensuring that they are creating the right stuff. And that it is performing for the client by engaging potential customers and generating leads. From a content perspective, the metrics that could by included in their reporting include:

- Backlinks and External Mentions
- Bounce Rate
- Content Downloads
- Content ROI
- Customer Acquisition Cost
- Email Click-Through and Open Rates
- Keywords by Ranking

## UX Specialist/Web Developer

This is the tech-savvy specialist at your agency, who designs and evaluates the way in which end users interact with websites and applications. Bottom line, they create the online interactive experience for you and your clients. Metrics that they could add to the dashboard include:

- Number of Fixed Bugs
- Latency
- Net Promoter Score/Happiness
- Task Success Rate
- Error Rate
- Connect to Response Start
- Average Engaged Time
- Design System Backlog Improvements

"

Klipfolio is an extraordinary tool, not only does it bring hidden client information into the spotlight, but it gives us the power to make fast data-driven decisions where action is necessary."

Rodrigo Rojas, TimeHunter

## Social Media Manager

Your social butterfly is on top of all of the latest social trends they always know what's up in the news and the business world. The social media manager is responsible for managing social channels and interacting with customers online. To monitor the success of their social efforts, they should include the following metrics:

- Social Interactions
- Social Traffic and Conversions
- Number of Followers and Subscribers
- Number of Page Likes
- Average Time on Page
- Total Page Views
- Unique Visitors
- Organic Traffic

By creating harmony between agency and client reporting, you can focus on the work that you do best. By building client dashboards, you're not only saving valuable time, but enhancing your client service experience and, in turn, improving the impression your clients have of your agency. Building dashboards for yourself also saves you time, and provides you and your team with quick real-time glances at all of the data you need to know in order to make faster, smarter decisions instantly - it's a win-win situation.
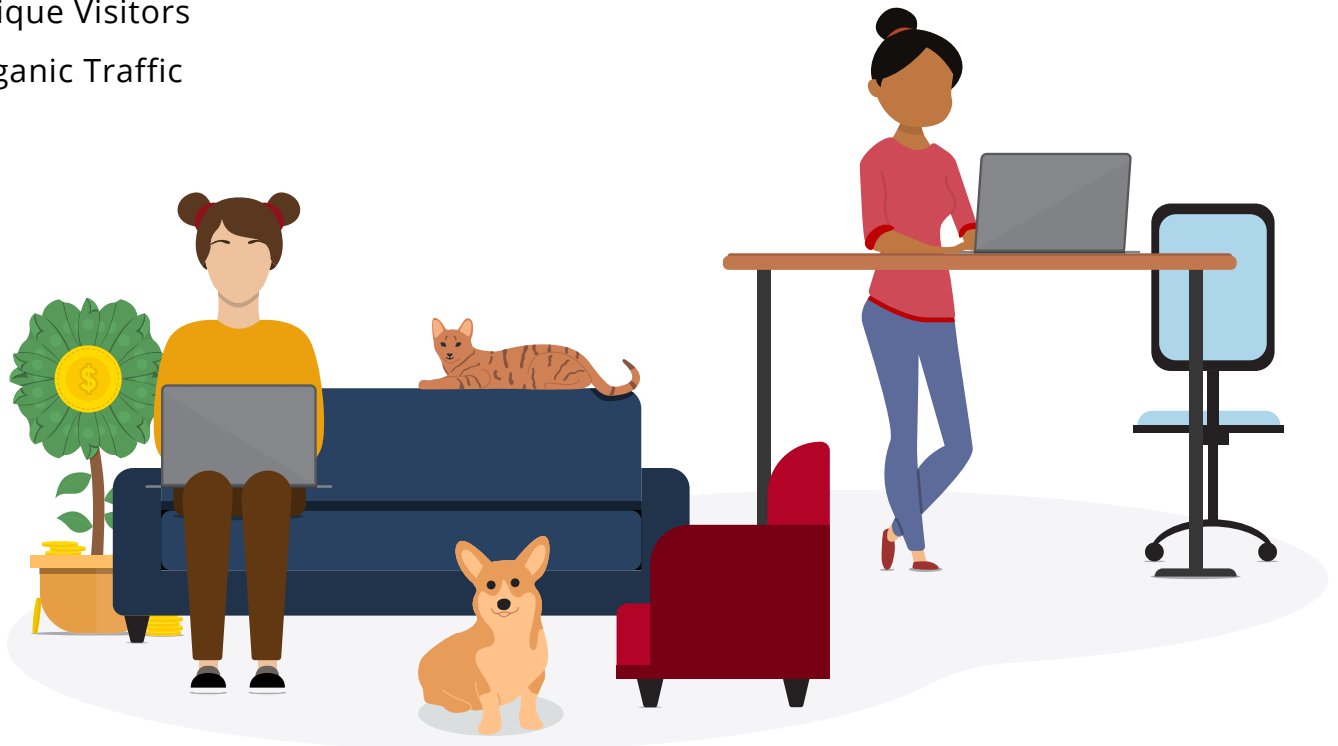
# Leveraging the Power of Agency Reporting

Dashboard reporting is a distinct way to offer more value than your competition.

### What is dashboard reporting?

First things first, there is a big difference between traditional reporting and dashboard reporting.

Typically, a traditional report is defined as an official document that gives an account of a particular subject. This document is created after thorough analysis or consideration by an appointed person or body. On the other hand, dashboard reporting omits the need for your team member's time and lets your computer do the work instead. It is innovative, it saves you time, and if you master it, you will look like a rockstar in the eyes of your customers.

For example, take our agency friends at RootedElm...

### A&W: A Data-Driven 100th Birthday

Our partners prove that success can be driven by data and solid reporting processes. With Klipfolio, RootedElm has been able to support A&W's marketing efforts, acting as a trusted advisor on projects such as their MugClub email marketing campaign.

Using the data that RootedElm built into dashboards and presented through dashboard reports, A&W made the decision to expand their subscriber reach and enhance engagement as they head towards celebrating their 100th birthday.

## 3 ways that dashboard reporting can add value to your digital marketing agency:

1. Lead Generation - Win new customers by standing out
2. Organization - Buy back hours in your day and increase performance
3. Transparency - Use open communication to foster a culture of trust

### Win new customers by standing out

How? It's simple. Reporting in real time gives your clients access to their data every day of the month, so they are involved every step of the way... no surprises at month-end. In other words, it's continuous understanding and peace of mind - for everyone.

One of the best and most effective ways we've found that agencies can do this, but many have yet to try, is to implement innovative reporting practices that put your clients in the driver's seat. Your customers can react in real time

and make smarter business decisions that are backed by real time data...

Let's look at another one of RootedElm's clients, Elise from Lexington Podiatry, whose business practices have changed because of this innovative process.

"[Dashboard reporting] help[s] me know when it's time to worry or when things are running smoothly with just a quick glance. Decision making on the fly has never been easier."

This is how you stand out. This is how you help your clients generate more revenue.

But, is my client acquisition process effective in the first place?

## Lead Generation Dashboard

Many agencies neglect to implement any formal processes around how they manage their client acquisition efforts, let alone organize what the data is telling them about its success.

By building out a lead generation dashboard, it allows you to keep track of and report on client onboarding - providing insights into which strategies are successful and where there is room for improvement.

As an agency, consider including these metrics to measure how well you are attracting new customers on your lead generation dashboard:

- Page Views
- Average Time on Site
- Session Duration
- Goal Conversions
- Bounce Rate
- Conversion Rate
- Page Performance



*Great, so now that I know dashboards are an awesome way for me to differentiate my agency and keep track of leads... how do I get my team on board?*

## Buy back hours in your day

With data at your fingertips, you are able to react with smart decision making on the fly, meaning you and your team are not only more organized, but more productive.

With increased internal transparency and understanding, your team is able to spot trends as they are happening and take action on the spot. This means your marketing campaigns and all other creative projects can be optimized in real time; in other words, your approach becomes proactive.

This is where a marketing performance dashboard comes in.

## Marketing Performance Dashboard

While it may seem like common sense, many agencies place so much emphasis on keeping their clients front and center, that they lose focus of their own goals and objectives. Here are a few metrics you can use to track your performance, ensuring you are prioritizing your business and your productivity in all marketing activities:

- Lead Conversion
- Blog Subscribers
- Campaign Performance
- Web Traffic Targets
- Return on Investment (ROI)
- Sales Closing Ratio
- Social Media Engagement

Andy Crestodina helped us prototype this marketing performance dashboard and agencies love it because it allows them to see which content is attracting and converting visitors, as well as what opportunities exist.

Lead Conversion Rate

## 38%
36%
Previous period conversion rate
29%
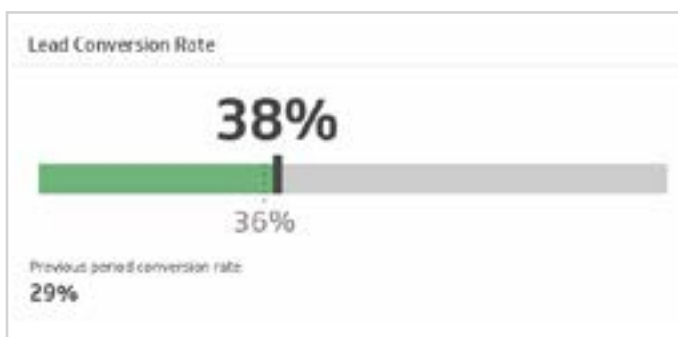
Strong performance doesn't happen without solid project management.

As an agency working with many clients, you understand the importance of data organization, and hopefully know the difference between reporting and monitoring at this point. Business dashboards allow digital marketing agencies to, in a click or two, access their client's most important data points.

No more sifting through tons of spreadsheets or those screenshots you've been saving and trying to organize in Google Drive.

Dashboards omit the endless spreadsheets you have stored on your computer and allow you to mix and match data sets, organizing them in whatever way feels most valuable. This is important for managing projects within your team and organization-wide; everyone has a clear, complete view of the project and all of its moving parts.

Consider tracking the following metrics for each of your projects on your dashboard:

- Project Updates
- Billable vs. Non-Billable Hours
- New Business Opportunities
- Time on Project

If you wanted to, you could even create multiple dashboards. For example, one dashboard for marketing project management and one dashboard for the overall business project management
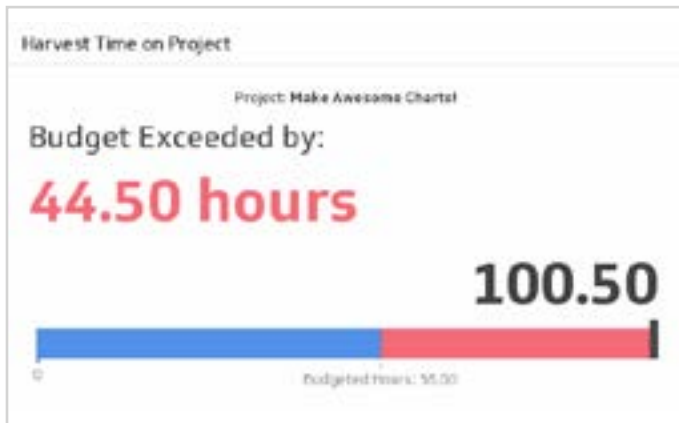


Okay, I love that I can monitor my team's performance, can I do the same for my client's performance?

Absolutely. *Communication fosters a culture of trust*

Clients today want to see and interact with their data in real-time, not just be told about it.

Data transparency fosters a culture of trust, which in turn, strengthens an agency team. A stronger team means better client service, and customers who are not only happy, but loyal.

## Financial Management Dashboard

Aside from reporting on marketing performance, agencies must manage the billing side of their client relationships. Juggling multiple clients and different account types requires systems and processes, and a financial management dashboard paves the way for both.

It's a useful way to inform everyone on the team about opportunities to improve the numbers. Focusing your financial management dashboard around the following metrics will help you get started:

• Profit and Loss Report
• Income
• Current Accounts Receivable and Payable
• Past Due Invoices
• Total Ads Cost

# 4 dashboards our marketing team uses to track the metrics that matter most

The marketing team at Klipfolio works fast. We are high performing. We are agile. We are data-obsessed in everything we do.

Every day spent on the marketing team is spent learning. What to measure, how to measure it, how to rework and remeasure, and most importantly, how to generate results. The best way to reach aggressive targets and lofty marketing goals was to be in the know about all of the real-time data that matters most to our team.

## Demanding goals and objectives at every level

Organizational transparency is something that Klipfolio prides itself on. Our company's OKRs are shared with every individual, team, and department, which allows goals at every level to be aligned seamlessly with overall objectives. From there, each contributor can develop an OKR strategy to support these high-level strategic goals.

For example, if one of Klipfolio's OKRs is to have 35,000+ monthly active users, then our

Customer Marketing Specialist could implement an OKR to reach 1000 active champions in Klipfolio's advocacy program by end of the year.

The marketing team is always juggling countless tasks and projects, and, since each member has so many things going on at once, it can be a lot to keep track of. This is where marketing dashboards make our lives so much easier.

## Marketing dashboards mean everything in one place

Not only do marketing dashboards provide a quick overview of our progress and performance, they allow the entire team and company as a whole to immediately understand our current position.

We use many tools and platforms to lay a foundation that supports our marketing strategy; without them, many of our campaigns and initiatives could not be effectively executed. This being said, it is extremely time-consuming for us to pull data manually from

each of these tools to report on the success of a campaign, which is why dashboards make it easy. From Marketo, to Trello, to Pendo, to Google Analytics, our dashboards bring the key information together - all in one place. We save valuable time while still checking in on our performance daily.

With multiple goals and data sources, we think it's best to use different dashboards for each project. This allows us to see the performance of various initiatives separately, making it easier for sharing, decision making, and determining the success of our efforts.

# The 4 marketing dashboards that make help make us awesome

## 1. Email Performance Dashboard

We use Marketo to run our email marketing campaigns. Email is a huge lever for us and generates an abundance of leads and new customers. We take a lot of pride in our backend flow of the streams as well as the email copy.

At Klipfolio, there are 4 main types of email programs we run on a recurring basis.

**Nurture Programs**

The aim of a nurture program is to provide important information to trial users during the first 14 days of their Klipfolio experience. By gradually educating the user and ultimately making them more confident about their abilities in the app, they can more clearly see the potential value for their business and feel like data champions in the office.

Some of the metrics used to track email nurture success include:

- Open rates
- CTR
- Wins

**Reheats**

Reheat campaigns are used to "reheat" expired users and are our last ditch effort to get people who stopped using their trial to try the app again. Generally we see lower success rates with this type of campaign, but we typically manage to encourage a handful of people to give us another try.

Some of the metrics we use to track reheat success include:

- Open rates
- Trial starts
- Wins

**Product Updates**

Although our product update initiatives are not used for lead generation, we pride ourselves in fostering current relationships and continuing to educate our users with updates on important product features. Once again, the goal here is to make our users as successful in Klipfolio as possible.

Some of the metrics we use to track newsletter success include:

- Open rates
- CTR
- Number of subscribers
- Number of unsubscribes

## Email Courses

Klipfolio email courses are another way we educate our users to be experts in data. From beginner to advanced courses, we offer easy-to-consume lessons delivered straight to our subscribers' inboxes. Contrary to traditional PDFs and other gated content used by marketers to generate email opt-ins, our courses outperformed them because they didn't feel like spam, they felt like paid programs, not free resources, and were broken down into bite-sized pieces.

Some of the metrics we use to track email course success include:

- Number of subscribers
- Number of unsubscribes
- Active trials
- Trial starts
- Wins
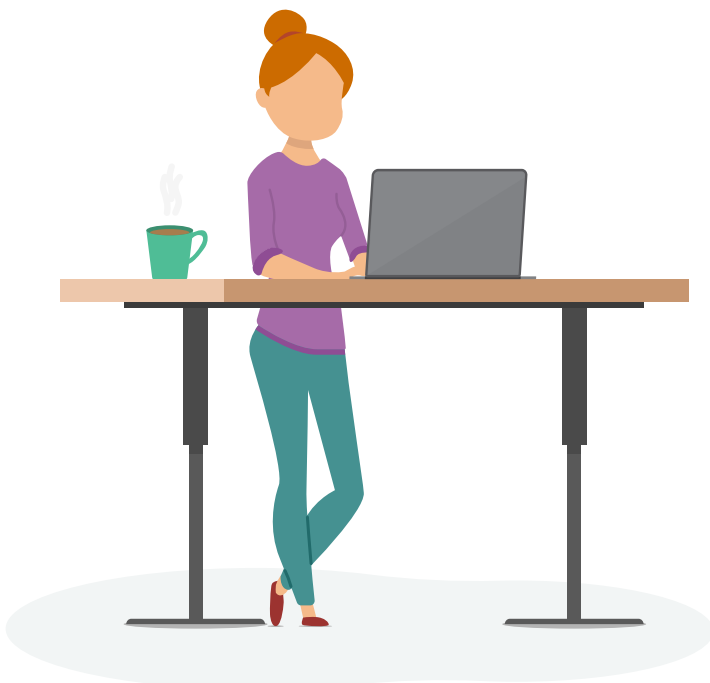
Example of Email Marketing Dashboard

## 2. Google Analytics Dashboard

SEO is the foundation of our marketing strategy here at Klipfolio. Our website sees over half a million visitors monthly, which means that understanding where they are coming from and how they are interacting with our content is important for our continued growth.

Because we rely solely on inbound marketing to generate leads, it is imperative that we fine-tune our SEO tactics on a regular basis. This means revamping web pages, adjusting copy and code, playing around with meta tags and descriptions - the list goes on. All members of our team touch the website in some capacity every single day.

Every marketer knows that Google Analytics is a necessity when it comes to tracking SEO and overall website performance. Every marketer also knows that this tool can be a beast to navigate, so, to simplify it, we extrapolate the metrics we need and put them up on a dashboard. Voila! Our most important metrics, in one place.

These metrics, the ones we love to stay on top of include:

- Total visits
- Bounce rate
- Sessions by type
- Average time on page
- Sessions by channel
- Pageviews per session
- Goal completions
- Goal conversions
- Pageviews

Continuous monitoring of our Google Analytics dashboard helps us to identify our top performing web pages and allows us to decide and prioritize which projects we should be tackling next. One of the most important metrics tracked by this dashboard is the conversion rates of leads in the funnel. By analyzing our data we can also figure out exactly who is on our website, which means we can make more informed decisions about how to communicate with our visitors. It's also awesome for figuring out which pages are best to test new marketing initiatives on i.e. implementing pop-ups or testing new CTAs.

# 3. Social Media Performance Dashboard

Social media marketing is all about engagement, although measuring engagement can be a challenge. Each social media platform offers its own unique metrics (not to mention its own specific challenges).
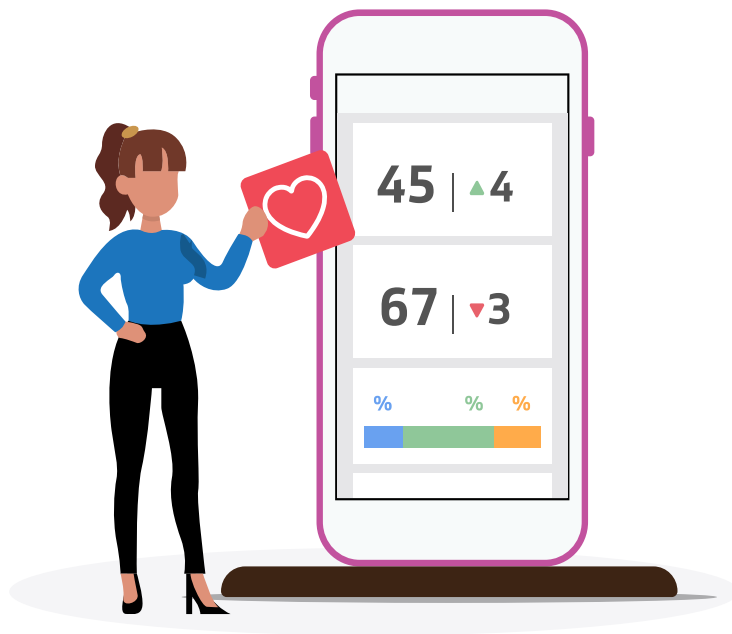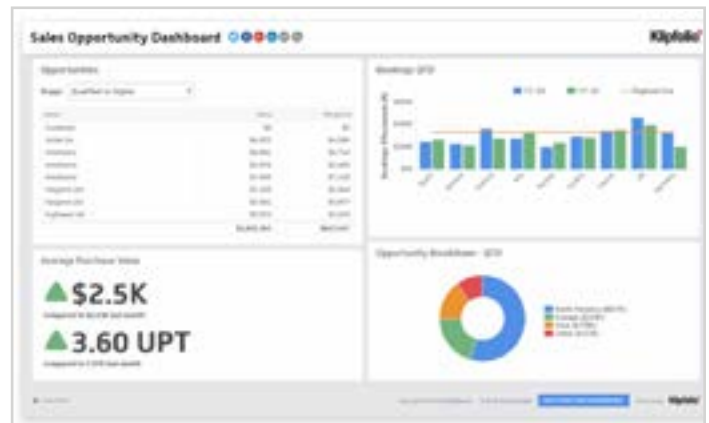


Here at Klipfolio, we use our social media dashboard to track engagement metrics across multiple platforms using a single interface that we can share with everyone on the team and rest of the company.

- Social Interactions
- Social Traffic and Conversions
- Referrals, Conversions, and Events
- Followers Growth KPI
- Social Events
- Social Shares
- Social Visits and Leads
- Social Sentiment
- New Followers

## 4. Sales Dashboard

Our marketing team makes it a priority to work hand-in-hand with our sales team as it takes multiple touchpoints to push a lead through the entire funnel and lock them in as a customer.

Like most teams, our sales and marketing team members are motivated by the prospect of closing deals and converting leads into wins. We have designed our sales dashboard to show the latest opportunities and sort them according to their stage in the funnel, their location, and perceived value.

We use shared sales dashboards to display performance, making it easy to see what stage leads are at in the marketing funnel. Some of the specific metrics we display on our sales dashboard include:

- Sales Bookings
- Sales Opportunities
- Average Purchase Value
- Units Per Transaction

If you want to add some friendly competition to fuel your sales team's motivation, you can learn how to track and compare both individual and team sales performance in real-time with our step-by-step guide on sales leaderboards.

## See more, learn more, do more

Getting serious about your data does wonders for your OKRs, your projects and overall workload. By going beyond standard monitoring and reporting, you're able to see more, learn more and do more. We love always being in the know, why don't you try it for yourself?
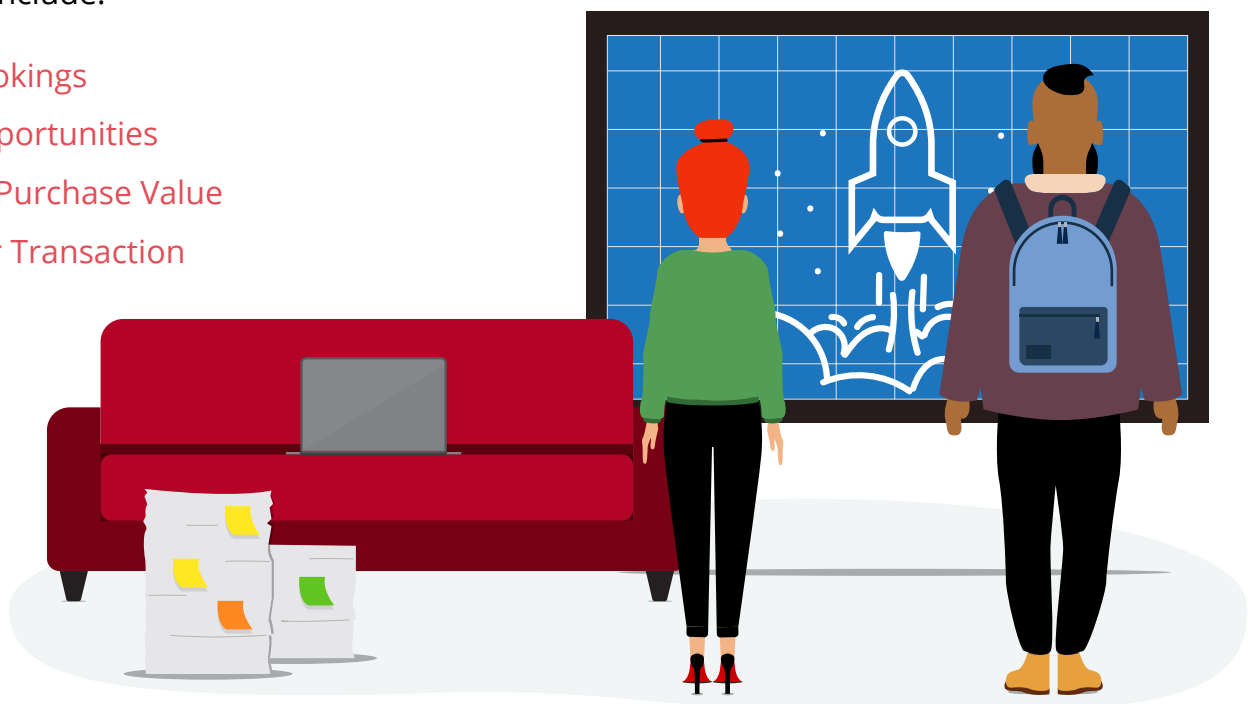
# Using data to foster lasting customer relationships

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## 5 Ways to Build Better Partnerships:

1. Ensure you and your partner are on the same page
2. Align your skill sets
3. Open communication and mutual respect
4. Consistent communication
5. Define who does what ahead of time
6. Ensure you and your partner are on the same page

One of the main ways your partnership could fail is if you and your partner have different definitions of success and thus focus your efforts in different directions. By being up front with what success looks like, both of you will be working towards a common goal.

## Align your skill sets

By understanding the strengths and weaknesses of your partners, you can give and take… meaning each of you can leverage your strengths and use your unique skill sets to complement one another.

## It's not just business, but personal too

Open communication and mutual respect are the bread and butter of any successful relationship. Never underestimate the power of a little TLC.

Despite disagreements or variance in ideas between you and your partner, remaining respectful and open-minded throughout the process will allow your relationship with one another to be more fruitful and rewarding. Be kind to one another.

## Consistent communication is key

Do this by grabbing a coffee or beer or Kombucha (if you are into that) every few weeks with your partner (and put it in your calendar as a recurring meeting so you don't forget!). This allows for open dialogue about anything. By being open and honest, when issues inevitably come up, big or small, you will be in the best possible position to work through them. Together.

## Define who does what...ahead of time

By defining which partner does what, you avoid doubling down on efforts. No point in doing things twice. Although the roles may change over time, establishing them up front will avoid conflict and overlap, optimizing collaboration efforts. And, if you don't like doing something, share it with your partner, maybe they love doing what you hate. This give and take is the beauty of business partnerships.

# What now?

There's lots to digest here. So here's a few next steps to get you started in thinking forward and being more data-driven.

**Nail down your clients' KPIs.** Having a clear picture of what their goals are and the steps required to reach them will help keep the team on track. Monitoring your clients' success is made easy when they implement solid KPIs. Check out our KPI Email Course for one bite sized lesson a day to your inbox.
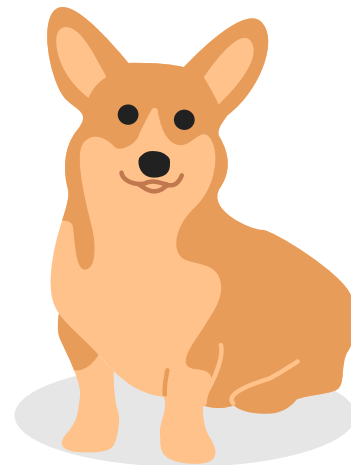
**Build a KPI dashboard and share.** Once you have a concrete KPI plan, you can help your clients' visualize their progress by adding them to a real-time dashboard. Not sure how to start? First, start your free trial. Second, dive into monitoring dashboards for your clients.

**Learn the ins and outs of agency reporting.** For all things agency reporting, check out our Jumpstart for Partners program or our Learn Hub, there you will find videos, webinars, tutorials, and courses.

Want answers to a burning question? Curious about how Klipfolio can help improve your Agency's reporting processes?

Book a one-on-one meeting with one of our Agency Experts.