

Marketing KPIs

Creating an effective marketing report



Designing effective marketing reports

Anyone running a marketing team will recognise the importance of marketing reports and the need for marketing measurements, whether for activities, digital engagement or brand recognition. However for the report to be more than just statistics, figures and KPIs there needs to be a carefully thought out narrative. This means the marketing KPIs and reports need to have the right measures included, but also to have the right design which prevents a distortion of the message.

For the marketing teams there is a need to think about how they produce their marketing reports; remembering to use standard design approaches elements to produce a coherent marketing report that:

- Has an intuitive design so that the marketing report is easy to read.
- Presenting marketing data to help implement virtuous change
- Logical layout
- Is a meaningful dialogue that tells a story



Designing the report

Designing the marketing report needs to incorporate any branding guidelines around colours, layouts and look; there are also some basic design rules that make a marketing report easier to read.

The layout of the data should only show the essential data. Including extraneous data makes the design cluttered and confusing. Providing sufficient white-space around data (such as tables, titles and legends) ensures they are legible and easy to focus upon.

The palette of colours being used is an important aspect. Select colours which are conducive and cohesive within a limited spectrum, this will give the overall design a consistency. Avoiding saturated colours which are indistinct or having a huge variety of colour types which may jar and appear harsh is sensible. One way is to think of it as an artist would when creating a painting; the colours and items used should fit naturally together to tell a story.

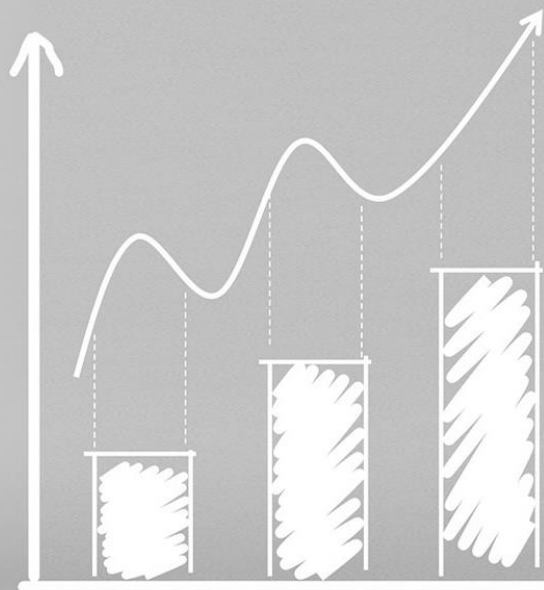


Presenting marketing data

The purpose of the marketing report should be twofold: to record the key metrics and measurements of the key marketing plan elements and to then facilitate decision making around future marketing plan elements (based on what has been successful and what could be improved).

This means that the report needs to work on two levels: being able to use the report to understand how marketing activities have performed and being able to use the report as the prompt for a next step or interaction (either for the marketing team or for wider teams within the business). Technology advancements mean that reports no longer have to be the static conveyors of information, the levels of interaction and sophistication mean users can drill down and to view granular detail (ie individual ROI of events, channel utilisation or degree of brand awareness across different audiences).

When designing a report it is important for the marketing report to highlight where an action (to gain further information) occurs. This should be consistent with other business function reports so that users recognise the action point. The indicator may be an icon, a specific colour or a hyperlink; it needs to fit in with the overall scheme to ensure it is easily recognised without over-dominating.



Logical layout

To get the most out of your marketing report it needs to conform to a logical layout so that it is easy to read. Traditionally the eye moves from left to right and from top to bottom, so the marketing report should be built into the reading order.

In the same way the eye also connects items which appear in groups. This means several unconnected graphs or tables which appear in a column instinctively causes the brain to see them as connected data. The use of grids, shading, borders and dividing lines can help to link those data shapes that are related, making it clear where data relationships fit.

Meaningful dialogue

Marketing reports usually comprise of a series of KPIs, graphs, word tags and tables however these need to be displayed in such a way that they provide meaningful dialogue around the marketing performance. Like any good story there should be a clear narrative that takes the reader on a journey from the core data, through the evaluation and on to a final decision.

The layout of the report will determine the effectiveness of the narration; having a logical flow between the different elements will make far more sense than data simply grouped together. The design of the marketing report needs to focus on the narrative journey so that it is clear what decision or action is being recommended based on the output from the marketing report.

The marketing report should simplify decision making and reporting. Focusing on the purpose of the marketing report at the outset (ie supporting next quarter planning, review of channels, analysis of which markets to target)

means only the essential elements are included and provides only the key information, reducing production time and reader requirements.

Marketing reports provide a vital role in strategic marketing and regular marketing planning. By making the marketing report concise and easy to understand, and by evaluating the data to show where improvements are possible, the marketing report facilitates corporate decision making. Robust marketing reports give the business visibility on what marketing activities are helping to win work and which areas need to be improved, giving confidence that the marketing team are successfully delivering value.

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