RULER

The fundamentals in creating Digital Marketing Reports

Insights from 40 marketing experts at leading digital agencies

www.ruleranalytics.com

Foreword

Reporting campaign performance to clients is a core, and often under-appreciated, part of agency life. As this report shows, there is an art to presenting the most valuable campaign information.

At Ruler, we understand the challenges in creating great and insightful reports, and the time it takes to produce them. Therefore, we sought the insight of digital marketing practitioners within 40 agencies to try and establish the fundamentals of digital campaign reporting, and how we can all work together to further improve them.

Many agencies highlighted the need to filter key insights from the reports to define what actions should be taken next. What is sometimes referred to as the "So What?" element.

However, good reporting can be time-consuming, so the team at Ruler are committed to finding time savings ways to access the best information.

Attributing effectiveness in a cross channel campaign also brings challenges and, Ruler is committed to working our partner agencies to make this more achievable.

We hope you enjoy our findings and would love you to join our partner programme at www.ruleranalytics.com/agency-partner

Richard Gregory
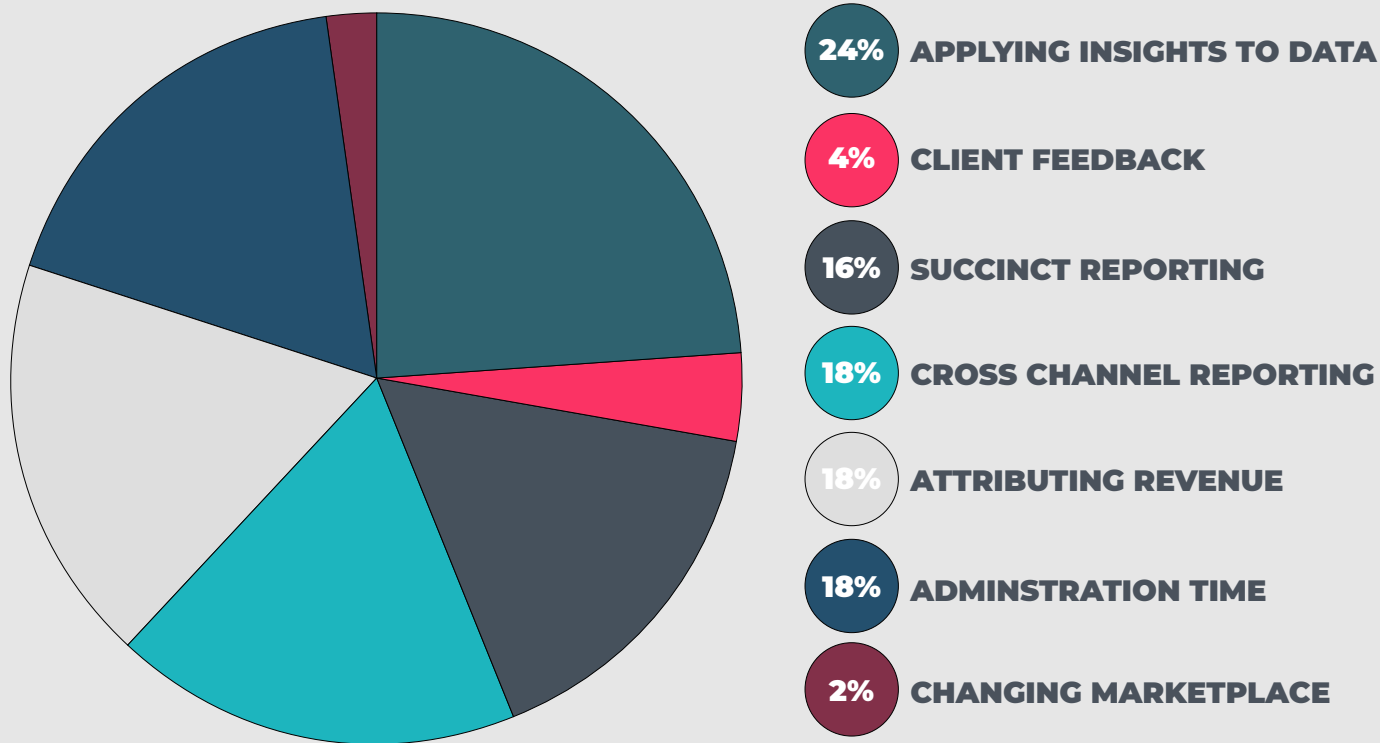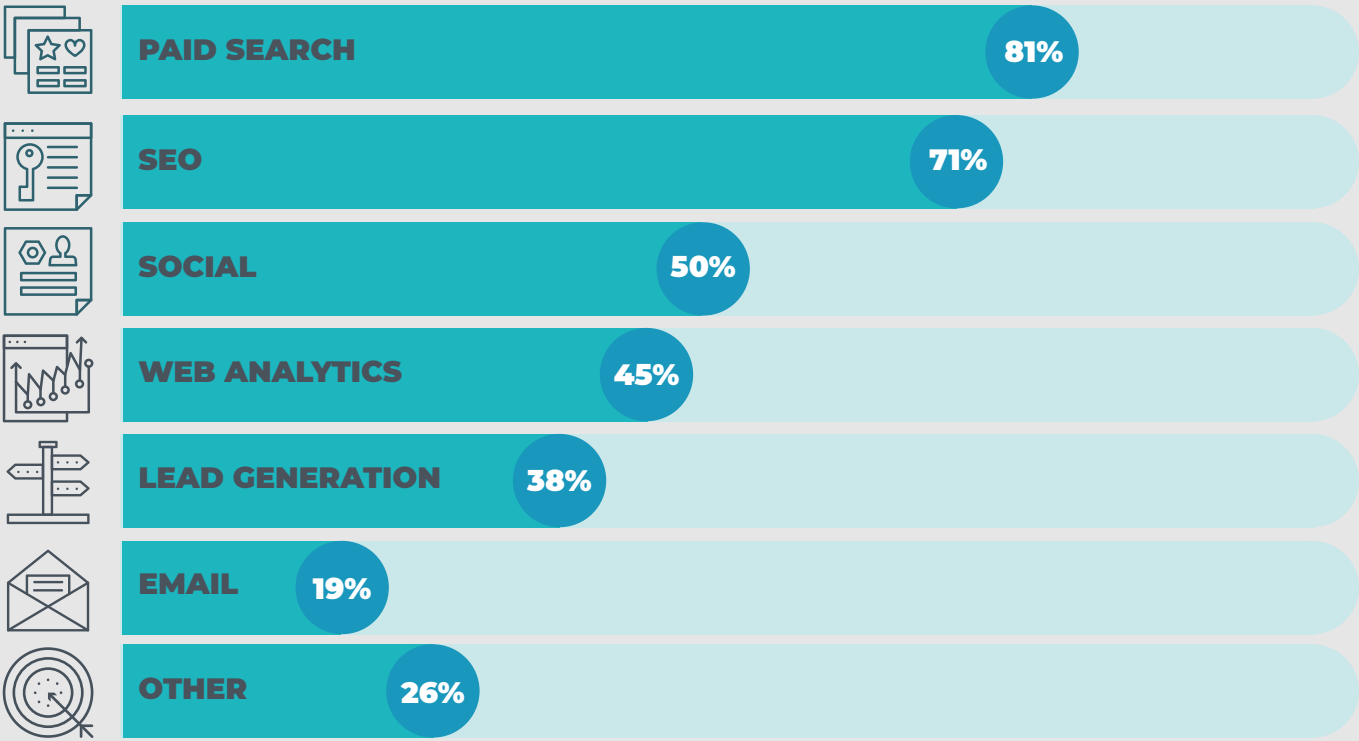Non-Exec Chairman, Ruler Analytics

Stats at a glance

Which areas of digital marketing do you specialise in?

Respondents typically specialised within Paid Search and SEO, with several also supporting their clients with other channels such as Social, Email and Outreach.

A number of those polled provided additional elements such as Web Analytics, Development and Conversion Rate Optimisation.

- PAID SEARCH **81%**
- SEO **71%**
- SOCIAL **50%**
- WEB ANALYTICS **45%**
- LEAD GENERATION **38%**
- EMAIL **19%**
- OTHER **26%**

## What are the main challenges you face when builidng reports?

Answers are varied for this question, with agencies mainly finding obstacles in adding relevant context to the statistics they were presented with.

Combine this with the challenges in analysing the impact of their activity across multiple channels and keeping the data clear and concise, it's easy to see why time taken to build reports can add up.

- **24%** APPLYING INSIGHTS TO DATA
- **4%** CLIENT FEEDBACK
- **16%** SUCCINCT REPORTING
- **18%** CROSS CHANNEL REPORTING
- **18%** ATTRIBUTING REVENUE
- **18%** ADMINSTRATION TIME
- **2%** CHANGING MARKETPLACE

What format do you report in?

The majority of agencies are using a range of report formats, with PDFs containing both data visualisation and supporting commentary alongside spreadsheets or BI tools for the cusotmer to dive deeper if they wish.

Over half of the agencies are utilising Google Data Studio for its rich, flexible and intuitive functionality. The ability for the client to access live data is often providing added value.

- PDF **65%**
- GOOGLE DATA STUDIO **47%**
- SLIDES **19%**
- SHEETS **16%**
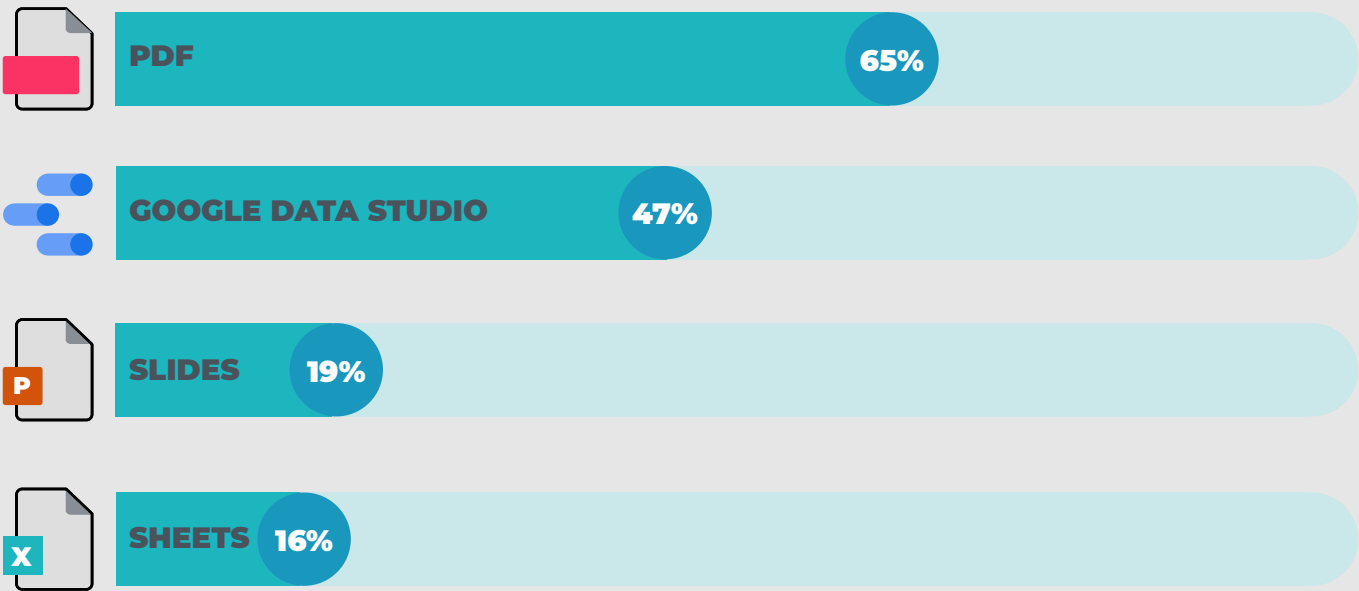
Just the facts...

There are a number of common themes running through the responses we've received, we've identified the top 5 tips to creating a compelling and useful digital marketing report.

3 Context is King

Of course, data is only part of the story. Your customer looks to you for expert advice on what the numbers really mean.

No one expects War and Peace, but adding commentary to your findings from someone close to the numbers will engage the reader and help build trust that you have the matter in hand.

Drilling into cross channel metrics, evaluating external factors and identifying underlying trends will add context for the reader, allow you to provide recommendations for future actions and stay on the front foot to optimise and improve performance.

1 Measure what Matters

Understanding what makes a customer tick is imperative to ensuring your marketing efforts are hitting all the right notes.

Are they looking to increase instore foot traffic? Raise awareness in a new market? Reduce churn? If your report can help answer the high level questions asked in the board room, then you could have a customer for life.

Clarifying your customer's core short, medium and long term objectives will ensure KPIs are aligned and provide relevant information to show the value you are driving and help inform business decisions.

4 Read the Room

Consider who might have access to your report.

While your main contact may marketing practitioner who lives and breathes Google Analytics, the report could easily make its way into the hands of a CFO who ultimately holds the purse strings and doesn't know their UTMs from their backlinks.

By keeping reports clear and concise, you can ensure all stakeholders can digest your report without fear of jargon overload.

2 Don't Drown in Data

With the wealth of statistics available from a multitude of channels, digital marketers must be ruthless in the data they present to a customer.

Failing to find the balance between the value or vanity of data could de-rail the message you're trying to convey and lead a customer down a rabbit hole of keyword rankings and follower counts.

By being laser-focused on the metrics that matter you can demonstrate success, identify areas for improvement and ultimately own the conversation.

5 Evidence your Effectiveness

You've done all the hard work in driving traffic to a website or raising brand awarenees, but how can you prove it's resulting in sales?

When it comes down to it, a client will want evidence of how much revenue your efforts are bringing to their table. Being able to effectively attribute the impact your marketing campaigns are having on the company's bottom line will allow you to definitively demonstrate your worth.

Utilising Marketing Attribution tools will ensure you present a single view of the leads you are generating are converting to a sale whether that's via an online checkout, in store purchase or sale over the phone.

What the experts say...

Ruler Analytics asked over 40 experts from the leading digital marketing agencies for their take on what goes into creating a digital marketing report for their clients.

We've provided their responses throughout this report to give you an overview of reporting best practice with the digital marketing industry.

Chris Rowett
Biddable Director

JOURNEY FURTHER
www.journeyfurther.com

Specialising in:

- Paid Search
- Social Advertising

❝ A report that can't be used to optimise performance is effectively a dashboard ❞

We use a combination of three elements; metrics and dimensions that we need to optimise the performance, metrics and dimensions the client requires for their questions, and insightful analysis to give context to the data.

We believe a report that can't be used to optimise performance is effectively a dashboard, offering only an update, without answering any questions. Whilst seeing the results is important, it is much more important to understand why the results are as they are. For example, we would always include breakdowns for any significant segments such as device type or product/service type. The reason being that if performance was better or worse than the previous period, the first question would be "why?", and the process to answer that is to isolate which segments have changed. It stands to reason this should be part of the report.

The analysis that accompanies a report should never just state the results - the report already does this so you are simply turning numbers into words and duplicating the work. The idea is to connect the numbers in the report with contextual bridges. For example, the clicks were down because the CTR dropped, not the impressions, and when segmenting by device it's clear that our drop in Absolute Top Impression Share on desktop has caused it.

It's not essential that the report offers a solution to the issue as this may be part of a follow-up, but where possible we would also link a new or ongoing action to the issue as a workstream to tackle it.

The final consideration is client-led metrics and dimensions. These are not always necessary for our optimisation, but should be included and touched upon in the analysis, as we don't always have the wider context of why they are important.

There are also a few "don'ts" we believe in. Don't add any metrics or dimensions that are not important to the objective of you or the client. We come across a lot of impressive sounding metrics that add no actual value to the context or the objective and can pull you away from the real objective. Bounce Rate is possibly the most iconic example of this. We had a great week for sales, but concerned that our bounce rates have increased? There could be any number of reasons why the bounce rate has changed, including positive reasons such as dropping customers on a more informative page (the product page perhaps) that mean 10% better conversion rate and 10% higher bounce rate.

We also believe in the cleanliness of data and formatting. Don't import more data than necessary. Holding on to historic data is a common pitfall that ends up slowing down GDocs and making files excessively large. Cleanliness is about both presenting the data in a way that is easy to read, and also about consistency. Conversion Rate Optimisation often focuses on reducing cognitive load in order to make it easier for a visitor to access the important information and take action.

Reporting is sort of the same, as we look to present the data and explanations in an easily digestible way. This doesn't mean the report is not granular or complex, but it flows well and is clearly explained. The benefit is better understanding of what is happening, reduces client stress and need for repetitive conversations.

Matt Cocking
PPC Manager

fifteen

www.fifteendesign.co.uk

Specialising in:

- Paid Search

❝ Without conversion, businesses don't make money, so why would you target yourself against anything else? ❞

Every report we send is focused around conversion.

Without conversion, businesses don't make money, so why would you target yourself against anything else?

With that in mind, the fundamentals for any report will include cost, number of conversions, the value of said conversions, a CPA based on cost/conversions and an ROI figure.

This highlights for the business if they're making money or not from our efforts.

Amy Wilkson
Director

Disruptive thinking

www.hellodisruptive.com

Specialising in:

Strategy

Delivery

> " It is essential to ensure the client understands the criteria behind a 'lead' "

We identify core marketing objectives with KPIs, that align with the client's overarching strategic and organisational growth objectives.

The challenge for us is articulating those reports in a way that suits both the marketing team we're working with (i.e. has enough detail to optimise and learn from), and also suiting the Partner / Director level which is often a non-marketing person.

We need to make the reports jargon free while satisfying the level of data that the marketing team needs.

Lead generation is always an important aspect to include - but it's essential to ensure that the client understands the criteria behind a 'lead', and also the stages they go through from lead nurture right through to acquisition.

Often these other stages come with their own KPIs., and can span content, engagement and basic performance metrics.

Matt Sellars
Account Director

Converted c

www.converted.co.uk

Specialising in:

Paid Search   Web Analytics

SEO   Web Development

Social Advertising

> " The fundamental data point to anchor your reports around will always be a company's business goals "

The fundamental data point to anchor your reports around will always be a company's business goals.

For example, if a company's main goal is to have a particular ROAS, the data should add valuable insights into whether this goal has been achieved in a particular week or month, with KPIs referenced that have impacted their main goal.

In the case of ROAS, this could refer to conversion rate, cost per click and ROAS split by campaign, to gain insights into where there's a positive and negative impact on the main business goal.
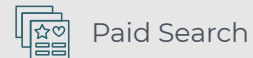
Roy Dovaston
Managing Director

CLICKGUARDIAN

www.clickguardian.co.uk

Specialising in:

Paid Search

" Our clients are most interested in cost, cost per conversion and conversion rate "

We use datastudio as this allows us to produce detailed reports.

Our clients are most interested in cost, cost per conversion and conversion rate.

However, they're also interested in whether introducing Click Guardian has an impact in terms of enabling and measuring whether removing click fraud & general click wastage has a positive impact on their KPIs.

Victoria Foster
Senior Account Manager

hitsearch
Experts in Digital Marketing

www.hitsearchlimited.com

Specialising in:

Paid Search   Lead Generation

SEO   Web Development

Web Analytics

" Traffic and sales are the two main areas our clients are interested in seeing growth "

Traffic and sales are the two main areas our clients are interested in seeing growth. All of our reports include details on how these areas are doing compared to the previous month, year, and against forecast.

This overview allows clients to quickly see how well a campaign is doing, whether it be focused on sessions, pageviews, enquiries or revenue.

Alexandra Ingram
Director of Paid Media

trafiki
ECOMMERCE MARKETING

www.trafiki-ecommerce.com

Specialising in:

Paid Search

" Reports need to meet the needs of the clients in a transparent and informative manner "

It really depends on the type of client, whether they're e-commerce or lead gen, and how much time they want to spend on understanding and dissecting performance reports.

Digital marketing reports need to meet the needs of the clients in a transparent and informative manner.

Most clients, in our experience, don't want to be overwhelmed by information overload so we provide top-line metrics one or twice a week - traffic, sales, revenue and ROAS.

One of our clients is a new and emerging retailer who has pooled the majority of their marketing budget into PPC activity, with little focus being paid to offline advertising.

We decided to include site-wide and multi-channel attribution sales and revenue data to measure the brand halo effect across other traffic sources.
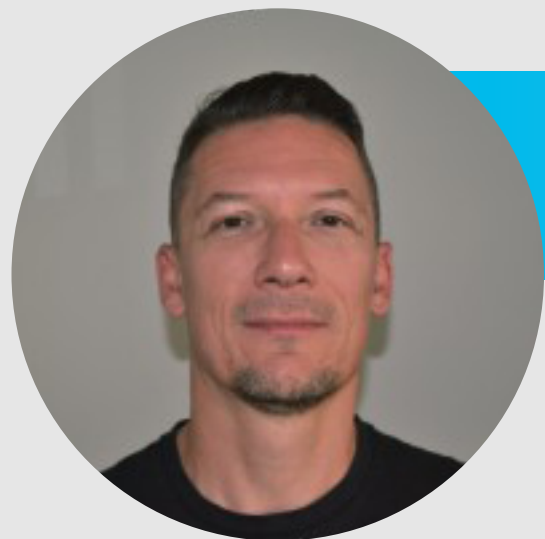
Paul Morris
Managing Director

superb.digital

www.superb.digital

Specialising in:

Paid Search

SEO

> " The more complex data included, the less likely the report is to be read and understood "

The main idea of the report is to be read and provide valuable insights. The more complex data included the less likely the report is to be read and understood.

To that end we try not to overload with complex information and only include what is genuinely going to be of use to a client.

We always start with a written summary - we'll summarise key stats and results, then move onto highlighting what we've been doing in the previous month and any interesting news or updates they need to be aware of.

The summary will then finish off with any insights and the plan for the following month.

From there the report is tailored to each client, we may include revenue information if they're e-commerce or traffic and goal conversion data if not.

John Warner
Senior SEO, Content & Marketing

CLICK CONSULT
PART OF CEUTA GROUP

www.click.co.uk

Specialising in:

SEO

Web Analytics

Web Development

Lead Generation

Content/Copywriting

> " Reports should clearly communicate your progress on top level KPIs in a manner understandable to someone that may have no idea what digital marketing is "

While there are plenty of metrics you could offer as integral to a digital marketing report – from sessions through to conversion rate, the one area that is often neglected is more top level.

We often forget that reports are shared among stakeholders, many of whom will be unfamiliar with the work you are doing.

For that reason, reports should clearly communicate your progress and its impact on top level KPIs (revenue, products sold etc.) in a manner understandable to someone that may have no idea what digital marketing is.

In addition – automate where possible. Manual reporting is seldom necessary for large parts of the digital marketing mix and automation can free up time for commentary and still save time every month.

Robert Stoubos
Founder/Owner

ODYSSEY
NEW MEDIA

www.odysseynewmedia.com

Specialising in:

Paid Search

SEO

Social Advertising

Conversion Enhancement

UX Design

❝ Multi-channel requires many more metrics to gauge cross-channel performance ❞

The fundamentals that we include in our digital marketing reports vary depending on channel activity.

Some campaigns require only reporting on certain metrics and others are multi-channel so they require many more metrics to gauge cross-channel performance.

Generally we often include the following metric reports - Traffic by Source Channel, Conversions by Source Channel, Revenue by Source Channel, Position Rankings (individually and summary), Backlink metrics, Paid Ad Campaign Performance metrics, Social Ad Campaign Performance Metrics.

All our reports also include supplementary notes to explain activity, gains and performance to our clients.

Charlotte Fallon
Account Manager

embryo
DIGITAL

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Specialising in:

Paid Search

SEO

Lead Generation

Web Analytics

Web Development

❝ Front and centre of all our reports are the amount of converstions that our client has received in the month ❞

Front and centre of all our reports are the amount of conversions that our client has received in the month. Calls, contact form enquiries, purchases, downloads, any actions taken on the website which impact their business. Many of them don't even get past this first page which list these conversions.

Then we detail all of the tasks that we have completed on their account over the month, and how much time each of them has taken, as well as a reason why we've done that task. These are separated by service so that it's really clear to them where their money is going!

We also include screenshots or images of any assets we've designed. Then we pull through all the usual stats from Google Analytics, search console, Google Ads, Facebook ads etc about traffic volumes, new vs returning user, all the key stats

We compare these to the previous month or do a year on year comparison where appropriate. Then we finish the reports with our strategy for the following month and what tasks will be carried out. It's a lengthy process!

Daisy Foster
CEO

Digitool

www.godigitool.com

Specialising in:

Paid Search

Social Advertising

Lead Generation

" Thanks to the help of Ruler Analytics, the customers can listen back to every call and read every email and assign an exact job value, allowing us to report on exact Return on Investment "

We first work out the average ROI. This allows the customer to have a quick glance at whether their marketing is working. All we need to know from the customer is their average job value and their average conversion rate. We then use a digital marketing report to show our clients:

1. How many leads you got from our marketing efforts (no. of calls and emails)
2. What is your conversion rate
3. What is your average job value.

We can then work out a "quick glance of the ROI" without assigning a value to every sale.

The second part of our digital marketing report allows customers to work out an exact ROI.

Thanks to the help of Ruler Analytics, the customers can listen back to every call and read every email then assign an exact Job value. This will then allow the report to know an exact ROI because we know the exact amount of work booked in.

Customers like this reporting method as there is the option for a quick glance and if they want to dig deeper into their marketing report they can listen to every call and work out exactly what they're getting back from their marketing efforts.

Duncan Heath
Strategy Director

fresh egg

www.freshegg.co.uk

Specialising in:

SEO

Web Analytics

Web Development

Content Marketing

Conversion Rate Optimisation

" There is nothing more frustrating to a client than seeing observations with no corresponding hypothesis "

We learnt (the hard way) a long time ago that trying to create a single report template that satisfied the needs of all clients was a fool's errand. Different levels and personalities of stakeholders, information presentation preferences and even cultural differences are just a few variables that need considering. With this in mind, we now ask clients during their onboarding questions such as: In what format would you like your reports? How regularly would you like to receive them? Who will be digesting them? What level of detail will be useful for you?

We do our best to cater our reporting to individual clients. That being said, there are some fundamentals we often include:

Historic performance:
I love that Maya Angelou quote – "If you don't know where you've come from, you don't know where you're going". Showing recent month-on-month performance, year-on-year performance or even longer time periods that allow for relevant trends will help contextualise current performance. It will prevent an over-focus on, and kneejerk reaction to, granular changes in measurables and more of an appreciation of bigger-picture fluctuations and overall strategy.

Actionable insights:
There is nothing more frustrating to a client than seeing observations in a report with no corresponding hypothesis as to why something is happening and, where relevant, suggested actions to respond.

For example, a report might point out that "conversion rate for newsletter sign-ups has dropped 20% in the last month". This is potentially dangerous data to report on if it's not accompanied by a logical (ideally evidence based) hypothesis, such as..."This is likely due in part to the new layout changes which have pushed the sign-up box below the fold on 64% of devices" and ideally a proposed solution such as..."It's recommended that moving this key sign-up box up the page again is tested to understand the impact its location is having on conversions'

Prioritised solutions:
There are lots of things wrong with any digital marketing activity and lots of opportunities to improve it. In over 15 years in digital marketing I've always found this to be the case, which I guess my career should be thankful for. However, some problems are bigger than others and some solutions are better – client's (be they internal or external) normally need help in understanding which are the priority.

What we find clients really appreciate is where it's made perfectly clear, via a traffic light or scoring system, which critical issues should be addressed right away, which ideas offer the greatest potential, and where the lowest hanging fruit is.

James Brockbank
Founder & Managing Director

digitaloft

www.digitaloft.co.uk

Specialising in:

SEO

> " The fundamental question a report must answer is 'What return is being seen from this investment?' "

The purpose of a digital marketing report is to demonstrate the performance of one or more channels, typically against pre-defined KPIs. It's an opportunity for stakeholders to see a snapshot of how a channel is performing combined with insights and activity.

In my opinion, the fundamental question which a report must answer is 'what return is being seen from this investment?'

Looking at SEO reporting; the fundamentals we include are the growth in organic traffic Year on Year (traffic on its own has no context - stakeholders need to see the comparable performance), organic impressions, click-through rate and the search terms driving these impressions and clicks.

We moved away last year from solely reporting on keyword rankings. Yes, we showcase average position, pulling this insight from Search Console; however, always found a static set of keywords to not be fully representative.

Ranking positions are often vanity metrics when looked at out of context; and showcasing impressions, clicks and click-through rate on a search term by search term basis also allows to spot quick win optimisation opportunities.

The most important inclusion, however, is being able to demonstrate financial returns. That means showcasing conversions, cost-per-conversion and return on investment at the very least. We very much tailor this on a client-by-client basis to ensure we're reporting on the KPIs which make our contact's job that little bit easier.

We'll then include a full breakdown of activities completed that month, an insight-driven summary of campaign performance and the following month's project plan.

Jack Giddens
Head of Biddable

Katté & Co.

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Specialising in:

Paid Search

> " Alongside the data we provide the "Why's" giving context that is easily digestable "

Our reports consist of a data sheet including performance metrics such as CTRs, CPCs, leads/transactions, revenue and there corresponding CVRs, CPAs and/or ROAS.

We'll always split these out by different targeting options and campaign types to get true view on performance at each level.

Along side the data we provide a written PDF document outlining the "Why's" giving context to the data that is easily digestible for the reader at any level in the clients business. This usually contains a mixture of written text accompanied by graphs and charts to easily visualise the data.

Aliesha Christopher
Marketing Data Analyst

PushON

www.pushon.co.uk

Specialising in:

Paid Search

Web Analytics

Lead Generation

SEO

Web Development

Social Advertising

What are the fundamentals you include in your digital marketing reports?

1. Traffic Metrics
2. KPI comparisons Year On Year/ Month On Month
3. Audience & Demographic Data
4. Engagement Figures

Victoria Spall
Account Director

BROWSER MEDIA .AGENCY

www.browsermedia.agency

Specialising in:

- Paid Search
- SEO
- Social Advertising
- Email Marketing
- Web Analytics
- Web Development

> " A pretty looking dashboard can only do so much. Each report should be tailored to the client's needs "

Anyone can run an automated report that will pull data raw from a web analytics platform and make it look presentable, but the real value in reporting lies in being able to provide commentary around core metrics that actually matter to a client.

Because reports are read by individuals with varying levels of knowledge, presenting the most important data in a clear and concise way is crucial. It is important to be able to tell a story and identify opportunities without confusing the reader.

A pretty looking dashboard can only do so much. Each report should be tailored to the client's needs, with insights into performance, as well as being able to inform on future strategies.

Our reports always start with an executive summary, to share the activities and learnings from the previous month and confirm the direction going forward, but then pull in data from Google Analytics and relevant biddable media platforms to show how a website has performed.

We will also include 3rd party metrics such as Moz's Domain Authority, which act as barometers to measure performance. Whilst these all need caveats, they help to show trends.

Colin Harrison
Director

:nivo digital

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Specialising in:

- Paid Search
- SEO
- Social Advertising
- Web Design
- Web Analytics
- Web Development

> " Our reports help condition the direction for wider marketing focus "

In addition to reporting on the general metrics such as website traffic and top level conversions like phone calls and contact form completions, we provide valuable insights into some wider factors that can influence results in our reports.

These include but are not limited to providing insights into

- Website downtime, after all what's the point of driving Paid Ads to a landing page that doesn't appear?
- Whether the website is secured through an SSL certificate
- When the domain is set to expire
- What level of security they have implemented on their website
- Website user testing insights

Some other favourites we include in our reports are assisted conversions, device insights and location conversions. These help to condition the direction for wider marketing focuses.

Cristiano Winckler
Head of Performance Marketing

SOMEBODY DIGITAL

www.somebodydigital.com

Specialising in:

Paid Search

SEO

Social Advertising

Lead Generation

> " Ultimately, the client needs to be able to see a return "

All reports need to have the standard metrics, like impressions, clicks, conversions and conversion rate, however, our agency has a strong focus in ROI, so we always try to put a value on each conversion, even if it's a lead generation campaign.

Ultimately, the client need to be able to see a return.

Jo Seward
Digital Marketing Manager

RUN

www.run2.co.uk

Specialising in:

SEO

> " We take time to explain the data and how we what this means for their business and how we will adapt our strategy accordingly "

Clients ultimately want to see commercial understanding from our monthly reports so we always try to keep conversion our primary focus. Is each channel generating a return?

We also don't like to present clients with pages of numbers and no insight. We take the time to explain the data, what this means for their business and how we will adapt our strategy accordingly.

Andy Hunt
Strategy Director

we!nfluence

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Specialising in:

Paid Search

SEO

Social Advertising

Affiliate Marketing

Web Analytics

Web Development

> " Profitability is what ultimately matters and it is surprising how many marketing reports without this "

Context. Data is meaningless without this.

Seasonal Expectations

Most businesses experience seasonal fluctuations in performance, so comparing one month to another is not very helpful unless you also have an understanding of how these months should compare.

Ideally, forecasts or targets which account for seasonal expectations should be established up front to set a benchmark of performance which can be reported against, but even this in isolation is limited in value (see next point).

Trend Spotting

Analysing longer term trends is important not just in understanding how you are performing now, but where performance might be heading.

A simplistic example would be looking at a report that shows revenue has increased both month on month and year on year. That is a positive picture on the surface, but looking at those numbers alone would miss a trend that shows the Year on Year growth has dropped by 50% over the past 6 months.

As a standard, the reports we build will focus on the year on year trendline (without ignoring the specific metrics or KPIs). To make the right decisions for clients, we need to be able to see beyond a snapshot of where we are right now - where performance has come from and where it is heading.

Commercially Focused Metrics

ROAS is not a relevant business metric.

Profitability is what ultimately matters and it is surprising how many marketing reports we see that make no reference to this. Most businesses can provide at the very least an idea of the average margin they are making on their sales, and it is extremely easy to combine this with known marketing costs (ad spend as well as any known costs of management, third party or internal) and include a profitability estimate within these reports.

ROAS or CPA are useful and readily accessible metrics that can be used when optimising campaigns day to day, but without also considering the big picture we can make decisions that actually hurt the bottom line, e.g. a campaign that is optimised for ROAS to the point that the profit generated (based on ad spend and average margin) does not even cover the cost of managing it!

Hardeep Matharoo
Head of Digital Marketing

BEST RESPONSE MEDIA

www.bestresponsemedia.co.uk

Specialising in:

- Paid Search
- SEO
- Social Advertising

" It is helpful having a comparison to track progress "

The fundamentals we include in our reports include the overall traffic with a breakdown of all marketing channels.

It is helpful is having a comparison with the previous year and month to track progress.

We also include a summary page of the deliverables completed with the next steps to have a record the work that has been completed.

Another essential element of the reports is the keyword rankings with comparison of previous ranking position.

George Onofrei
Account Manager

broadplace.com

www.broadplace.com

Specialising in:

- Paid Search

" There are endless data points we could observe, so aligning the KPIs with objectives is important "

From an agency perspective, what we include in a digital marketing report will vary widely depending on the client's size, sector, specific requirements and the complexity of the project.

Before deciding what to include in each report, we need to get a good understanding of what the client's main objectives are. There are endless data points we could observe, so aligning KPIs with objectives is important. This helps shape the perspective in which we address the data too.

Alongside the objectives, we also consider the KPI's used in each specific sector, where we may have good industry benchmarks to review and compare from.

Regardless of the project type and sector, timeframes are a really important part, as it is very challenging to get a like for like comparison when not taking into consideration MoM, YoY comparisons, seasonality and trends.

A digital marketing report should be specifically tailored to its intended audience as certain metrics will be less relevant for high-level stakeholders where other users will require the granular detail.

In a digital report, it is useful to add commentary and analysis. It is important to create written insights to describe the visual trends of a report, but also to justify changes in performance. Depending on the type of report and audience, it may also be necessary to include recent and future actions in reaction to the noticed trends in performance.

We would always look to mention external factors that could impact performance like bad weather for a travel company (people will look for getaways to sunnier places) or good weather for an e-commerce company (everyone will be outside partying and not shopping); media mentions about specific high ticket products/ services that heavily increase search demand and influence costs.

Where reports can create extra value is in specific insights or trends related to more granular levels of detail, for example, best/worst selling products or top viewed pages. These details can often be missed from the top-level overviews that many dashboards provide, but a good quality report will help bring those insights to the surface.

In the end, the purpose of a digital report is to help the audience understand the effectiveness of various marketing channels, highlight efforts that brought success and contextualise the ones that did not. It is important to recognise that the requirements will never always be the same.

Dan Pillay
Head of CampaignHero

CAMPAIGNHERO

www.campaignhero.ai

Specialising in:

Paid Search

SEO

Social Advertising

> " Remember your report should have a purpose - if any element no longer serves the purpose or has been superseded, then it's time to say goodbye "

Objectives:
As a marketer we try to position reports as a means to an end, as such we encourage them to be goal or action orientated wherever possible. Starting with a goal or objective and adding the metrics to support an understanding of the objective is what makes a report useful. This is often easier to apply to an affiliate or performance marketing report than a brand report however there is value in an action orientated approach to any type of campaign.

Inputs & Outputs:
Our next requirement is to have a healthy blend of lead and lag KPIs - although it's crucial to focus on goals and objectives a good marketing report for us, we want to draw attention to lead KPIs and inputs as well as outputs. For example if a campaign objective is to drive calls of a certain length a dashboard would focus on the output of that, but a fuller report would also draw attention to the actions taken to achieve it.

Context & Narrative:
For us, reports should tell a story, although it's tempting to hold reports up as an untouchable unbiased version of the truth, we're still in marketing - it's our role to create a narrative based on context and make the conclusions and story easy to follow for the stakeholders. Simply providing KPIs without any opinion or understanding of "why" typically leaves clients and stakeholders with mixed messages. Of course the narrative and conclusion should be well supported and evidence based but we don't believe in hiding from it.

Shortcuts:
Less is usually more - whatever your reporting format KPI dashboard, monthly powerpoint or PDF summary the fundamental error I see is crowding of reports with data, with no real structure or connection between the datapoints. It's extremely common to add new data to a report, add a slide or chart, but it's comparatively rare to see a confident marketer remove something or streamline something. Remember your report should have a purpose - so if any element of your report no longer serves the purpose or has been superseded, then it's time to say goodbye.

360 Views:
Finally, we're seeing a host of tools and methodologies that allow us as marketers to look at more channels and more importantly, how they interact with each other. Wherever possible and reasonable (with the above rules in mind) it's good for us to at least consider if not include data from all channels where appropriate. Attribution, even when you as a marketer might only be responsible for specific channels helps tell the full story, aids narrative and often prevents duplicate reporting.

Marty Rogers
Paramount Digital
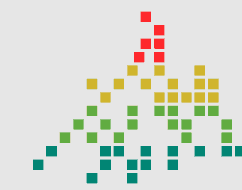
Paramount Digital

www.paramountdigital.co.uk

Specialising in:

SEO

> " Being a transparent agency we provide a list containing every action that has been performed for the client's budget "

We provide mainly SEO services so our reports always provide an overview that provides insight into not just current ranking positions, but also ranking changes - we track a lot of keywords for every client and each day we track how many positions have changed for every keyword which can help the overall report to look more positive rather than sole focus on a X position moved to Y position.

Our reports also report on overall website traffic, how much of that was delivered via organic, how many leads they got overall, and how many of those were thanks to organic - of course each of these show percentage increase month-on-month, too.

Reports also show a table of their best performing keywords - where they were when we started, where they are now, monthly increase and search volume.

Being a transparent agency we also provide a list containing every action that has been performed for the clients budget. Every on-site change, every piece of content written, every link earned. This is what helps us to achieve such a high retention rate, I believe.

SEO reports also contain commentary, providing the client with an overview of the month's work, how we think things are going and what we're looking to do next month.

Paul Baguley
Managing Director

ISD INTERNET SALES DRIVE
www.internetsalesdrive.com

Specialising in:
- Paid Search
- SEO
- Lead Generation

What are the fundamentals you include in your digital marketing reports?
Google Analytics data including traffic, pages and engagement.

This is compared year on year.

We provide GSC performance report.

Back link Audit report. Keyword rankings compared to competitors and site audit

Aaron Crewe
Managing Director

novi. digital
www.novi.digital

Specialising in:
- Paid Search
- SEO
- Social Advertising
- Web Analytics
- Web Development
- Lead Generation

" We avoid the 'vanity metrics', this enables us to focus on what is working well, alongside seeing what isn't "

In our reporting we include whatever the client wants to see. Reporting can be done daily, weekly, bimonthly, monthly, quarterly or annually, depending on their requirements.

Automated reports can be done as frequently as they require, manual reports can be monthly, quarterly or annually.

In terms of metrics, again, this is up to the client. We do often advise that they shouldn't focus on ranking positions or volumes of visitors, even necessarily the number of enquiries, but rather the ROI of these enquiries.

As such we recommend a ROAS (return-on-ad-spend)-driven approach, focused on Cost-per-conversion, average conversion value, value / cost and conversion rate.

We avoid the 'vanity metrics'. This enables us to focus on what is working well, alongside seeing what isn't.

Michael Ferrari
Owner

Pen Cap
Online Marketing & Consulting

www.pencapseo.com

Specialising in:

Paid Search

SEO

Lead Generation

> " While traditional metrics like users, conversions etc are all great, they don't always paint the full picture "

For me, one of the most important parts of reporting is getting granular enough to show how specific strategies and tactics have improved the bottom line. While traditional metrics like users, conversions, etc., are all great, they don't always paint the full picture.

Along with those, I prefer to show clients direct before-and-after numbers for each part of the site we touched.

For instance, I recently did a fairly big content pruning project for a client. As we implemented the changes, I made sure to note in our reports the date we made the changes, the pages/parts of the site it would impact, and then show the difference in traffic, conversions and revenue from the date of implementation moving forward.

In this case we saw a major boost in impressions and sessions for our targeted pages (thanks to less cannibalization), which lead to those pages driving in more revenue through additional conversions.

Without showing this detail--which can easily be done with a standard table--it would be impossible to show the client how all the hard work paid off.

Ted Parry
Director

amore digital

www.amoredigital.co.uk

Specialising in:

Conversion Rate Optimisation

> " One of the biggest mistakes I see is marketers sending off complex reports to their clients/leadership team and not giving any background, or explaining what it means and how it impacts their business "

Being heavily involved in the PPC & Paid Social space means I need to have a really strong grasp on a few of the core metrics. I like to start my reports off with a view of the top line which highlights:

• Clicks
• Cost
• Cost Per Click
• Sales
• Revenue
• ROI

This data is then compared month to month so I have a close eye on performance, especially on the return on investment side.

Further down the report I segment the monthly data further by how individual campaigns are performing, if certain devices performance has improved or declined, if there are certain times of the day doing better than others.

In addition to this data I always like to highlight insights and provide commentary of what was done last month, and plans for next month.

One of the biggest mistakes I see is marketers sending off complex reports to their clients/leadership team and not giving any background, or explaining what it means and how it impacts their business.

Chris Price
Founder

ark.
www.arkadvance.com

Specialising in:

- Paid Search
- SEO
- Social Advertising
- Email Marketing
- Web Analytics
- Web Development
- Lead Generation

> " Pages and pages of data "blurb" can look impressive in its volume but from our experience the more you add the less attention you receive "

You are not short of data when it comes to creating a digital marketing report. Pages and pages of data "blurb" can look impressive in its volume but from our experience the more you add the less attention you receive. And really it's not what the data says that matters it's what it all means.

That's why our interpretations of what we are seeing is front and centre before we present the data that supports it. In this dialog we talk about the trends we see, the outcome of the experiments we have run and an overall comment on where we see things going.

Following the digital marketing inspired sale from start to finish enables us to nicely round out our reporting commentary. That's where solutions like Ruler come into their own.

They help us bridge the web / phone lead to direct facing sale technology chasm so that our dialog can include customer friendly metrics like "quotes accepted" and "services revenue agreed" and bind these to the detailed digital marketing tactics of paid clicks from Google, Facebook or Linkedin.

Nick Craig
Managing Director

Mackerel Media
Digital Marketing
www.mackerelmedia.co.uk

Specialising in:

- Paid Search
- SEO
- Social Advertising
- Lead Generation
- Web Analytics
- Web Development

> " We try to look at every aspect that could be influencing change, explore whether it's part of a trend, and educate the client on the true reason for it "

As is the case with most agencies, we include a range of measurement metrics for every site or campaign we report on.

Over the years, we've endeavoured to move to a position of adding value through our reporting, and we can do that by providing intelligent analysis and insight on the underlying performance data, and help the client see the trends and changes that are not immediately apparent.

For example, anyone can easily report on percentage uplifts or downturns in organic traffic, but how many people examine that to understand the underlying factors and pressures that have resulted in that outcome?

We try to look at every aspect that could be influencing that change, explore whether it's part of a trend, and educate the client on the true reason for it happening, and how they might turn that to their advantage.

The best way to summarise this would be that we tell the client what they don't know, not what they do. There's no value in telling a client something they can easily get from the Analytics account they are in every second day, but there is value in helping them understand that the in-store activity they ran in France last month correlated with an uplift in average ecomm basket values from male customers over the age of 45. Or, that if they shifted their delivery cut-off windows by 48 hours, they could capture +27% incremental revenue in the south east of England for a time-limited campaign.

So in summary - it has to be all about the value. Clients don't value something that comes for free or cheaply, only what has value and adds value to their business.

Nick Handley
Head of Performance Marketing

Fluid DIGITAL
www.fluid-digital.com

Specialising in:

Paid Search

> ❝ The reports we send touch multiple people in the business and needs to be accesible to everyone at all levels ❞

Fluid reporting is built on the mentality of 'answer the question before it is asked' which leads our reporting to be very detailed and thorough. However, we understand the reports we send touch multiple people in the business and it needs to be accessible to everyone at all levels.

We manage to achieve this by using a myriad of visual graphs and charts alongside tables, all connected together using Google Data Studio and various APIs.

We cover top level metrics and key business goals in an easy to digest, simple format at the top of our reports and as you dive deeper into our reports (from top to bottom of the page) the more granular it becomes.

Our top level metrics for Ecommerce clients (PPC only) covers the following; Cost, Clicks, Impressions, Revenue, ROAS, Conversions, CPA, Market Share, all metrics include YoY comparisons. We give this detail in a metric card format for the month and also include a top level revenue and conversion trend graph for year to date.

Following this top level reporting section we dive a bit deeper providing all key metrics split out by campaign for people who want to look into the detail and understand where spend, revenue and conversions came from. We include device splits and audience metrics alongside search terms and competitor trends to give enough detail to inform our clients on their sphere from a PPC perspective.

Lastly we show our clients the type of products that are selling and also attach abandonment metrics which can inform our clients and the wider business on what is selling and if they need to stock more of certain products due to high performance.

Our reports are sent in PDF format and also viewable online to the client only, this allows them to interact with the report and also send it out to the wider business if needed.

Mindy Gofton
Head of Marketing Strategy

ICOM
www.i-com.net

Specialising in:

SEO

Content Marketing

Email Marketing

Brand Marketing

> ❝ Clients need the interpretation of the numbers far more than they need the numbers ❞

Each client has clear objectives we target with each strategy cycle and KPIs we use to measure progress towards those objectives so our reports focus on those KPIs.

We look on reporting as a way to demonstrate the value of our work, but we also realise that not all our clients have the time to read through a long, detailed report. So our reports contain an executive summary which highlights the key points (and standout metrics or key things achieved in the cycle as well as issues we will look to address in the next cycle) and then we go into the longer report.

We typically start with an overview of all the work we've completed over the period (either 1-month or 3-months) including any links, PR coverage and social media content, etc. We then run through the key statistics and KPIs comparing month-on-month (or quarter-on-quarter) but also to the same period the previous year so as to take seasonality into account.

We then will run through an analysis of how the work we've completed has impacted the KPIs. For example, if we've been focusing on improving the content on a client's website, we would highlight changes in traffic or conversions on the pages we've changed.

If we've been running a content and PR campaign we would explain how this campaign has impacted brand searches or traffic to the services being promoted in the campaign.

Based on the results, we would then explain what the next steps would be - what the client can expect in the next strategy cycle, which can help them understand why we're recommending the next stage in the strategy to be delivered in a certain way. This also gives us the opportunity to demonstrate we're being proactive in addressing any problems in performance by showing what we're going to do to make improvements.

We have found that reporting in this way, rather than by sending reams of statistics and ranking positions, really helps clients understand the impact of their digital marketing campaigns because they need the interpretation of the numbers far more than they need the numbers - as they know if their enquiries and sales have gone up or down.

Beckie Brown
Head of Paid Media

ETCH Group
www.etchuk.com

Specialising in:
- Paid Search
- SEO
- Social Advertising
- Email Marketing
- Web Analytics
- Web Development
- Affiliate Marketing

> " Picking a sensible basis for comparison will enable you to tell a story within your digital marketing report "

We help brands accelerate to resilient growth, by constantly redefininf what a marketing partner looks like.

Firstly, metrics in isolation mean very little to most people, you'll likely be met with 'I don't know if that's good or bad'. Selecting a period in time you are comparing to is a good start. However, unless you think carefully about it, you may just paint a false picture of what good and bad looks like.

For a business who doesn't really experience seasonality, to compare how sales are increasing month on month (February vs January) is likely a good indicator of growth. However, if one of the busiest times of the year is during your Back Friday sale, then it's highly likely October will look pretty rubbish when compared with November.

It's important to remember that this basis for comparison might not be completely fixed either. Keeping accurate records, perhaps through a comms plan or your analytics platform you'll see if you ran a promotion last year, that won't be repeated this year. In that case, year-on-year sales data will likely be skewed in favour of the promotional period.

The final consideration is your stakeholders to whom you are reporting. Whilst the hands-on marketing team may want to understand how bounce rate is fluctuating week-on-week, the board likely wants high-level indicators (sales and revenue for example) on a monthly or quarterly basis.

Picking a sensible basis for comparison will enable you to tell a story within your digital marketing report and you can ensure your story adds value and resonates with those who hear it.

Kherrin Wade
Strategy Director

ADIDO
www.adido-digital.co.uk

Specialising in:
- Paid Search
- SEO
- Social Advertising
- Email Marketing
- Web Analytics
- Web Development
- Lead Generation

> " The main point of our reporting is 'why' things have developed the way they have and how to make the most of learnings moving forward "

For our Paid Search it is all about context. The main point of our reporting is not so much delivering KPIs and how performance have faired but rather "why" things have developed the way that they have and how to make the most of learnings moving forward.

With that in mind our reporting takes shape to include week on week data and yearly trends to provide that context along with a detailed analysis of the search and competitor landscape.

Metrics are provided in both numeric form, visuals in the shape of a graphs as well as a detailed written commentary – all of which is followed up with a meeting to explain intricacies, and to help direct the performance in line with client focus.

A big focus of our SEO reports is around YOY comparisons of organic traffic. MOM comparisons are sometimes used, but YOY offers the most accurate insight into whether our efforts have had the right impact or not without being influenced by seasonal trends.

We look at traffic to the website as a whole, but then break the report down by landing page if we have had a specific campaign or focus.

Of course, another main focus is conversions. For ecommerce we would look at transactions and revenue YOY, and again focus in on the products we had been giving a push through our SEO work. We use Analytics data as well as any other ecommerce data our clients can provide us with.

Another big focus is, of course, keyword rankings, which we track using SEM Rush. We usually have a few main focus keywords for our clients which are reported on monthly, then deeper analysis based on the recent work completed and how that has impacted the rankings of other keywords.

Andy Adams
PPC Specialist

clicky.™

www.clicky.co.uk

Specialising in:

- Paid Search
- SEO
- Social Advertising
- Lead Generation
- Web Analytics
- Web Development

> ❝ Detailed analysis is key, along with what we will do next, tied in to meeting their overall marketing goals ❞

Initially we will have the main KPI(s) from the client about what information matters the most to their overall marketing goals, these could be sales/lead volume, or maintaining a certain cost per acquisition and then we'd build our reporting around this.

We also tend to include a range of other reporting metrics that contribute towards their main aims, which often helps when our analysis is explaining why performance is up/down and where improvements can be made.

Detailed analysis is also key, speaking to the client in ways that relates the key points in language they will understand, along with what we will do next - again, tied in to meeting their overall marketing goals.

Maria Christoforidou
Inbound Strategist

FIFTH RING

www.fifthring.com

Specialising in:

- Paid Search
- SEO
- Social Advertising
- Email Marketing
- Web Analytics
- Web Development
- Lead Generation
- Inbound Marketing
- Account Based Marketing

> ❝ Providing the data to the client is not enough if they cannot interpret it ❞

It depends on the type of digital marketing report. Usually, for paid social campaigns, we start with an overview of the campaign performance, and then break it down by ad group. Those tables include the number of impressions and clicks, clickthrough rate, engagement rates, video views and cost.

I always make sure to include a short glossary for clients in order to help them understand terms like CPM, impressions vs reach, etc.

In addition, I include industry benchmark rates, so they can understand what they're competing against and whether the campaign is performing ahead or below target.

Furthermore, we include demographic data such as job titles, industry, region, age groups - anything that can help us further refine the targeted persona profiles.

I always close the reports with a section on key findings and recommendations. Providing the data to the client is not enough if they cannot interpret it. Often clients don't have the time to go through a full report so they'll look at the main points and suggestions.

Ash Winder
Senior Paid Media Executive

SΩ Digital Marketing Agency
www.sqdigital.co.uk

Jeff Lyall
Head of Search Marketing

BE FOUND CHOSEN
www.befoundbechosen.co.uk

Specialising in:

- Paid Search
- Web Analytics
- Web Development

Specialising in:

- Paid Search
- SEO
- Social Advertising
- Email Marketing
- Web Analytics
- Web Development

" Your expertise is incredible valuable, that's what turns a report from simply being numbers on a screen to an insightful document "

Provide Key Stakeholders with Value and Actionable Insights

This sounds a no-brainer, right? You'd be surprised how many Digital Marketing reports are automated, regurgitated bits of selected data that mean nothing to a customer and offer little in the way of meaning to the agency themselves to base decisions on.

There are two key questions you need to ask yourself before creating a report:
• What are the objectives I'm measuring performance against?
• Who is my audience?

Ultimately, you're creating a report to review performance against your given objectives, so these KPI's should be front and centre. Now let's take two audiences: the CEO of a business and the Marketing Director. These two people have fundamentally different needs; CEO's needs a clear, concise document that can be easily interpreted regarding sales/leads generated, whereas a Marketing Director may require more in-depth information regarding work that has been carried out, for example, strategy for the upcoming [X] month(s) and granular breakdowns.

You know the old adage – less is more – and nowhere is this more accurate than in reporting on Digital Marketing. Keep in mind your document's aim is to give the reader an overview of how the campaigns have fared; your report should communicate critical performance insights in an easy-to-digest manner, with secondary information in supporting documents/appendices if required.

Whilst we're on the subject of clichés - "A picture's worth a thousand words". Drop data-centric tables for graphs and charts where applicable, this makes important information easy to digest for key stakeholders and can be a more-effective method of communicating your point.

Finally, and arguably the most important section of any report, is the recommendations and insights you provide. Your expertise is incredibly valuable, that's what turns a report from simply being numbers on a screen to an insightful document that has actionable outcomes and ultimately provides the platform for growth. You should be working on a model that regularly reports -> reviews -> hypothesises -> acts -> reports, this will ensure all data generated is meaningful and will identify key strengths and weaknesses in your current strategy that can be leveraged/solved to improve future performance.

" Our customers care about how much money they're making, so we do exactly that "

What are the fundamentals you include in your digital marketing reports?

Key metrics which matter most to our clients - no fluff, no numbers for numbers sake, just the hard-hitting ones that they'll have to report to the board. For most of our paid clients, this looks like ROAS, cost, and revenue taken. Simple.

We never report on things like impression share, impressions, or even rankings and other vanity metrics. Our customers care about how much money they're making, so we do exactly that.

Where does Attribution fit in?

Several agencies noted how important Marketing Attribution can be to help provide context to the leads that have been generated thanks to their efforts.

On the flipside, a number of agencies mentioned how challenging it can be to link revenue to activity without a reliable tool in place.

Dan Pillay
CampaignHero

we're seeing a host of tools and methodologies that allow us as marketers to look at more channels and more importantly, how they interact with each other. Wherever possible and reasonable (with the above rules in mind) it's good for us to at least consider if not include data from all channels where appropriate.

Attribution, even when you as a marketer might only be responsible for specific channels helps tell the full story, aids narrative and often prevents duplicate reporting.

Chris Price
Ark Advance

Following the digital marketing inspired sale from start to finish enables us to nicely round out our reporting commentary. That's where solutions like Ruler come into their own.

They help us bridge the web / phone lead to direct facing sale technology chasm so that our dialog can include customer friendly metrics like "quotes accepted" and "services revenue agreed" and bind these to the detailed digital marketing tactics of paid clicks from Google, Facebook or Linkedin.

Daisy Foster
Digitool

Thanks to the help of Ruler Analytics, the customers can listen back to every call and read every email then assign an exact Job value. This will then allow the report to know an exact ROI because we know the exact amount of work booked in.

Customers like this reporting method as there is the option for a quick glance and if they want to dig deeper into their marketing report they can listen to every call and work out exactly what they're getting back from their marketing efforts.

Ash Winder
SQ Digital

Yes, it may be the biggest 'buzzword' of the last few years, but attribution is a vitally important part of Digital Marketing, which is why it should be communicated to key stakeholders and customers (and if it isn't then it definitely needs to be!).

You'd be surprised at how many Digital Marketing reports neglect to mention 'the A word.' Scarily, this means decisions are being made that could negatively impact future performance, due to budget being weighted more heavily towards channels that on the surface appear to generate conversions.

Attribution can seem a daunting or overly technical model to understand, particularly if your audience consists of board members and senior personnel who don't quite understand marketing but need to know they are getting a return on investment. Therefore, you need to tell a story - it's all about giving the reader an overview of how channels have fared in a succinct, easy to digest manner.

For example, here at SQ Digital, we put attribution modelling into layman's terms by segmenting last-click attributed conversions alongside other attribution models to visually represent the overall impact of each channel. This allows us to discuss budgeting with a customer to ensure we are aggressively pushing channels that drive conversions, not just those that are credited with them, to help grow businesses.

Despite the advancements in algorithms and 'machine learning', consumer's online behaviour has never been less predictable than now. However, by analysing and reporting on varying attribution models, you will be able to both re-apportion budgets and gain a better insight into how your audience interacts with your website and brand. This allows you to better optimise your ad copy, ad delivery and landing pages.

Different verticals can see wildly different data when looking across a range of attribution models – 'big ticket' items or those with long-term implications (such as life insurance for example) typically see multiple interactions with a website and brand before an enquiry or purchase takes place.

It's a case of marketing to the person behind the data –remember those board members and senior executives - these products and services don't often have a linear path to purchase, analysing your attribution data allows you to optimise your marketing funnels accordingly.

On the subject of attribution, another key measure of success you should be reporting on is offline conversions. Similar to different models, it's imperative you're communicating the impact your online marketing is having on your online sales – it's an age-old agency problem of proving what tangible benefit your work has on a client's business. At SQ we utilise Ruler Analytics' call tracking software, Google's Store Visits data alongside customer's internal CRM data to build a big picture of the impact our marketing has on their sales
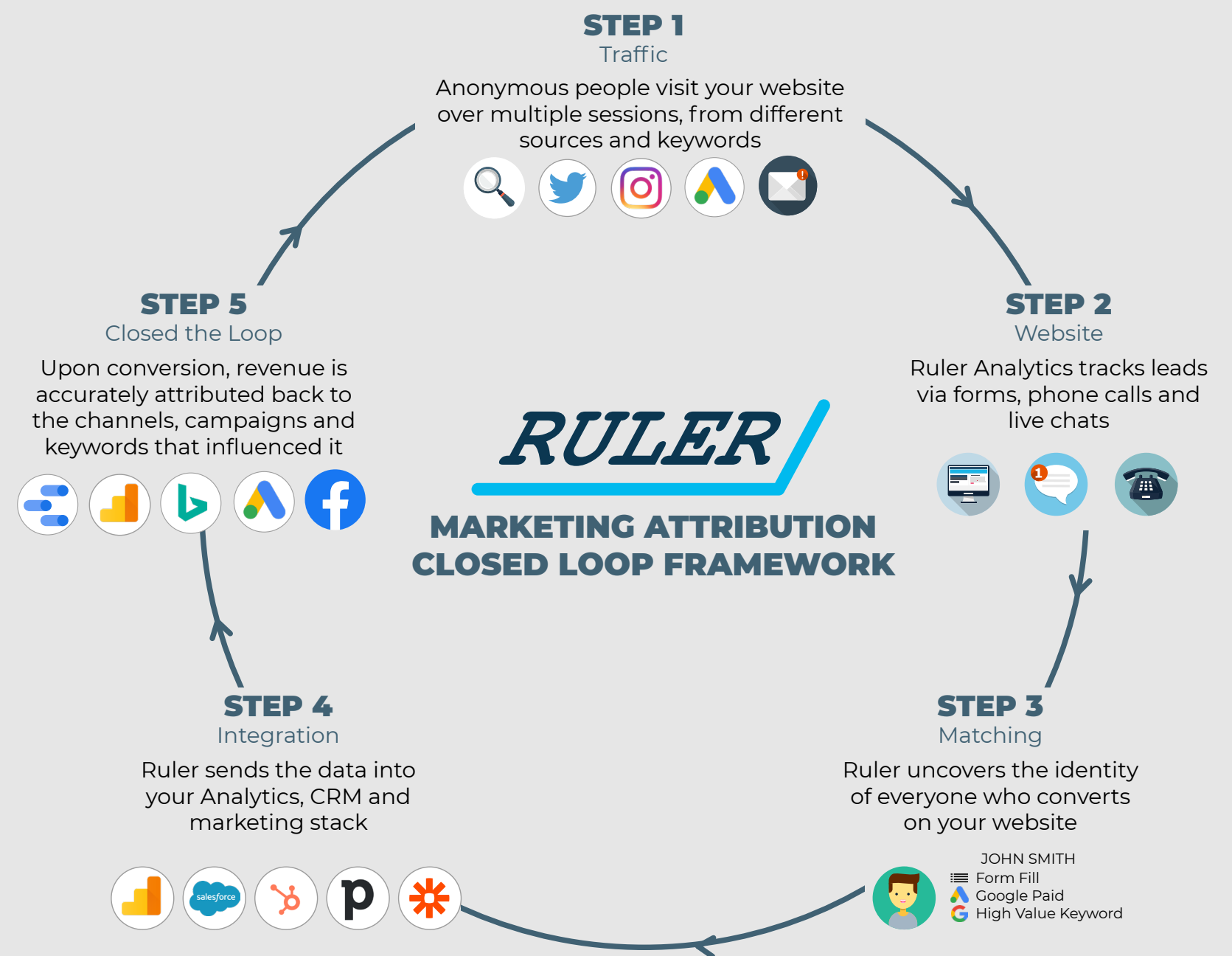
How can Ruler Analytics help?

Agencies can align sales revenue with marketing activity through Ruler's Marketing Attribution Closed Loop Framework. Ruler tracks website visitors over multiple touch points and connects the dots once a visitor converts to a lead via form completion, call or live chat conversation.

By integrating this data with your customer's CRM or sales records, Ruler closes the loop between lead and the sale, providing definitive proof of the impact your campaigns have on business growth.

Whether you report via Google Data Studio, Analytics or Facebook Advertising, Ruler's flexible integration options can push data to where you need it most, helping you analyse data cross-channel to get a true understanding of your client's most valuable customers and optimise campaigns to drive even more return.

STEP 1
Traffic
Anonymous people visit your website over multiple sessions, from different sources and keywords

STEP 2
Website
Ruler Analytics tracks leads via forms, phone calls and live chats

STEP 3
Matching
Ruler uncovers the identity of everyone who converts on your website

JOHN SMITH
Form Fill
Google Paid
High Value Keyword

STEP 4
Integration
Ruler sends the data into your Analytics, CRM and marketing stack

STEP 5
Closed the Loop
Upon conversion, revenue is accurately attributed back to the channels, campaigns and keywords that influenced it

RULER
MARKETING ATTRIBUTION
CLOSED LOOP FRAMEWORK

Become a Ruler Partner today

Ruler is an integral part of hundreds of our agency partner's value proposition, helping digital agencies retain and grow their customer base and cement relationships built on trust through data-driven evidence of successful, revenue generating marketing campaigns.

Book a demo to find out how Ruler's partner programme could help demonstrate the value of your marketing activity to clients.

www.ruleranalytics.com/agency-partner