

Dashboards:

A Case Study from Bloomberg Tax Technology

Agenda

- Introduction.
- Goals & Objectives.
- Role of Dashboards.
- Deep Dive – Case Study.
- Questions.

Introduction

20+ years experience in marketing for B2B technology, regulatory and not-for-profit organizations.

- Sr. Manager, Online & Digital Marketing, Bloomberg Tax Technology
- Principal, Marketing Strategy Solutions

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Goals & Objectives

- Increase inbound lead generation
 - website engagement
 - form completion conversion rate
- Focus on lead quality
 - conversion rate of Sales Assigned Leads (SAL) to Opportunity
- Revenue
 - marketing tied to sales revenue goals

The Role of Dashboards

- Identify meaningful, actionable metrics to optimize marketing tactics to achieve goals and objectives.
- Provide at-a-glance overview of progress towards goals.
- Ability to drill-down for deeper analysis of marketing program effectiveness.

Google Analytics – Overview

Total Unique Visitors

11,985

% of Total: 100.00% (11,985)



Total Pageviews

26,416

% of Total: 100.00% (26,416)



Unique Pageviews

22,502

% of Total: 100.00% (22,502)



Total Goal Completions

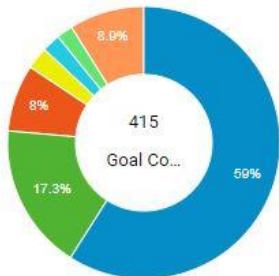
415

% of Total: 100.00% (415)



Goal Completions by Source

google (direct) bing yahoo
bnasoftware-support.force.com bna.com Other



Avg Pages per Visit

1.50

Avg for View: 1.50 (0.00%)



Avg Time on Site

00:01:31

Avg for View: 00:01:31 (0.00%)



Bounce Rate

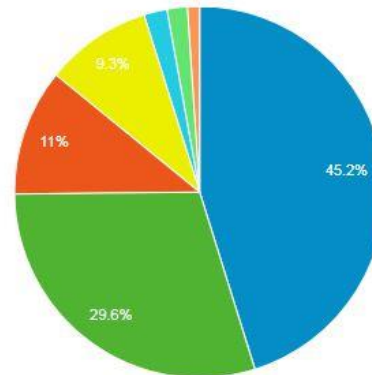
63.62%

Avg for View: 63.62% (0.00%)



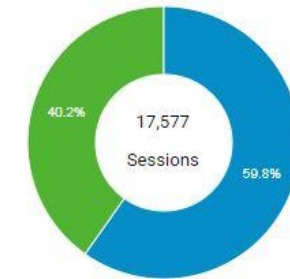
% of Traffic Sources

organic (none) cpc referral cpm email Other



New vs Returning Visits

New Visitor Returning Visitor



Top 10 Campaigns

Campaign	Sessions
FA003 Fixed Assets Display Prospecting	924
IT1722 Income Tax Planner Search	206
Branded Search	198
Remarketing Display	139
FA003 Fixed Assets (New) Search (BMM & Phrase)	104
retailABM	76
Corporate Tax Analyzer Search (BMM & Phrase)	66
FA003 Fixed Assets (New) Search (Exact)	47
Corporate Tax Analyzer Search (Exact)	42
servicesABM	42

Google Analytics – Key Pages

Corporate Tax Analyzer

google (direct) go.bloombergbna.com google.com
bing Other



Overall Product Pageviews

Pageviews



Income Tax Planner

google bing (direct) yahoo kitces.com
Other



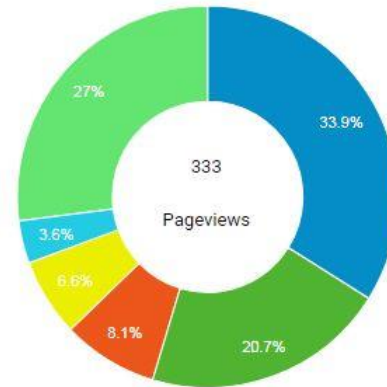
State Tax Analyzer

google (direct) bing bna.com facebook.com
Other



Advantage

(direct) google facebook.com cfo triblio Other

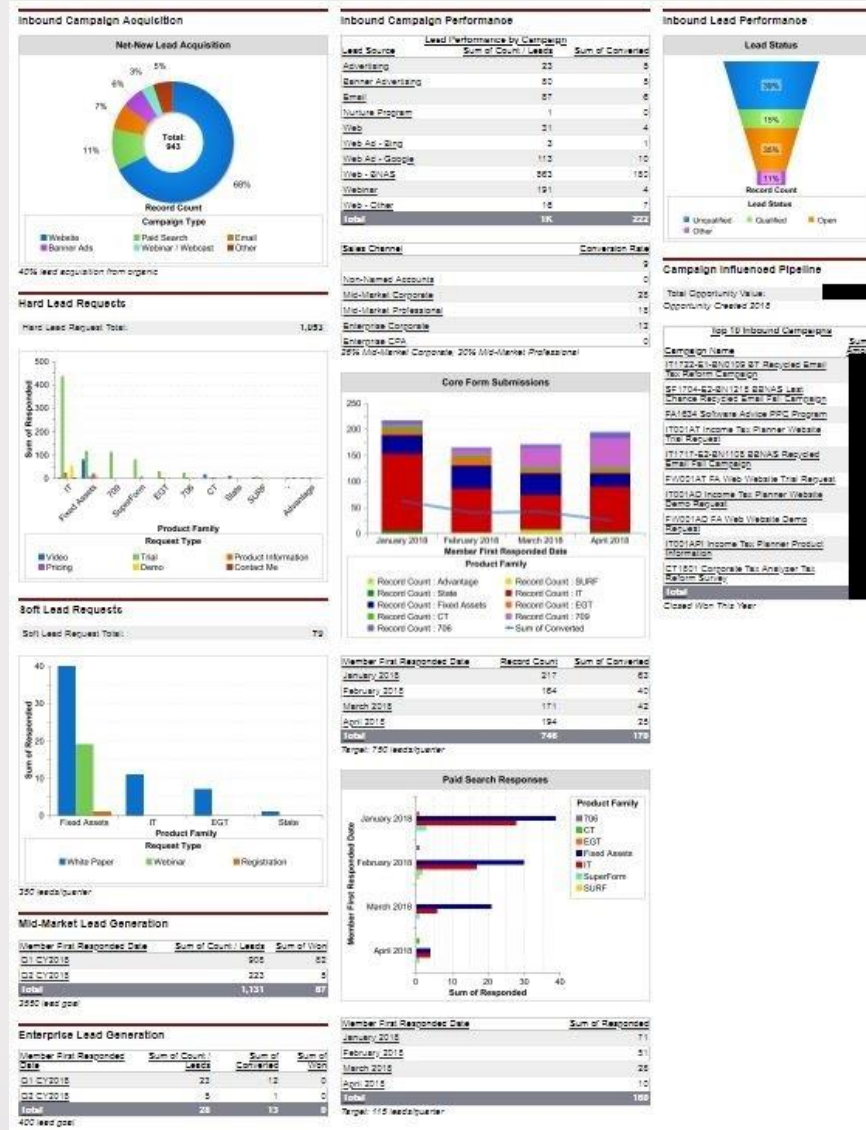


Estate & Gift Tax Planner

google (direct) cfo bing kitces.com Other



Salesforce – Inbound Overview



Progress Against Goals

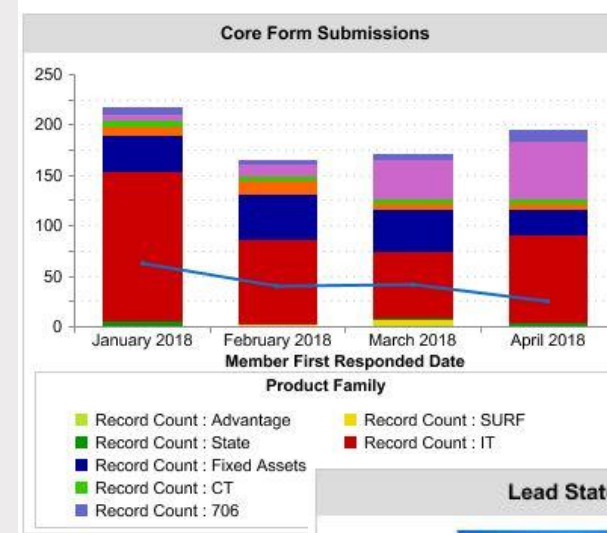
Inbound Campaign Performance

Lead Performance by Campaign		
Lead Source	Sum of Count / Leads	Sum of Converted
Advertising	23	5
Banner Advertising	80	5
Email	87	6
Nurture Program	1	0
Web	31	4
Web Ad - Bing	3	1
Web Ad - Google	113	10
Web - BNAS	863	180
Webinar	191	4
Web - Other	16	7
Total	1K	222

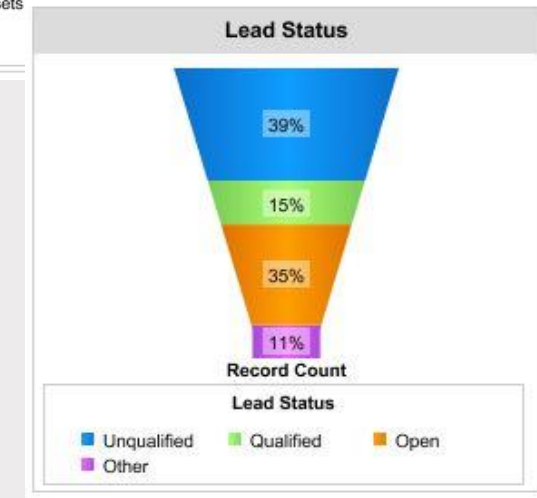
Sales Channel	Conversion Rate
	9
Non-Named Accounts	0
Mid-Market Corporate	28
Mid-Market Professional	18
Enterprise Corporate	12
Enterprise CPA	0

26% Mid-Market Corporate; 30% Mid-Market Professional

Quantity



Quality

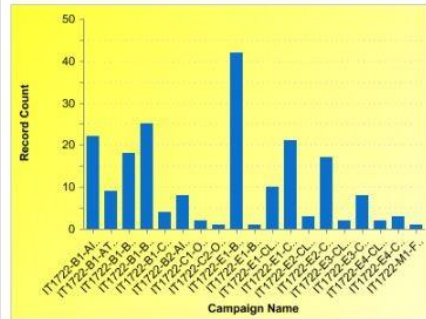


Campaign Reporting

IT1722 Tax Reform 2018 Interim

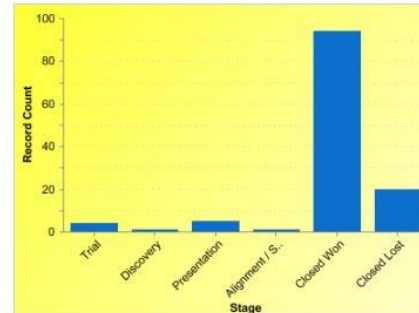
Total Campaign Responders: 213
Includes lead and contact records

IT Tax Reform Leads Not Converted by Tracking Code (IT1722)



Campaign Name	Record Count
IT1722-B1-AI0101 AICPA 300x250 Tax Reform Banner Ad JOA	22
IT1722-B1-AT0101 Accounting Today 300x250 Banner Ad Tax Reform Campaign	9
IT1722-B1-BN0104 BT Website Banner Ads Tax Reform Campaign	18
IT1722-B1-BN0105 BTAC Login and Product Page Tax Reform Campaign Banner Ads	25
IT1722-B1-CD0207 CPAacademy Banner Tax Reform Campaign	4
IT1722-B2-AI0201 AICPA 728x90 Tax Reform Banner Ad TTA.com	6
IT1722-C1-OG0105 Google PPC Ads Tax Reform Interim Campaign	2
IT1722-C2-OB0105 Bing PPC Ads Tax Reform Interim Campaign	1
IT1722-E1-BN0109 BT Recycled Email Tax Reform Campaign	42
IT1722-E1-BN0222 CPAacademy Webinar Nurture Email Tax Reform Campaign	1
IT1722-E1-CL0131 CPAdirect Marketing Sponsored Email Interim Tax Reform Camp	10
IT1722-E1-CP0117 CPA Practice Advisor Sponsored Email Tax Reform Campaign	21
IT1722-E2-CL0221 CPAdirect Marketing Sponsored Email Tax Reform Campaign	3
IT1722-E3-CP0207 CPA Practice Advisor Sponsored Email Tax Reform Campaign	17
IT1722-E3-CL0313 CPAdirect Email Extended Tax Reform Campaign	2
IT1722-E3-CP0307 CPA Practice Advisor Email Extended Tax Reform Campaign	6
IT1722-E4-CL0327 CPAdirect Email Extended Tax Reform Campaign	2

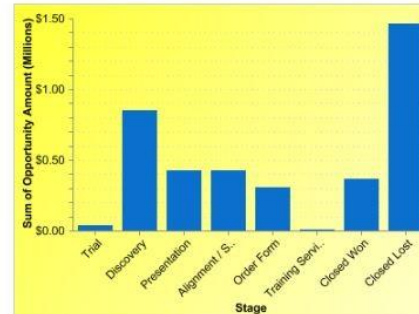
(IT1722) Attributable Opportunity Amount Created From Leads



Opportunities attributed directly to campaign, created from LEADS. Does not include opportunities not converted from a lead.

Stage	Record Count
Trial	4
Discovery	1
Presentation	5
Alignment / Selection	1
Closed Won	94
Closed Lost	20
Total	125

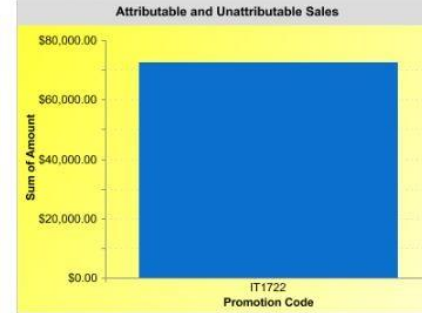
Opportunities influenced by Campaign (IT1722)



All opportunities with IT1722

Stage	Sum of Opportunity Amount
Trial	\$39,856
Discovery	\$854,331
Presentation	\$423,206
Alignment / Selection	\$426,635

IT Tax Reform 2018 All Web Sales By Promo Code



All ITP Web Acquisition sales from 1/1/2018 - 2/28/2018

Promo Code	Sum of Amount
IT1722	\$70,000
Total	\$70,000

IT1722 Purchases from UNISON

Start Date	Sum of Extension	Record Count
Q1 CY2018		116
Q2 CY2018		7
Total		123

High-Level Quick Glance:

- Total campaign responses
- Responses by specific tactic within the program
- Opportunities created
- Sales and Revenue

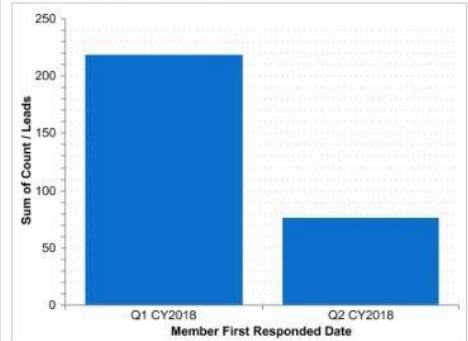
Target Market

Mid-Market Sales-Assigned Responses/Leads

Member First Responded Date	Sum of Count / Leads	Sum of Count / Leads	Sum of Won
Q1 CY2018	908	908	84
Q2 CY2018	328	328	9
Total	1K	1K	93

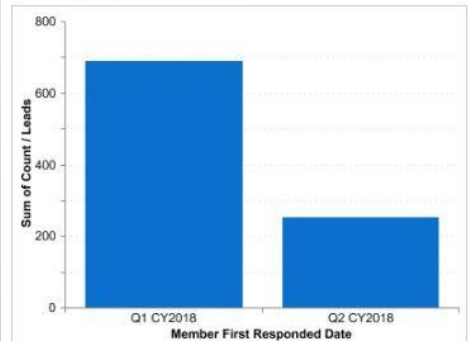
Lead Goal: 3550

Mid-Market Corporate Leads



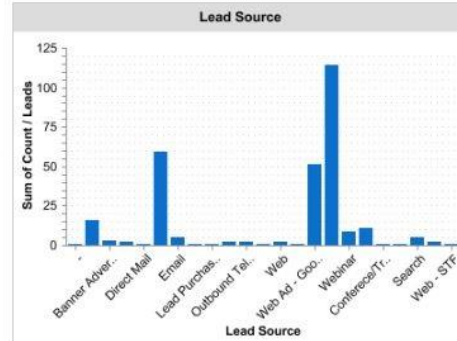
Conversion Rate: 30

Mid-Market Professional Leads

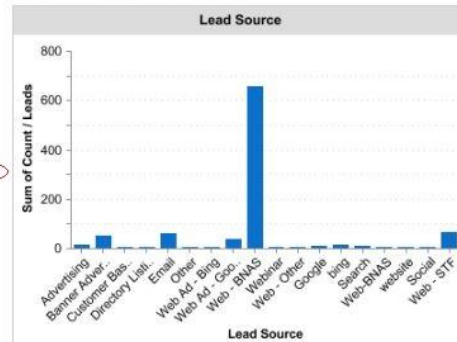


Conversion Rate: 19

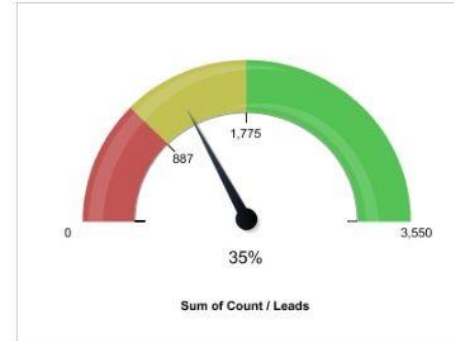
Mid-Market Corporate Leads



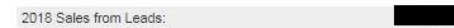
Mid-Market Professional Leads



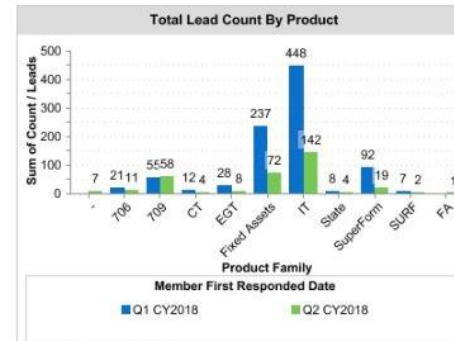
2018 Mid-Market Responses/YTD



Sales from 2018 Created Leads



2018 Mid-Market Sales-Assigned Responses/Leads



Only indicates total count of leads.

High-Level Quick Glance:

- Conversion Rate – a new focus for this year
- Total MQL, SAL, Revenue
- Call-outs for marketing sources and products
- Gauge for easy visual of progress toward goals

Achieve Your Goals

- Executive-level dashboards get everyone on the same page
 - Overall goals
 - Metrics being measured (KPIs)
 - Same view of progress towards goals
- **At-a-glance, actionable insight**
 - Know what is working and what is not
 - Optimize tactics throughout the program
 - Identify tactics to keep/remove for the next program

Questions & Discussion

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