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# The Data-Driven Marketer's Playbook Canada Edition

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How to build an integrated  
data strategy for your marketing,  
from audience insights to action

**Google**



# Contents

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Introduction 03

---

The new challenges for enterprise marketing  
in Canada 04 →

---

Let data be your guide 10 →

---

Train to transform 15 →

---

The three pillars of your integrated strategy 22 →  
Pillar 1: The right data  
Pillar 2: The right culture  
Pillar 3: The right technology

---

Conclusion 45 →



# Introduction

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It can be a real challenge to see the customer clearly amidst those rushing currents of customer data—from mobile apps, television, in-store visits, websites, and every device in every hand in the world. Until now there has been no way to truly gather and integrate omnichannel data from online and offline sources to understand the full customer journey.

Recent advancements have revealed a new approach to gaining deeper audience insights: building an integrated data strategy. It can help you see the journeys of every member of your audience and, more importantly, deliver to them the customized and relevant messages and experiences that get results.

We'll discuss this integrated approach in this playbook. It's based in part on interviews with digital marketing experts and analytics leaders at a variety of companies, from global healthcare giants to online-based businesses to financial services firms.

We have also relied on [The Customer Experience is Written in Data](#), a 2017 research report created by Econsultancy in partnership with Google. Econsultancy surveyed more than 700 marketing executives at organizations with revenues of more than \$250 million to find out how well they were using data to guide marketing strategy and business decisions.

The Econsultancy report focused on how marketing leaders—those who significantly exceeded their top business goal in 2016—did things differently. To summarize the findings:

Marketing organizations paving the way have recognized that there are three things that go better together in today's world:

1. Data, that is well-integrated to provide a more complete view of each customer
2. Teams, that increase collaboration, communication, and sharing of data and audience insights
3. Technology, that unifies analytics and advertising stacks so Canadian marketers can deliver more relevant, engaging customer experiences and value to the business."

Even if you're not a market leader, there's good news: There are now many ways for any organization to integrate data to better understand its audience, and act quickly on it to improve advertising and the customer experience.

Let's take a look at how you can not only tame the tides, but drink deeply from your business data.



**Tony Singh**

Performance Solutions Lead, Google Canada



## PART 1.

### THE NEW CHALLENGES FOR ENTERPRISE MARKETING IN CANADA

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Data, data, everywhere...  
and not a drop to drink.



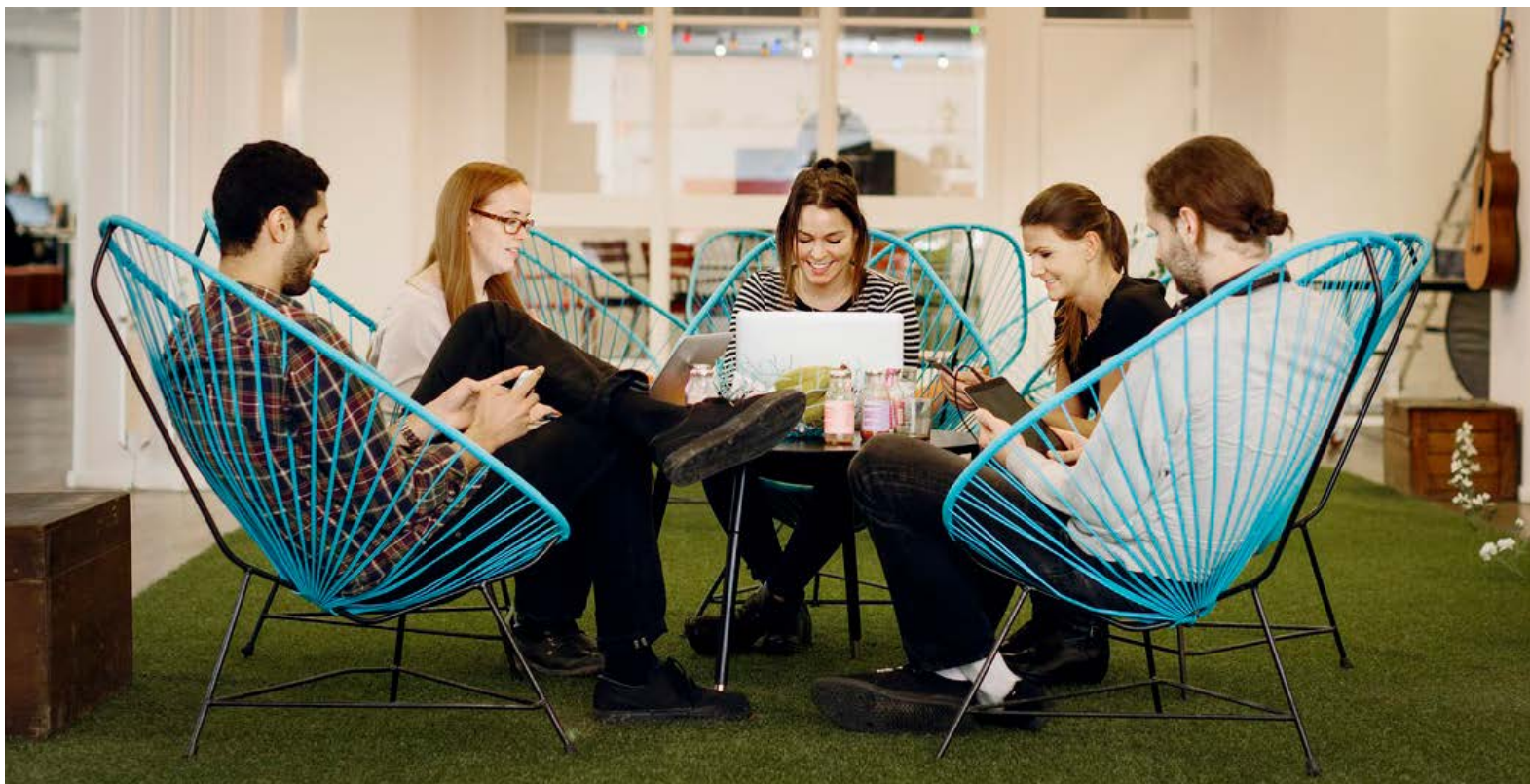
## The new challenges for enterprise marketing in Canada

As 2016 ended, 61% of marketing decision makers said they still [struggled to access or integrate the data](#) they had needed that year.<sup>1</sup> At the same time, only 22% of marketers said that they lacked the right analytics tools to do their jobs.

The problem, in other words, lies not in technology but in the data itself. Companies are struggling with too much information, too many sources, and too few ways to use all their data together to improve the customer experience.



**61%** of marketing decision makers said they still struggled to access or integrate the data they had needed that year.







## The cross-device challenge

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Today's end-to-end customer experience is almost always a cross-device experience. Increasingly, that includes voice search assistants or devices from the Internet of Things. Nearly 90% of marketers, across all types of organizations, now say that understanding these user journeys across channels and devices is critical to their success.<sup>2</sup>

"We get all different types of data feeds from all different types of platforms," says Stasha Rosen, senior product analyst at the fashion and lifestyle website Refinery29. "And it's essential that we reconcile them with each other to be able to draw apples-to-apples comparisons. That can be a real challenge for us or for anyone."

Trying to swim in a continual flood of cross-device information can be further complicated when trying to navigate larger or more complex organizations. And even when that information is available, it has to be connected in a way that makes sense.

"Having hundreds of millions of terabytes of data that isn't actionable really does nothing for me."



**Rob Roy**

Chief Digital Officer,  
Sprint

In order to gain a complete picture of your audiences, customer experience, marketing and advertising performance, you may need to connect multiple stakeholders and data sources. In the Econsultancy study, leaders were 26% more likely to say that their data and analytics strategy identifies data owners or key points of contact.



## Classic culture issues

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If the technical challenges of data are large, so are the cultural challenges. They often keep organizations from adapting to keep pace with evolving consumer demands.

Once you've harnessed the data coming in, you need to analyze it and get it out — filtered and actionable — into hands of decision makers across your organization. That requires good old-fashioned communication: Turning complex information into clear recommendations and visualized data that tells a story and offers usable insights. The road to this kind of growth is paved with obstacles. Leaders must figure out how to:

1

### Overcome the fear of failure

Anyone who's ever worked in an organization of any size can understand the problem here. Success may be rewarded but failure is toxic, right? Why risk it? Yet the 2017 Econsultancy survey shows that this can change. Executives from leading companies are 55% more likely to say that their marketing organizations are comfortable with risk.<sup>3</sup> Create room to fail and you create room to innovate and grow.

2

### Get comfortable with ambiguity

Don't let "analysis paralysis" set in. Great strides have been made in integrating data, but there will always be outliers. Empower people to try new ways to experiment and learn how to bridge gaps in data. Leading marketers — those who significantly exceeded their top business goal in 2016 — are 45% more likely to say their organizations are quite open to change.<sup>4</sup>

3

### Break down silos

It's not just the marketers or analysts in the trenches who feel the pain of siloed customer data: 86% of senior executives (SVP or higher) across all types of organizations agree that eliminating organizational silos is critical to expanding the use of data and analytics in decision-making.<sup>5</sup> That's good news: Everyone is on the same page and responsible for helping make change happen.

4

### Trust data over whims, gut reactions, and even past experiences

Just because *we've done it before* or *it feels right* or *we like the sound of that idea*, it doesn't mean it's the best move for your business. What does the data say? Even if there are gaps in your data, can you still get good directional insight? Is the data perhaps predicting a surprising outcome that contradicts your intuition? Data-informed decisions pay off: Nearly two-thirds of leading organizations say that their executives treat data-driven insights as more valuable than gut instinct.<sup>6</sup>

All these challenges are why marketing directors and CMOs need a new strategy for data. They need new ways to integrate data from all their sources — and to analyze and understand a more complete view of their audience.



## CHECKLIST

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- ☐ Unify data to improve the customer experience.
- ☐ Connect multiple stakeholders and data sources to gain a complete picture of your audiences.
- ☐ Overcome the fear of failure.
- ☐ Break down organizational silos.
- ☐ Get comfortable with ambiguity.
- ☐ Trust data over whims, gut reactions, and past experiences.





## Case study

### BMW and MINI engage more qualified leads with audience solutions

With so much complex consumer data on hand, it can be hard to connect it all to what really matters: finding and converting your best customers. Here, we look at how two of Canada's luxury vehicle brands are driving more qualified leads using an audience-first strategy.

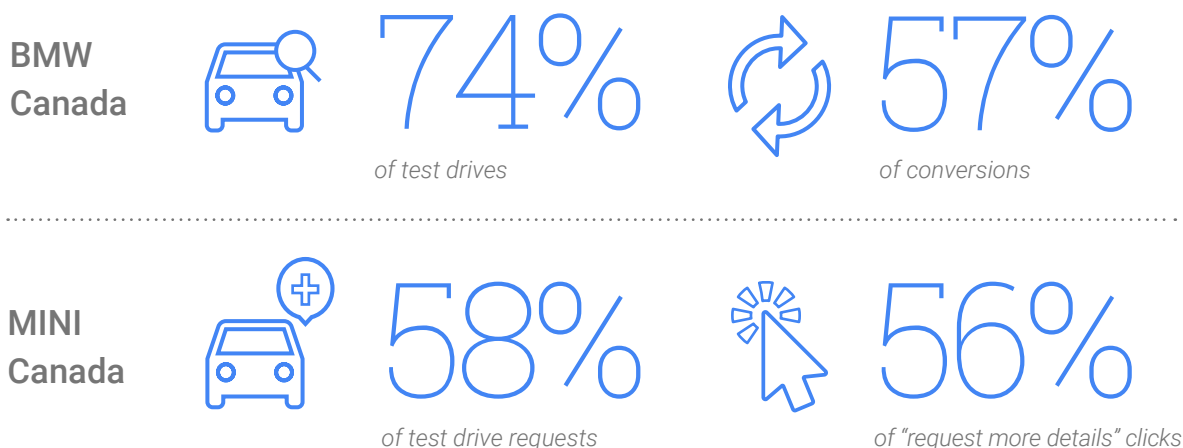
[BMW Group](#) opened its first dealership in Canada nearly 50 years ago and now has 49 BMW dealerships and 30 MINI dealerships across the country. The brand had optimized both digital and traditional media channels to deliver impressive consideration results, but it was pushing for new ways to engage a higher value audience. [Media Experts](#), BMW Group's partner in digital marketing, wanted to leverage the brand's leading position as one of the most-considered brands in luxury. Together, the teams

developed an innovative, audience-first strategy that would help push more high-consideration consumers down the purchase funnel.

BMW and MINI drove more leads through segmented audience lists than any other media tactic. A quick definition: segmented audiences are subsets of users you can isolate based on data (e.g., a group of users who have completed a certain action, such as requesting a quote). BMW and MINI valued these lists, and while these audiences displayed a higher cost-per-click, the segments they identified and targeted were much further along the path to purchase and therefore more likely to convert.

By leveraging audience solution tools and insights, both brands have been able to invest in high-value customers who are actively engaged in the luxury car buying process and ultimately more likely to book a test drive or buy a BMW or MINI vehicle.

### Search audiences generated\*:



\*during the campaign period (Jan—Jun 30, 2017)



## PART 2.

### LET DATA BE YOUR GUIDE

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“Data is a key transformation tool for all departments. It has become a core way of working ... I can’t imagine a marketing function without this capability, attitude, and infrastructure.”<sup>7</sup>

Vice President, Financial Services



## Let data be your guide

Great marketing will always need a veteran hand on the steering wheel of strategy. But just as a GPS helps with navigation, today's data and technology can direct you where you want to go so *much faster*.

This is a powerful reason to rely on an integrated data strategy as your foundation for uncovering audience insights. If the managers of a team in one office are seeing different data from those in another office or in the C-suite, you're driving down a foggy road indeed.

"While the vision is there, at many companies decisions are still primarily based on gut," says Jeff Rasp, director of U.S. digital strategy at Bayer Consumer Health. "Decisions in the past haven't been fully informed because marketers have been looking at all their data sources separately. It takes integrated data for marketers to make those decisions truly based on data and impact."

In response, Bayer is building its own source of truth: a shared pool of integrated data that aggregates not only all the data from its analytics platform, but also television data, competitive data, and social data. In other words: all the things that didn't come together in the past. Now Bayer can make informed decisions based on the combined impact of channels, not just a siloed view of each.



Nearly 2/3 of leading organizations say that their executives treat data-driven insights as more valuable than gut instinct.

**Econsultancy and Google,**

"The Customer Experience is Written in Data",  
May 2017, U.S.





Once your data house is in order, you can really start to see a more complete picture of your audience. That lets your marketing team do more as they:



## Organize

One of the best things your business can do is to uncover your most valuable customer segments and look at how they behave. With the right data you can create personalized messages and experiences for different customer groups, such as audiences with the highest potential lifetime value, or even for individuals based on where they are in their journey. It's easy to set up ads for, say, people who looked at mountain bikes on your site but left without putting anything in their cart.



## Measure

Even a few years ago, last-click attribution was a big step forward. Today it would be a big step backward for marketing leaders. Data-driven attribution can not only show you the customer journey, but answer questions like "What's really contributing to our conversions?" and "How can we better allocate our budget instead of saying 'This is what we did last year?'"



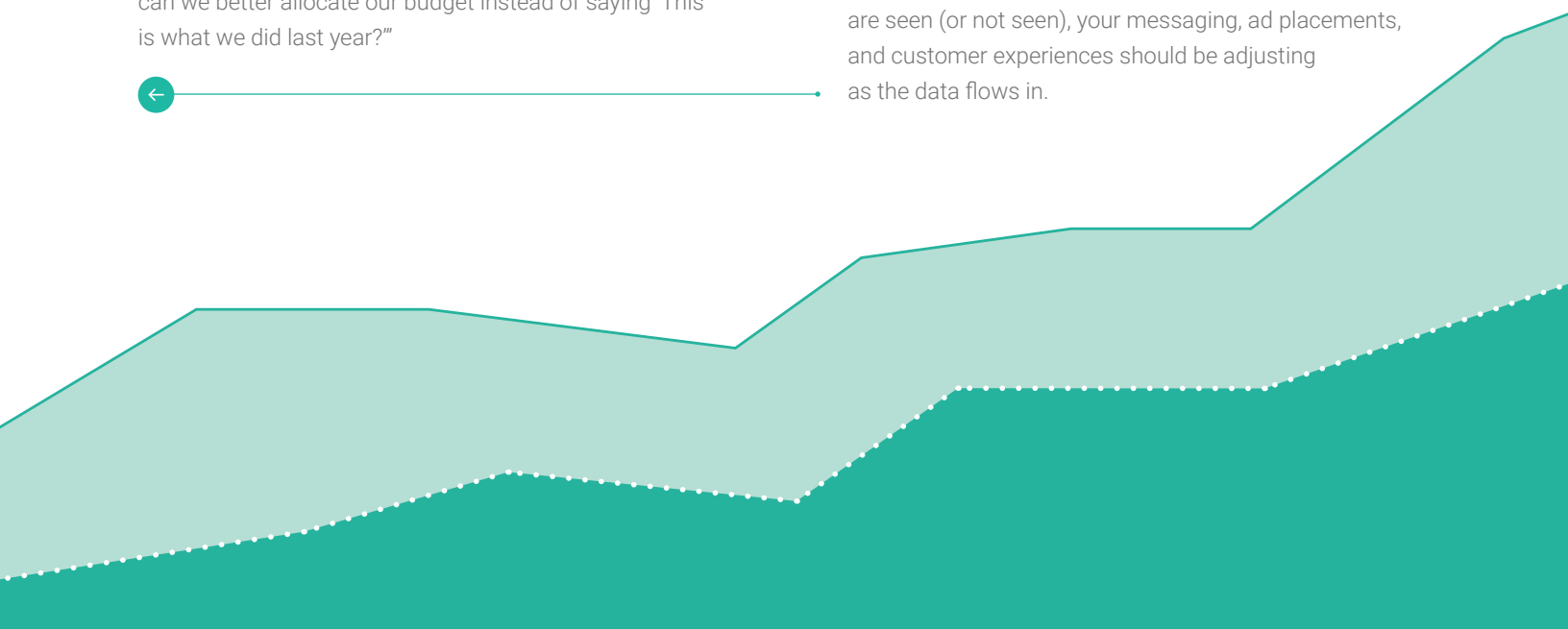
## Design

Good data lets you go beyond ads to create a better website experience. Why should a first-time visitor to your retail clothing site have the same experience — or receive the same offer — as a loyal user who visits every month to check out a particular brand of shoes? Audience data can help you create a custom experience with tailored visuals and more powerful messages for each.



## Reach

With today's always-on consumer, Canadian marketers face an even bigger challenge when trying to answer the perennial question: *How do I reach the right person, at the right time, with the right message?* The truth is, today's digital analytics can deliver data and audience insights to help you optimize experiences in near-real time. As visits are made, as purchases happen, as messages are seen (or not seen), your messaging, ad placements, and customer experiences should be adjusting as the data flows in.





The Econsultancy report bears this out. “The [market leader] strategies themselves reflect their reliance on data; they are 48% more likely than mainstream respondents to say that marketing strategy is strongly data-driven.” And nearly 7 in 10 leading marketers say that their companies use data to support decision-making at all levels.<sup>8</sup>



# 7 in 10

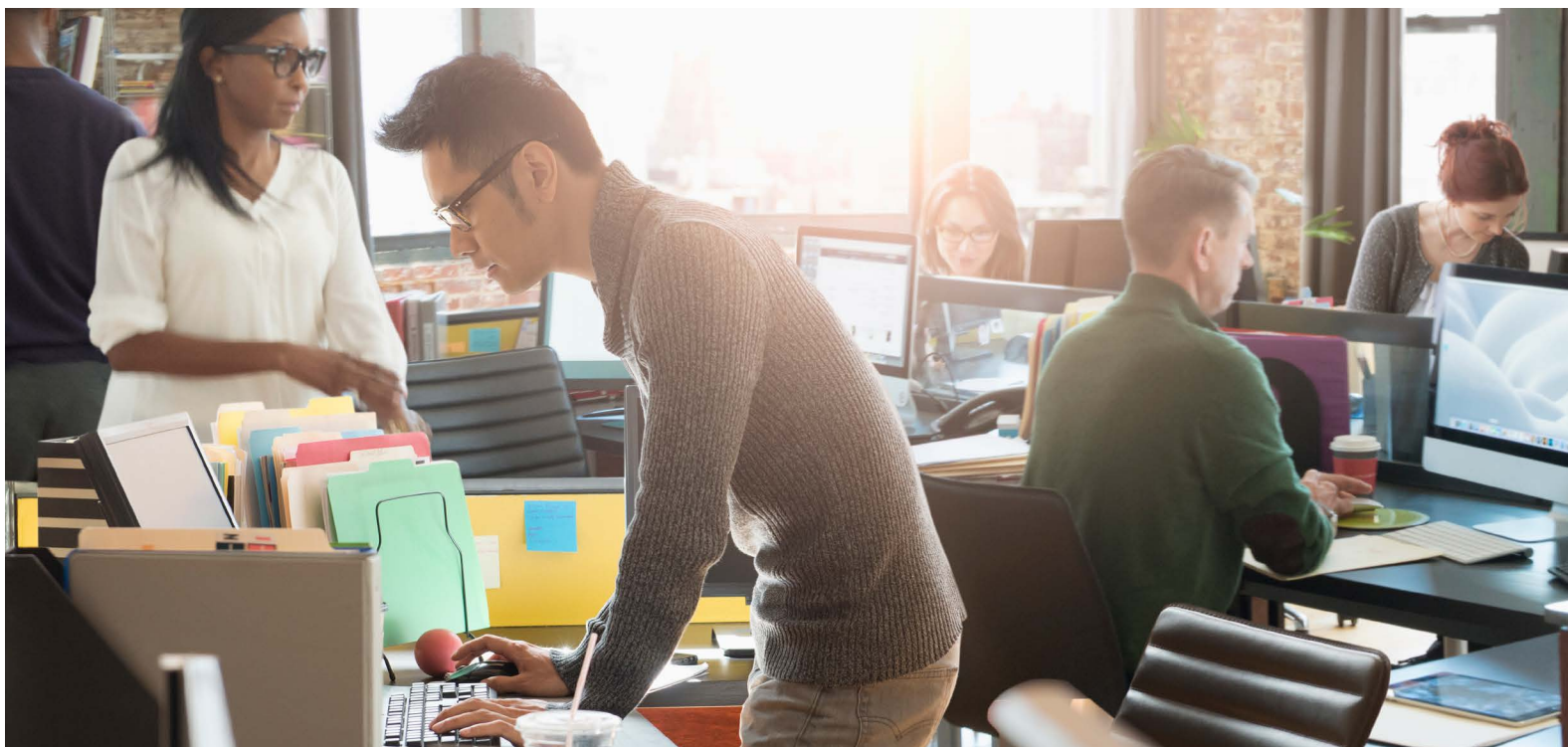
Nearly 7 in 10 leading marketers say that their companies use data to support decision-making at all levels.<sup>8</sup>

## Never trust my gut?

Your gut is still important; just be sure you're feeding it a diet of solid data.

“We like to say we want to be data-informed, not necessarily data-driven,” says Stasha Rosen of Refinery29. “We educate our team to make sure that people don’t become slaves to the metrics.” In particular, you want to avoid analysis paralysis — getting so lost in the data that you can’t or won’t make choices until the data seems to line up perfectly.

“Intuition still matters,” says Rosen. “If you wait until you’ve reached 99% certainty in the data to make a decision, then that’s probably too late.”





## CHECKLIST

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- ☐ Build a “source of truth:” a shared pool of integrated data that aggregates data from its analytics platform, television data, competitive data, and social data.
- ☐ Leverage your “source of truth” to:
  - ☐ Organize data.
  - ☐ Design compelling creative.
  - ☐ Reach and deliver.
  - ☐ Measure and optimize.
- ☐ Use data to support decision-making.





PART 3.

TRAIN TO TRANSFORM

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The best strategy  
in the world won't  
help much if your  
team can't execute  
and measure it.



## Train to transform

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In the Econsultancy survey, 3 out of 4 marketers agreed that lack of team education and training on data and analytics is their biggest barrier to basing more business decisions on data insights.<sup>9</sup>

Better training starts with a real desire to transform the entire organization. What is needed is both a top-down and a bottom-up belief that data should drive decision-making. That means trusting the data — and the analysts, too.

“Our analytics team focused just on report-pulling only two or three years ago,” says Monika Rut-Koroglu, director of digital analytics and optimization for FXCM, a retail online foreign exchange brokerage. “This has completely transitioned over recently, with the team becoming marketing strategy drivers. Analytics plays a very important role in all our marketing efforts: driving marketing strategy, validating benchmarks, evaluating and providing data insights. Actionable insight is key for the team and for the company.”



Leading marketers are more than twice as likely as the mainstream to say that they routinely take action based on insights and recommendations from analytics.

### **Econsultancy and Google,**

“The Customer Experience is Written in Data”,  
May 2017, U.S.





## Give *everyone* the training they need

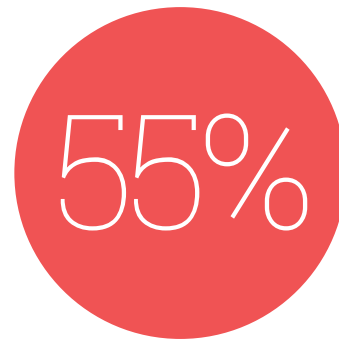
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If you're setting out to break down silos in your own company, the carrot usually works better than the stick. At first, only the data and analytics team may get the full picture of how analytics can lead the way to better strategy. But the more people see how an integrated data strategy provides better audience insights that benefit their team, the faster the groundswell of adoption happens.

Create a training plan to educate people about the tools and opportunities that are available. Don't ignore the generalists and junior members of your team: Leading marketers in the Econsultancy survey were 55% more likely than mainstream companies to say that their generalists get enough training to effectively use data and analytics resources.<sup>10</sup>

"Any time we give trainings on what we're doing, we record them and put them on a platform where all employees can find them as needed," says Jeff Rasp of Bayer. "If someone asks 'Do we even have something like this?', we can send them to that video, as a kind of one-to-one training on demand. That's helping us leverage those tools more inclusively across all our brands."

About that groundswell of adoption: Often the best way to break down data silos is to offer team-level support rather than company-wide edicts. At FXCM, the analytics team pulls data reports from disparate sources, then tries to find as close to an apples-to-apples comparison as possible to validate trends they've spotted in the data. They then go back to various departments to talk people through the analysis and insights, gather feedback, and build consensus. This team-by-team approach can align stakeholders and win their support for larger company-wide shifts in strategy and marketing campaigns.



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### **Econsultancy and Google,**

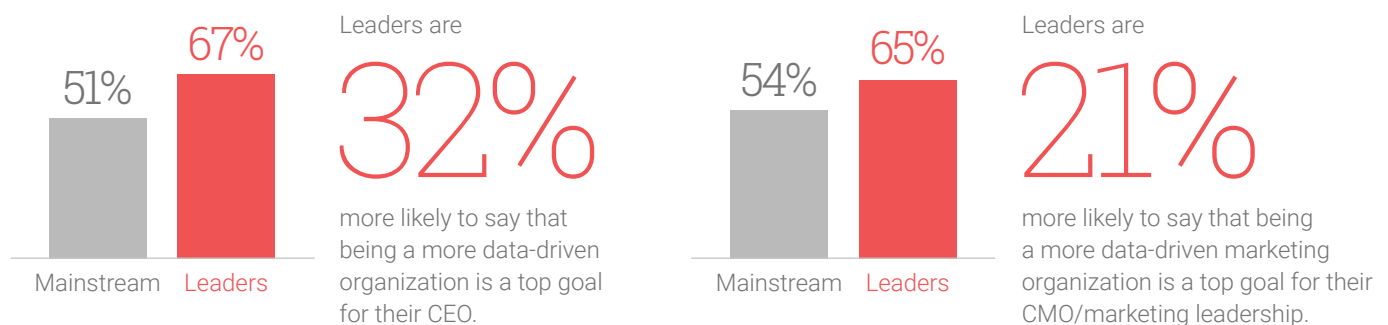
"The Customer Experience is Written in Data",  
May 2017, U.S.



Breaking down data silos (and organizational ones) takes time, of course; it's a big commitment. Of those who have done it, five common ingredients emerge as necessary to truly get everyone in an organization into the same data-first mindset:

## 1. Get the C-suite in sync

Your top executives set the tone for your company culture. If you want more people using data and analytics to guide daily decisions, then your CEO has to make data a top business priority. That could mean undergoing a full data-driven transformation to shed legacy ways of working and move to new technologies and processes. Or, it could mean setting goals for using data to inform strategic initiatives. Alignment across the C-suite, especially with the CMO, is vital. As always, team strategies should match corporate strategies, so that focus can be instilled in each team that ladders up to top leaders.



Econsultancy and Google,

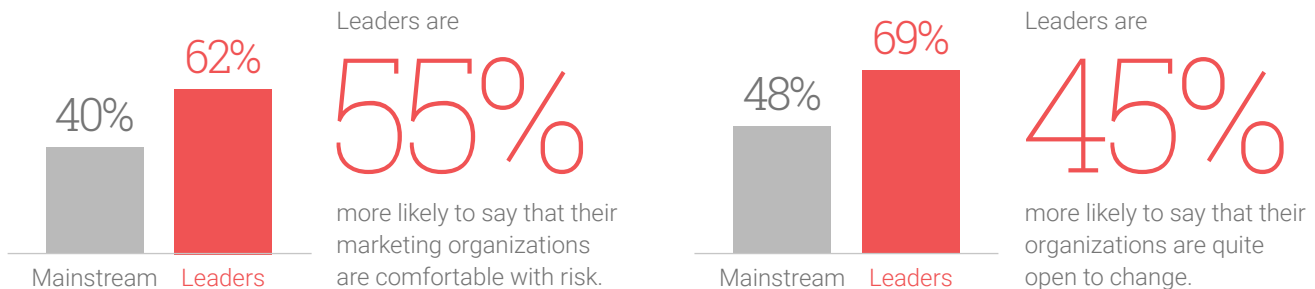
"The Customer Experience is Written in Data", May 2017, U.S.





## 2. Be open to change and risk

Promote change? You bet! But organizations that put too many rules, must-dos and red tape in place stifle the birth and spread of new ideas. It's tough to innovate your way through walls, after all. When employees are encouraged by leaders to change and take risks, they feel empowered to experiment and innovate. Or, in the words of Sprint's Rob Roy: "If we're not failing, we're not pushing the envelope hard enough."

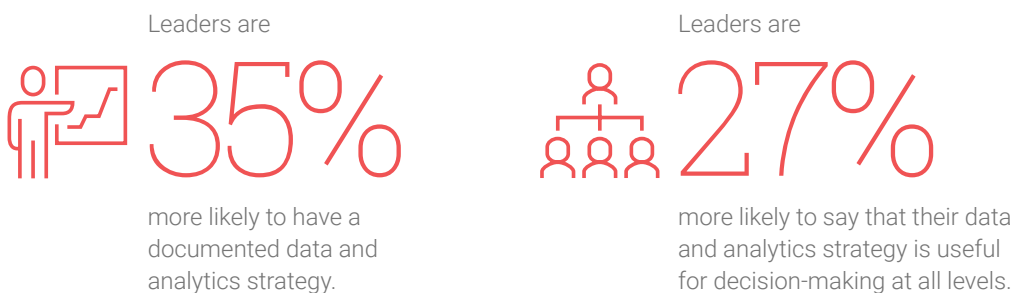


Econsultancy and Google,

"The Customer Experience is Written in Data", May 2017, U.S.

## 3. Be clear on your data strategy

Know where you start. Even though the world (and marketing) move at a fast pace, it helps to document things so you can tell what effect your changes in ideas and programs have over time. Be sure to document and socialize your data and analytics strategy company-wide so that it can be understood and executed.



Econsultancy and Google,

"The Customer Experience is Written in Data", May 2017, U.S.





## 4. Work together — and keep talking

Getting rid of silos is one thing; keeping them from coming back is another. To keep communication flowing, look for ways to encourage, enable, and sometimes formalize channels for collaboration across departments and even within teams.



**Econsultancy and Google,**  
“The Customer Experience is  
Written in Data”, May 2017, U.S.

## 5. Create new roles for analysts

If your own analysts have simply been “report pullers” in the past, you may want to shift perceptions by giving them new roles and even new titles, like *data storyteller* or *strategic analyst*.

Analysts who can make the data come alive with stories and business context are a wonderful resource; they can convince marketing managers or other skeptical collaborators of the value of your new integrated data strategy. And the more that analysts have the time and firepower to tailor their insights to each team, the more they can help them reach their biggest goals.



**Econsultancy and Google,**  
“The Customer Experience is  
Written in Data”, May 2017, U.S.





## CHECKLIST

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- ☐ Create a training plan to educate people about the tools and opportunities that are available.
- ☐ Break down data (and organizational) silos by:
  - ☐ Getting your C-suite in sync.
  - ☐ Being open to change and risk.
  - ☐ Being clear on your data strategy.
  - ☐ Working together—and talking.
  - ☐ Creating new roles for analysts.



## PART 4.

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# The three pillars of your integrated strategy

So far we've discussed some of the challenges and ideals of integrated data. But what does it take specifically to get the typical organization onto the right path? The Econsultancy study and our interviews with business leaders revealed three pillars for making it happen: the right data, the right culture, and the right technology.



## Pillar 1: The right data

Why don't more companies understand their user journeys? Many still struggle with data blindness, not knowing what data they have or how it fits together. Canadian marketers who know their data from origins to integration are best poised for success in the years to come. Truly understanding your data (and the customer journey) this way starts with executing key steps in your data strategy.

### 1. Manage the data pipeline

More data is better, yes — as long as that data is both relevant and reliable. What first-party data do you have, and where does it come from? Do you have feeds of sales data, website interactions, or other customer data? Is your data clean, accurate and accountable? Can you see your original data, or is it owned by an agency or another partner?

There is no magic data Roomba that will clean all your data automatically. But technology does help automate some tasks and it can greatly reduce the burden of having to stitch together all the data points and confirm their validity.

"One of my responsibilities is identifying the core data sets for the company, and making sure that we distribute those to the analysts throughout the company in a clean and workable fashion," says Stasha Rosen of Refinery29.

"An interesting trend for the publishing industry is that we've been slowly moving from owned platforms to more distributed platforms. 10 years ago we were primarily the Refinery29.com website. But now our content is becoming divorced from the means of distribution," says Rosen. "Any given piece of content is no longer just a page on our

website, but it can be sliced and diced and distributed in different ways."

"That kind of distribution is optimized for the user, which is good. It's a better experience, but it poses more challenges from a data perspective because it's introducing a new source of data that has to be reconciled with all of our other sources of data," she says.

Industry leaders are willing to pay for better data. In fact, marketing leaders are 72% more likely than others to strongly agree that they are investing in improving the quality and/or volume of the first-party data they capture, according to a [different study with Econsultancy](#). And 27% were more likely to have increased investments in technologies for better sharing of first-party customer data across team or product lines.<sup>11</sup>

Once first-party data is in hand, many leaders then look for a deeper understanding of their audiences by adding third-party data into the mix.

"Raw data is necessary to make educated decisions, and many times we are given 'pre-filtered' reporting that meets the needs of the presenter, not us."

- Director, Automotive Industry



## 2. Put data in context

When you're combining data sources, the apples-to-apples comparisons are something that each company has to configure for itself. "Our data architecture has to fit our needs," says Monika Rut-Koroglu of FXCM. "We were with our old third-party provider forever, but month-to-month data just became more obsolete. At the end of the day we didn't know what the data represented because we didn't know how it was being collected." She says:

["We switched to \[managing our own analytics in-house\] because we needed more streamlining and transparency. Now we can create documentation on what exactly we need to track and why we need to track that."](#)

"We group our website visitors based on the similarity of their behaviour and deploy our tracking of the website via single tag management container. All the customers and all the events are being collected in exactly the same way, in order, across our websites," Rut-Koroglu says. "That gives us global transparency and allows us to maintain our tracking systems mostly flawlessly."

"This has been our success story: The re-implementation of better data tracking is the fundamental piece that enables our success today," she says. "The biggest portion of our analytics team's success in driving strategy is that implementation through data confidence."





### 3. Adjust Your KPIs

Even with the cleanest data, you also need to know your KPIs and ensure they are tied to the larger business outcomes you want. In the Econsultancy study, leaders were 40% more likely than others to say that their data and analytics strategy identifies the business goals the organization is trying to achieve with data analytics.

It's also important not to let a single KPI drive out all other data detail or insights.

“Instead of seeking one KPI to rule them all, we really like looking at oppositional metrics,” says Stasha Rosen of Refinery29. “We look for two or three valuable metrics that also keep each other in balance.”



**Stasha Rosen**

Senior Product Analyst,  
Refinery29

At Experian, the consumer services division was focused on conversions: getting people to sign up for online credit reports and related products. “But we realized that using only this KPI wasn’t sustainable,” says Jane Yu, senior director of digital analytics and ad operations. The team [shifted their analytics strategy](#) to focus on a longer-term metric: customer lifetime value.

“We knew making the shift to lifetime value meant understanding and segmenting our customers on a much deeper level,” says Yu. “That was a daunting task. We needed to closely examine first- and third-party customer data from many different sources. This is often messy and scary, and it’s never perfect.”

Even after they put the right structures in place, Yu says: “We couldn’t just change our customer segmentation strategy and messaging in order to make lifetime value our priority — we also had to update our measurement and metrics to reflect the evolving strategy. To do this, we started optimizing for lifetime value.”

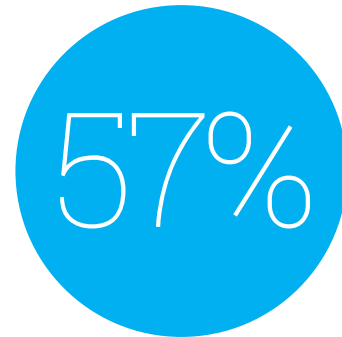


#### 4. Give everyone access

Data's no good if analysts are the only ones who can see it. The goal is to help *everyone* use data to make better decisions and improve results, after all. In the Econsultancy survey, leaders were 57% more likely than the mainstream to strongly agree that open access to data leads to higher business performance.<sup>12</sup>

But transparency goes two layers deep: everyone needs access to insights, but they also need to know where the original data comes *from* and how to use it.

With democratized data, everyone in the company drinks from the same data well. (They can bring their own cup, of course.) Whatever platform you choose, it should serve both the do-it-yourself marketing managers and strategy planners and your data scientists and advanced analytics practitioners. In the Econsultancy survey, organizations with integrated marketing and advertising technology stacks were 43% more likely to report that their teams have ready access to data (including things like multiple seat licenses for analytics) compared to marketers without fully-integrated technologies.<sup>13</sup>



Leaders were 57% more likely to strongly agree that open access to data leads to higher business performance.

**Econsultancy and Google,**

"The Customer Experience is Written in Data",  
May 2017, U.S.







## 5. Do deeper analysis

Finally, you're ready to dig into the data: look for patterns, ask questions, and use more tools to uncover insights.

If you're not already involved in machine learning and artificial intelligence, get ready. This advanced technology learns without being explicitly programmed; machine learning models can quickly mine huge reams of data for patterns and anomalies, providing faster speed to insight than ever before. Here are a few things to look out for — and a few pitfalls to avoid.



### Keep data consistent

Machines can't draw useful insights from garbled data. As noted earlier, data has to be clean and normalized from collection through storage, reporting and maintenance.



### Test your model

To validate your machine learning model after you've trained it, try testing it with historical data. Make sure you use an appropriate confidence interval for the business outcome you want. (Testing doesn't end with the first iteration of the model; it continues after the model starts making real decisions with new customers.)



### Pay attention to privacy

Maintain user privacy by using data in aggregate and anonymized signals. Leaders in the Econsultancy study were 31% more likely than others to say that their data and analytics strategy identifies standards and processes related to data security and privacy.<sup>14</sup>



### Be creative

Machine learning models are very good at telling you who to reach to achieve your business goals, but they may not be able to write the most engaging ads or design your website for you. Make sure that your creative team is involved and ready to make the consumer engagement connection between the data and the user.

Machine learning may sound new, but it has already been built in to many systems at Google and other companies. Artificial intelligence can highlight patterns or anomalies that may have previously been hidden. You don't know what you don't know, but machine learning can spot and surface opportunities that can lead to "aha" moments for Canadian marketers. It works best when combined in a one-two punch with your team's own thoughtful human analysis.



For more helpful background on machine learning, see [The CIO's Guide to Data Analytics and Machine Learning](#) from the Google Cloud team



## 6. Act fast

Once you've taken machine and human analysis as far as you can, don't wait around for something more perfect. Even the best integrated data still has gaps. Speed is important: Estimate where you need to, use proxies where you can, then take action.

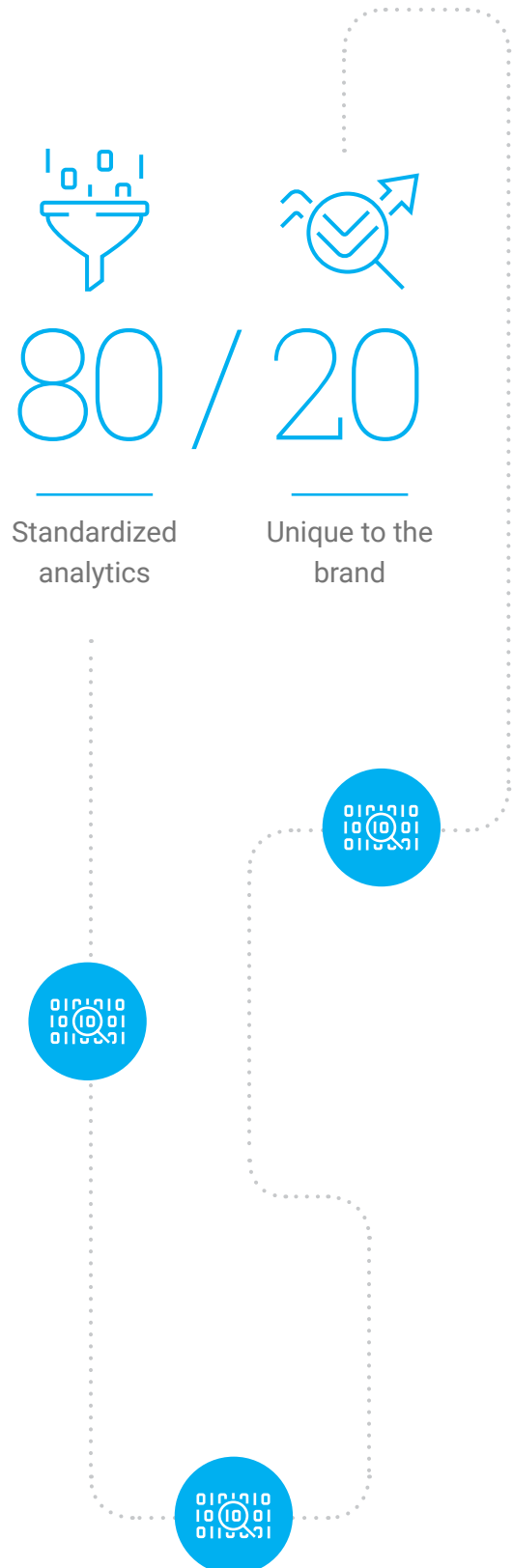
"Marketers are uncomfortable with estimates," said Jeremy Hull, EVP, iProspect, in [a 2016 Econsultancy report](#). "We've labored with the idea that data is so perfect and that we can track and measure everything. It's a fiction and will become more of a fiction as we have more things that we can't measure one for one. The goal isn't to have perfect data — it's to have good enough data to drive insights and make decisions."

For data analysts, the job is to present fresh data stories about audience segments and customer groups with clear, actionable recommendations. For Canadian marketers, the job is to quickly turn those recommendations into more relevant ad messaging and creative — and more personalized customer experiences in apps, websites, and stores.

If you are working with an agency, make sure you're all on the same page and using an approved standard.

"When our media agency is managing programs, we make sure that they're doing it against a standard structure and a standard approach," says Jeff Rasp of Bayer. He adds:

**"Our belief and our methodology is that yes, there are unique aspects of every brand, but we try to align around an 80/20 rule: 80% of analytics is standardized and 20% is unique to the brand."**





And take nothing for granted; your assumptions may be quite wrong. FXCM, for example, had a very specific funnel and conversion strategy implemented for years. But when FXCM began managing its own data again, what they found was “completely staggering,” says Monika Rut-Koroglu. “The data showed the customer acquisition strategy was based on faulty assumptions and that the customer journey was completely different 90% of the time.”

Once the FXCM team realized this, they took action right away, using A/B and multivariate testing to try different scenarios and approaches. “We started testing in various silos, mainly via specific display, search campaigns, and website experiences, to validate a new acquisition approach,” says Rut-Koroglu. “We’ve seen great results and great incremental lift. Are we 100% confident we’re serving exactly the experiences customers want? I’m not sure anyone ever is, but we have a much better understanding and can be more confident.”

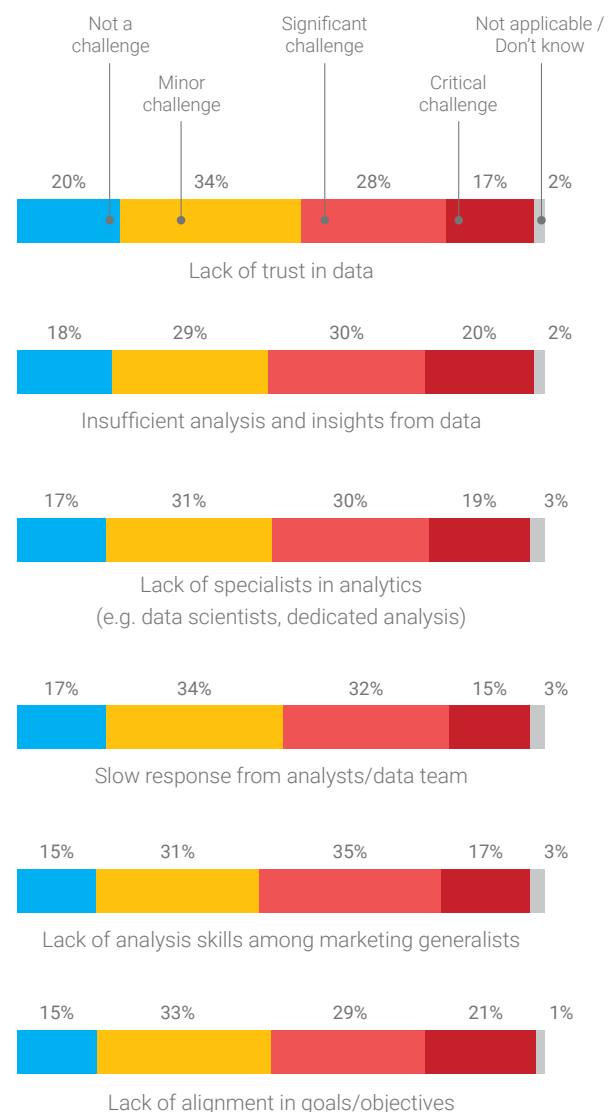
Having confidence in your integrated data is part of the equation — the other part is having integrated analytics and ad technologies needed to take action. The Econsultancy survey showed that industry leaders are 52% more likely than the mainstream to have an integrated marketing and advertising technology stack. If you don’t have a unified platform, think about what else may be possible.

“Measuring and tracking lifetime value used to be an ad hoc process, but now with a single platform we can dynamically track and update based on new performance data. ... As we continue to develop this data and model, we’ll be able to apply it to our marketing directly through [our tools],” says Jane Yu of Experian.

## Sometimes data challenges are people-related

Some of the human challenges of analytics include building trust in data, training team members, and making sure everyone is agreed on goals and objectives.

**In your opinion, how do these human challenges negatively impact your organization?**



**Econsultancy and Google,**

“The Customer Experience is Written in Data”, May 2017, U.S.



## PILLAR 1 CHECKLIST

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- ☐ Manage the data pipeline.
- ☐ Put data in context.
- ☐ Adjust your KPIs.
- ☐ Give everyone access.
- ☐ Do deeper analysis:
  - ☐ Keep data consistent.
  - ☐ Test your model.
  - ☐ Pay attention to privacy.
  - ☐ Be creative.
- ☐ Act fast.



## Pillar 2: The right culture

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Our 2016 [Culture of Growth eBook](#) talked about the champion, a CMO or other C-level employee who supports testing and experimentation and delivers the resources needed to move ahead. That can mean budget, talent, developer time, or (maybe most importantly) a sense of urgent priority.

The same kind of C-level vision and support is present in companies where a data and analytics strategy is core to marketing. But vision alone isn't enough, of course: It has to carry through to action.

"The reward structure for your organization has to be set up to actually applaud and focus on things which are not traditionally the shiny object," says Josh Spanier, Senior Marketing Director, Global Media at Google.

"We have to create a process and reward system which celebrates these different wins."

Here are some simple questions to ask to see where your company stands in the transformation.



Is a data-driven culture or transformation articulated in the highest company goals?



Are other orgs besides marketing aligning their goals and incentives accordingly?



Where do analytics and digital media fall in our organization?





Really harnessing data and putting it to use may require certain leaders within the company to reevaluate how teams are structured — or formalize points of alignment and collaboration across certain functional areas, such as brand marketing, digital media, and analytics departments. In particular, marketing may have the audience insights needed to guide the entire customer relationship, moving it beyond branding and into the front lines of corporate strategy.

Not all leaders approach data-driven marketing the same way. But most seem to use one of three organizational models:



**The center  
of excellence**



**Distributed team**



**Hub and  
spoke model**







## THE CENTER OF EXCELLENCE

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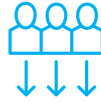
Many multinational leaders use a center of excellence model, where a central digital point person or team works to establish and document guidelines and processes. Often a point person or activation team is created within each brand or business unit to ensure follow-through.

This model can be especially useful for companies without huge budgets, or for major corporations with many smaller offices scattered around the globe. In those situations, it can be difficult to have a robust data science group in every market — difficult both financially and in terms of finding the necessary talent.

There's a tradeoff involved: Try to do too much globally from a central data team and you gain agility but lose connection to the local markets. But decentralize too much and you can lose quality or risk having key data stay siloed geographically.

A center of excellence team can often supplement remote offices with top-flight help, while the offices provide a connection to the local market.

Bayer is one company building on the center of excellence model. "Digital remains a center of excellence and this allows us to standardize tools, platforms, and best practices to then socialize across the division," says Jeff Rasp. "But once we establish those practices we pass them to an activation team, which makes sure that there's compliance across the division."



## DISTRIBUTED TEAM

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With this model, there is no real overarching analytics presence. Instead, analysts are embedded within individual teams and functions throughout the organization.

The great advantage of this model is that it allows analysts and local teams to test and make fast, nimble strategic shifts on a monthly, weekly, or even day-to-day basis. They also get to know the team's business better.

"Our organizational structure for analytics is quite distributed," says Stasha Rosen of Refinery29. "We have analysts embedded in teams throughout the company. We identify the core data sets for the company at a high level, and then make sure that we distribute those to the analysts throughout the company in a clean and workable fashion."

For Refinery29, the distributed model also applies to creation: "We've succeeded in creating a more iterative design process based on testing and really careful data analysis. That's been an exciting transformation that helps us really focus on users and what they prefer."



## HUB AND SPOKE MODEL

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This is a hybrid approach, taking the best parts of the center of excellence and a distributed model. The expert core team establishes consistent, shared guidelines, tools, and processes. Then, the people embedded with each brand team or functional organization are accountable for implementing best practices and feeding insights and optimizations back to the central core. This blended organizational structure also allows for greater alignment of objectives and business goals.

Sprint uses a “quasi” hub and spoke model, according to Chief Digital Officer Rob Roy. He first built up a center of excellence through his digital team, then worked to teach, promote, and influence people within Sprint’s various organizations to champion that digital hub. A close partnership developed with the customer relationship team, then it extended to other arms of the business.

“We worked closely with the network team, as well as the prepaid group to do analysis on things like how much we should price phones, elasticity of price, number of handsets that move, and the type of customer that buys it,” Roy says. “And once we showed those teams some very interesting and actionable data, the teams’ leader took it to the CEO, unbeknownst to us. It was very well-received and once he saw it — then the floodgates opened.” More support and interest in making data-informed decisions followed.

Whichever model they use, most industry leaders have the same goal: empowering local teams to innovate and explore, with the freedom to make changes and take risks.



## Where does your data come from?

Another key question: Will you handle all data and analytics in-house, or outsource some or all of your data management and related operations to an external agency or other partner?

FXCM has chosen to do it all in-house. With a relatively small data team, hands-on analytics drives daily decisions.

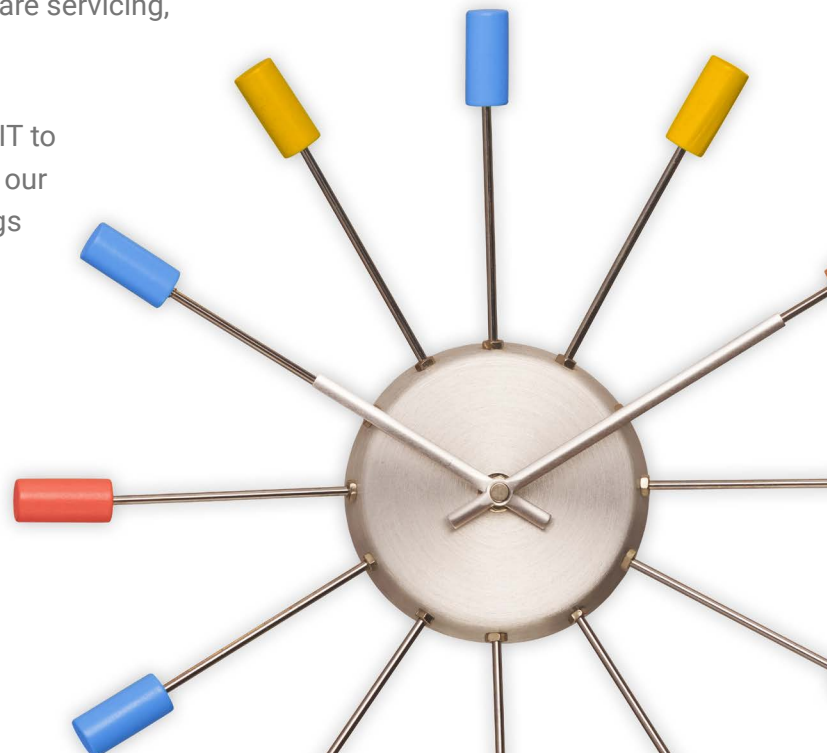
“Talking with people from different industries, this seems to be the biggest change within marketing teams: having a front-row analytics team that is driving the strategy,” says Monika Rut-Koroglu.

Not only is FXCM’s team able to act on data faster, they’re able to understand it better. Rut-Koroglu says: “Our team has a fundamental knowledge of how data is being collected and processed. They understand both the limitations and opportunities that come with our data; there’s never a question of ambiguity or misunderstanding. That transparency has been extremely important to the success of our marketing campaigns. The team also has great knowledge of the business, who we are servicing, and what the corporate objectives are.”

“We’re also fortunate in that we don’t have to go to IT to implement analytics changes,” she notes. “Parts of our web team act as ‘marketing IT,’ so we can turn things around a lot faster than companies where they have to formally go to the information technology department and fight to get the resources to implement or change the tracking.”

### Who leads on KPIs?

Old and new KPIs tend to bump into each other as data-friendly cultures grow. It’s a good idea to have the team that integrates the data lead the discussion on how various KPIs and metrics are calculated. That’s true not just for paid media but for owned media like websites, e-commerce platforms, and social media. In the Econsultancy survey, leading companies were 38% more likely than others to say that their data and analytics strategy includes how they define KPIs for owned properties.





As another solution, many other companies outsource some or all of their data collection, analysis, or activation to agencies or other third parties. That choice may be based on channel priorities in a particular region, a need for specialized technical expertise, or even a need for a fresh perspective. Put another way, a number of brands have a vision for how data can help them meet their business goals but need help with execution.

One example of a strong partnership is with restaurant-booking app OpenTable and global advertising agency PMG. “OpenTable has an aggressive goal to lead the market. So, to them, this meant not only exceeding those consumer expectations, but also [thinking ahead of the competition](#),” says PMG Founder and CEO George Popstefanov.

“We helped OpenTable segment their customers by customer lifetime value, which captured more than just the value of a single dining reservation. This segmentation then enabled them to deliver a customized experience to those high-frequency customers that matched their dining preferences. Capturing the value of a relationship versus the value of a single reservation, OpenTable was able to evolve their marketing goals and benchmarks to more accurately reflect that longer-term value of a customer.”

Whatever path you take, the point of your strategy should be to integrate data across platforms to better understand your customers and the true marketing impact on your core business objectives. For those who do outsource, it's important to be clear at the start that your company, not the agency, owns the data.

As many more organizations go through digital and data-driven transformations, new jobs are gaining traction to help lead the change:

#### **Programmatic Lead:**

Some digital marketing teams hire a new person to lead their programmatic efforts as they manage more of their own data in-house. This specialist role is responsible for managing the data pipeline and the relationships with key point people who are the day-to-day users of technologies in the marketing and advertising stack.

Jeff Rasp introduced this role at Bayer when he spotted an opportunity to differentiate their digital efforts. That person leads more media buying in-house, with real-time access to data and insights.

#### **Data / Analytics Storyteller:**

Some organizations have hired a new data storyteller. Think of this person as a messenger: one who helps to simplify complex data analysis, shares insights in the context of brands and business units, and serves it all up for marketing managers or C-level audiences short on time.



## Better training

When you set out to train employees in data analysis and action, you'll probably do all the logical things: set up classes (and make sure everyone attends), post docs and videos, provide training on your data and marketing platforms. That's all good.

But it's also important to address the "three lacks":



### Lack of confidence

We all have a natural fear of failure. Data storytelling is an art. It's hard to learn and hard to do. But here's the good news: If technology can help you by surfacing insights automatically, you're halfway to a good result anyway.



### Lack of trust

Why should I stick my neck out? That's the eternal human question. Emphasize to your team that you'll back them up *and* encourage them to keep a clear trail of the data that led them to a particular test. ("Trust but verify," as Ronald Reagan once said.) When a test succeeds or fails, that trail of data will be a valuable learning tool for the next go-round.



### Lack of time

This often takes the form of pressure to launch new features or execute on existing product needs. Who has time to think? You know the drill here: Finding time is always a problem in business, but people who have zero time are guaranteed *not* to look at the data.







## PILLAR 2 CHECKLIST

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- ☐ Pick an organization model:
  - ☐ The center of excellence
  - ☐ Distributed team
  - ☐ Hub and spoke model
  
- ☐ Train to address:
  - ☐ Lack of confidence
  - ☐ Lack of trust
  - ☐ Lack of time



## Pillar 3: The right technology

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OK, you're there: You have your integrated data and analytics strategy in place. You have your well-trained, collaborative team. Now for the final piece of the puzzle: your technology solution.

Compared to other marketers, organizations with fully-integrated marketing and advertising stacks are:



41%

*more likely* to use customer-level data to segment and reach individuals.



47%

*more likely* to use audience-level data to personalize customer experiences.



56%

*more likely* to use attribution to evaluate how channels work together and to allocate budgets.



59%

*more likely* to use digital analytics to optimize the user experience in real time.

**Econsultancy and Google,**

"The Customer Experience is Written in Data", May 2017, U.S.

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Of all the Econsultancy study respondents, 55% said that the lack of data integration presents a significant or critical negative impact on their organization. That's where the magic of a unified stack comes in: It integrates your marketing and analytics technology with your ad technology so you can truly put your insights into action.

It means, for example, that your search buying team and TV buying team can better coordinate their messaging to bid on the most conversion-friendly keywords at the precise moments a client's TV ad spots are airing. In addition, businesses can save money and time by having their buying, selling, and analytics tools all in one platform.



And it means that you can better observe and analyze consumer interactions with your website, and attribute each visit to a display ad viewed or a brand engagement on social media. More than that, you can look at behaviours and interactions with your site to identify, say, audience segments for people likely to buy related products, or people who need a nudge to purchase what was left in their shopping cart. Then you can apply those lists to your media buys so you can remarket to them on other channels.

Marketing leaders today are in a position to drive themselves in ways that used to require endless requests to IT. Many companies now have a web or digital team that serves as “marketing’s IT.” With an integrated marketing and advertising stack, the marketing org can feed audience insights back into their campaigns and customer experiences at a quicker pace.

To circle back to our opening framework, Canadian marketers can use integrated technology platforms in four key ways.



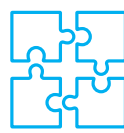
### Organize data

Bring it all together to build a full view of the customer.



### Design compelling creative

Develop messaging customized to each audience, using data-driven creative and other techniques.



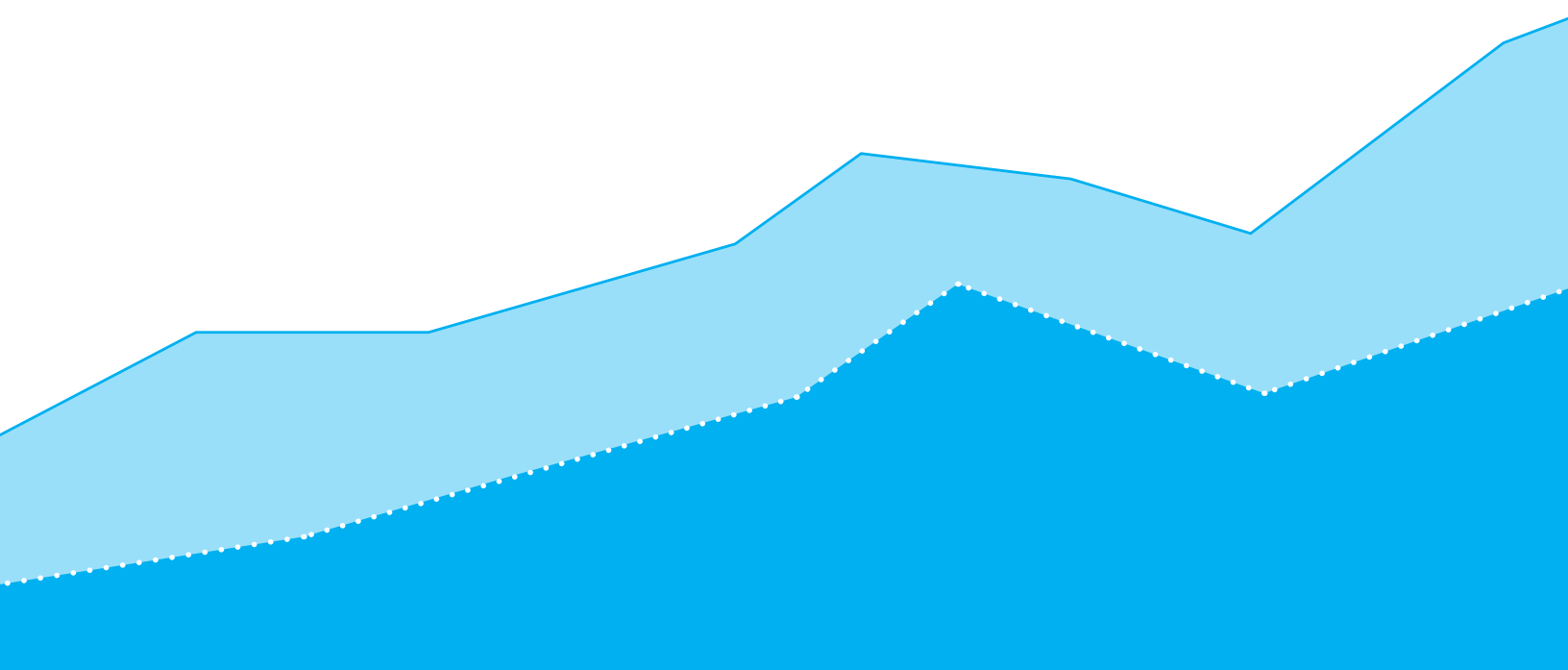
### Reach and deliver

Find the right audience in the right moment, with minimum waste, and at the best possible price.



### Measure and optimize

Integrate analytics like cross-channel attribution with the measurement stack. Then use newly-gained customer insights to get better faster.

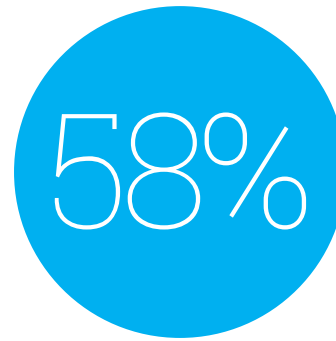




Whatever the technology, the relationship between the CMO and CIO or CTO is still key. After all, marketing data can become a strategic asset for the entire company. When the CMO and the CIO or CTO are key collaborators, marketing data can be combined with other first- and third-party data sources to help everyone conduct more complex analyses and uncover deeper insights — and then use what they learn to drive bigger business outcomes.

That's one of the great strengths of having your own integrated technology: You get a clear, unbiased look at what's working and what's not working.

That makes transparency, and an integrated data strategy, all the more important.



Leading marketers are 58% more likely than the mainstream to strongly agree that first-party data is a strategic asset that informs their decision making.<sup>15</sup>

**Econsultancy and Google,**

Marketing and Measurement Survey,  
North America, March 2017





### PILLAR 3 CHECKLIST

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- ☐ Organize data.
- ☐ Design compelling creative.
- ☐ Reach and deliver.
- ☐ Measure and optimize.



## Case study

### The Home Depot Canada's VP of Marketing and e-Commerce on curiosity and building a data-driven culture

*Michael Rowe, VP of Marketing and e-Commerce at The Home Depot Canada, offers his advice on fostering a data-driven culture and shifting measurement mind-sets within your organization.*

We measure a lot at [The Home Depot](#), and we've found that it's important to strike the right balance between the metric and the insight. Our ability to access vast amounts of data today is exciting, but we still have to filter out the noise and home in on what's actionable. Below are a few tips that can help you do just that:

**Don't rely on one source.** We often uncover our best insights when we triangulate our data, whether it pertains to internal reporting, test and control methods, customer insights, or vendor information. Try multiple sources and tie that together with the different data sets you have.

**Work cross-functionally.** We're pleased to have a small but growing central analytics team that uses machine learning and visualization software to quickly communicate media recommendations to our business partners. At my level, I look for associates and our partners to come in with a sense of expertise or to make recommendations with their data. I always ask what they'd like to do and encourage proposals. It's a culture of empowerment.

We have a nimble team that has embraced the organization's culture—which calls for our associates to think entrepreneurially, outside the box, and of new ways to propel our sales growth. By leveraging data from different departments and channels and even third parties, we've enabled new tools for our organization across merchandising, supply chain, e-commerce, and marketing. This data allows us to get further into the decimal places than we could in the past, enabling us to make much more informed decisions.

#### The Home Depot's data sources



Internal reporting



Test & control methods



Customer insights



Vendor information





## Tying it all together

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Data, data everywhere ... and now you're in command of it all, reading the tides and sailing your ship like an admiral. Or if you prefer, standing like a pirate astride a new treasure chest.

That's the power of an integrated data strategy. With online and offline data pulled together, you can truly understand the full customer journey and find better ways to reach and serve those customers. That's good news for them, and better news for your business.

We hope these ideas and guidelines will help you tame those tides. Good luck!

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### Sources:

1. Google Surveys, U.S., "2016–2017 Marketing Analytics Challenges and Goals," Base: 203, marketing executives who have analytics or data-driven initiatives, Dec. 2016.

2-10, 12-14. Econsultancy/Google, "The Customer Experience is Written in Data", May 2017. [n=677 marketing and measurement executives at companies with over \$250M in revenues, primarily in North America; n=199 leading marketers who reported marketing significantly exceeded top business goal in 2016, n=478 mainstream marketers (remainder of the sample)].

11 & 15. Econsultancy and Google, Marketing and Measurement Survey, n=514, marketing and measurement executives at North American companies with over \$250M in revenues; n=133 leading marketers who reported marketing significantly exceeded top business goals in 2016, n=381 mainstream marketers (remainder of the sample), March 2017.

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## Additional resources

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For more on building a data strategy — or on Google analytics and advertising technology — check out these resources:

### Research reports

#### [The customer experience is written in data:](#)

Why and how the most successful brands are putting data at the center of marketing strategy

#### [Driving growth with measurement in a mobile world:](#)

New attitudes and approaches to analytics and measurement

#### [Measurement and growth:](#)

How leading brands are connecting measurement with business goals

#### [An audience of individuals:](#)

How leading brands are investing in a first-party future

### Technology and product information

#### [Google Analytics 360 Suite](#)

#### [DoubleClick insights on data-driven creative](#)

#### [A brand marketer's guide to programmatic buying](#)

### Articles, blogs, and webinars

#### [Better together: Why integrating data strategy, teams, and technology leads to marketing success](#)

(via ThinkWithGoogle.com)

#### [Want to be a leading marketer? Go with data, not your gut](#)

(via ThinkWithGoogle.com)

#### [Three ways to get data out of silos and into your marketing strategy](#)

(via Google Analytics Blog)

#### [Marketing with a heart of data](#)

(via Google Analytics Blog)

#### [Marketers: Get your data house in order](#)


(in partnership with MIT Sloan Management Review Custom Content Studio)

#### [How to build a culture of growth](#)

(via Google)


### About the Google Analytics 360 Suite

The Google Analytics 360 Suite offers powerful and integrated analytics solutions for today's biggest enterprises. Measure and improve the impact of your marketing across every screen, channel, and moment in today's customer journey. It's easy to use, and makes data accessible for everyone so the "aha" moments are simple to discover and share. Move from insight to impact faster with the Google Analytics 360 Suite, and as a result, make the most of every consumer connection.

[Find out more](#) 

### About DoubleClick

DoubleClick connects the right people in the right moments to make digital advertising work better. Through its industry-leading suite of integrated mobile, video, programmatic, measurement, creative, and search management solutions, DoubleClick empowers brands, publishers, ad networks, and agencies to realize what's possible with digital.

[Find out more](#) 



# Leaders vs. the mainstream: How does your organization stack up?

Ready to build an integrated data strategy for your company? Here's how those who are doing it successfully compare to more mainstream businesses that are lagging behind.

## Measurement

### Leading marketers

Tie marketing metrics and KPIs to larger business outcomes — for example, customer lifetime value or profit.

### Mainstream marketers

Measure marketing results at the campaign level or in functional silos.

### Why it matters

Leaders are 33% more likely than the mainstream to say that their data and analytics strategy explains how the organization defines and measures the touch points in the customer journey.<sup>1</sup>

## Data

### Leading marketers

Use an integrated platform to consolidate, organize and share consistent data across teams.

### Mainstream marketers

Keep data in siloed teams, each of which uses its data only to inform its own strategies and decisions.

### Why it matters

Leaders are 57% more likely than the mainstream to strongly agree that open access to data leads to higher business performance.<sup>2</sup>

## Audience

### Leading marketers

Have an integrated data strategy that enables them to create audience segments, based on lifetime or potential future value to the business.

### Mainstream marketers

Segment customers by demographics and market to averages.

### Why it matters

Leading marketers are 1.5X as likely to use a consumer-centric metric, like customer lifetime value, to measure success.<sup>3</sup>

## Questions to evaluate how your organization compares

Do your marketing metrics align with your topline business goal?

Do you know what data is being combined and calculated for your metrics?

Do you have a strategy to measure all touch points in the consumer journey?

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Have you taken inventory of all your data sources and identified owners or points of contact?

Have you organized your data and identified gaps in first-party data that need to be supplemented with other sources?

Have you put data into context and created apples-to-apples comparisons to standardize data?

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Have you identified and prioritized audience segments — and applied those priorities to your advertising and marketing?

Do you have a model to understand the future value of customers and segments?

How does that value information inform your marketing strategy?

1 & 2. Econsultancy/Google, "The Customer Experience is Written in Data", May 2017, U.S. (n=677 marketing and measurement executives at companies with over \$250M in revenues, primarily in North America; n=199 leading marketers who reported marketing significantly exceeded top business goal in 2016, n=478 mainstream marketers (remainder of the sample), May 2017.

3. Bain Marketing Survey 2016.



## Technology & automation

### Leading marketers

Use modern technology, including products and platforms informed by machine learning, to increase speed to insight.

### Mainstream marketers

Use process automation backed by fixed rules or human-derived insights.

### Why it matters

Leading marketers are 48% more likely than the mainstream to be increasing investments in capabilities, like machine learning.<sup>4</sup>

## Experience

### Leading marketers

Use data to personalize marketing across online and offline customer experiences.

### Mainstream marketers

Deliver a one-size-fits-all experience to customers.

### Why it matters

Organizations with integrated marketing and advertising stacks are 47% more likely to be using audience-level data to personalize customer experience as marketers without fully-integrated technologies.<sup>5</sup>

## Attribution

### Leading marketers

Go beyond the last click with data-driven attribution.

### Mainstream marketers

Use last-click attribution.

### Why it matters

Organizations with integrated marketing and advertising stacks are 56% more likely to be using attribution to evaluate how channels work together and to allocate budgets as marketers without fully integrated technologies.<sup>6</sup>

## Questions to evaluate how your organization compares

Do marketing teams have the flexibility and authority to use automation and machine learning to treat segments differently according to LTV?

Are you getting full use out of the technology capabilities you have in place?

Have you integrated your marketing and advertising technologies so you can act on audience insights?

Are you using customer and context data to deliver a seamless and fast mobile experience?

Do you currently deliver a consistent customer experience across online and offline touchpoints?

Do you optimize the customer experience based on audience data/insights in near-real time?

Do you have a single-channel solution for attribution to analyze conversion patterns?

Do you have a cross-channel view of attribution that assigns credit to each stage of the customer journey?

Do your teams take actions by updating bids, budgets and strategies based on attribution results?

4. Econsultancy and Google, Marketing and Measurement Survey, n=514, marketing and measurement executives at North American companies with over \$250M in revenues; n=133 leading marketers who reported marketing significantly exceeded top business goals in 2016, n=381 mainstream marketers (remainder of the sample), March 2017.

5 & 6. Econsultancy/Google, "The Customer Experience is Written in Data", May 2017, U.S. (n=677 marketing and measurement executives at companies with over \$250M in revenues, primarily in North America; n=199 leading marketers who reported marketing significantly exceeded top business goal in 2016, n=478 mainstream marketers (remainder of the sample), May 2017