



Marketing Operations Analyst

Hiring Exercise

Congratulations: you are receiving this exercise because our Talent team believes that your profile may be aligned with what our team needs for the role of Marketing Operations Analyst. The purpose of this exercise is to give you the opportunity to showcase your skills from various angles. The test is composed of three parts. Please read the instructions carefully. The first two parts should take approximately an hour each to complete. For the case study, budget for 1-2 hours.

To share your results, please create a new public repository on GitHub and upload all the files there, then provide us with the link. If you don't have a GitHub account, you can compress the files into a zip archive and share that with us instead. Feel free to reach out if you have any questions.

Part 1 - Data Analysis

Analyzing data from various sources, making sense of it and reporting findings are the bread and butter of the Marketing Operations Analyst role.

In this directory there is an SQLite database file called `data.db`. This is anonymized data representing the identity and activity of users on an online platform. Your goal is to analyze this data and provide a short summary of your findings.

Your analysis should include but is not limited to the following questions:

- How many interactions did each customer have? How about each company?
- Which customers/companies exhibit lower usage? How about higher?

Save your analysis as a Jupyter Notebook titled `data-analysis.ipynb` in this repository.

Part 2 - Data Pipelines

An important part of the marketing operations workflow involves working with data in motion, setting up repeatable processes and ensuring that data ops run smoothly. For this task, your



goal is to find an API (<https://github.com/public-apis/public-apis> would be a good place to start looking), consume the data and store it in a format of your choice.

Your process should account for the following points:

- How do you check that the process has run successfully and the data is accurate?
- How do you automate this process so that it runs periodically?

Save your script in a file titled `data-pipelines.py` in this repository and ensure that it's reproducible.

Part 3 - Case Study

Background

You've been tasked with improving the efficiency of the marketing team's reporting process. The team spends several hours each week manually compiling data from various sources, including their CRM, emailing platforms, and website analytics. This process is time-consuming and prone to errors. Additionally, the CRM data itself is in need of cleaning and optimization.

Your Tasks

As the Marketing Operations Analyst, it falls to you to formulate a plan and provide remedies to improve the team's processes. Please address the following areas:

1. CRM Data Management:

- Describe a process for cleaning and deduplicating customer data in the CRM system.
- Explain how you would set up a lead scoring system using data from multiple sources (website interactions, email engagement, purchase history).

2. Workflow Automation:

- Design a simple workflow for automating a customer onboarding process using tools like Zapier or native CRM automation features.

3. Reporting Process Improvement: Outline a plan to automate the weekly reporting process, considering:

- Data sources and their APIs
- Data transformation and cleaning steps



- Visualization and reporting tools
- Implementation timeline and potential challenges

Deliverables

Please provide a detailed plan addressing each of the tasks above. Your plan should:

1. Explain the steps you would take to clean and optimize the CRM data.
2. Describe how you would implement a lead scoring system and what factors you would consider.
3. Present a workflow diagram or description for automating the customer onboarding process.
4. Outline a comprehensive plan for automating the weekly reporting process.
5. Discuss potential challenges in implementing your solutions and how you would address them.
6. Explain how your solutions will save time and improve data accuracy for the marketing team.

Your response should demonstrate your understanding of CRM systems, data management, marketing automation, and reporting processes. Be specific in your recommendations and provide justifications for your choices.

You may choose whatever format you think works best to present your plan. Please make sure the file title contains **case-study**.

Good luck!