



CASE STUDIES

Taking Analytics for Marketing Budgeting to the Next Level

Allocadia replaces marketing budget spreadsheets with a cloud-based solution that connects with financial, workflow, and other third-party systems. On any given day, customers can see how much of their marketing budget has been spent and how much is unused compared to what they still have planned.

Allocadia has been a GoodData partner since 2012, when the team decided to replace their existing analytics solution with one that offered their customers the best reporting possible through better visualizations and improved usability.

USE CASE

Analytics for marketing budgeting and planning system and for marketing campaign ROI

SOLUTION

Powered by GoodData

FAVOURITE METRIC

Performance forecast

Helping Marketers Run Marketing

“A marketing team’s tasks fall into two basic categories,” explains James Thomas, CMO of Allocadia:

- | Doing marketing: Creating campaigns, designing programs to engage prospects, producing creative assets, etc.
- | Running marketing: Setting strategically aligned objectives, allocating targets for investments and returns, and building strategic plans to meet those targets

Allocadia helps customers do the latter more efficiently and effectively — which Thomas knows from personal experience, having been an Allocadia customer before coming on board as CMO. “As an Allocadia customer, I saw first-hand the benefits the product delivers, in terms of both strategic planning and day-to-day decision making,” he recalls.

"Customers can see how much of their marketing budget has been spent and how much is unused compared to what they still have planned," notes Thomas. "The comparison is key, since coming in under budget can almost be worse than going over."

Customers can also look at their actual returns on those investments compared to their forecasted returns. As part of their offering, Allocadia includes a full set of marketing performance dashboards for the entire spectrum of users within their global marketing organizations from field marketing, to marketing operations and the CMO

"We wanted to focus on our core application of the marketing workflows around managing investments and returns, and we didn't want to build a reporting solution from the ground up," says Co-Founder and Chief Product Officer Katherine Berry. "So we partnered with GoodData to create packaged data products that we could distribute to our customer network with the goal of helping them become more efficient and strategic."

In four years of successful partnership, GoodData has helped Allocadia grow their business by creating Smart Business Applications that enable fast, easy delivery of templated and custom analytics products to their customers.

"That allowed us to deliver value to our customers quickly," explains Berry. "We were able to leverage templates for about 80 percent of new clients' requirements and spend our time on customizing the remaining 20 percent."

"Now conversations are less about 'here's what you can do' and more about 'here's what your day could look like.'"



James
Thomas

James Thomas

Chief Marketing Officer, Allocadia

From Present to Future

Darren Card, Director of Product Development, notes that “our analytics platform, powered by GoodData, has done a great job of showing customers what’s happening with their marketing investments and returns from an information standpoint — how their plans are progressing and how their various initiatives are lining up.”

With continued product development and innovations, Allocadia had new data it needed to incorporate into the dashboards, such as attribution data, so the team saw this as an opportunity to refresh on them. “We wanted to explore best practices in dashboard design, visualizations, and [storytelling](#) — to further optimize the dashboards for our customers in the context of both new and existing data,” Card recalls. “We wanted our dashboards to be persona-focused and action-oriented, to go beyond reporting information and guide customers on what to do with these insights.”

Allocadia saw the chance to offer a better understanding of marketing performance, to help those marketers with quicker more actionable insights that would allow them to decide instantly what to do next. “We decided to engage the GoodData services team to help guide us through this process,” said Card.

The Allocadia team also met with some of their best customers to gain a deeper understanding of how they were using the platform. “What we discovered,” says Card, “is that customers were wanting dashboards that were more persona-based and more action-oriented around marketing workflows.”

The feedback from one customer in particular proved especially valuable to the project. “Their company is built on open-source development, in which people share their work and collaborate to create new solutions,” Card recalls.

Card recalls. “We were so impressed by what they were doing with their analytics that we asked permission to work their approaches into our out-of-the-box dashboards.”

Allocadia was ready to take the outcomes of its partnership with GoodData and merge those best practices with what they learned from customers to begin designing a new solution.

Best GoodData Features

- **Ability to tell stories**
- **Flexible data model on the back end**
- **Ability to create templated out-of-box reports for customers, then easily customize them**
- **Best-practice approach in persona-based design**

Setting the Plan in Motion

As the process began to take shape, the team was determined to approach it with an unwavering focus on best practices and on the insights they had gained from their customers. “Our customers provided some great examples of customized dashboards,” Berry recalls, “and we knew that others would benefit from the time and energy they had invested. Allocadia customers are always ready and willing to help each other out, to share the insights from their experience and innovation so that everyone can move forward. And we are very appreciative of this great community and especially thankful to the customers that allowed us to incorporate their work.”

Reaping the Benefits

Allocadia’s next-generation analytics product is receiving positive feedback from customers. “They’re seeing Allocadia in a whole new light,” Berry says. “Our dashboards aren’t just about information — they’re about what you can do with that information based on your personas. For us, it’s about knowing your customers, the stories they need to tell, and the actions they need to take to run marketing more effectively.”

As Allocadia's customers are primarily marketers, good visual presentation was more than just a "nice to have" — it was essential. "Marketing professionals work with visuals every day, so we needed a 'wow' factor, and thanks to GoodData, we have it," notes Berry.

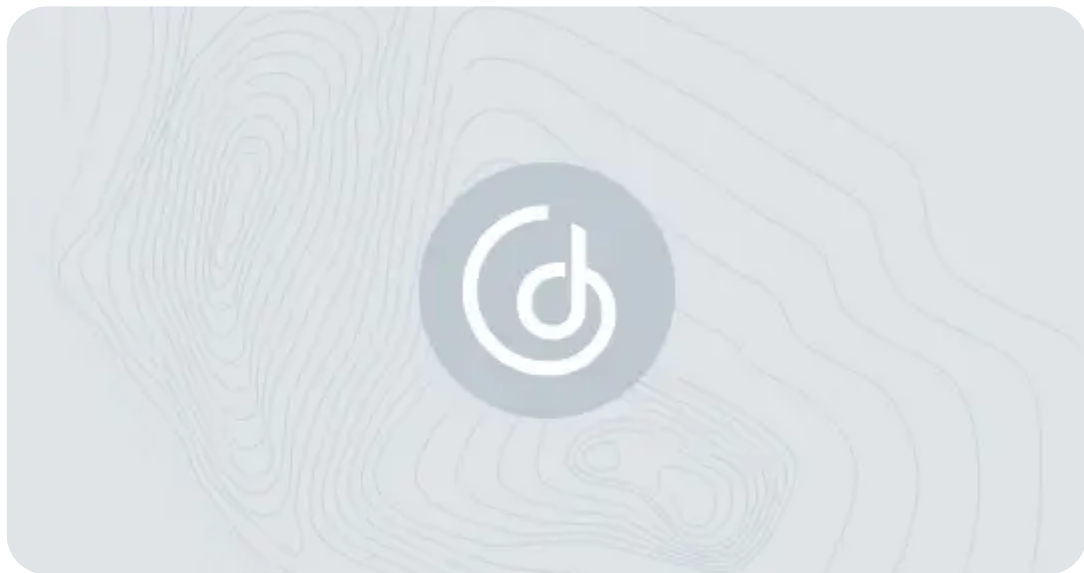
The team sees this refresh of Allocadia's analytics benefiting the company in many ways.

Because their pricing model charges by the seat, the new analytics platform allows Allocadia to drive revenue by increasing penetration with existing customers. Analytics are relevant to more users across the marketing organization, who now have visibility into their investments. Allocadia can also push data to be reported through independent business intelligence tools. "We serve customers in a different way by offering a new data source for their centralized reporting," explains Berry.

And while customers can design their own dashboards, they sometimes need guidance in deciding what stories the dashboards should illustrate. Allocadia offers that guidance as an add-on service, which creates an additional revenue stream.

"Our customers start with us by setting a foundation from a budgeting and planning perspective," says Berry. "Then they grow into managing the returns on their marketing investments with us, which adds immense value to the solution. Plus, we're able to more easily deliver on the promise of ROI with powerful, embedded business intelligence capabilities."

Allocadia developed its next-generation analytics platform as a specific response to customer needs. "We saw how they were optimizing their dashboards, and we knew there was more we could do to give them those capabilities at the outset," Berry recalls.



Allocadia Dashboard (all data has been genericized).

Allocadia is also seeing a lot of traction in the marketing performance management space. “We need to make sure our visualizations are the best that they can be,” notes Berry, “and GoodData helps us achieve that goal.” “How we win with this offering is that we are able to incorporate all the customer intelligence that we have with our position as a leader in marketing performance management,” said Berry.

Thanks to its partnership with GoodData, Allocadia was able to go beyond purely informational dashboards and evolve its platform into a more persona-based, action- oriented strategic asset. As Berry puts it, “We’re adding a new level of storytelling that enables them to raise their game to a new level.”

Results:

For Customers:

- ✓ Increased efficiencies in making marketing decisions and acting on data
- ✓ Better user experience due to intuitive dashboard design

For Allocadia:

- ✓ Ability to provide additional value through best-in-class embedded business intelligence reporting

Additional resources

If you'd like to discover more about embedded analytics and the GoodData platform, we have a number of additional resources available.

Learn more

Visit GoodData's [embedded analytics](#) website to learn more about different types of embedded analytics, solutions, benefits, and additional customer success stories.

Embedded analytics trial

With the [embedded analytics trial](#), you can see GoodData's analytics platform embedded in an application's user interface so you can get a clear example of what embedded ad hoc data discovery looks like. Explore a demo application enhanced by analytics visualizations, then create analytical insights using an intuitive drag-and-drop experience.