Case Study: Funnel Analytics & Event Tracking Framework

GBI Retail Platform — Product Case Study

Executive Summary

Our product lacked visibility into how users progressed (or dropped off) across core funnels like registration, funding, and order placement. This made it nearly impossible to diagnose friction points or measure the impact of product improvements. I led the effort to design and implement a granular event tracking framework, enabling actionable funnel insights and automated marketing recovery efforts via HubSpot. This initiative laid the foundation for a data-informed roadmap and cross-functional conversion strategy.

🎯 Goals

Business Goals

- Establish clear visibility into customer behavior across registration, funding, and ordering funnels
- Empower marketing and sales teams to re-engage high-intent users with automated and live outreach
- Attribute conversion outcomes to product, marketing, and sales touchpoints
- Enable leadership to make better roadmap decisions and investment prioritization

User Goals

- Reduce friction in onboarding and purchasing flows
- Provide timely, relevant communications if users abandon mid-flow
- Improve overall experience through informed, targeted enhancements

Non-Goals

- Redesign of onboarding or checkout flows

- Tracking of purely informational content (non-conversion paths)

👤 User Stories

- *As a product team*, we want to understand where users are abandoning so we can prioritize improvements.

- *As a marketer*, I want to trigger outreach to users who stall in onboarding so we can improve conversion.

- *As a sales rep*, I want visibility into which users to follow up with after key drop-off points.

- *As a company leader*, I want to know which teams are driving revenue so we can scale what works.

🧩 Solution

I led the definition and implementation of a **comprehensive funnel analytics system**, including:

- Mapped out major product funnels (registration, funding, order placement)

- Defined step-by-step events for each funnel with key properties (e.g. funding method, order value, time spent)

- Collaborated with the head of product to set standards for event granularity and naming conventions

- Partnered with marketing to ensure events could drive **HubSpot workflows**, enabling re-engagement via email and sales calls

- Created **HubSpot Deals** tied to key product events, so abandoned conversions could be tracked as recoverable opportunities

- Ensured events were sent asynchronously to avoid impacting user experience or performance

I created the **source of truth documentation** that guided engineering, product, and marketing teams in implementation and usage.

⚙️ Execution

- Brought engineering leads into discovery early to assess feasibility, identify unused legacy tracking, and confirm async event emission

- Facilitated alignment between product engineering and marketing tech teams to ensure events were actionable in HubSpot

- Worked with stakeholders to **prioritize funnels**, focusing first on flows most tied to revenue

- Navigated tradeoffs on event data granularity vs. performance — scoped high-priority attributes first, leaving heavier data capture for phase two

- Post-implementation, created **Sankey diagrams and funnel visualizations** for internal use — these are now regularly referenced in roadmap planning and KPI reviews

📈 Outcome

- ✅ Defined and implemented detailed funnel tracking across registration, funding, and order placement

- ✅ Created a centralized system of attribution — leadership can now see which team (product, marketing, sales) influenced revenue outcomes

- ✅ HubSpot workflows are now live for abandoned users — enabling targeted outreach with measurable recovery rates

- ✅ Funnel visualizations now inform product prioritization and post-launch measurement

- ✅ Marketing and sales now use "Deals" to re-engage lost leads with coordination from product and support

> 🚧 Final development and future funnels are still underway, but core systems are in place and actively delivering business value

📎 Artifacts

- Funnel mapping documents (registration, funding, orders)

- Event property schema and naming standard guide

- Live Hubspot product funnel data visualization

- HubSpot Deal attribution tracking dashboard

🧠 Key Learnings

- Early, tight collaboration with engineering and marketing made the project smoother and more sustainable

- Events are most useful when they serve *multiple teams* — product, marketing, sales, support

- Visualization matters — even if the data is accurate, stakeholders won't use it unless it's easy to understand and access

- Tradeoffs on data granularity vs. performance are easier to make when you have clear stakeholder priorities

Why It Matters

We built more than a metrics system. This gave us real visibility into how users move through our product, where they get stuck, and how our changes affect behavior. Teams across product, marketing, and sales now use the same data to make decisions — and it's already shaping how we plan, prioritize, and grow.