Metrics that Matter: How to Report ROI with Ease

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What is ROI?

Today's Agenda

- Key Reporting Considerations

- Pre-Funnel Engagement

- Journey Analytics

- Program Performance and Attribution

Considerations for your Reporting Strategy

Vanity Metrics

May sound impressive,
but no impact on revenue &
profitability

Activity Metrics

Report on results and impact, not just what you do

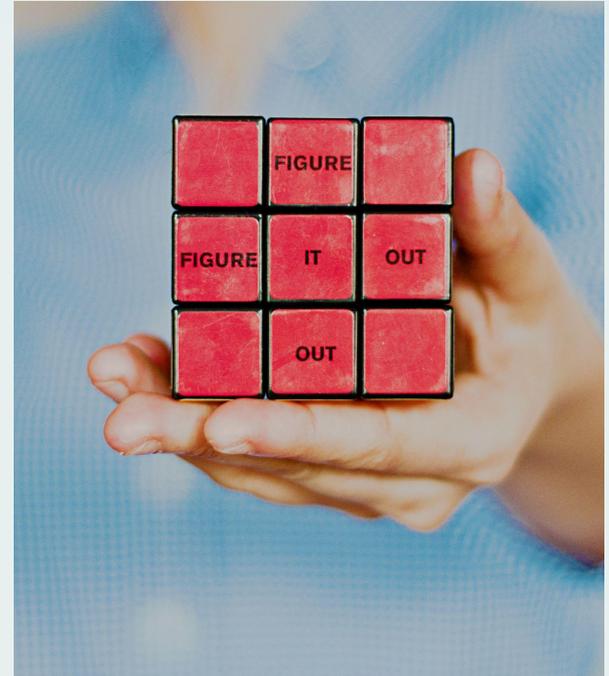**Quality > Quantity**

Volume Doesn't Drive Behavior

Define actionable metrics & simplify reports

Data Requires Strategy & Translation

Help consumers understand "Why?"

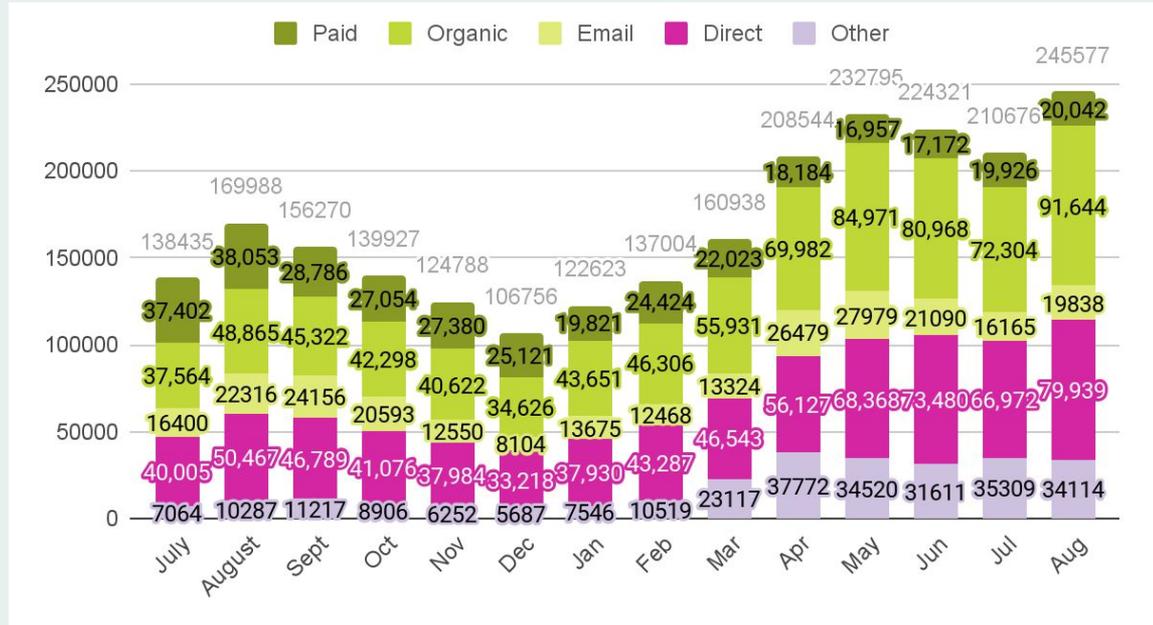# Pre-Funnel Engagement

"Before someone spends money with you, they spend <u>time</u> with you."

Web Traffic by Channel

Step #1 for Reporting on Brand & Marketing Impact

Related Metrics:
Sessions, Conversion Rates, Unique Accounts on Site

Legend: Paid, Organic, Email, Direct, Other

Month	Paid	Organic	Email	Direct	Other	Total
July	37,402	37,564	16400	40,005	7064	138435
August	38,053	48,865	22316	50,467	10287	169988
Sept	28,786	45,322	24156	46,789	11217	156270
Oct	27,054	42,298	20593	41,076	8906	139927
Nov	27,380	40,622	12550	37,984	6252	124788
Dec	25,121	34,626	8104	33,218	5687	106756
Jan	19,821	43,651	13675	37,930	7546	122623
Feb	24,424	46,306	12468	43,287	10519	137004
Mar	22,023	55,931	13324	46,543	23117	160938
Apr	18,184	69,982	26479	56,127	37772	208544
May	16,957	84,971	27979	68,368	34520	232795
Jun	17,172	80,968	21090	73,480	31611	224321
Jul	19,926	72,304	16165	66,972	35309	210676
Aug	20,042	91,644	19838	79,939	34114	245577

Advertising Lift

Compare Ad Lift by Tiers of Spending & Industry Benchmarks

Advertising Lift % by Tier

Legend: Tier 1/AE Top 5 — Tier 2/AE Top 30 — Tier 3/DBTAL — Benchmark
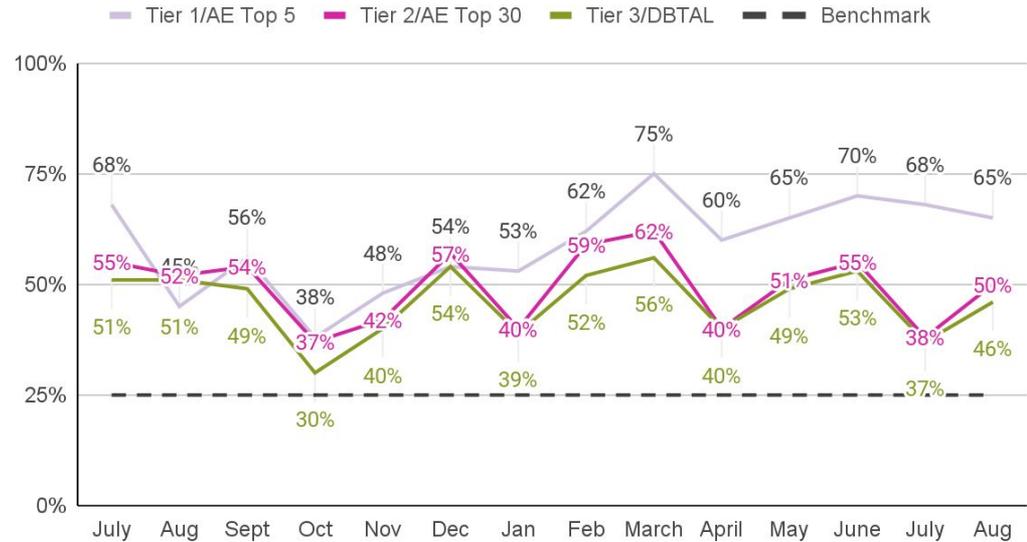
Qualified Responses

Target Persona

+

TAM+ Account

=

Qualified

Qualified Responses
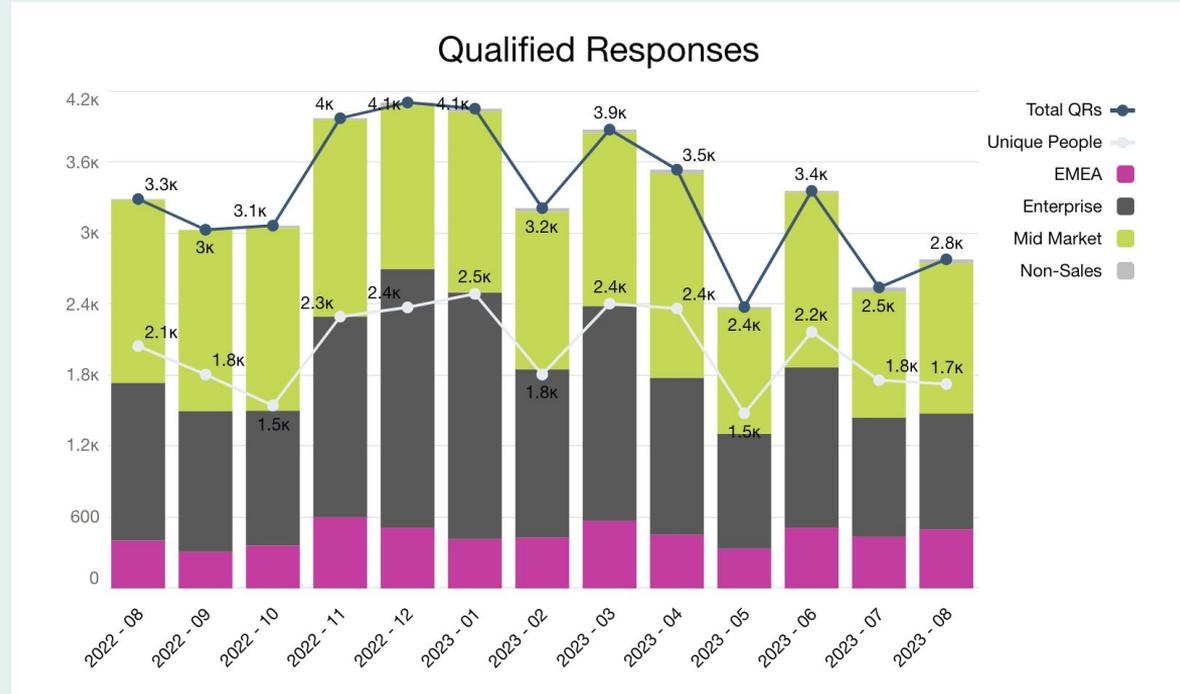
Account Engagement
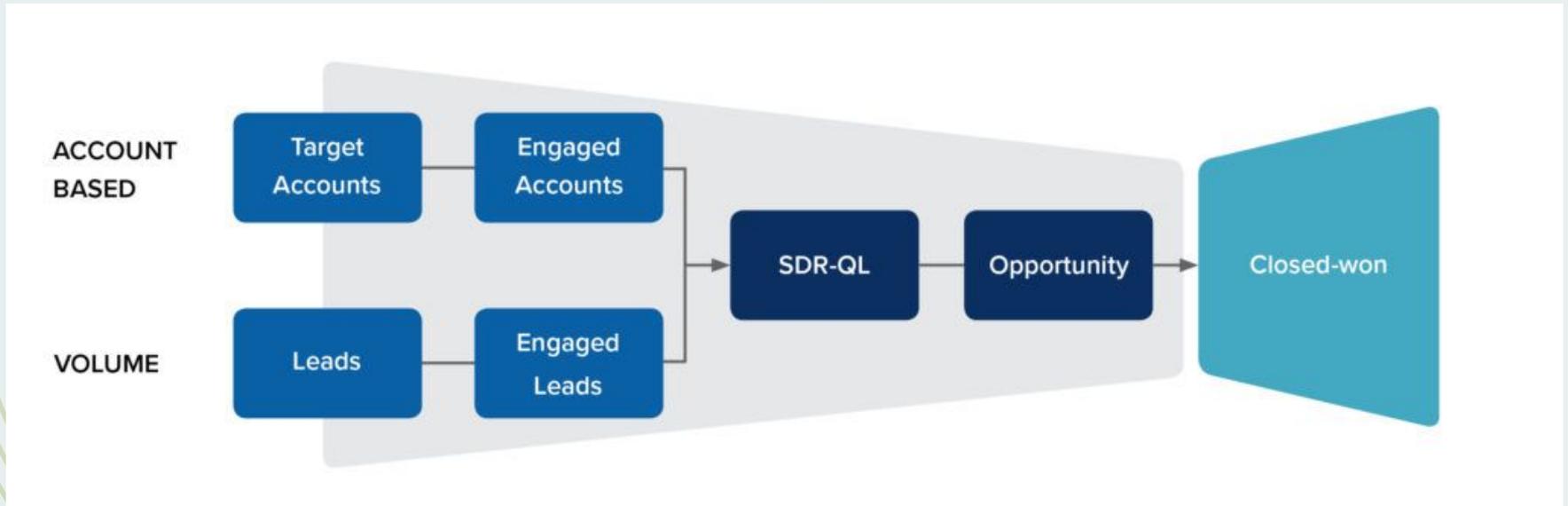
Track Engagement Over Time

View Engagement Minute trends by Account Segment or Account Tier

Related Metrics:
Historical Engagement, Unique Engaged Accounts, Unique People Engaged

Journey Analytics

Revenue Leading Indicators

The TOPO Double Funnel

The 4 Vs of Journey Analytics

- **V**alue: Current count (balance)
- **V**olume: Movement into stage
- con**V**ersion: % moved forward
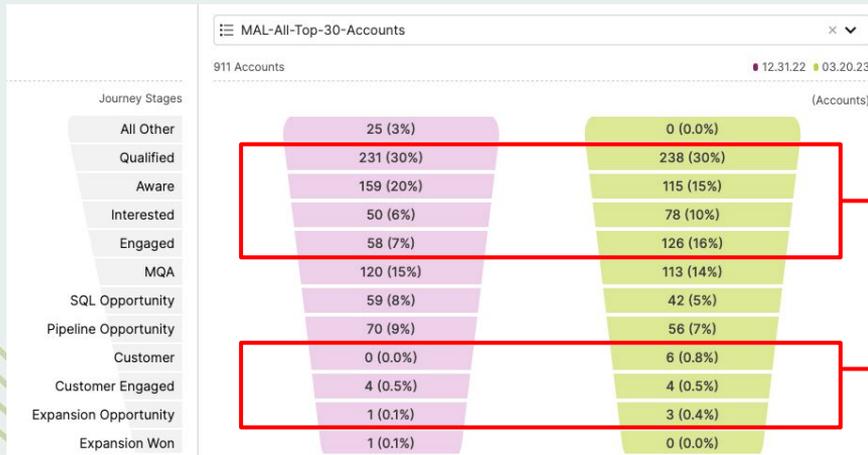- **V**elocity: Time to move forward

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Journey Stage Comparisons

Quarter over Quarter

Track Accounts through their Journey

Stage	Accounts		Volume	Velocity	Conversion
All Other	10	0.1%	65	179 days	97.1%
	337	4.5%	12	69 days	40.8%
Qualified	5,311	66.9%	466	93 days	50.8%
	4,964	65.8%	42	72 days	38.5%
Aware	1,206	15.2%	1,678	24 days	24.8%
	674	8.9%	1,167	43 days	20.7%
Interested	335	4.2%	581	18 days	36.0%
	393	5.2%	573	25 days	31.7%
Engaged	390	4.9%	472	31 days	28.7%
	391	5.2%	455	33 days	38.8%
MQA	306	3.9%	286	49 days	22.9%
	433	5.7%	492	36 days	22.2%
SQL Opportunity	156	2.0%	180	26 days	27.7%
	138	1.8%	170	32 days	27.2%
Pipeline Opportunity	136	1.7%	93	136 days	1.1%
	132	1.7%	105	81 days	4.4%
Customer	23	0.3%	3	54 days	40.7%
	22	0.3%	1	36 days	38.7%
Customer Engaged	62	0.8%	32	99 days	15.2%
	52	0.7%	21	86 days	18.8%

Using Journey Stage Comparisons to Understand Performance

- Visualize progression downward as accounts become more engaged

- Compare multiple account lists and time periods for cohort analysis and A/B testing
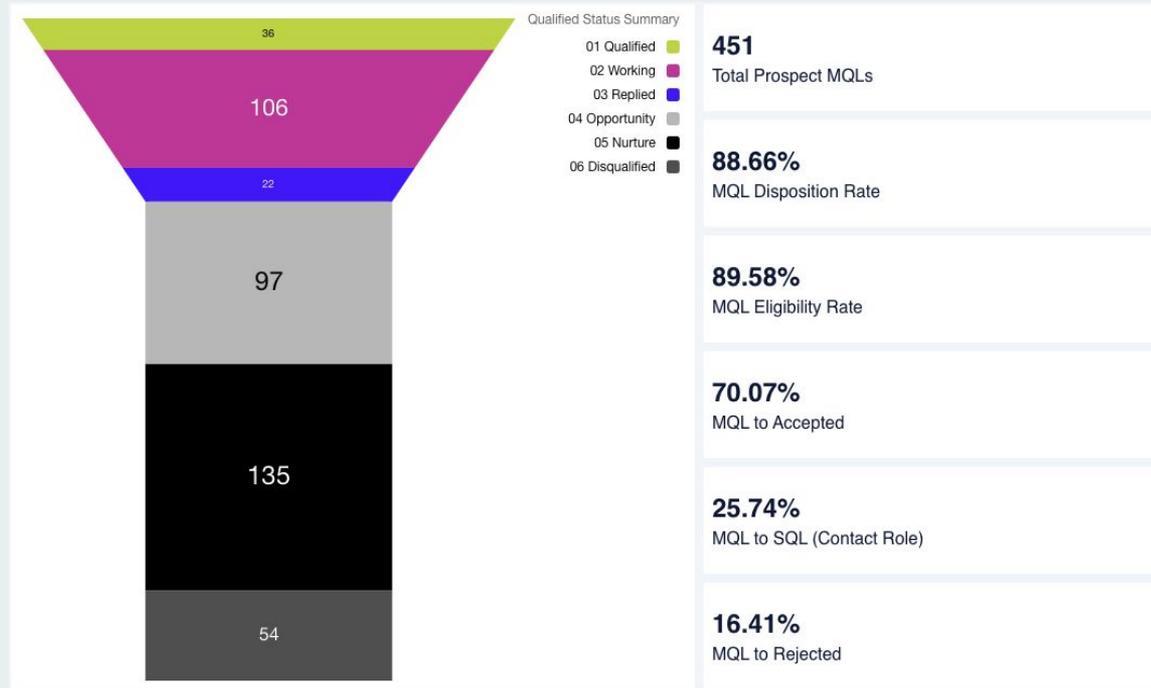
Journey Stages	12.31.22	03.20.23
		(Accounts)
All Other	25 (3%)	0 (0.0%)
Qualified	231 (30%)	238 (30%)
Aware	159 (20%)	115 (15%)
Interested	50 (6%)	78 (10%)
Engaged	58 (7%)	126 (16%)
MQA	120 (15%)	113 (14%)
SQL Opportunity	59 (8%)	42 (5%)
Pipeline Opportunity	70 (9%)	56 (7%)
Customer	0 (0.0%)	6 (0.8%)
Customer Engaged	4 (0.5%)	4 (0.5%)
Expansion Opportunity	1 (0.1%)	3 (0.4%)
Expansion Won	1 (0.1%)	0 (0.0%)

MAL-All-Top-30-Accounts

911 Accounts

Strong focus in Q1 to engage this pool of accounts, 2x accounts in Engaged 90 days later

6 accounts converted to Customer stage

MQ Funnel Conversion

How is your MQ Funnel performing?

Use Analytics to Inform & Improve

Qualified Status Summary
- 01 Qualified
- 02 Working
- 03 Replied
- 04 Opportunity
- 05 Nurture
- 06 Disqualified

Funnel values: 36, 106, 22, 97, 135, 54

451
Total Prospect MQLs

88.66%
MQL Disposition Rate

89.58%
MQL Eligibility Rate

70.07%
MQL to Accepted

25.74%
MQL to SQL (Contact Role)

16.41%
MQL to Rejected
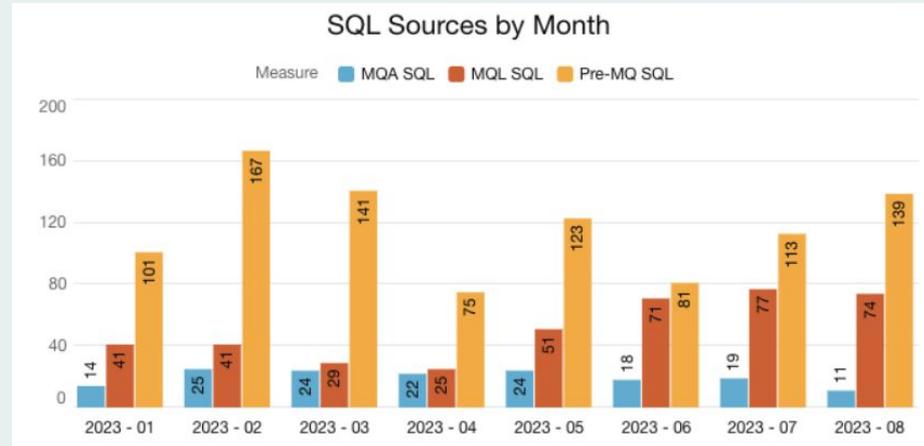
Opportunity Sources

Track performance through Opportunity stages

Related Metrics: % Lost in SQL, % Pipeline to Closed Won, % Open, Opportunity Velocity

SQL Sources by Month

SQL to Pipe Conversions MoM
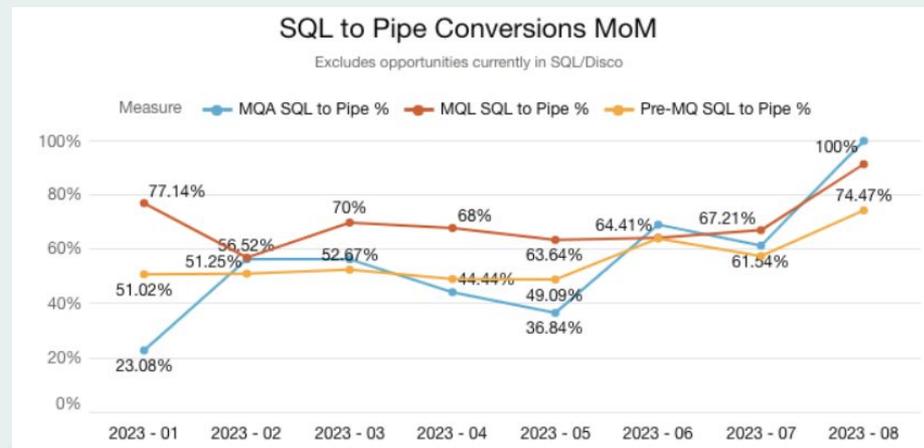
Owning the Funnel Together

Bookings Goal / **ASP** / **Win Rate**

=

Pipeline Goal

....

Pipeline Goal / **% of MQL** / **MQA Sourced Opps** /
Conversion Rate

=

MQL/MQA Goal

Opportunity Tracking

Conversion rates to align Marketing & Sales

New Business	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	12M Average
Enterprise	58%	64%	67%	65%	61%	62%	63%	64%	48%	45%	64%	67%	**61%**
Mid Market	58%	63%	65%	69%	59%	72%	60%	70%	56%	67%	53%	60%	**63%**
EMEA	80%	96%	61%	76%	71%	60%	53%	51%	82%	80%	83%	50%	**70%**
Grand Total	**65%**	**74%**	**64%**	**70%**	**64%**	**65%**	**59%**	**62%**	**62%**	**64%**	**66%**	**59%**	**64%**

Upsell	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	12M Average
Enterprise	96%	89%	82%	82%	93%	100%	90%	91%	89%	75%	79%	88%	**88%**
Mid Market	75%	62%	68%	70%	45%	85%	73%	72%	81%	96%	89%	58%	**73%**
EMEA	-	100%	50%	100%	100%	100%	100%	50%	100%	100%	100%	100%	**91%**
Grand Total	**86%**	**84%**	**67%**	**84%**	**79%**	**95%**	**88%**	**71%**	**90%**	**90%**	**89%**	**82%**	**84%**
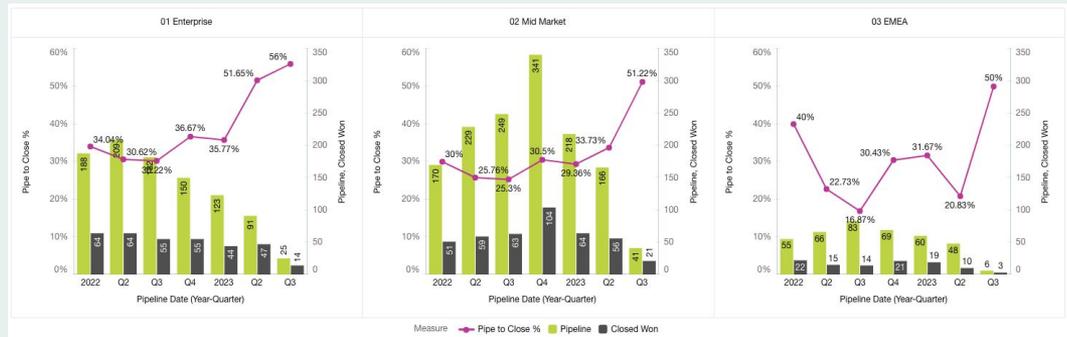
# Program Performance and Attribution

Monthly Program Review

Regularly Review Short Term Results

Campaign Goal Progress,
Qualified Responses & Investment/QR,
Critical Thinking & Evaluation

Campaign Name	Channel	Program Investment	Campaign Goal	Goal Target	Goal Actual	% of Goal	Total QRs	Investment /QR	Program Owner	Would you do this again?	Why or Why not?	What would you change about this program?

Campaign Goals
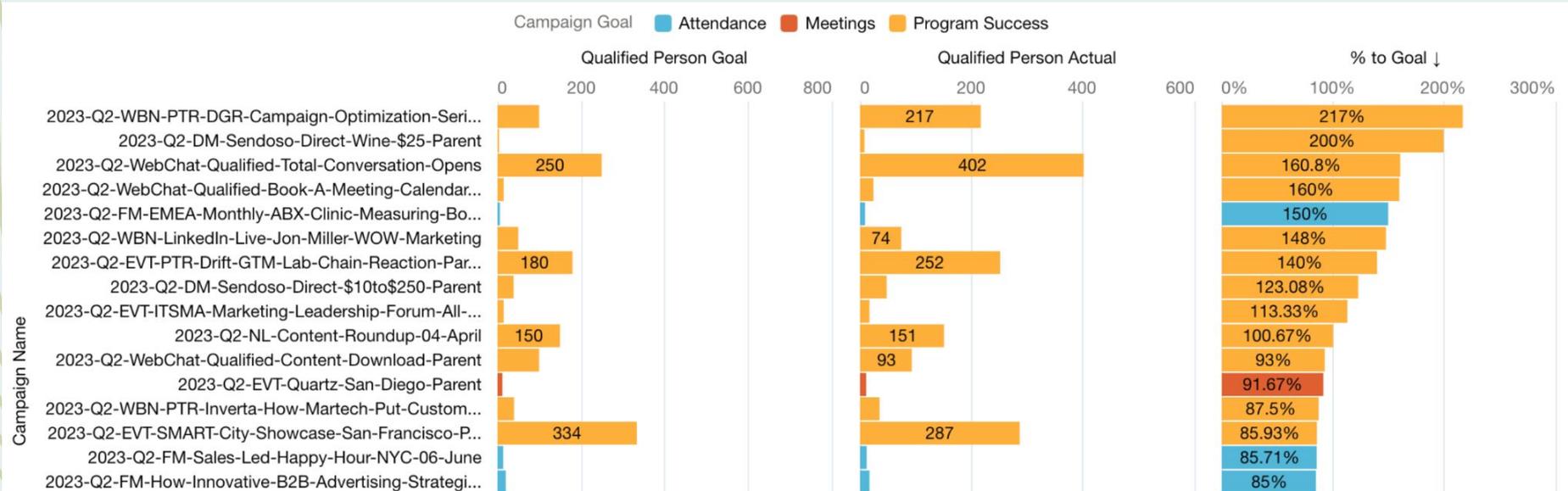
Quarterly Program Review

Review Attribution Results
Once per Quarter

Attribution by Stage,
Multi-Touch Ratios,
Critical Thinking & Evaluation

Campaign Name	Channel	Program Investment	Pipe Attribution (Pre-Pipe)	# of Pipeline Opps (Pre-Pipe)	Pipe MT Ratio (Pre-Pipe) - Target 10	CW Attribution (Pipe to Close)	# of CW Opps (Pipe to Close)	CW MT Ratio (Pipe to Close) - Target 5	Program Owner	Would you do this program again?	Why or Why not?	What would you change about this program?

Attribution by Opportunity Stage

Multi-Touch Attribution

Pre-SQL

SQL to Pipeline

Pipeline to Close

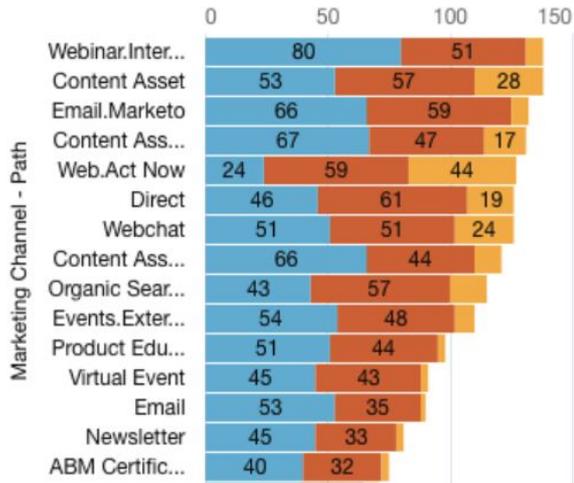# Multi-Touch Ratios

Create Attribution Goals by Opp Stage

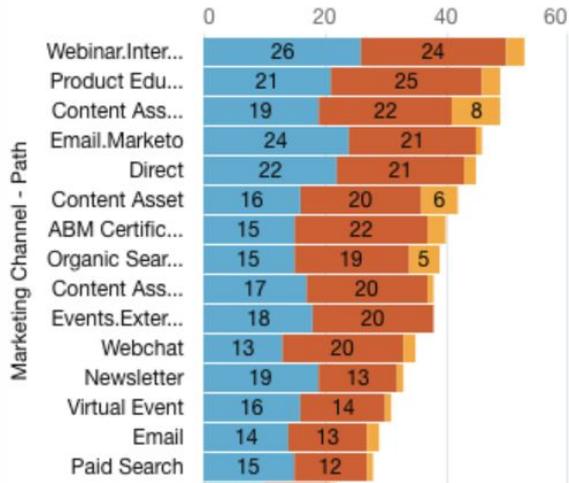Understand Marketing Impact on Pipe Creation & Deal Acceleration

Sum of Multi-Touch Attribution $

/

Program Investment $

=

MT Ratio

Opps with Pre-SQL Touchpoints b...

Marketing Channel - Path

Channel	Enterprise	Value 2	Value 3
Webinar.Inter...	80	51	
Content Asset	53	57	28
Email.Marketo	66	59	
Content Ass...	67	47	17
Web.Act Now	24	59	44
Direct	46	61	19
Webchat	51	51	24
Content Ass...	66	44	
Organic Sear...	43	57	
Events.Exter...	54	48	
Product Edu...	51	44	
Virtual Event	45	43	
Email	53	35	
Newsletter	45	33	
ABM Certific...	40	32	

Opportunity Owner Role Segment Bucket — 01 Enterprise

Opps with SQL to Pipe Touchpoin...

Marketing Channel - Path

Channel	Enterprise	Value 2	Value 3
Webinar.Inter...	26	24	
Product Edu...	21	25	
Content Ass...	19	22	8
Email.Marketo	24	21	
Direct	22	21	
Content Asset	16	20	6
ABM Certific...	15	22	
Organic Sear...	15	19	5
Content Ass...	17	20	
Events.Exter...	18	20	
Webchat	13	20	
Newsletter	19	13	
Virtual Event	16	14	
Email	14	13	
Paid Search	15	12	

Opportunity Owner Role Segment Bucket — 01 Enterprise

Opps with Pipe to Close Touchpoi...

Marketing Channel - Path

Channel	Enterprise	Value 2	Value 3
Email.Marketo	54	28	
Content Ass...	37	27	
Content Ass...	36	22	
Direct	35	21	
Product Edu...	33	20	
Webchat	32	16	
Content Asset	31	14	
Events.Exter...	29	20	
Webinar.Inter...	31	13	
Organic Sear...	22	19	
Community	28		
ABM Certific...	21	13	
Web.General	24		
Paid Search	27		
Webinar.Ext...	20	12	
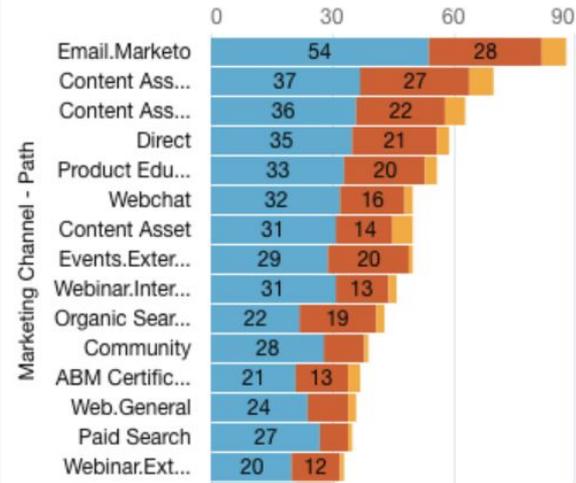
Opportunity Owner Role Segment Bucket — 01 Enterprise

Using Program Impact for Marketing Influence

Use **Quick Filters** to easily apply frequently used account or person filters to your data set.

Select **Date Ranges** to view results from responses within a given time period.

Use **Advanced Filters** to apply any additional field available in DB1 to your data set.

Program Impact

📅 Jan 1, 2021   📅 Dec 31, 2021   Load Filter ▼ ▼ ⋮ >

MAS-Account-Tier (Segment): Tier 1 (AE Top 5) × ▼   Journey Stage: Select... ▼   Account Segment: Select... ▼   MAS-Persona (Segment): Select... ▼

Campaign / Programs   ▼

Search 🔍   Campaign / Program   Type / Channel

Swap between **Type/Channel** and **Campaign/Program** for more or less granular summarization.
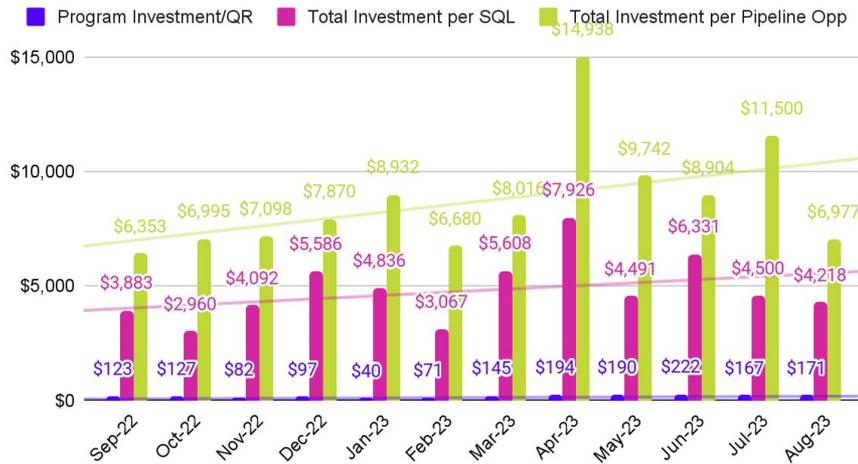
Type (23)	Successes ↓	Account Coverage	Won Opportunities	Win Percentage	New Opportunities	New Pipeline Revenue	Closed-Won Revenue
Content Asset	600	73% (144/197)	602	67.49	936		
Event	592	69% (135/197)	460	66.47	749		
Webinar	432	63% (125/197)	539	66.79	847		

Efficiency Metrics

Tie Marketing to Business Results

Marketing Investment/Performance

■ Program Investment/QR ■ Total Investment per SQL ■ Total Investment per Pipeline Opp

	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23
Total Investment per Pipeline Opp	$6,353	$6,995	$7,098	$7,870	$8,932	$6,680	$8,016	$14,938	$9,742	$8,904	$11,500	$6,977
Total Investment per SQL	$3,883	$2,960	$4,092	$5,586	$4,836	$3,067	$5,608	$7,926	$4,491	$6,331	$4,500	$4,218
Program Investment/QR	$123	$127	$82	$97	$40	$71	$145	$194	$190	$222	$167	$171

Investment per Opportunity Dollar

Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23
$0.12	$0.12	$0.13	$0.13	$0.16	$0.12	$0.15	$0.24	$0.17	$0.16	$0.21	$0.14

Key Takeaways

1. Focus on multiple areas of measurement to demonstrate value

2. Make sure your external reports speak "the language of business"

3. Internal marketing reports should focus on leading indicators to revenue

4. Use reporting to improve — not prove — your marketing

Demandbase.

Thank you!