

Customer Behavior Insights through Marketing Dashboards



Seattle, WA September 8-9

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Take-aways

- Techniques to consolidate disparate data sources
- An easy-to-understand model using customer data to create lifetime value estimates
- Sophisticated approaches to identifying customers by segment and assigning lifetime value estimates
- Graph and dashboard design principles to accelerate understanding of program outcomes
- Understanding of how simple visual analytics and dashboards can empower program owners to quickly comprehend success and meet objectives

Does your organization have multiple disparate sources of internal and external data about your customers, sales and campaigns? What if you could merge these data sources together with common office productivity tools, begin with simple rules for customer segmentation and customer lifetime value estimates, and present these insights rapidly in simple yet effective dashboards? Would this revolutionize your marketing programs and the ability of your teams to make smarter tactical and strategic decisions?

This course is interactive and hands-on, using the case study approach. It will show you a simple yet solid path to obtain hidden value from your data, including the ability to combine key datasets, efficiently analyze data using simple tables and graphs, and develop simple yet compelling dashboards that address tactical business needs and communicate ongoing results. Most importantly, all of this work can be updated with new data and changing conditions to manage ongoing needs in your marketing program.

NOTE: You will need to bring a laptop with free evaluation or full versions of Excel (2007 or 2010), Microsoft Access (2007 or 2010), and Tableau 6.0 installed. Although we focus on these tools, the techniques and concepts are applicable to any standard data feed, analysis tool or database in your workplace. Sample data sources that will be used in class exercises include in-house campaign data, Google Analytics, online sales data, online advertising data and offline transactional sources.

Stephen McDaniel

Co-founder of Freakalytics, LLC and Author of *Rapid Graphs with Tableau Software* and *SAS for Dummies*

Mr. McDaniel has more than 20 years of experience as a teacher, consultant, leader, innovator and author in the fields of visual analytics, business intelligence, data warehousing and data mining. He has worked with many organizations to go beyond standard information delivery models with long-project timelines to help people rapidly understand, present and take action with their data.

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Day 1

Through a number of hands-on exercises, learn to:

- Combine and enrich your data: multiple case study-approach
- Develop customer segments

Specific hands-on exercises include:

- Disparate data sources
- Additional data management
- Data quality issues
- Customer segments

Day 2

Through a number of hands-on exercises, learn:

- Customer value basics and review of a technique for customer valuation
- Dashboard development using a case study approach, combined with segments and customer valuation
- Good design guidelines for graphs and dashboards

Specific hands-on exercises include:

- Customer value
- Tableau Software and dashboards*
- Good dashboard design*
- Interactive group development of a dashboard*

* Note that dashboard exercises will be created in **Tableau 6.0**, which has a free desktop evaluation license, a free reader and a free public version.

