Design of a reporting solution for internal and external clients of a marketing agency

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Abstract

Purpose of the article The purpose of this paper was to analyze the previous state of the reporting solution used to serve both the marketing agency's employees and its clients, and to propose a solution that would make the reporting process more efficient in terms of price, time consumption and reliability.

Methodology/methods A qualitative approach has been chosen to identify the criteria and tools relevant to the study. Based on unstructured personal and video interviews with clients and employees who interact, maintain or present the reporting dashboard, specific criterions and sets of relevant tools have been identified for a multi-criteria evaluation. Each criterion was given points on the scale of 0 points (does not comply), 0.5 points (partly complies) and 1 point (fully complies).

Scientific aim The changes should lead to increased reporting reliability, easier data manipulation and an updated graphical framework. It is possible to extract, transform, present and analyze the data needed for decision-making faster and more reliably than before. Both the agency's internal team and its clients benefit from these research outcomes.

Findings Based on the internal and external analysis of the selected company, a previous state of a reporting solution and the main needs identified by unstructured interviews, 6 sets of relevant tools have been tested in field. A total of 14 criterias have been identified, including price, simplicity of data transformation, reliability, cloud support, available data sources, available documentation and developer support. The multi-criteria evaluation has shown a set of Google Sheets, Supermetrics for Google Sheets and Data Studio tools as the most suitable solution for the given case, followed by a combination of Data Studio and Supermetrics for Data Studio. Both solutions had better results in terms of price, cloud options and simplicity of data and dashboard preparation than the current solution.

Conclusions This paper serves as a partial basis for deciding on the appropriate tools for a new version of the reporting solution, which should serve not only as a tool for internal analysis of results, but also as a representative form of presentation of the agency's work. The author points out that the reporting and thus chosen solution is marketing related and might not be applicable to other business fields. Due to the internal development of the solution, there is a possibility to extend it by recommending a suitable composition/typology of posts published on social networks. Based on the manual classification of posts by type, it would be possible to analyze these and introduce trends and "hard" data into the monthly results as to why specific metrics have decreased/increased. Often the decline is due to the absence of certain post types or a different boosting mix. Combined with machine learning, this superstructure can serve as a great competitive advantage.

Keywords: Reporting, Visualization, Social media, Internal and external user, Marketing

JEL Classification: M15, M21

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