THE **TOP 5** REPORTS THAT EVERY B2B MARKETER NEEDS

brightfunnel™

INTRODUCTION

As data-driven marketers, we can all agree on at least this one thing: we *have* to measure and report on our marketing efforts and activities.

We all agree about this for a few reasons:

1. Reports help us understand the impact and effectiveness of everything that we do.
2. They help us intelligently plan for future campaigns and budget allocation.
3. They allow us to prove the effects of our work on the bigger business picture.
4. They help us get a seat at the revenue table. Yes!

But while we all agree that we *should* be reporting, it's not always easy to get everyone aligned around the *types* of reports we really need. What metrics should we focus on? What data matters the most? What reports offer the best insights and deliver the most value for the whole team?

At BrightFunnel, we hear these questions a lot. So, to lend a proverbial helping hand to our fellow data-driven professionals, we've boiled these questions down to the top five reports every B2B marketer should have ready in her back pocket.

For each featured report, we also offer an explanation of why that report matters, what exactly you should track, and who you should report your findings to. This should help function as a starting point as you work to build out a robust, scalable reporting process that best aligns with your business' needs.

Well, what are we waiting for—let's get reporting!

MARKETING IMPACT

What Is It?

This is your money report. Marketing impact reporting measures how each marketing activity has **sourced** or **influenced** pipeline and revenue for your business.

You can choose to look at this from a first-touch perspective, if you want to see what marketing has sourced, or you can look at it from a multi-touch perspective to tell the bigger story—how marketing's activities have influenced pipeline and revenue at multiple touchpoints throughout the buyers' journey.

There are a few different ways that you can approach multi-touch attribution, but the most common attribution models are the 40-20-40 model—which gives 40% credit to the first and last touches, and the remaining 20% is spread across all the touches in the middle, or an evenly weighted model—which gives equal credit to all touches across the entire journey. In addition to these more standard attribution models, you can create custom-weighted attribution models to fit your business needs.

Why Does It Matter?

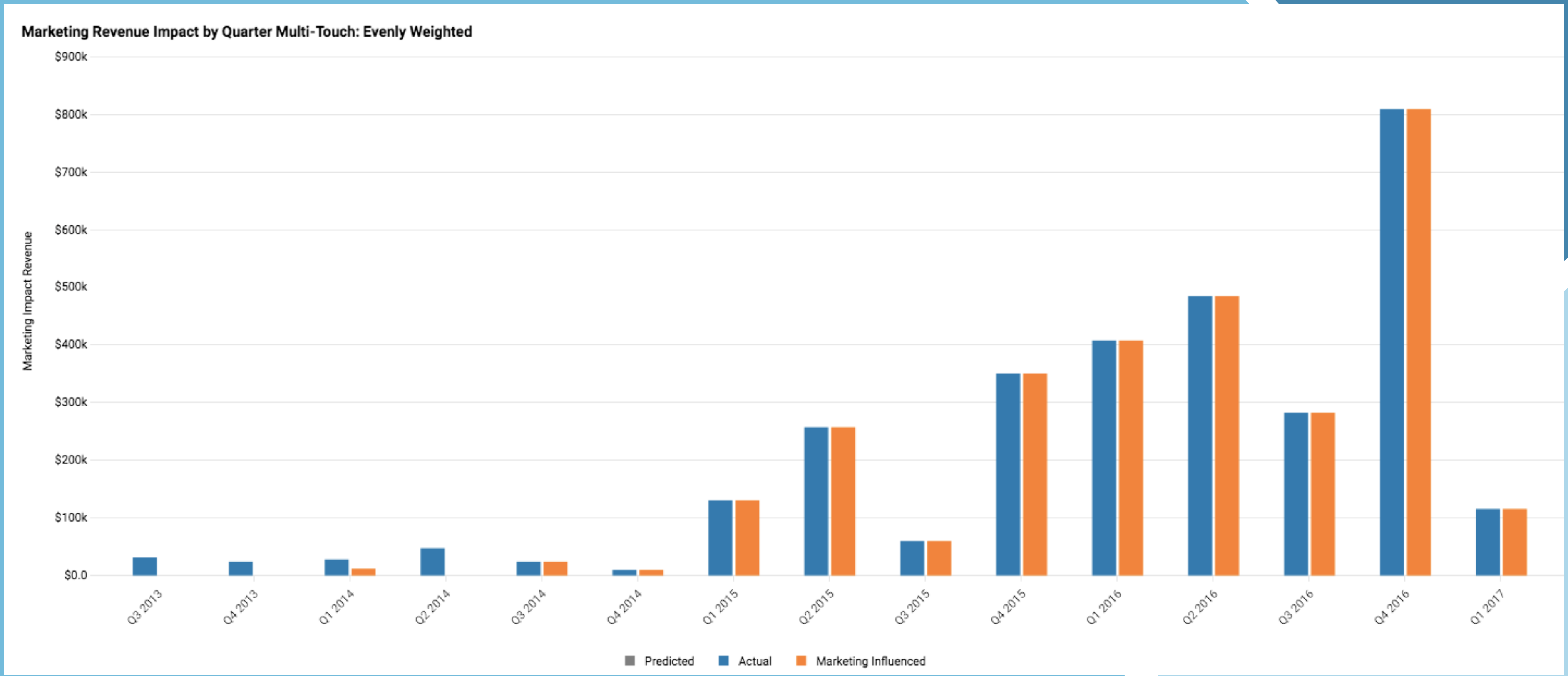
Marketing impact reports tell the team's big picture story—how marketing's efforts have impacted the company's bottom line by helping to influence pipeline creation and sales throughout the entire buyers' journey. Marketing impact reporting goes beyond the basic metrics, such as number of leads sourced, to show results in the language of business: *dollars and cents.*

What Do I Track?

Since marketing impact reporting looks at all channels and campaigns, you want to keep an eye on *everything* you do. Look at how marketing impact is trending over time to make sure that the team is influencing an increasing amount of pipeline and revenue. You can do this type of reporting in Excel, if you have a pivot table whiz on your team, or you can do attribution tracking in a marketing analytics tool, like BrightFunnel.

Who Do I Report To?

Take this one all the way up to the top of the marketing team. Show your VP or CMO this report once every quarter to demonstrate the overall effectiveness of the activities you've been focusing on. This is also a great report to show to your board! These are the numbers that your executives want to see—pure dollar impact on the business.



Marketing impact reporting showing evenly-weighted multi-touch attribution to revenue

REVENUE FUNNEL ANALYSIS

What Is It?

Revenue funnel analysis reports give you a consistent look into how leads are flowing through your sales funnel. This type of report lets you understand the percentage of leads that become MQLs, meetings, pipeline, and closed-won deals. By understanding what percentage of opportunities turn into deals, what percentage of SQLs turn into opportunities, and so on, as a marketer, you can plan better. If you know that you need X amount of deals at the bottom of your funnel, you can work your way up to understand how many leads you need at the top!

There are a couple of different ways for you to look at this type of report. First, you can look at your funnel through a cohorted waterfall view. This shows how all leads generated during a certain period of time flow through your funnel. In other words, out of the 1000 leads you have created so far this quarter, how many of those leads have made it to MQL, SQL, or opportunities.

Second, you can look at this data as a stage snapshot, which shows you where everything is in your funnel at any given time, regardless of when the initial lead was generated. It is essentially a "snapshot" or a moment in time.

Why Does It Matter?

Funnel analysis reports give you a glimpse into how you're moving leads through your sales funnel to closed-won. By looking at each stage in detail, you can determine where leads are getting stuck. Are leads getting stuck at the top of your funnel in the open lead stage? Maybe it's time to rethink your nurture programs. Are they becoming MQLs but then falling off? You might want to redefine your stages with that disconnect in mind. Are SDRs booking meetings that aren't converting into opportunities? Marketing and sales should come together to figure out what they can change in order to push those leads through.

Additionally, by understanding how leads convert through each stage, you and your sales leadership can better plan for how you are going to get to the number you need quarter-over-quarter.

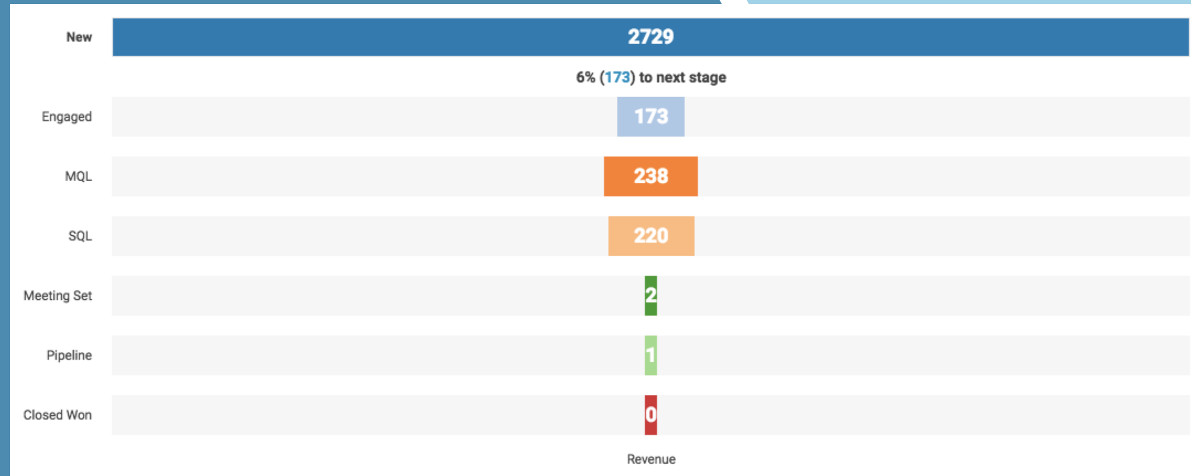
What Do I Track?

To understand your sales funnel, you need to look at your leads, MQLs, SALs, SQLs, Opportunities, and Closed deals—or your own equivalent lead and sales stages. You can track this in your CRM, but it requires manual calculations around how leads are converting through each. However, this can be time consuming and difficult, and most marketers lack the resources to do this easily.

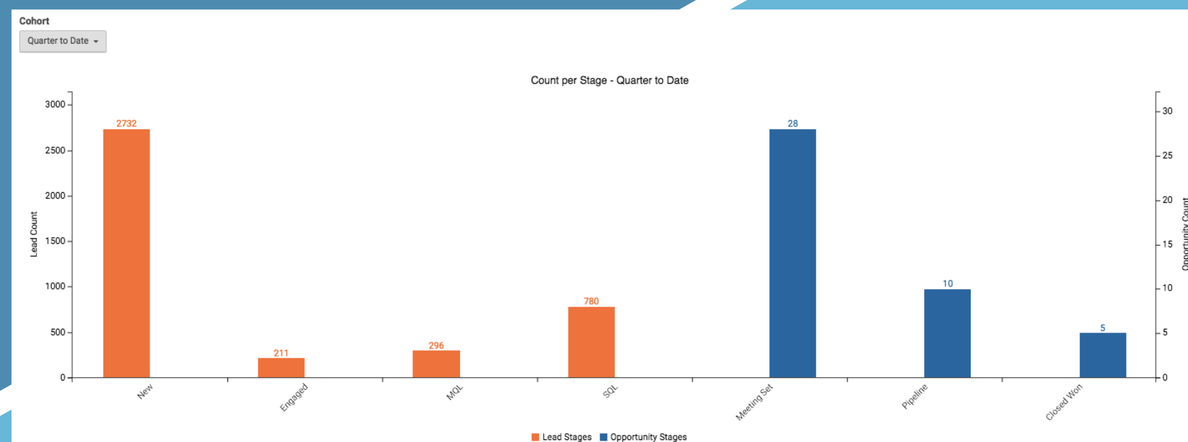
You can also use tools, such as BrightFunnel, that pull the conversion data in from your CRM and offer a visualization of your lead progressions.

Who Do I Report To?

You'll want to pull these reports for yourself on a weekly or monthly cadence, to keep tabs on how leads are converting and where in the funnel you need to refocus your efforts. You should also report these findings about once per month to your sales leadership, so they know how leads are flowing through the funnel. Armed with this knowledge, you and your sales leadership can band together as a combined revenue team to tackle your problem areas.



Cohorted funnel showing progression of all leads generated during that period



Stages snapshot showing where everything is at any given time, regardless of when the lead was generated

CHANNEL PERFORMANCE

What Is It?

Channel performance reports help you understand which channels are performing the best across the board. This shows you how channels such as online ads, tradeshows, or email blasts are doing. And you can track this from multiple perspectives to see how these channels are performing throughout the funnel.

By reporting from a first-touch perspective, you can understand which channels are bringing in the most (and least) leads. This helps you decide where you should focus your sourcing efforts, and where you should be concentrating your top-of-funnel offers. You can also incorporate web tracking technology to see how effectively your digital channels, such as social media and organic search, are sourcing leads.

By looking at this data through one of the multi-touch models mentioned earlier, you'll be able to understand how each of your channels is working to move leads *through* the funnel. You'll see which channels are best at converting leads to MQLs and opportunities, how much pipeline and revenue is influenced per channel, and—if you keep track of your cost data—you'll also be able to determine ROI and see what channels have the highest or lowest cost per lead or opportunity.

Why Does It Matter?

These reports help you determine what channels you should focus your efforts on and allocate your resources to. Are you sourcing a lot of leads through digital ads? Keep investing there. Are tradeshows helping to convert leads to MQLs and opportunities? Figure out which ones are helping to convert those leads and keep attending them. By looking beyond the first touch to understand which channels are helping move leads through your funnel, you can plan your channel mix for the future based on your past results.

What Do I Track?

When measuring your channel performance, you need to keep track of your full channel mix to see what channels bring leads in and what channels influence leads from opportunity-to-close. By understanding what channels work best for your business you can a) choose the corresponding offer that maps to where a lead is in his buying journey and b) you can better plan your marketing mix throughout the year.

Who Do I Report To?

Channel reports are mostly for your team, since these reports help you decide how you should execute future campaigns. Each program manager or functional owner on your team should understand what channels that she is responsible for, and keep track of how these channels perform.

Look at your channel reports regularly to ensure you're always up-to-date on how each channel is working to deliver leads, pipeline, and revenue. You'll also want to share results quarterly with your CMO, to help inform more executive decisions around budget allocation and larger initiatives.

Campaign Group	Attributed Pipeline	Attributed Revenue	Lead Touches	Oppt. Touches	Deal Touches
ADR	$1,285,093	$45,443	189	230	5
Website	$759,008	$63,697	949	215	16
Organic Search [WT]	$606,891	$79,864	552	180	18
Webinar	$325,945	$45,814	1,917	218	9
Nurture	$189,675	$46,904	684	121	5
Direct [WT]	$118,874	$4,413	261	39	2
Social [WT]	$37,294	$0	119	14	0
Google Adwords [WT]	$30,625	$0	54	11	0
Paid Search	$25,929	$0	108	8	0
Tradeshow	$24,125	$0	55	11	0
Direct Mail	$23,125	$0	12	5	0
Content Syndication	$16,322	$1,450	1,110	40	1
Email (BrightFunnel)	$10,000	$0	146	55	0
13 items 1 pages					
Totals	**$3,452,907**	**$287,585**	**6,156**	**1,147**	**56**

Multi-touch attribution report for channels

CAMPAIGN PERFORMANCE WITHIN EACH CHANNEL

What Is It?

Campaign performance reports help you understand which specific programs and offers are impacting your prospects and leads throughout the funnel. Here, you're looking one level down from your channel performance report to see what individual programs and content are performing best in each of your channels.

In other words, as a marketer, you might be running multiple content syndication programs; campaign performance reports will shed light into key metrics on the best performing syndication vendor and content asset.

Again, you can look at this from a first-touch perspective, to see what specific programs are sourcing the most leads, or from a multi-touch perspective, to better understand what programs influence your deal cycles. You can also look at how fast each of your programs moves leads from stage to stage.

How do you use these reports? As an example, do you notice that top-of-funnel webinars bring in a lot of prospects from the get-go? Concentrate your lead gen efforts there. Are ebooks good at keeping leads engaged before they're ready to convert? Keep investing in that type of content.

Why Does It Matter?

Campaign performance reports help you understand which individual marketing programs move the needle for your business. This type of reporting is critical for accurate forecasting and intelligent campaign planning. Let's take events as an example—with campaign specific reporting you can look back at each individual event that you sponsored throughout the year to see what event performed the best for your business.

Additionally, if you know historically that a specific program brought in a certain number of leads and MQLs, you can better plan for the following month, quarter, or year, since you can repeat programs that performed the best.

What Do I Track?

You'll want to track how each individual program or offer performs across the board and within each individual channel. While you can track some aspects of campaign performance in your CRM, marketing automation, or in Google Analytics, it's not always easy to cobble all of that data together to get an accurate big picture of what's working best. You can also rely on spreadsheets, but those take a lot of time and are prone to human error. The best way to track this is through an attribution tool, which pulls your data from various sources like your CRM, marketing automation platform, website, ad networks, and more, to give you a clearer picture of campaign performance across channels.

Who Do I Report To?

As with channel performance reports, you and your team should look at your campaign performance reports regularly to help inform how you're planning for upcoming programs. Your demand generation programs manager, your content manager, social media manager, and events manager should live for this type of reporting. This helps them get a solid grasp on how everything that they are running contributes to the business.

You'll also want to share these results with your CMO every quarter so that she can keep tabs on what is bringing you the most success.

Campaign	Attributed Pipeline	Attributed Revenue	Lead Touches	Oppt. Touches
Q116 - Website - Request a Demo	$583,623	$17,013	202	87
Q116 - Website - ABM Guide	$29,992	$13,153	166	26
Web_CaseStudy_Invoca	$29,992	$13,153	173	26
Q415 - Website - The Definitive Guide to Multi-Touch Revenue Attribution eBook	$26,548	$5,357	150	26
Q416 - Website - ABM Benchmark Report	$25,894	$11,450	67	14
Jan17 Demand Gen Meetup - Attribution Panel	$25,000	$0	5	1
Q415 - Website - The New B2B Buyer's Journey eBook	$23,661	$0	43	6
Q415 - Website - The Analytics Cloud Review eBook	$7,143	$3,571	8	4
Q116 - Website - Raab - Attribution Buyer's Guide	$3,704	$0	19	3
Q216 - Website - SevOne: Account-Based Marketing Measurement Gets Real	$3,125	$0	17	3
Web_CaseStudy_Cloudera	$217	$0	14	6
Q416 - Website - Tegile Case Study	$109	$0	12	3
Q316 - Website - Webinar: SalesFolk	$0	$0	5	1

Multi-touch attribution on a campaign level—looking at the top performing content assets on the website

ACCOUNT ENGAGEMENT

What Is It?

Account engagement reports help you understand how your marketing activities are influencing the accounts in your database, and—if you're practicing Account-Based Marketing—how you're doing with your high-priority target accounts. Account engagement reporting gives you insight into how many engagements overall there are on an account level, what programs your account is engaging with the most, and how many people you have engaged with in that account.

If you want to go a level deeper, you can also segment your results to see which titles have interacted with you the most and which channels are seeing the most engagement at the account level. This helps you better target leads and contacts within an account by informing your tactics as you move forward with your plan of action. You can also track your sales activity alongside marketing, to make sure you have all your bases covered and that you understand the full account buying journey.

Why Does It Matter?

This type of reporting is particularly useful if you're developing or practicing an Account-Based Marketing strategy, as it will help inform your efforts by showing you where you're succeeding and where you're falling flat with your target accounts. See the percentage of leads and contacts who you've engaged with, and look at what they've engaged with (and where they've engaged with it).

Even if you're not exclusively practicing ABM, you'll still get a lot of useful information by tracking and reporting on account engagement.

What Do I Track?

You should look at a) what percentage of target accounts are engaging with your marketing activities, b) which accounts are engaging, and c) who at those accounts is engaging. This will help you gauge where you are finding the most success. From there, you should dig even deeper to see what your accounts are engaging with, and where they're engaging.

Who Do I Report To?

You will absolutely want to share these reports with sales leadership at least once per month, as your two teams will be able to align your efforts around account engagement activity. You should also share them with your VP and CMO to show which target accounts are progressing on the path to sale.

Account Name	Marketing Engagements	Total Contacts	Unique Engaged Contacts	Sales Activity	% Engaged by Marketing	Web Activity
ATL Corp	17	15	4	46	27%	149
PEK Corp	15	18	4	102	22%	0
DXB Corp	11	97	3	674	3%	90
ORD Corp	11	22	3	45	14%	2
HND Corp	10	48	2	53	4%	0
LHR Corp	10	16	3	49	19%	55
LAX Corp	9	48	5	44	10%	0
HKG Corp	9	106	3	3	3%	23
CDG Corp	9	12	3	35	25%	55
DFW Corp	9	4	2	56	50%	0
AMS Corp	8	4	2	79	50%	0
FRA Corp	8	1	1	4	100%	4
JFK Corp	8	2	2	9	100%	1

10637 items 819 pages < ... 1 2 3 4 5 6 7 8 9 10 11 12 ... 819 > CSV

Account engagement report

CONCLUSION

Reporting on your marketing activities is essential if you want to prove the value of your work and make better decisions around campaigns down the road.

By starting with the five reports mentioned in this ebook, you can begin creating a culture of measurement amongst your team and become a trusted partner to your business. By showing your executive team and board more than just activity metrics, you can uplevel marketing to really get that seat at the revenue table.

Through reporting, you can get an accurate understanding of where you are currently in terms of helping to generate pipeline and revenue, see where you need to be, and intelligently decide how to get from here to there with ease.

Happy Reporting!

47 Kearny Street, Suite 804
San Francisco, CA 94108
brightfunnel.com