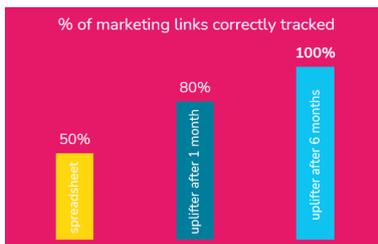


Improving campaign data quality, globally



A global investment company greatly improved the quality of their campaign data by getting all their marketers around the world to use Uplifter as their universal UTM tracking platform.

Executive summary

Situation

A global financial services company was struggling to compare the performance of its marketing campaigns around the world.

The problem

More than 50% of its campaigns had either incorrect UTMs, or broken links, or no tracking code at all.

There was no universally standard way for in-house marketers and agency staff to create UTM codes. Marketers used their own choice of tools – spreadsheets and UTM generators.

Some regions created their own UTM taxonomies, making it impossible to compare similar campaigns across geographies.

The impact

- ✗ Campaign data was inconsistent and inaccurate in Google Analytics.
- ✗ Analysts would waste hundreds of hours trying to find missing data.
- ✗ Marketing managers were unable to make data-driven decisions about campaign performance.

The solution

The global digital analytics team chose Uplifter for staff around the world to create consistent campaign codes.

Consistent tracking improved better data quality.

Outcomes

- ✓ All marketers and agency staff can now self-serve tracking codes and reports. Within 3 months, 80% of all marketing campaign activity was correctly tracked. Within 6 months, they reached 95%.
- ✓ Analysts save hours, no longer cleaning data. Freeing them up to focus on higher value activities.
- ✓ Better data quality drove better insights, attribution and reduced Cost Per Lead.

Background

The business

This global investment company is headquartered in London and operates in 28 countries around the world.

The digital team

The central digital team sits in the UK. Regional teams manage local markets with the help of local agencies.

As there is no online sale, the primary digital objectives are to drive visitor engagement and to generate leads.

An engagement might be downloading a fund factsheet or watching a fund manager video.

A lead might be arranging a call with the Institutional Investment team.

Our stakeholder

The chief stakeholder works in the global analytics team.

He supports marketing teams around the world with their reporting, dashboarding and data management.

He combines Google Analytics data and cost data in a data warehouse to report on campaign success.

Challenges

The global marketing team were struggling with three challenges:

1) Inconsistent campaign codes

There were two processes to create campaign codes:

1. **Self-service.** Marketers would generate each code via a shared spreadsheet. But the shared spreadsheet would frequently break or get used incorrectly.
2. **On-request.** Marketers would request each code by emailing an analyst. But a busy analyst could be a bottleneck to a campaign going live.

"It's hard to keep telling people to do it better, when they were already doing their best. Humans are great at inventing things and being creative. They're not so good at repeating things and getting them right every time."

2) Dirty data

Inconsistent campaign codes meant data was not being collected correctly. Campaign data in Google Analytics was inaccurate, missing or misleading. If the business wanted to do any meaningful reporting, the central analytics team would first have to clean data in the warehouse – a highly manual and time-consuming process.

“Marketing would tell me the campaign they’d want to monitor, and I’d go look for stuff, using Regex to search in the campaign name values. You’d hope you’d found everything there was about a campaign, but you’d know at least 20% of stuff just couldn’t be scraped together.”

3) Untrusted reports

Campaign reporting was only as good as the underlying data. No data meant no reports. Poor data meant poor reports.

Without the ability to accurately compare like-for-like campaign performance, the business was challenged to make better decisions.

“The person carrying out a social media campaign mostly wants to know: how do promotions on Twitter compare with Facebook? What’s the difference in cost per click? Things like that. Ideally, they’d want to just go to one page and see it.”

Solution

The analytics team chose Uplifter to help marketers create and manage consistent campaign codes.

“Uplifter forces them to create codes in a specific way and in a consistent format every time.”

The Uplifter team followed a three-step onboarding process:

1. Review the existing process and agree the global taxonomy
2. Configure Uplifter with the new taxonomy
3. Train users

In one day, over 70 marketing and agency staff around the world had been trained how to use Uplifter to effortlessly create consistent campaign codes.

The next day, they could ditch the spreadsheet and start creating codes.

Results

The impact of Uplifter can be seen across three parts of the business: campaign execution teams, central marketing teams and senior management.

100% self-serve campaign links

Link creation is now 100% self-service: any marketer who needs one can create one.

The analytics team is no longer needed to create links, so there are no bottlenecks. And many hours of analysts' time have been freed up to focus on higher-value work.

100% accurate campaign data

All campaign codes are now 100% compliant with the global taxonomy. Codes are 100% accurate and right first time – no typos, no missing fields, no nonsensical names.

“For management, it used to be hard to compare one campaign with another. We might be tracking 80% of the traffic for one campaign and only 60% for another, so is it fair to compare the two? But with Uplifter, our campaign analytics data is almost perfect.”

100% self-serve campaign reports

Campaign reporting is also self-service, using Uplifter as a single-sign-on portal to view campaign reports in GA or a BI visualisation tool like PowerBI. Now everyone has access to the single source of truth.

“Each marketing channel had slightly different tools for analysis, slightly different data. You never got an exact like-for-like comparison.

“Now we can use trusted data from GA to visualise in either PowerBI or Data Studio. And we can view it in the same place the campaign code was generated.”

Minimal data cleaning

For analysts, the time spent cleaning data in the data warehouse could also be hugely reduced. More time could be spent with high-value analysis and insight generation.

“We monitor our tracking, and I would say we've gone from being able to connect up maybe 50% of our campaign activity, to up to 80% of activity connected to cost data. I feel like we can get to 95% quite easily with Uplifter.”

Better decision-making

At last, marketing budget holders can get reports they can trust, leading to better decisions.

Campaign improvements can be easily measured and understood, which means less waste, more engagement and more leads.

“The impact of Uplifter was most obvious not in the campaign code creation, but in analysing the performance of campaigns.”

“Management wants to know if we can increase the spend on Twitter and decrease it on Facebook, where there’s a higher conversion rate. That is where the long-term business benefit for accurate campaign tracking is... making better decisions.”

Peace of mind

Uplifter tests each link every day. This gives campaign managers assurance that, while the campaign is live, all the links work, no landing pages have failed and visitors are getting the experience they’d planned.

Richer analysis

Previously, analysts had to download a file of campaign data every day and manually import it into the customer data warehouse.

Now they use Uplifter’s Open API to pull in the latest campaign codes automatically.

This allows analysts to do more granular reporting and look at full end-to-end campaign ROI.

Future plans

As digital marketing spend increases, the company wants to further embed Uplifter into their marketing stack.

Soon, campaign codes will be pushed automatically from Uplifter directly into Salesforce Pardot.

As well as increasing the quality of email campaign data, this could save hundreds of marketing hours.

Further questions

- **How would you describe the process of using Uplifter in one sentence?**
"It's a really easy-to-use tool for creating well-formatted UTM tagging on all your marketing activity"
- **What most impressed you about Uplifter?**
"How simple the setup and configuration was. With Alex [Head of Product] we did one day of set up with a further day for training."
- **Did you look at any competitors?**
"I did Google around for a similar tool. And I'll be honest, I didn't find anything like Uplifter. I found things like the Google UTM tracking creation web page, but it doesn't do anything like Uplifter. There just wasn't really anything I could find that was comparable."

Learn more

Want to learn more about how Uplifter can transform your marketing teams operations?

Visit upl.inc/quality