# Marketing Reporting with Looker Studio

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# Overview

As marketers, we face constant pressure to perform and meet revenue goals, even in the face of rapid changes to the competitive landscape or economy.

One thing remains consistent, the need to prove your worth to clients or senior leadership, whether you're with an agency or in charge of your own company's KPIs.

So, how do you demonstrate impact and reinforce that you've made the right choices?

**Reporting.**

But not just any reporting. You want quick and highly customizable reporting that works with your data and connects to multiple sources to ensure you are able to demonstrate the full picture of your marketing efforts in a way that's easy for leadership and clients to digest.

In this guide, we'll review why more agencies and market-ers are turning to visualization tools like Looker Studio for campaign reporting, plus how you can get started using Looker Studio for your own data needs. From design and data formatting basics to more advanced techniques, our guide will help you glean the insights you need from various sources to showcase value and achieve alignment around your marketing strategy.

**58%**
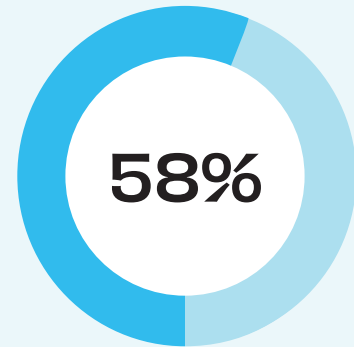
58% of marketing professionals monitor five or more KPI-tracking tools per week.

**64%**
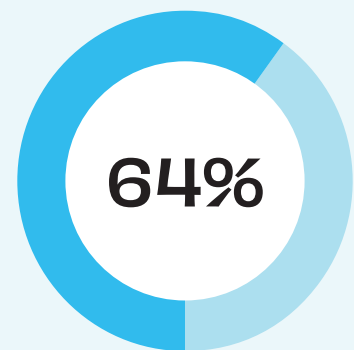
Marketing professionals report that only 64% of their team's decisions are "data-backed."

Source: State of Data-Driven Marketing Report

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# Contents

**PART 1**

# Approaches to Reporting

## From Excel Sheets to Custom Visualization

Clients need to stay informed. Your boss wants to share with leadership how you're cutting customer acquisition costs month over month. We all have goals and KPIs, and regular reporting delivers their progress towards those goals directly to key stakeholders. There are many ways to accomplish a regular reporting cadence.

Choosing the best method requires knowing which works best for your audience or the client. Low touch, hands off clients might be okay with short email communication and in-person meetings. Working with experienced in-house strategists could require as much raw data as possible in spreadsheets. But for the most flexibility, ease of customization, and real-time updates, many marketers are choosing visualization tools like Looker Studio for campaign reporting.

**Which reporting approach works for your audience?**



— Simple email check-ins with topline stats
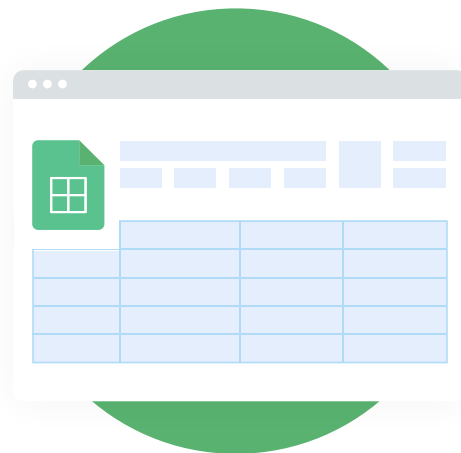
— Spreadsheets full of raw data and graphs

— Fully visualized, shared dashboards

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**PART 2**

# Building an Effective Looker Studio Report

## Looker Studio Basics

The two [basic elements of Looker Studio](#) are data sources and, of course, reports. Data sources contain the raw data that you'd like to visualize with graphs and tables in reports. Before you begin connecting all your sources and building beautiful charts showing off your wins for clients, pause to quickly plan your approach. There is a lot you can do in Looker Studio. But you only want to focus on what your audience wants, and needs to see.

What's the story you want your report to tell? For agencies running campaigns on behalf of clients, this story is often "Here is what we're doing with your money, and here is how it's performing against expectations and previous periods." Translating that into some tangible metrics, most agencies will want to include things like:

— Spend
— Clicks
— Impressions
— Conversions
— Cost-per-click
— Cost-per-impression
— Cost-per-conversion
— All, or some, of those metrics over time
— All, or some, of those metrics broken out by channel, or campaign

The great part about a data visualization tool like Looker Studio is that you can consolidate and report on results from many sources all in one sheet. Spend and impressions might be coming from your ads platforms, while conversion and event tracking might be happening in Google Analytics. Google-owned properties, like Google Ads and Analytics, are the easiest to connect to Looker Studio.

For your data from other advertising channels, like Facebook ads, there are multiple ways to accomplish the task. One is to spend money on a tool like [Supermetrics](#) to automatically connect ads data to Looker Studio. For larger agencies who value efficiency and can spread costs over multiple clients, this might be a great option. For smaller agencies or businesses, another option is to use Google Sheets. Export the data from your ad platforms into Sheets on a regular cadence, either every morning or weekly for performance deliverables.

You'll want to make sure you're telling the complete story of your efforts. Don't forget to capture and report on every valuable conversion. Using a tool like CallTrackingMetrics, and [its own Looker Studio integration](#), allows you to report on volume of calls, average lead scores, and other key indicators of your performance.

## What's the story you want your report to tell?

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# Looker Studio Formatting, Filters, and Fine-tuning

You've planned out the story to tell, and worked through backend connections for the necessary data. Now you get to the fun stuff: designing your report. With copy and paste and easy styling options, you'll be able to customize for every client. But to start, create something you can use as a template. A report framework that will work for the majority of your clients.

## Page Formatting

The top of your report should be quick answers to the questions that your audience asks the most. Things like "how much did we spend this month?" The clearer those answers, the quicker you can move into the meat of your report in status meetings. Looker Studio reports will also get shared internally by the client to other stakeholders, so make sure KPIs are clearly labelled and have enough context for even a casual viewer.

Clients always want to know how you're performing compared to previous periods, especially for those topline KPIs. You can include comparison data in a few ways. We'd recommend using a mix of these approaches. When editing a chart or table in Looker Studio, you have a built-in option to compare date ranges.

Or, you can add chart types that visually reflect time ranges, like leads per month or daily advertising spend.

**Default date range**

◉ Auto

◯ Custom

This month to date
(exclude today)

**Comparison date range**

← Previous year ▼

### CTM AGENCY TIP

When setting up the Looker Studio integration, double check to make sure you're using the agency API token (vs account token). This will allow you to sync data across all your clients with one data source.

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The rest of the space in your report template should be used to complete the KPI story you've decided on earlier, in a way that's digestible for the client. Include a few visual elements like bar or pie charts. And, even though Looker Studio is a visualization tool, don't be afraid to use tables to summarize related metrics.



Sample dashboard created in Looker Studio

**CTM AGENCY TIP**

When building a Looker Studio report, set a small date range as your default. Data sources like Google Analytics or CallTrackingMetrics pass a lot of information through their connectors and a shorter time frame can help speed up the process by using a smaller data set.

Try not to pack too much into one page. You can customize the size of your pages to fit what you need, like a wider version for displaying the report on a screen in a client status meeting or standard paper size for printing out hard copies. Looker Studio also allows you to add additional pages to reports, so you can spread things out in a way that makes the most sense for your campaigns. Two approaches that work well:

**A.** Use page one as a consolidated summary of all channels and campaigns, then use additional pages to display the same information for individual channels.
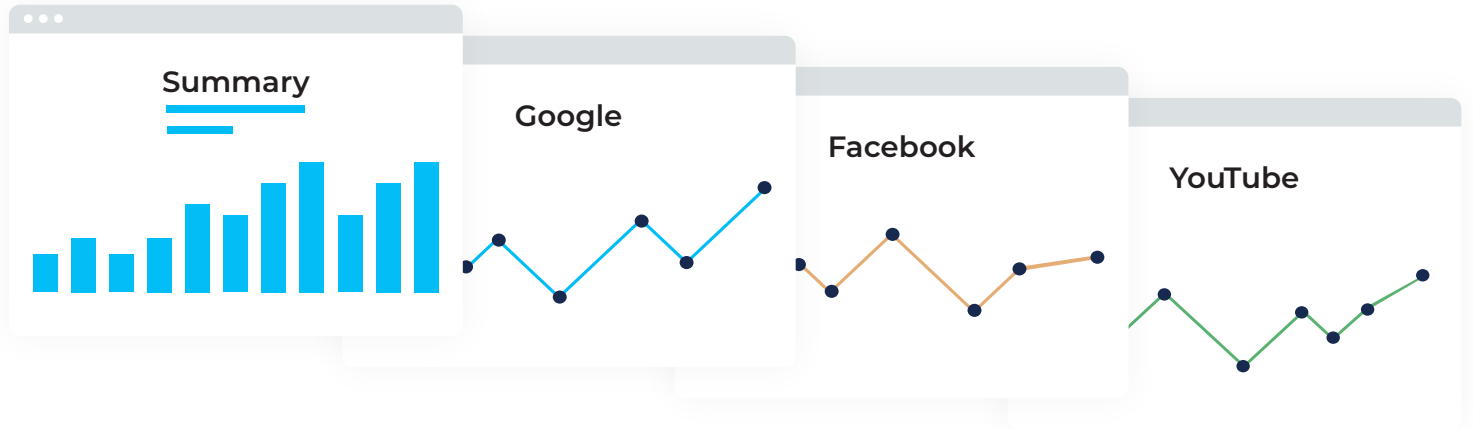


**B.** Use page one as a high-level summary, and then drill down into categories on additional pages, like website activity, funnel metrics, or demographic reporting.



The final piece? Capturing offline conversions: the ones happening over the phone, or in person at your store or office. Importing offline conversion events into a platform like Google Ads gives you a more comprehensive look at which keywords and targeting criteria are providing the best ROI on your campaigns.

**Calls by Source**
January 2022

Google Organic
12%  (308)
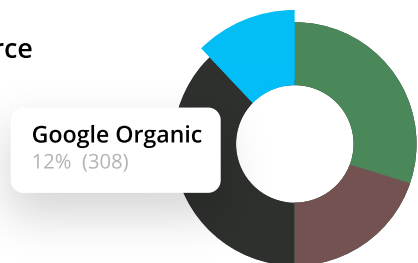
# Using Looker Studio Filters

Filters and data controls are the unsung heroes of Looker Studio. They allow you to customize individual charts or full pages to only the data you're looking to present.

Data controls in Looker Studio offer the ability to make your reports flexible and interactive. The most popular control is the date range selector. We put a date range selector at the top of almost every report we make. It gives any viewer of the report the ability to choose any time frame for their data analysis. As an agency, you can set the default to current month, compare to last month, and then let the client view and compare any other window on their own time.

Other controls, like the advanced filters or drop down lists, allow you to filter a whole page of data into relevant segments. During a client presentation, you could use a drop down selector to display only results from Facebook, LinkedIn, and Twitter to show your paid social results separately from your consolidated totals. A great use case for CallTrackingMetrics agency customers is to use controls to filter by subaccounts to view individual client data, or to group related clients together in one report.

Individual chart and table filters give the agency control over what data to display. If your agency is running paid media campaigns, you might not want to include organic results, or even results from other internal paid efforts. You could filter by your custom UTM parameters to pull in only relevant details from Google Analytics or filter by specific tracking numbers or tracking sources for your CTM data.

**CTM AGENCY TIP**

Use the dimension "type" through CTM's Looker Studio connector to filter for specific types of communication, e.g., inbound calls, forms, chats, or outbound calls.

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# Fine-Tuning Your Reports

Every client touchpoint is crucial for agencies, so take the time
to finish off your reports with some of the finer points.

## BRANDING

Pull the color codes and a logo from your client's or your company's style guide and add
them to your report for a personal touch. Charts, backgrounds, and almost everything can
be customized by color so you can avoid standard greens and reds.

## STANDARDIZATION

Inconsistency can stain an agency's image, so you'll want to spend some time making sure
similar elements have the same settings. Customize small things like blank data to read "-"
or "0" instead of "no data" to avoid a table looking incomplete.

## RENAMING METRICS

Naming conventions in data sources aren't always the most display friendly. Fortunately, you
can easily edit names of the metrics in your report to something easier for your audience to
understand, or easier to fit into a small chart.

At some point in building your first few Looker Studio reports, one of your metrics is going to
look off. You expected to see *xxx* and instead you're reporting *yyy*. Our number one trouble-
shooting tip is to check the metric's aggregation. Oftentimes the fix is as simple as switching
from 'count' to 'sum.' The next best place to check is filters. An extra, or incomplete, filter can
throw off your values or give you an error fetching data.

### REPORT TROUBLESHOOTING TIP

If a metric is not reporting as you expect, first check the metric's
aggregation. Aggregating by 'count' versus 'sum' can give you a
vastly different outcome. Next, check your filters for any extrane-
ous or incomplete filters.

# Advanced Looker Studio Techniques

One of the great things about Looker Studio is that it's still a relatively new tool and Google keeps adding great features all the time. A few of those features that can give marketers an even more customized reporting experience are **data blending** and **calculated fields**.

**DATA BLENDING**

A common roadblock for marketing reporting is that the data is coming from many different places. It's very easy to add a Facebook Ads chart, a separate Google Ads table, and a score-card for CallTrackingMetrics qualified leads. But with data blending, as long as you have a common data point, you can merge multiple sources into one new source and bring them all into one element.

**CALCULATED FIELDS**

Just like bringing data sources together, you can also create your own custom metrics with calculated fields. If your client is dead set on seeing cost-per-thousand (CPM), but none of your data sources have that baked in, you can create one using existing dimensions. In this case it would look something like "Ad Spend/(Impressions/1000)."

With the ability to consolidate data sources and customize nearly every piece of a report, there are very few limits to what you can accomplish for your agency with Looker Studio reports. Our Looker Studio integration is the perfect accompaniment to our already robust in-platform reporting and analytics, giving agencies and marketers an extra level of control and personalization.

**There are very few limits to what you can accomplish with Looker Studio reports.**

# Want more Looker Studio content?

Check out our series How CTM Uses CTM to discover how our Senior Manager of Demand Generation uses Looker Studio to track marketing ROI over time.

Plus, get a demo today of our industry-leading call tracking and communications platform to start integrating your calls and lead scores into your performance reporting.
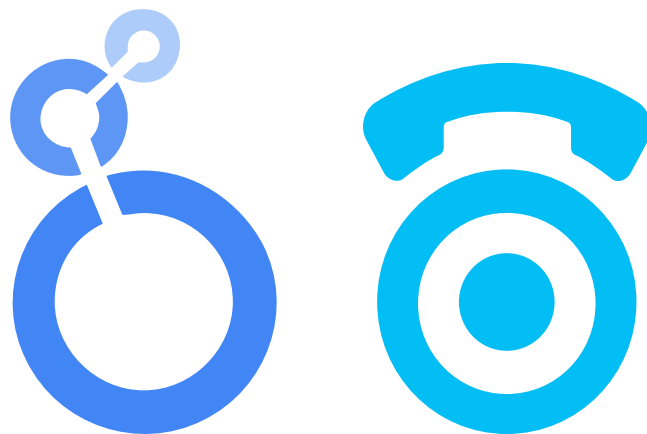
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To learn more about CallTrackingMetrics and how we can support the growth of your business, request a custom product demo today.

**Book a Demo**

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