Client Analytics Exploration

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Problem Statement

The clients have provided feedback stating that the post campaign reporting provided by the agency team is not insightful enough. Analytics is being held accountable for this as they lead the development of the report so this exploration was undertaken to better understand the situation at hand and determine what needs to or can be done to improve post campaign reporting.

Challenges to be Addressed

After receiving feedback from key internal folks in Analytics & Planning within the agency team, I've identified 3 broad challenge areas and a few distinct root causes across these. These root causes are resulting in a variety of symptoms felt by our internal teams & clients. These have been summarized below.

Challenge Area	Root Cause	Symptom	Proposed Solution
Lack of consistent senior leadership support/oversight on Analytics side	-Client has scoped for a lean team perhaps due to the fact that they've planned to in-house most measurement (i.e. brand lift measurement) -As a result, agency invests in short term and/or very low % of senior Analytics leadership time, mostly to provide issue escalation/resolution support	-Clients (mostly Data Science) has unrealistic expectations of the work the team should be doing -Clients (including Media & Marketing) don't trust the agency team so ask for much more data/reporting than might actually be necessary, further squeezing the already lean team -Agency Analytics team is struggling to find their identity in relation to client Data Science team, which leads to them being more reactive than proactive in communications/relationship management	-Agency to rethink the team structure & propose ideal team setup (based on 'real' work being expected) to client leadership -Client to pay for or agency to invest in sr. leadership role - if investment from agency, should be for at least 9 months -Develop a top-to-top relationship - Sr. leadership to invest time in resetting relationship with client Data Science team; re-gain & re-establish the clients trust -Sr.leadership to provide consistent guidance, mentorship & air cover for day-to-day Analytics team

		-Current agency Analytics team is better suited for day-to-day campaign reporting activities only, not for fixing E2E processes related to data quality, availability, etc. -Erosion of client trust -Clients have asked for team members to be rotated off of the account due to lack of cultural fit -Internally, Analytics team attrition also due to lack of cultural fit with the client	
Lack of access to meaningful data (i.e. BLS) for Brand measurement & reporting	-Client DS in-housed BLS measurement and not giving access to agency; Agency Analytics can only report on media metrics -No correlative work done on media metrics relationship to brand lift	Agency Analytics hamstrung to provide "insightful" reporting as media metrics reporting inherently doesn't lead to "insights", only takeaways	-Client DS to share BLS data in a purposeful way -Partner with client DS to develop correlative analysis to help identify brand signals, which will help make media metrics reporting more pointed & useful
Too many (unnecessary) reports	-Clients don't trust the agency due to previous errors in data reporting so now require more reporting touchpoints -Client Media & Marketing don't trust client DS reporting (internal politics) so lean on agency to help fill in gaps	-Clients request biweekly/triweekly, mid campaign, and post campaign reporting for 20-30 campaigns, with very short turnaround times -Current reporting SLAs don't allow for meaningful collaboration between agency teams to build useful narratives in reporting	-Audit current suite of reporting provided by the agency to determine usefulness to client (internal Analytics team feedback is that clients are inundated by agency reporting so largely don't engage with it) -Based on audit results, reset reporting expectations to aim for 'quality over quantity' for clients -Incorporate measurement plans as part of the Analytics toolkit; currently client DS sets the measurement framework for all campaigns but the agency team can provide complementary view of this to ground all campaign reporting

Additional Context for Proposed Solutions

We have seen similar challenges on other accounts within the agency so bringing those learnings to this client could be very beneficial

1. Lack of <u>consistent</u> senior leadership support/oversight on agency Analytics side
   a. Other client/other agency team -
      i. Analytics client didn't think the agency analytics team was 1) focused on the right work (i.e. campaign reporting) and 2) didn't trust the reporting we were providing due to numerous errors
      ii. This lead to them relegating the agency to basic executional work, & keeping all "thought leadership" in-house
      iii. Also, prior to the formation of agency team, global analytics leads on the agency side were asked to be removed due to lack of cultural fit.This lead to morale issues with junior teams & resulted in higher attrition than experienced before
      iv. With the formation of new agency team, came fresh, dedicated senior leadership (C level) which helped re-establish the clients trust in our teams, development of necessary foundational fixes (i.e. making our data more reliable) & our teams getting more interesting work from the clients
   b. Another client -
      i. The client side data science team also ran the show leading to the same kind of dynamic we see with this client
      ii. Earlier in the relationship, senior Analytics leadership wasn't very present in the day to day, would mostly be available for issue escalation/resolution, which didn't help establish client trust in the agency analytics team
      iii. Mid-last year there was a shift in client leadership and a new lead (VP) was brought in and worked on re-establishing the relationship with Data Science clients & also helped better connect clients with each other (Marketing with DS), while also helping to build up the internal Analytics team morale
2. Lack of access to meaningful data (i.e. BLS) for Brand measurement & reporting
   a. Other client/other agency team -
      i. We haven't had this particular issue, but we do get continually pushed to improve our reporting & the clients co-create the work with the agency team
         1. The clients reshaped our post campaign report from 50+ slides to ~10 slides, by focusing on stories with the most material impact to the business
         2. They've partnered with us on exercises to better understand in-market signals for brand lift success, allowing the agency & clients to make better campaign optimization decisions via in-flight reporting
         3. Analytical thinking isn't just reserved for campaign measurement alone, but being applied to develop better planning practices, i.e. using the brand signals to help plan campaigns with higher likelihood of success
3. Too many (unnecessary) reports
   a. Other client/other agency team -
      i. The clients complained that they were receiving different data points/reporting from different agency teams, which lead to confusion on what the source of truth really is
      ii. The Core Solutions team (agency data & tech group) conducted an audit across all the reports/dashboards provided to the clients to understand which ones were actively engaged with, and the results showed that most of the reporting was not being used
      iii. This led to a larger effort we are currently working on, to help streamline our data sources and

infrastructure which we will be able to reliably use for all of client's reporting needs
- iv. This data infrastructure also feeds client's in-house reporting solution
- b. Yet another client -
    - i. The clients had similar feedback for the agency team, that reporting being provided wasn't insightful enough. This led to exploration of how Gen AI can help people create better post campaign reporting & there is now a working solution that clients are willing to fund for further testing. This does require upfront foundational work (i.e. required 5 years worth of post campaign reports to train the tool) & people investment (i.e. tech & ops) to build the solution

Next Steps

The first two identified challenges may require additional time and/or client buy-in but we can start resolving the 3rd challenge now; solving for too many & unnecessary reports:

1. What data do we have & how should we be using it based on business & campaign goals
    a. We have access to a slew of media metrics but not all of them serve the campaign goals; we are the authority on this so should help clients define the right set of metrics to monitor
2. Are we taking advantage of all media/planning tools available to us as an agency, to help provide more media context to the reporting we are providing
    a. This would require better collaboration with the Planning team AND internal training for Analytics to help them understand how to best utilize this information
3. Reassess current reporting suite & templates
    a. Is the biweekly gsheet report helping clients? Understand why they aren't looking at them (i.e. too frequent cadence? Report too data heavy?)
    b. Do we need post campaign reports to be 50+ slides?
    c. How best to incorporate measurement plans from the agency side?