



ABOUT CLIENT

- A U.S.-based leadership development firm, serving clients globally, offering services for executives, senior managers, and emerging leaders.
- The company provides executive coaching, leadership development programs, keynotes, workshops, webinars, and self and peer-coaching sessions. The firm also offers Professional Training and Certification, all based on their proprietary Next Level methodology aimed at scalable leadership growth.

PROBLEM STATEMENT

When sat for the first round of discussion, the client highlighted their struggles with monitoring and analyzing user engagement, marketing performance, and audience growth due to fragmented data spread across platforms like LinkedIn, ConvertKit, and Google Analytics. Key issues identified were:

- Data Silos:**
- The client’s data was fragmented across LinkedIn, ConvertKit, and Google Analytics, each providing valuable insights but in isolated pockets.
- Limited Insight:**
- Without a centralized dashboard, it was hard to see how marketing campaigns were performing or how audience engagement was evolving.
- Need for Centralized Reporting:**
- The leadership team needed a way to pull all this data together into a single, easy-to-understand interface that would give them the clarity they needed to make faster, more informed decisions.

SOLUTION

The project involved integrating and centralizing data from multiple platforms (LinkedIn, ConvertKit, Google Analytics) into a unified reporting solution. Our team chalked out the primary goal to create an intuitive Looker dashboard that would provide visually engaging, actionable insights. This dashboard would enable stakeholders to track key performance indicators (KPIs), perform trend analysis, and gain real-time insights to optimize marketing efforts and audience engagement.

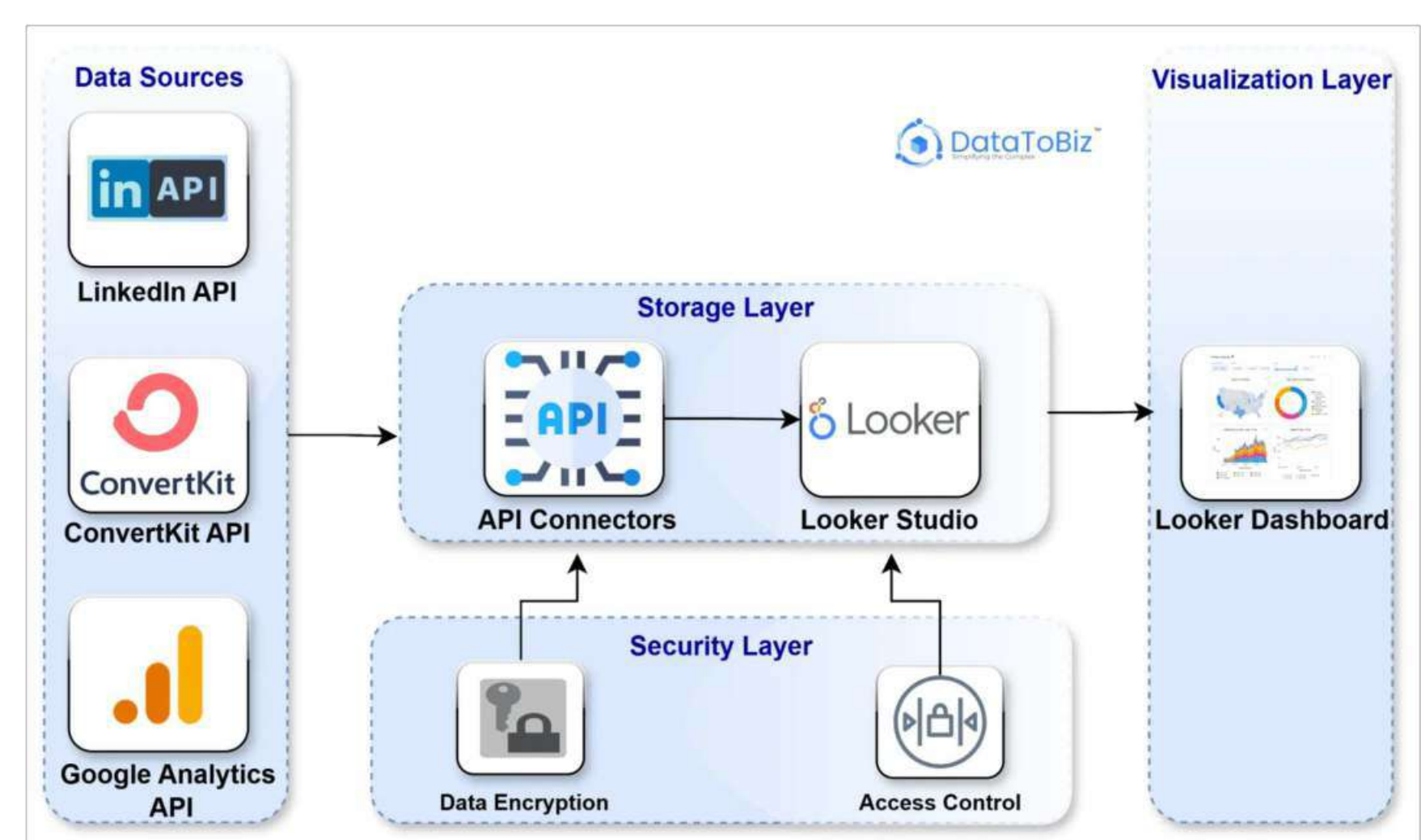
- Data Integration and Consolidation:**
- We set up seamless integration between LinkedIn, ConvertKit, and Google Analytics, using API connectors to pull real-time data into a single repository.
  - Standardized the data to ensure compatibility, making it easy to work with across platforms.
- Interactive Dashboard Design:**
- We built a custom Looker dashboard that brought all the metrics together into a single view, making it easy to see the bigger picture.
  - Added dynamic filters and drill-down options, giving users the flexibility to explore the data in ways that were most relevant to them, whether by date range, campaign, or audience type.
- User-Friendly Interface:**
- We focused on making the dashboard as intuitive and easy to use as possible. A clean layout and clear navigation ensured users could quickly find the insights they were looking for.
  - Designed the dashboard with visually appealing graphs and charts, which made it easy to spot trends and outliers at a glance.
- Insightful Metrics and Real-Time Analysis:**
- The dashboard was designed to highlight the metrics that mattered most—user engagement patterns, campaign performance, and audience growth.
  - Real-time data updates ensured that decision-makers always had access to the most current insights, empowering them to act quickly on fresh data.

- Custom Reporting and Scalability:**
- We added functionality for custom reports, so users could generate tailored analyses based on their specific needs, helping them make decisions faster.
  - Built a flexible system that could grow with the client’s needs, allowing for the integration of additional data sources and analytics tools as the business evolved.

TECHNICAL IMPLEMENTATION

- **Data Integration:** We used API connectors to seamlessly pull data from LinkedIn, ConvertKit, and Google Analytics, ensuring that all data was captured in real time.
- **Data Transformation:** The data was standardized to ensure it was compatible with the Looker platform, allowing for easy filtering, querying, and analysis.
- **Visualization:** We created custom visualizations, including charts, graphs, and trend lines, to present the data in a way that was both actionable and easy to understand.

TECHNICAL ARCHITECTURE



BUSINESS IMPACT

- Improved Decision-Making Efficiency:**
- With the new dashboard, decision-makers were able to act 30% faster, using data-driven insights to inform their next steps.
- Faster Time-to-Insight:**
- The client saw a 40% reduction in the time it took to gather and analyze data, enabling quicker decision-making and more agile strategic planning..
- Real-Time Monitoring:**
- The dashboard’s real-time data refresh capabilities allowed the client to monitor key metrics continuously, ensuring they could track performance as it happened.
- Campaign Optimization:**
- Armed with detailed insights, the client was able to tweak and optimize their marketing campaigns, ultimately improving audience engagement and driving better ROI.
- Enhanced Reporting Capabilities:**
- The ability to generate custom reports allowed the client to tailor insights to specific stakeholders, making it easier to share data-driven findings across teams and departments.

By implementing this centralized, interactive data solution, DataToBiz helped the client simplify data management and make informed, strategic decisions. The new system optimized their marketing efforts, driving better results while offering flexibility for future growth.

**Industry**

Management Consultancy

**Services Used**

- Data Analytics
- Google Data Studio

**Region**

North America

**Function/Department**

- Advertising and Communications
- Marketing and Branding

**Engagement Model**

End to End Project Lifecycle Management

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