MOBILE WHITEPAPER:
OVERCOMING PRIMARY OBSTACLES TO EFFECTIVE MOBILE ANALYSIS
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Whitepaper by
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WOULD YOU DESCRIBE YOUR MOBILE ANALYTICS CAPABILITIES AS BEING MORE LIKE A SMARTPHONE, A FLIP PHONE, OR A PAGER? If you said pager, you’re not alone. In a recent survey of 241 marketers conducted by Stratigent, 47% of respondents described their mobile analytics capabilities as “Basic Tracking: Top-line metrics only.” At least you’re in a better position than the 5% of respondents who admitted to not tracking their mobile initiatives at all.

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Improving mobile analytics capabilities is a lot more difficult than buying a smart phone. Buying a smart phone primarily requires money, but money isn’t the primary obstacle to effective mobile analytics. Among the top 10 challenges identified by respondents, lack of budget was only #8. The top three challenges were (1) Lack of resources and expertise; (2) No mobile strategy; and (3) Difficulty of integrating and analyzing data from multiple sources.

Stratigent works with companies of all sizes to upgrade their mobile analytics metaphorical “pagers” and “flip phones” to “smart phones.” We also help companies with sophisticated mobile analytics programs to leverage all the features of their mobile analytics “smart phones” and further drive innovation.

Here are a few tips for overcoming the top challenges of resources/expertise, strategy and integrated analysis. For simplicity’s sake, we will address them in a different order.
To overcome this challenge, you actually need two strategies – a mobile platform strategy and a mobile analytics strategy. In an ideal world, the mobile platform strategy and objectives would be in place first. The next step would be to develop a mobile analytics strategy that would enable you to achieve your overall objectives. But too often in the real world, analysts have to retroactively develop a mobile platform strategy and establish mobile objectives just so they can develop the mobile analytics strategy. If that’s the world you live in, we can empathize.

Consider using a technique that our analytics consultants use in that position – go back to basics. The most common mobile platform objectives are to (1) Increase reach; (2) Provide a positive, engaging user experience; and (3) Have the user complete a desired action or conversion behavior. Those objectives are a good place to start. Developing a full mobile platform strategy is beyond the scope of this white paper, but there are a variety of good resources included in the appendix.

Now, let’s discuss the analytics strategy. A good mobile analytics strategy has three components:

1. **Organizational Buy-In & Strategic Alignment**
   - Who is going to support your mobile analytics program? How will you leverage analytics to achieve the overall business or marketing objectives?

2. **Technology & Infrastructure**
   - What tool(s) will you use to track your mobile sites, apps and ads? Who will implement them and how? What questions will you want to answer and what data will you need for that analysis?

3. **Insights & Improvements**
   - What will you need to measure in order to determine if your mobile strategies are successful? How will you communicate this to the organization? How will you pull data together from disparate sources to tell the whole story?

The mobile analytics strategy should directly align with the mobile platform strategy. For the purpose of this white paper, we will assume that your objectives are similar to the common ones listed above.
Organizational buy-in and strategic alignment is a key component of any successful measurement program. It’s especially important for high-growth initiatives such as mobile platforms that require a lot of support and investment. In order to confidently create a mobile analytics strategy, marketers need to have the support of executives within their organization. They also need visibility into the organization’s overall mobile and multi-channel goals and strategies.

**Organizational Buy-In**

Gaining organizational buy-in can be a challenging task, even for the most seasoned marketer. Without it, marketers are challenged to generate sufficient momentum for their programs. Many initiatives fall by the wayside due to lack of budget, support or agreement. Organizational buy-in also offers accountability to a growing program, which helps marketers to keep projects on track and schedule resources.

Lack of accountability is still a challenge for today’s marketer. Ten percent of marketers surveyed said their organizations do not hold them accountable for the performance of their mobile initiatives. This can present significant obstacles, especially when trying to gather resources to execute your mobile strategies. Being accountable for a complex new program can be daunting. However, having a set definition of success presents an opportunity for an open dialogue about what is working and what isn’t.

So how do you go about gaining organizational buy-in? Most begin by finding an internal champion for their mobile initiatives. Frequently, this champion is an executive who is familiar with the initiative and its potential. This champion can lend much-needed support to the program, helping you secure the budget and resources necessary to make your mobile analytics strategy a reality.

After finding a champion for your mobile initiatives, onboard your team members and familiarize them with what they will be working on. You’ll also need to work with your champion to help you align your mobile strategy with your business strategy.
Strategic Alignment

No program is an island unto itself, and this is especially true for your mobile initiatives. In an ideal world, your mobile initiatives should be an extension of your brand presence in the offline and digital space. Mobile is just a new way to interact with your customers – one they keep close by at all times. With that in mind, it is important to determine how to leverage analytics to help you succeed.

You should align your mobile and business strategies as soon as you can and revisit that alignment regularly. To get started, work with your champion to help you answer the following questions:

1. **What are we trying to do with our mobile sites and applications?**
   In other words, what are the key objectives for your mobile platforms? Are you trying to sell products via your applications, or are you simply trying to generate brand awareness by encouraging users to interact with your brand in a new way?

2. **How will we know when we have succeeded?**
   What is the definition of “success” for your mobile platforms? Do you have a revenue target that you need to hit through your mobile application? Are you aiming for a specific retention rate among your e-book consumers?

3. **How can we use analytics to succeed?**
   What can mobile analytics offer that will help you to determine what is influencing your success? What tactics can you employ to improve your performance as much as possible, and what will it take to get there?
Technology & Infrastructure

Once marketers gain organizational buy-in, they are tasked with creating and executing a tracking strategy to measure user behavior on mobile sites and in mobile applications. Creating a comprehensive tracking design can be very challenging, and it shows – only 16% said they had implemented advanced tracking, such as success events, user-level data and segmentation.

From a technology and infrastructure perspective, there are several major considerations when creating your strategy:

- **Tools:** Which tools will you use to measure your mobile platforms and advertising?
- **Tracking Strategy:** How will you get the data you need to make informed decisions?
- **Implementation Processes:** Once you have created your tracking strategy, how are you going to implement it?

A successful mobile analytics program should have answers to all of these questions.

Tools

One of the most difficult aspects of implementing mobile tracking is simply agreeing on an appropriate tool. There are a variety of mobile analytics tools available at different levels of tracking, designed to suit the needs of almost any marketer. Considering the variety of mobile platforms and advertising strategies available, many programs utilize more than one.

Most analytics tools offer some form of mobile device tracking, both from a mobile site and a mobile application perspective. Industry leading analytics tools like Adobe SiteCatalyst, Google Analytics, Unica NetInsight, Coremetrics Explore and WebTrends Analytics all have capabilities for tracking mobile activity. Many of these tools require JavaScript, and therefore perform best with smart phones or tablet devices. Most of these tools also offer some form of mobile device segmentation, which allow marketers to compare the behavior of mobile visitors versus desktop visitors.

Over the last few years, a number of mobile-specific measurement platforms have developed, some of which provide more comprehensive data. Mobile analytics tools like Flurry, Amethon and Localytics provide rich data including mobile handset information, demographics, benchmarks by vertical and mobile carrier data. Tools are available at any price point, including free. There truly is a tool for everyone.
Tracking Strategy

Mobile tracking, especially as it pertains to applications, can be challenging. It often requires APIs and specialized tracking functionality to send data to analytics platforms. To add to the complexity, organizations often rely on agencies to create their mobile applications rather than creating them in-house. Because creating and maintaining a mobile application requires a significant investment, analytics tracking is critical – monitoring mobile initiatives is the only way to determine if they are really reaching our users in the way that we intended.

Creating and maintaining a mobile tracking strategy typically requires three components:

1. Requirements Gathering and KPI Development:
Gathering requirements and developing KPIs for mobile sites and applications is very similar to developing KPIs for any other initiative. However, mobile often requires the process be completed for multiple platforms instead of just one. Many companies choose to create KPIs for their entire mobile program as well as for individual platforms. Utilizing metrics like Mobile Cost Savings or Overall Program Contribution can help marketers maintain a high-level view of the success of the mobile program as a whole. Platform-specific metrics such as Revenue per Visit can help determine what is performing best. As with any KPIs, mobile KPIs need to be approved by the organization to ensure that everyone agrees on the measures of success. Remember to include other measures that might not be KPIs into your requirements – your developers will need to create a comprehensive strategy that will allow you to get all of the data that you need, including user experience measures.

2. Tracking Strategy Creation:
Once you have defined your mobile KPIs and gathered your tracking requirements, you will need to create a comprehensive mobile tracking strategy. Include instructions for implementing basic code, as well as more advanced features and functionality like on-click tracking for interactive elements or downloads. Creating a solution design document that lays out all the events and custom variables used is helpful when you need to update your strategy for new site or application elements.

3. Functionality Updates:
Like all initiatives, it is important to consider that your mobile platforms will change over time. When creating a tracking strategy, maintain some flexibility to allow for periodic updates. Keeping good documentation can make it easier to update your tracking strategy over time.

3 QUESTIONS YOU SHOULDN’T FORGET TO ASK YOUR STAKEHOLDERS

1. Do you have any revenue or cost-saving calculation that we can use to determine how well these initiatives are performing?

2. Are there any set goals in place for our mobile metrics?

3. Is there anything particularly special in the mobile sites or applications that we should track, like videos or social media integrations?
Tracking Strategy

Establishing an implementation process for mobile sites and applications can be very difficult. Marketers must go through the same processes as in a typical analytics implementation. But because many companies do not maintain their own mobile applications and sites, it is even more important to have defined implementation processes in place to make sure no steps are skipped during development.

Every organization uses processes differently, and processes that work for some organizations may be completely unrealistic for others. While it is important to develop a process for mobile analytics implementation, it is equally important to update and improve these processes based on what works and what does not. It may make sense for some organizations to schedule periodic process and KPI reviews.

Insights & Improvements

Reporting and analyzing the data generated from user interactions with mobile applications and sites is the third key element of any good mobile measurement strategy. It’s also arguably the most complex, and it represents one of the largest challenges for marketers that we surveyed. Generating insights from data and making decisions about what to do next is the crucial element that determines whether organizations can adapt their mobile platforms to meet the needs of their consumers.

Because generating insights and suggesting improvements is such a broad topic, we will discuss it in Section 3.

A SAMPLE MOBILE ANALYTICS IMPLEMENTATION PROCESS MIGHT INCLUDE THE FOLLOWING STEPS:

1. Determine scope of mobile initiative or perform slated for development or updates
2. Gather business requirements through stakeholder interviews
3. Develop KPI’s and gain approval
4. Prioritize tracking requirements (optional but necessary if resources or time are limited)
5. Develop a comprehensive tracking strategy
6. Implement tracking strategy in development
7. Q/Z all code, paying special attention to functions that are especially complex or affect mission-critical data
8. Make any necessary adjustments and test again
9. Push to production
10. Q/A code and check reports
CHALLENGE #2
LACK OF [HUMAN] RESOURCES [OR RESOURCES WITH MOBILE EXPERTISE]

A whopping 41% of marketers surveyed said a lack of resources or experience was the biggest challenge in measuring their mobile marketing initiatives. This should come as no surprise – emerging technologies frequently face talent shortages in the beginning. Many organizations do not begin investing in niche resources until a business case has proven a need. Further complicating the challenge of resourcing, mobile analytics requires a variety of skill sets. A typical analyst does not have the technical skills needed to implement complex tracking requirements in a mobile application, and a developer usually has neither the time nor the expertise to analyze vast quantities of data to make meaningful recommendations.

At a bare minimum, organizations hoping to measure their mobile initiatives need the following:

- **Implementation Specialist**: Responsible for developing tracking strategies based on business requirements. In the early stages of a mobile program, this person is often responsible for tracking strategies for desktop websites and marketing initiatives, and is familiar with your in-house analytics tool.
- **Analyst**: Gathers the rich data available and analyzes it to make recommendations. Typically, this person is also responsible for desktop website analysis or analysis of typical marketing initiatives. He or she has firm knowledge of data analysis best practices and processes.
- **Developer**: Responsible for implementing the tracking strategy defined by the Implementation Specialist. This person is often a member of the IT department at your company, or, if you commonly use an agency to develop your mobile properties, he or she might be a member of their team.
- **Champion**: Mentioned in “Organizational Buy-In and Strategic Alignment” this person often owns the strategic vision for the mobile platforms and analytics.

Not all organizations have these resources at hand; many successful organizations also complement their available team with consultants, agencies or contractors familiar with mobile technologies and analytics.

Augmenting your staff with contractors can help to fill resource gaps in the short term, but it is equally important to develop expertise internally. There are a variety of excellent classes, workshops and conferences, as well as a number of great online resources. Links to these are available at the end of this whitepaper.
Marketers experience a variety of challenges when it comes to reporting and analysis. Twenty-three percent of marketers surveyed said their greatest challenge in measuring mobile initiatives was that analyzing all of that data was hard work. Thirteen percent said that their mobile data is heavily siloed, making it difficult to draw any sort of meaningful conclusions. Because of this, it is important to put a good mobile reporting and analysis process into place.

Depending on your mobile analytics program, you may have a lot of time to devote to mobile analysis, or you might only have a little bit of time to generate insights and recommendations. The tactics below can be used together or separately to help you leverage mobile analytics to improve your mobile sites, applications and advertising.

Analysis & Recommendations
Creating meaningful reports requires marketers look to the key goals and objectives defined at the outset of their mobile program – how does the organization define “success” as it pertains to these initiatives? While many marketers may monitor top-line metrics somewhat regularly, these rarely indicate the progression of the overall program. What’s more, they do not answer more important questions about how users are interacting with your applications and sites. The implementation of a regular reporting process will help you to gain a deeper understanding of whether mobile sites and applications are meeting the needs of consumers.

In addition to regular reporting on your KPIs, you can and should dive deeper into your mobile data. This helps determine whether key site and application functionality is having the desired results. For example, if you have a media site or application, you would be well served to analyze the performance of mobile media. This helps determine if your content is optimized for smaller form factor devices like smart phones and tablets. To determine additional opportunities for improvement, analyze other key site functionality such as on-site search or shopping cart funnels.

At the most basic level, all organizations should include the following in regular mobile program or platform reports:

- **KPIs:** Make sure to include all of your KPIs, as well as some sort of context. Comparisons to goals or benchmarks are preferable. If you do not have these in place, comparisons to previous timeframes (e.g. versus last month, versus this month last year, etc.) can also help provide context.
- **Diagnostic Metrics:** Include any diagnostic metrics you think may help lend further context to your KPIs. For instance, if Mobile Cost Savings is one of your KPIs, it might be helpful to include information about savings from particular initiatives or platforms.
- **Insights:** Because most people who look at your mobile reports are not as intimately familiar with the initiatives and intricacies as you are, you should always include some kind of commentary to help guide report consumers to the most important data and findings.
- **Recommendations:** Where possible, include recommendations for improving your mobile platforms or initiatives based on data in the reports. For instance, if you discover a particular mobile paid search campaign is driving a very high Cost per Visit, you might recommend reducing funding for that campaign or testing alternate versions to improve its performance.

**Problem**
You discover that a particular mobile paid search campaign is driving a very high cost per visit.

**Recommendation**
Reduce funding for that campaign, or test alternate versions to improve its performance.
Testing & Optimization
Testing and optimization can also help marketers attain the best possible results in their sites, applications and advertising. Though it may seem overwhelming, implementing a testing and optimization process can help you to tailor your mobile sites to your users. Thirteen percent of marketers surveyed said that they were currently testing their mobile sites.

Testing tools and processes on mobile sites offer plenty of benefits – first and foremost, a quick, definitive answer to the age-old question, “Which works best?” Implementing a testing and optimization program takes the guesswork out of site designs. The winner is simply the best performer. Testing can also help generate momentum for your mobile analytics program, and presenting the results of a simple test can tie a measurable increase in success rate to the winner.

Multi-Channel Dashboards & Reports
Siloed data is another big challenge for mobile marketers. With so many tools available, many marketers must interpret data from a variety of sources, often with very little to tie this data together. In addition, the more mobile sites and applications an organization has, the greater the potential for siloed data. This can create a chasm between each site, platform and measurement tool.

Many organizations have responded to the challenge of siloed data by creating multi-channel mobile dashboards. Dashboards can be created in a simple tool like Excel or in more sophisticated third party tools like Tableau, Klipfolio or Spotfire, which allow you to view all of your mobile data side-by-side. These dashboards pull in data from a variety of sources, including analytics platforms, app stores, text messaging tools and carriers. With a multi-channel dashboard, you will be better able to view data correlations and trends, paving the way toward more meaningful analysis and recommendations.
Data Warehousing

Other organizations are working to bridge the gap between online, offline and mobile users by pushing data to a centralized data warehouse or business intelligence tool, such as Cognos, Business Objects or SAS. At a basic level, users are identified on each platform, and when user IDs or names match, data is tied together within the system. This strategy provides a more robust picture of the online and offline customer.

Organizations leveraging this kind of analytics have a powerful competitive advantage. Such a strategy allows companies to view a user across a variety of touch points, using this information to target relevant offers and content to their users. A multi-channel approach like this helps organizations view mobile sites and applications as a single touch point within a vast ecosystem of customer experience.
As a global leader in medical technology, Medtronic launched an iPad app in the fall of 2010 to enhance the experience for sales representatives, physicians, patients and other external stakeholders when discussing content related to Medtronic’s products and therapies. Medtronic’s mobile Content Management System (mCMS) provides the latest marketing and sales content to the organization’s iPads for use anytime, anywhere.

Jim Freeland, Senior Principal IT Mobility Analyst, said, “In addition to providing an iPad-based app for our business units to share marketing and sales collateral in an innovative new way, we needed to be able to determine which features of the app and content were most used by sales reps in order to focus additional app enhancements on the user experience, quantify cost savings, and to help our marketing teams identify the use of their materials. Determining which content was most frequently used also helped internal marketing teams focus time and energy on enhancing materials.”

To gain insight into how users interact with the application and content, Stratigent devised a SiteCatalyst tagging strategy for all functionality within the mCMS app. Medtronic correlates application activity by user, company division, product or therapy group, and content, so Stratigent developed capabilities for these segmentation points as part of the implementation. According to Freeland, “We want to be able to present the business with a lifecycle view of content moving through the MCMS system.”

With tracking in place, Medtronic can see who is interacting with the application, which content is most popular and which files are being downloaded, tagged, shared and downloaded by third parties. Medtronic leverages the SiteCatalyst data to create reports and dashboards to send to business units, breaking down the content so it’s relevant to them. This helps the business units see the effectiveness of their sales reps. It also sheds light on what is most compelling, informing content creation in the future. Per Freeland, “Mobile apps must include metrics within their requirements. Without visibility into who is using your app, or at least how individuals are using the app, it is obviously difficult to interpret needs and provide enhancements to benefit the organization. The SiteCatalyst solution Stratigent helped implement provides us critical metrics for the mCMS iPad solution.”

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- Jim Freeland, Senior Principal IT Mobility Analyst
This is an exciting time to be in analytics, particularly in mobile analytics. Comscore predicts that US smart phone users will top 100 million in 2012, with over half of the market using smart phones as their primary mobile devices. We have seen sharp increases in mobile activity in our clients’ data as well, regardless of their company size, industry, marketing spend or mobile platform strategy. With all of these changes in the landscape, it’s thrilling to be able to offer companies insight into the behavior of their customers from yet another channel – especially one that has become increasingly personal and pervasive. Don’t settle for basic mobile analytics data any more than you would for basic website analytics. Things are changing fast and you don’t want to be the last person on the block with a pager.

US SMART PHONE USERS WILL TOP 100 MILLION IN 2012

CONCLUSION

Resources

Classes/Workshops
- Online Marketing Summit
- SMX West
- http://mobilemarketingstrategiessummit
- eMetrics
- Strategic Mobile Marketing by Mediabistro
- Web Analytics Workshop: Measuring Mobile
- Analytics by MarketMotive
- Mobile Marketing Basics, Measurement and Analytics by Mobile Marketing Association

Learning Mobile Analytics
- Mobile Analytics Report by byte mobile
- Google Analytics Enhancements for Mobile Apps by Google Analytics Blog
- Blackboard Mobile Learn Analytics User Guide by Blackboard mobile
- Re-think Mobile Marketing & Analytics 1 hr Video blog by Avinash
- Measuring the Success of Your Mobile Strategy whitepaper by Webtrends
- Mobile Analytics: An End-to-End Walkthrough by Google Analytics
- Mobile Application Privacy Policy Framework by Mobile Marketing Association
- The potential of Marketing with Mobile Barcodes by Mobile Marketing Association
ABOUT STRATIGENT

Stratigent LLC, based in Naperville, Illinois, was founded in 2002. Stratigent focuses on transforming the way organizations leverage data to make decisions. As a pioneer in the multi-channel analytics space Stratigent has the industry's most talented team of business and technical consultants.

To learn more visit http://stratigent.com or email marketing@stratigent.com

ABOUT ERIN CROPPER

Erin Cropper is a Senior Consultant and Team Lead at Stratigent, where she is responsible for leading web analytics and online marketing projects for many key accounts. Erin specializes in strategic roadmap and KPI development, and also leads a number of dashboard design and development projects.

Erin is one of Stratigent’s primary training resources, and frequently presents on a wide variety of training topics to companies in many verticals. She has obtained technical certifications for several web analytics technologies including: Omniture Certified Professional Implementation, WebTrends Technical Support Engineer, Google Analytics IQ, and is an Optimost certified professional. Prior to joining the team at Stratigent, Erin worked as a technical Support Specialist at Indiana University. She earned her BS in Informatics from Indiana University.

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