kick point

Better Marketing Reports

Dana DiTomaso
@danaditomaso

Goals, KPIs, and Metrics

- Building better goals
- Turning goals into metrics that can be reported on
- Are you monitoring or reporting?
- Picking the right chart or graph to show your results

kp

Introduction to Google Data Studio

- Creating data sources
- Using calculated fields
- Tidying up "bad" data
- Effective report design

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Goals, KPIs, and Metrics

A lot of goals can't be measured.

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Goal:

Launch the new website!

Goal:

Sell 250 houses in 2020.

Goal:

500 leads from outside the US in Q1 2020.

It might be very difficult to make your goal measureable.

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1. Encourage caregivers to identify their needs early on, bring light to their own wellbeing, and provide practical strategies and resources to staying well.

Your research department will be conducting evaluation co-design sessions with a caregiving group you've already worked with. These insights will be key in determining whether the needs they identified before the project have been addressed.

We'll strengthen these insights by analyzing your online users.

We'll want to know if they're:

- Consuming the content on your website (reading, watching in full)

- Having a positive experience from website content and finding it useful

- Engaging with content on social media (shares, likes, comments)

To find this out, we will measure:

- **Content Consumption** — This custom metric answers the question: did the viewer read/watch the content in full on your website? Time on site and time on page metrics in Google Analytics aren't able to accurately measure this metric, so we will be implementing a custom version of Content Consumption on your site that will add together video view time and read time. You can read about Content Consumption and how it works on our blog.

- **Popup Surveys** — We will implement a popup survey on the website that will ask visitors if they are finding the content they are viewing helpful. We will test both simple thumbs up/thumbs down responses, number ratings, and a text box to see which has the best response from your site visitors. We will be able to capture the survey results in Google Analytics and cross-

Can your goals be better?

Common Goal Problems

- You should have a clear how, what, and why for each goal
- They should be SMART – Specific, Measurable, Attainable, Relevant, and Timely
- Does the goal have enough detail that you can give a clear result with a report?

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Consider building a goal charter.

The goal charter answers three key questions.

1.

What are your goals?

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2.

Why do they exist?

3.

How will we know when we've met these goals?

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Your Goal

You identified one goal for this project: **Convert trial users into paid users — ideally at the enterprise license level.**

This seems like a relatively easy goal to measure — "Are we getting trial users? Are they buying?" — but in reality, there are a lot of different pieces that make up this goal.

When we're thinking about this kind of goal, it's often more effective to think about all the different pieces that make up the final goal then by focusing on the final goal themselves. Then we have a better understanding of how to improve results in the future. This means that we need to be able to measure:

- How many people who visit your site have the potential to become paid users?
- How many of those people actually fill out the form or contact you in another way to start a trial?
- How many trial users become paid users?
- What percentage of these people are at the enterprise licence level?

1. Encourage caregivers to identify their needs early on, bring light to their own wellbeing, and provide practical strategies and resources to staying well.

Your research department will be conducting evaluation co-design sessions with a caregiving group you've already worked with. These insights will be key in determining whether the needs they identified before the project have been addressed.

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2. We will rely on Google Analytics and YouTube Analytics for usage data.

Our Google Tag Manager & Analytics Plan will have more information on how your accounts will be configured and integrated, but we know that we need to capture the information you mention in this paragraph:

- Referral source (social, search engines, partners)

- Visitor behaviour (what pages/resources are visited, how often)

- Demographic data (using Google Analytics and YouTube demographic data)

- Geographic location

- Views, subscribers, and audience retention metrics (from YouTube)

We will also be setting up cross-device tracking in your Google Analytics account. This means that if someone is opted into Google's Advertising Network (which happens by default), and are logged into Google, we'll be able to track the same person across multiple devices and multiple visits.

There is one risk that will cause problems in our ability to capture returning visitor behaviour over the lifetime of this project. The ITP Project aims to reduce or remove our ability to track users using Safari for longer than 7 days. By default, Google Analytics cookies are set for two years. There are some ways around these restrictions currently, but each new version of ITP reduces the number of workarounds available. There is also discussion that Google may also implement ITP which would have a massive, negative impact on our ability to track returning users and to track users across

Read all about Goal Charters:

kickpoint.ca/goal-charter

Now, phrase this goal as a question.

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"How can we get 250 new clients this year?"

"Will we meet our goal of 250 new clients this year?"

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Now, turn these goals into metrics.

Goal	KPIs	Tactics	Metrics	Report
Increase gross sales to $17.5 million.	1. Gross sales. 2. Average sale size. 3. Average time to close sale.	1. Use lead tracking to determine percentage of lead sources per industry and their source. 2. Use lead scoring to identify high close rate/fast closing leads and their source.	1. Lead form fills (using the multi-attribution model).	1. Number of leads. 2. Attribute leads to channels. 3. Attribute high value leads to channels.

Next, build your data inventory.

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What We'll Need

- GA — tracks when people fill out the form
- Salesforce — CRM, tracking people from lead to sale/loss
- Human beings — responsible for updating the CRM
- Call tracking?

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What We Know

- We have been tracking form fills via GA goals and attributing that to channel
- We will add call tracking and see where calls come in
- We can improve data collection by our team

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What We Need

- Tie Google Analytics to Salesforce when a form is filled or a call is made
- Push won/loss result from Salesforce back into GA

The Right Chart or Graph Will...

- Be able to tell you at a glance if you're on the right path
- Not require additional explanation
- Not require your presence to communicate results
- Be understandable years from now

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What is Your Question Asking?

- Comparison – bar, combo, table, line
- Distribution – histogram, scatter
- Composition – stacked bar or area, pie
- Relationship – scatter or bubble
- Are we there yet? – bullet

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Ignoring what doesn't help you is just as important and watching what does help you.

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Reports should be both backward-looking as well as forward-looking.

Reporting: What happened? Will we get to where we need to go?

Monitoring: What is happening? What do I need to do?

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Discussion:
Let's review a few goals!

Next: Build Your Analytics Plan

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Your Goal Charter and your Analytics Plan work together.

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What should your Analytics Plan include?

Everything that you'll measure or collect and how that process happens.

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Who is responsible for what?

Who is allowed to do what?

You're explaining the why behind the setup.

We will add the following custom dimensions:

1. Client ID — session-scoped variable that captures the Client ID set by Google Analytics.
2. Session ID — session-scoped variable that creates and collects a random Session ID. One Client ID could have multiple sessions.
3. Hit ID — hit-scoped variable that collects the actual timestamp of each hit in local time. One Session ID would have multiple hits.
4. Hit Type — hit-scoped variables that captures the type of hit, including event for Events, pageview for Pageview, etc. This is useful to add more granularity to path analysis in our reporting.
5. Full Referrer — hit-scoped variable that captures the entire referral path of how the visitor got to the website. This uncovers additional information about visits to the site that are not via a referral source, such as Social Media.
6. GTM Container ID — hit-scoped variable that saves the GTM Container ID that was used to build the GA hit. Useful to identify spam traffic sent from outside our site.
7. Navigation Type — hit-scoped variable that captures the type of navigation that resulted in the hit. For example, Navigate (visitor wrote the address in the address bar or clicked a link to the current page), Reload (user reloaded the

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Think of this document as analytics succession planning.

You're showing how the tools tie together.

Your GTM container will contain the following pixels:

- Google Analytics
- Facebook
- Google Surveys Website Satisfaction (unconfirmed)

The Tags, Triggers, and Variables will be set up to support the Google Analytics tracking goals covered in the previous section. We will also have the following custom tags:

- Remove Personally Identifiable Information — whenever a page "hit" is sent to Google Analytics, we will scan it first to detect and remove any PII before sending along the data
- Truncate Google Analytics Payload — Google Analytics has a maximum number of bytes that can be sent with each hit. If a hit is too long (e.g. lots of variables and other information being sent), it will discard the hit but not report an error. This code will help us avoid that issue.
- Detect Printing — We will send an event to Google Analytics if we suspect that a page was printed.

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By: Dana DiTomaso

May 24th, 2019

What Your Google Tag Manager Container Should Contain - Whiteboard Friday

SEO Analytics | SEO Tools | Whiteboard Friday

The author's views are entirely his or her own (excluding the unlikely event of hypnosis) and may not always reflect the views of Moz.

Agencies, are you set up for ongoing Google Tag Manager success? GTM isn't the easiest tool in the world to work with, but if you know how to use it, it can make your life much easier. Make your future self happier and more productive by setting up your GTM containers the right way today. Dana DiTomaso shares more tips and hints in this edition of Whiteboard Friday.

Don't forget to address where the data is going and who has access to it!

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Google Data Studio

You can always look at data in Google Analytics, but sometimes you just need to know a few things, not every possible piece of data that GA will throw at you. That's why we will be creating a report for you in Google Data Studio once we have all the views, events, and goals set up and therefore can get the data you need to know.

This report will be in our Google account and shared with you. Normally we would create this report in your Google account, but one part of the report uses a paid data connection so that we can display your Google My Business data in your dashboard.

Here is what the report will cover:

First Page: Overview

- Are people contacting you?
- What are they searching for?
- How did they get to your site?
- What types of goals did they complete once they were on your site?
- How many members signed up and where did they come from?

Second Page: Content

- What pages are most popular (landing pages and page visits)
- What content was consumed?

Introduction to Google Data Studio

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Data Sources
& Explorer

Add your data sources FIRST.

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Recent

Name	Owned by anyone ▼	Last modified ▼ ↓
▤ ▮▮▮▮ // GA // 01 Master	Kick Point	9:42 AM
▤ ▮▮▮▮ // GAds	Kick Point	5:16 AM
▤ ▮▮▮▮ // GSC // URL Impression	Kick Point	5:15 AM
▤ ▮▮▮▮ // GSC // Site Impression	Kick Point	5:14 AM
▤ ▮▮▮▮▮▮▮▮ // GAds	Kick Point	Sep 9, 2019
▤ ▮▮▮▮▮▮▮▮ // GA	Kick Point	Sep 9, 2019
▤ ▮▮▮▮▮▮▮▮ // GAds // Supermetrics	Kick Point	Sep 9, 2019
▤ ▮▮▮▮▮▮▮▮ // GA // Supermetrics	Kick Point	Sep 9, 2019
▤ ▮▮▮▮▮▮ // GA	Kick Point	Sep 9, 2019
▤ ▮▮▮▮▮▮ // GAW	Kick Point	Sep 9, 2019

Original data is not affected by anything you do in GDS.

Use the Explorer to see what you have in a data set.

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Untitled Explorer

Save

Share

Add a chart

Filter | Drop metric or dimension fields here to create filters ⊕

Chart > Table

	Source	Sessions ▼
1.	google	2,526
2.	(direct)	755
3.	crowdcast.io	59
4.	moz.com	43
5.	gmb	42
6.	baidu.com	42
7.	t.co	36
8.	linkedin.com	35
9.	bing	26
10.	brightlocal.com	20
11.	contentstrategy.com	20
12.	answers.squarespace.com	18
13.	CMblog	16
14.	kickpoint.ca	15
15.	duckduckgo	12

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DATA | STYLE

Data Source

🖉 kickpoint.ca // GA ...

⊕ BLEND DATA ?

Dimension

ABC Source

⊕ Add dimension

Drill down ⊙

Metric

AUT Sessions

⊕ Add metric

Available Fields

🔍 Type to search

ABC Acquisition Campaign
ABC Acquisition Channel
ABC Acquisition Medium
ABC Acquisition Source
ABC Acquisition Source / ...
ABC Ad Content
ABC Ad Distribution Netwo...
ABC Ad Format
ABC AdWords Ad Group
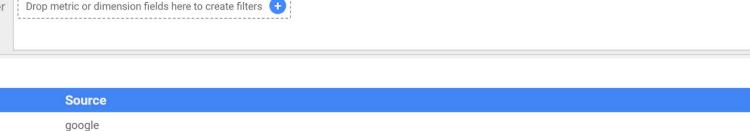ABC AdWords Ad Group ID
ABC AdWords Ad Slot

⊕ CREATE NEW FIELD

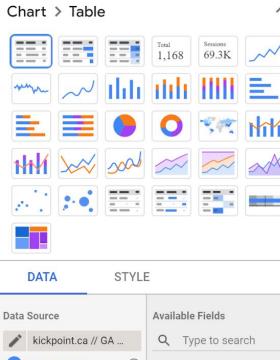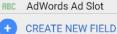➕ Tab 1

This helps you figure out if you need calculated fields.

Calculated Fields

Basic Math

- Addition: +
- Subtraction: -
- Division: /
- Multiplication: *

Running Calculations

- Applied at the field level
  - Running sum
  - Running average
  - Running min
  - Running max
  - Running delta
  - Running count

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Functions

- COUNT_DISTINCT (or APPROX_COUNT_DISTINCT) – count how many times something happened
- VARIANCE – find variance, such as very low or very high periods of traffic
- CONCAT and HYPERLINK – make clickable chart cells
- TRIM – fix up label mistakes in events

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Where do social media visitors land on the site?

Page	Sessions ▾	Pageviews
/events/	186	386
/event/spring-edmonton-womans-s...	142	162
/event/the-edmonton-tattoo-arts-fes...	48	53
/	45	197
/newsletter/	41	84
/event/wild-rose-antique-show-sale-...	39	75
/event/volleyball-canada-national-c...	36	52
/event/rise-against-with-afi-and-anti...	30	33
/event/edmonton-home-garden-sho...	26	31
/event/edmonton-2018-motorshow/	26	40

1 - 10 / 32   ‹   ›

Field Name

Landing Page (with links)

Field ID

calc_zYxSK5Rm

Formula ?

```
1  HYPERLINK(CONCAT('https://yoururlgoeshere.com', Landing Page ), Landing Page )
```

CASE

CASE

    WHEN Country IN ("USA","Canada","Mexico") THEN "North America"

    WHEN Country IN ("Germany","France") THEN "Europe"

    ELSE "Other"

END

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1.	facebook / boosted	**2,797** (33.41%)
2.	google / organic	**2,000** (23.89%)
3.	reddit / native	**764** (9.13%)
4.	stackadapt / display	**759** (9.07%)
5.	Facebook / non-retargeting-ads	**480** (5.73%)
6.	google / cpc	**399** (4.77%)
7.	(direct) / (none)	**359** (4.29%)
8.	Facebook / carousel-ads	**213** (2.54%)
9.	bing / organic	**97** (1.16%)

Field Name

Fix Nightmare UTMs

Field ID

calc_TUowIWdm

Formula ⑦

```
1  CASE
2  WHEN ((Source="direct" AND Medium="(not set)") OR Medium="(none)") THEN "Direct"
3  WHEN Medium="organic" THEN "Organic Search"
4  WHEN (Social Source Referral="Yes" OR REGEXP_MATCH(Medium,"^(social|social-network|social-media|sm|social network|social media|non-retargeting-ads|carousel-ads)$")) THEN "Social"
5  WHEN (REGEXP_MATCH(Medium,"^(cpc|ppc|paidsearch)$") AND Ad Distribution Network!="Content") THEN "Paid Search"
6  WHEN REGEXP_MATCH(Medium," ^(cpv|cpa|cpp|content-text|native)$") THEN "Other Advertising"
7  WHEN (REGEXP_MATCH(Medium,"^(display|cpm|banner)$") OR Ad Distribution Network="Content") THEN "Display"
```

Possible Chart Options in GDS

- Table (& Pivot Table)
- Scorecard
- Time Series (Line)
- Bar (Regular, Stacked)
- Pie
- Tree

- Geo Map
- Combo

Table

- Useful for comparison and when you need to know actual numbers immediately
- Data is automatically summarized
- Can display number, heatmap (with number), or bar
- Can include x-axis and target with the bar option

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Pivot Table

- Use a pivot table when you need to summarize multiple variables (up to two row dimensions and two column dimensions)
- Can include up to 10 metric fields
- Data can include totals
- Can't include metric filters
- They do not paginate (unlike standard tables)
- Limit of 3 per GDS page
- Limit of 50,000 rows of data
- Metric data includes number, heatmap, bar (like standard table)

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Scorecard

- Displays a single metric
- Useful for summaries of data and running calculations
- Can show a compare

Time Series

- Useful for data over time (of course)
- Time on the X, metric on the Y
- Can have a second metric on the right Y
- Up to 5 metrics
- Can include a breakdown dimension

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Bar

- Many different uses!
- Can fake a histogram by using the CASE function
- Can show up to 5 metrics
- If you add on a second dimension it does limit your metrics
- Can have regular or stacked bars

Pie

- Probably my least favourite chart
- One metric
- Can limit the number of slices
- Can have a donut instead (and control the size of the hole)

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Geo Map

- Also not super useful
- Metro & Metro Code is useful (US-only) as it lines up with media markets (DMA Regions)
- Region is not available for a lot of countries
- Only includes the first 5000 rows of data (unless otherwise specifically mentioned for a field type)

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Combo

- Single dimension with up to 5 metrics
- Or 2 dimensions with 1 metric
- Can have a secondary sort and breakdown dimension

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Area

- Like time series but shaded under the line
- One dimension and one metric, over time
- Can show a stack and/or cumulative

Scatter & Bubble

- Good to show distributions or relationships
- Can include a trendline
- Scatter = 2 metrics, up to 3 dimensions
- Bubble = 3 dimensions

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Bullet

- New-ish!
- The "are we there yet" chart option
- Center bar shows the actual metric
- Vertical line shows the target
- Target can't be dynamically generated
- Bands for threshold ranges (bad, ok, good)

Tree

- New!
- Visually breaks down a dimension by metric components
- Can get pretty messy

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Other Chart Tips

- Use the Dimension Color Map
  - That way your dimensions are always using the same colors, regardless of chart or data position

- Layer Multiple Charts
  - Using transparent backgrounds it can appear that they are the same chart

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Designing Reports

Guidelines

- Answer one or two questions/goal per page
- Consider the audience
- Make it very clear what each page covers
- Keep in printing or screen dimensions (ask what they'll use to view)
- Give the charts/text room to breathe
- Explain everything
- PowerPoint? Landscape. Printing? Portrait.

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Google Data Studio

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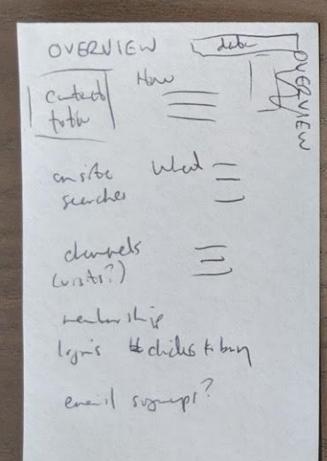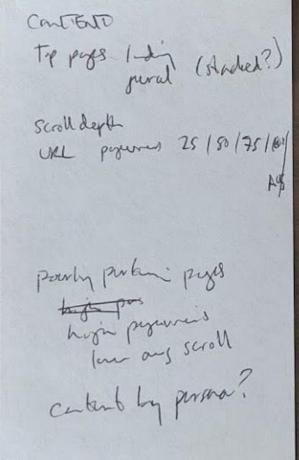Here is what the report will cover:

First Page: Overview

- Are people contacting you?
- What are they searching for?
- How did they get to your site?
- What types of goals did they complete once they were on your site?
- How many members signed up and where did they come from?

Second Page: Content

- What pages are most popular (landing pages and page visits)
- What content was consumed?

OVERVIEW | date | OVERVIEW

- Contents total | How ===
- on-site searches | What ==
- channels (visits?) | ===
- leadership
- logins | # clicks to buy
- email signups?

CONTENT

- Top pages | day plural (stacked?)
- Scroll depth
- URL pageviews 25/50/75/100%
- Age

- Poorly performing pages
  - ~~high pos~~
  - high pageviews
  - low avg scroll
- Content by persona?

GOOGLE SEARCH

- impressions | clicks
- pos | keyword queries etc.

SOCIAL NETWORK

- total visits (% of total) | top networks
- Landing pages | Network filter
- page | network | session | depth

Navigating Reports
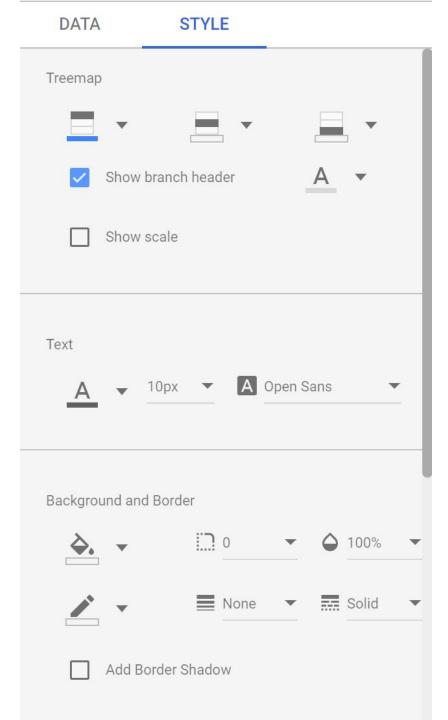
Set the Layout and Theme options.

LAYOUT

THEME

View Mode

Header visibility

- ◉ Always show
- ○ Auto hide
- ○ Initially hidden

Navigation position

- ○ Left
- ◉ Top

Display mode

- ○ Fit to width
- ◉ Actual size

- ☑ Has margin

Canvas Size (?)

Custom ▾

Width (px)	Height (px)
2000	1080

THEME

Current Theme

Custom ▾

Primary

🪣▾ A̲▾ A Open Sans ▾

Secondary

🪣▾ A̲▾ A Open Sans ▾

Color By

- ○ Series order
- ◉ Dimension values

✎ Manage dimension value colors
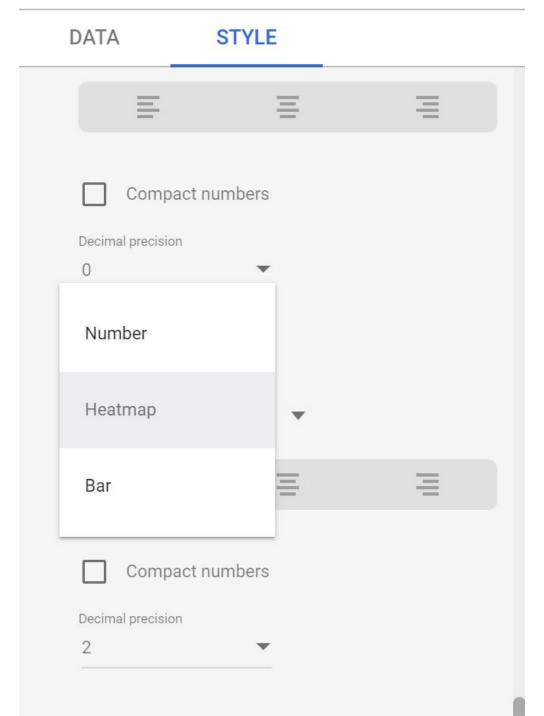
Chart Palette

Every chart type has similar options in GDS.

Data Source

✏️ Ottinger // GA Mas...

➕ B▮

Dimension

ABC Day of week

📅 Hour

➕ Add dimension

Drill down 🔵

Default drill down level
Day of week ▼

Levels to show
2 ▼

Metric

SUM Goal 4 completions

Total rows

250 ▼

Default date range

Available Fields

🔍 Type to search

ABC 1st interaction campa...
ABC 1st interaction channel
ABC 2nd interaction camp...
ABC 2nd interaction channel
ABC 3rd interaction campa...
ABC 3rd interaction channel
ABC 4th interaction campa...
ABC 4th interaction channel
ABC 5th interaction campa...
ABC Ad content (utm_cont...
🔗 Ad destination URL
🔗 Ad display URL
ABC Ad distribution network
ABC Ad format
ABC Ad group
ABC Ad group ID
ABC Ad match type
ABC Ad matched query
🔗 Ad placement domain
🔗 Ad placement URL
ABC Ad query word count

Treemap

☑ Show branch header

☐ Show scale

Text

A ▼   10px ▼   A Open Sans ▼

Background and Border

🪣 ▼   ⬚ 0 ▼   💧 100% ▼

✏️ ▼   ≡ None ▼   ⊞ Solid ▼

☐ Add Border Shadow

Compact numbers

Decimal precision

0

Number

Heatmap

Bar

Compact numbers

Decimal precision

2

Tip:

If you change the number of columns in a table, the formatting won't move to the new column.
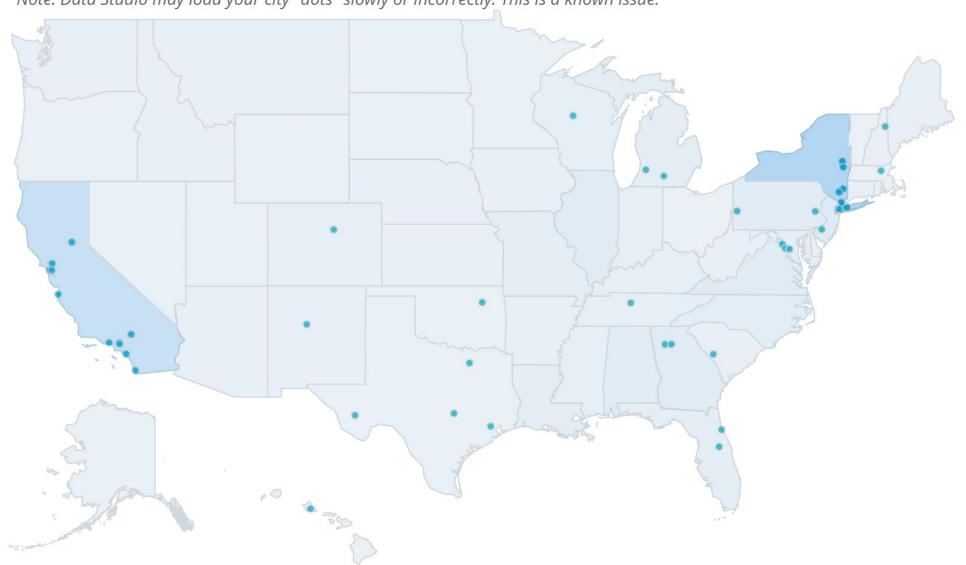
kp

Phone Calls

Where are people calling you from?
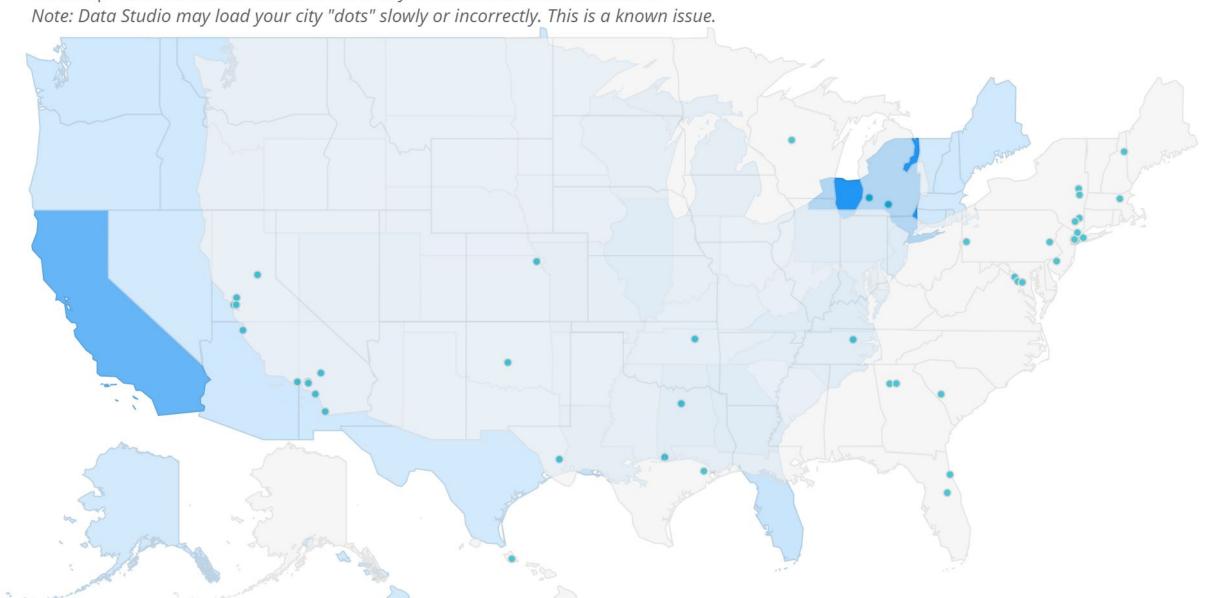This map doesn't include calls where the City or State couldn't be detected.
Note: Data Studio may load your city "dots" slowly or incorrectly. This is a known issue.

Phone Calls

Where are people calling you from?

This map doesn't include calls where the City or State couldn't be detected.
Note: Data Studio may load your city "dots" slowly or incorrectly. This is a known issue.
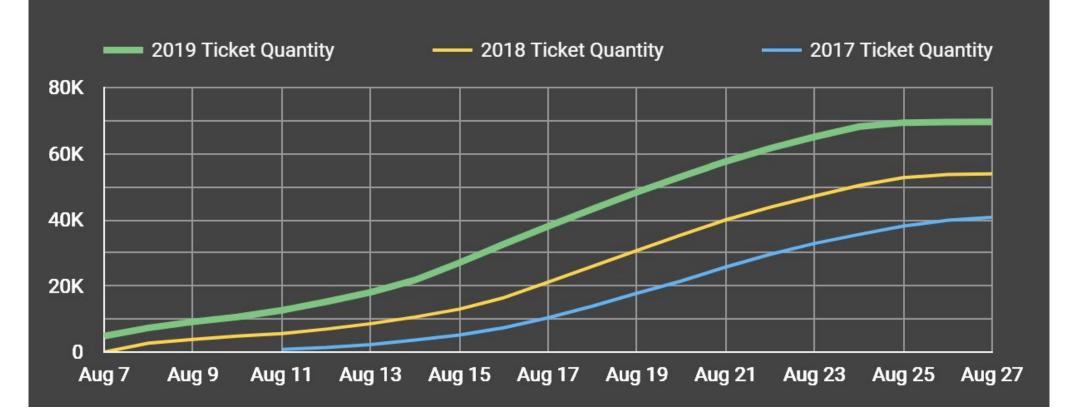
Year Over Year

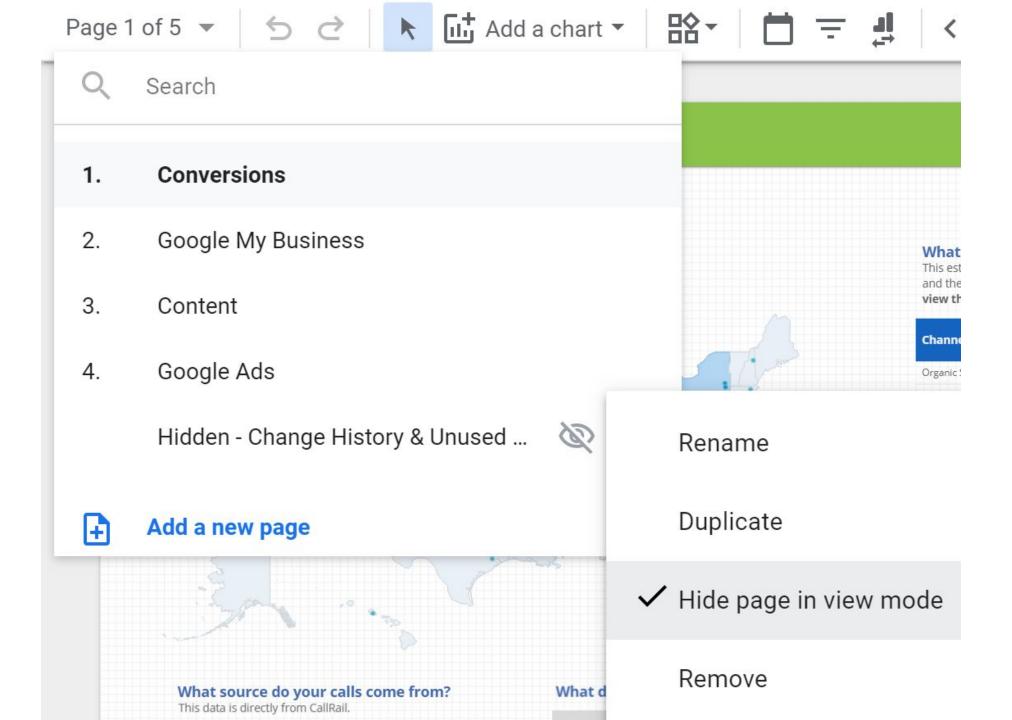*We are missing one day of ticket sales from 2017.*
2017 Festival: August 17-27 (tickets on sale August 9)
2018 Festival: August 16-26 (tickets on sale August 7)
2019 Festival: August 15-25 (tickets on sale August 8)

2019 Ticket Quantity   2018 Ticket Quantity   2017 Ticket Quantity

Add a chart

Search

1. **Conversions**

2. Google My Business

3. Content

4. Google Ads

Hidden - Change History & Unused ...

Add a new page

Rename

Duplicate

✓ Hide page in view mode

Remove

What source do your calls come from?
This data is directly from CallRail.
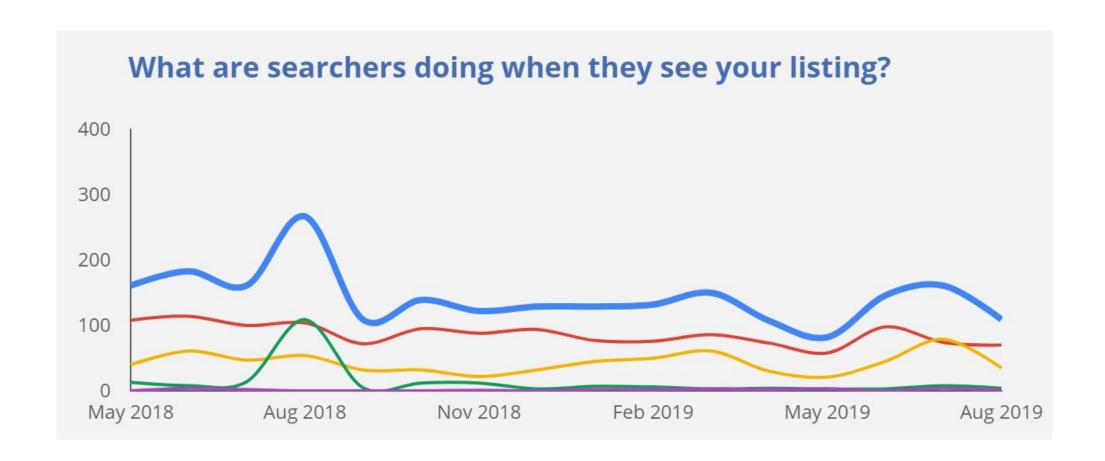
Change History:

1.0 Aug 30 2019 - initial dashboard released
1.1 Sep 3 2019 - lead value added (initially $2k/lead), changed "where are people coming from when they convert" to "lead value" table.
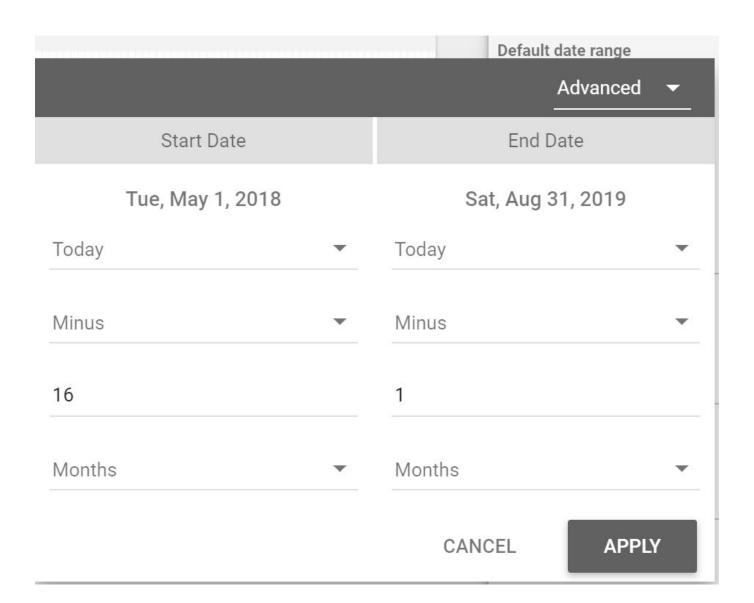
Tip:

Make important metrics larger than others.

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What are searchers doing when they see your listing?

Default date range

Advanced ▼

Start Date	End Date
Tue, May 1, 2018	Sat, Aug 31, 2019
Today ▼	Today ▼
Minus ▼	Minus ▼
16	1
Months ▼	Months ▼

CANCEL   **APPLY**
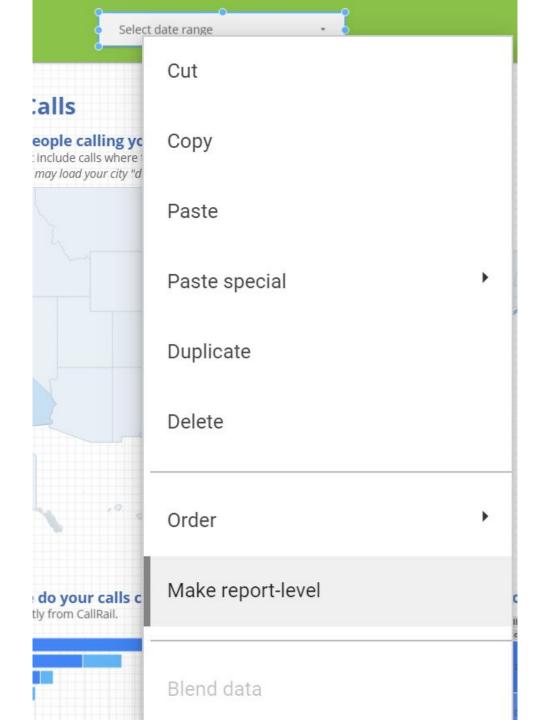
Tip:

Use report-level elements.

Select date range ▾

Cut

Copy

Paste

Paste special   ▸

Duplicate

Delete

Order   ▸

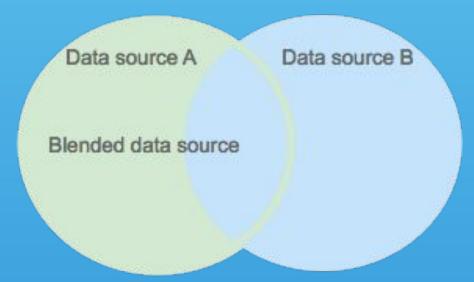Make report-level

Blend data
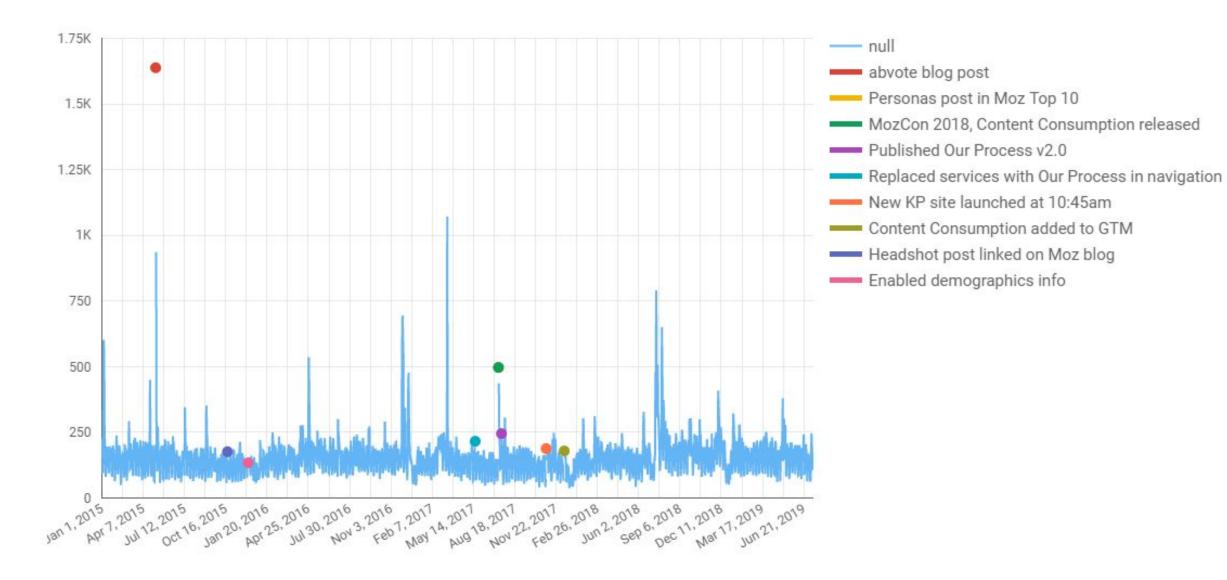
Advanced Google Data Studio
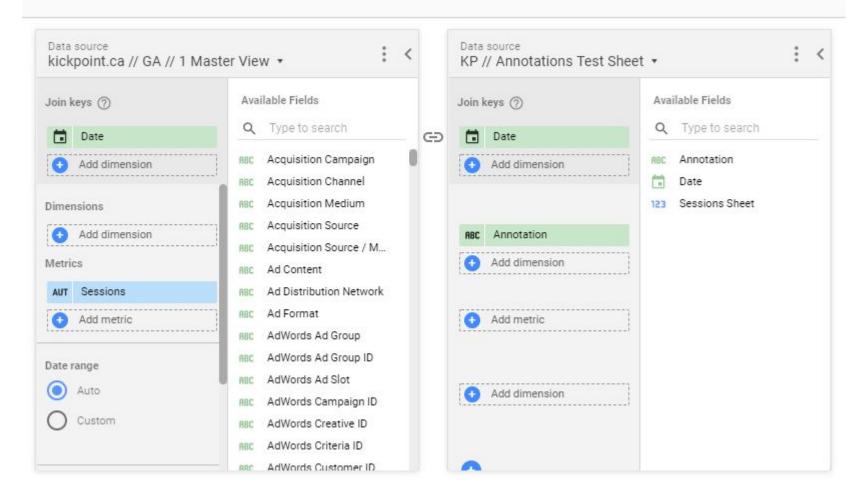
Blending

Blending Rules

- Each data source needs to share a set of one or more dimensions (the join key)

- Blending is a left outer join

- **You can blend a data source with itself**

- You can blend a calculated dimension (e.g. tidied data)

Data source A   Data source B

Blended data source

What can you blend?

—	null
●	abvote blog post
●	Personas post in Moz Top 10
●	MozCon 2018, Content Consumption released
●	Published Our Process v2.0
●	Replaced services with Our Process in navigation
●	New KP site launched at 10:45am
●	Content Consumption added to GTM
●	Headshot post linked on Moz blog
●	Enabled demographics info

Y-axis: 1.75K, 1.5K, 1.25K, 1K, 750, 500, 250, 0

X-axis: Jan 1, 2015, Apr 7, 2015, Jul 12, 2015, Oct 16, 2015, Jan 20, 2016, Apr 25, 2016, Jul 30, 2016, Nov 3, 2016, Feb 7, 2017, May 14, 2017, Aug 18, 2017, Nov 22, 2017, Feb 26, 2018, Jun 2, 2018, Sep 6, 2018, Dec 11, 2018, Mar 17, 2019, Jun 21, 2019

Blend Data

Data source
MozCon Example // Old Domain ▾   ⋮ ‹

Join keys ⑦

📅	Date
⊕	Add dimension

Dimensions

⊕	Add dimension

Metrics

AUT	Impressions - Old
⊕	Add metric

Date range

◉ Auto

○ Custom

Available Fields

🔍 Type to search

🌐	Country
📅	Date
ABC	Device Category
ABC	Google Property
ABC	Query
123	Average Position
123	Clicks
123	Impressions
123	Site CTR

🔗

Data source
MozCon Example // New Domain ▾   ⋮ ‹

Join keys ⑦

📅	Date
⊕	Add dimension

Dimensions

⊕	Add dimension

Metrics

AUT	Impressions - New
⊕	Add metric

Date range

◉ Auto

○ Custom

Available Fields

🔍 Type to search

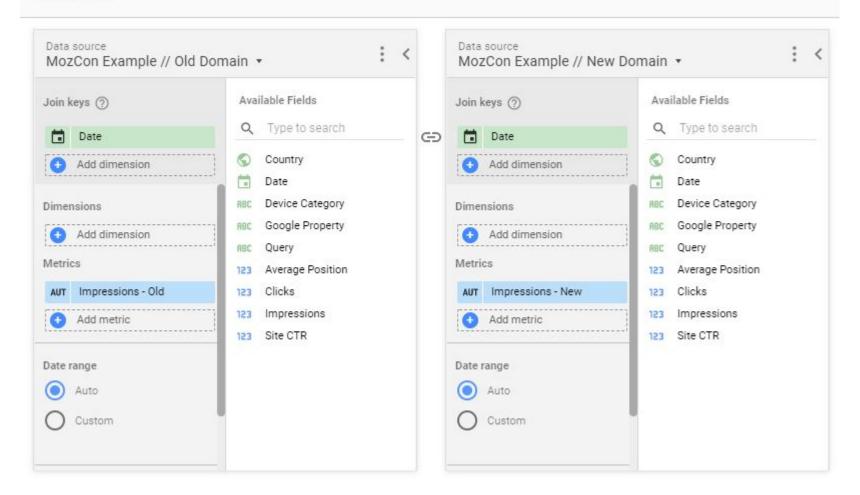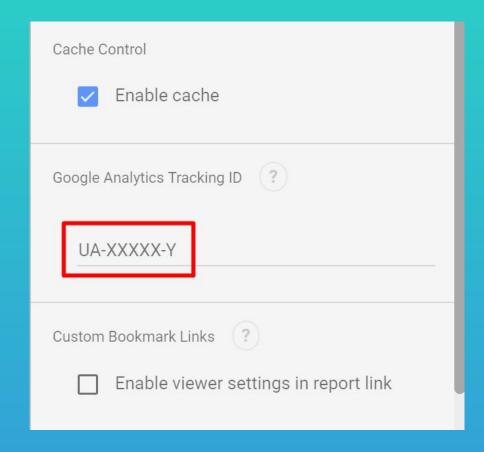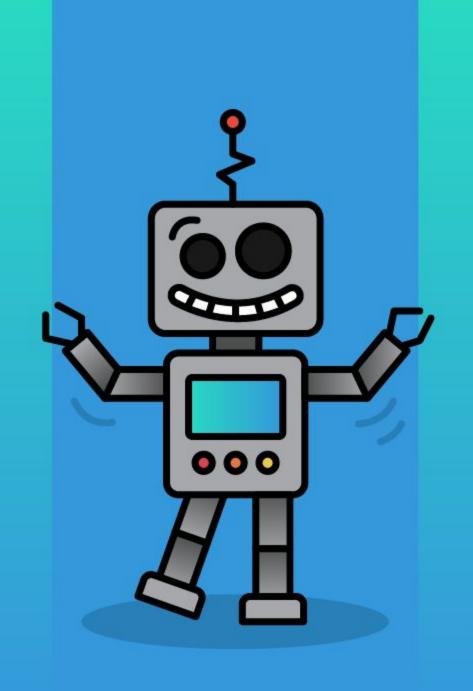| 🌐	Country
📅	Date
ABC	Device Category
ABC	Google Property
ABC	Query
123	Average Position
123	Clicks
123	Impressions
123	Site CTR

Tracking Report Usage

File > Report Settings

Thank You!
kickpoint.ca/newsletter

Dana DiTomaso
@danaditomaso