



Apteco

# Interactive marketing dashboards

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Empower your co-workers with  
visual data insights they can use  
for marketing action.



# A data-driven future

The future of every business will be defined by how it uses data. That's why organisations are already implementing large-scale digital transformation projects that will help them better serve customers and make strategic decisions based on data they have locked in their operational systems.

Many of these projects are focused on strategy or production – but the same principles can be used by marketers too. Businesses generate, and have access to, enormous amounts of data – but the majority lack the means needed to turn that data into information and their insights into action.



# The big data disconnect

**Everyone, including campaign teams, strategists, and product managers, has a vested interest in data. All of these departments and individuals can apply data to specific use cases relevant to them.**

But currently, many feel disconnected from the data. Instead of being in a position to tap into the data they need to do their job better, they are reliant on data experts and tech teams to access and present information in a format they can use.

The desire to protect data and limit access is an understandable one. After all, GDPR is still very much part of every company's data governance strategy.

However, this reliance on data experts is also limiting. The effort required to get hold of actionable insights is considerable, and the information may be outdated by the time it arrives at the top of the data specialist's 'to do' list.

Without easy access to timely data, it becomes a peripheral aspect of decision-making. Or 'best guess' decisions are made without taking into account all of the supporting information – simply because those insights are unavailable.

# Dashboards bridge the disconnect

True digital transformation is about giving everyone in the organisation access to insights that they can use. This process of data democratisation empowers everyone to better serve customers and to excel in their roles. One way to achieve this is by converting raw data for display visually on a dashboard.

Dashboards are multi-element panels that display key information so that it can be understood at a glance. They are already a common tool for sales and service teams who have targets and responsibilities that need constant real-time tracking for instance.



Dashboards have several benefits. For example, visual information is quick and easy to understand – you don't have to be a data scientist to make sense of what you see. Information can be displayed in near real-time, allowing you to make quick decisions with the most relevant, accurate data available.

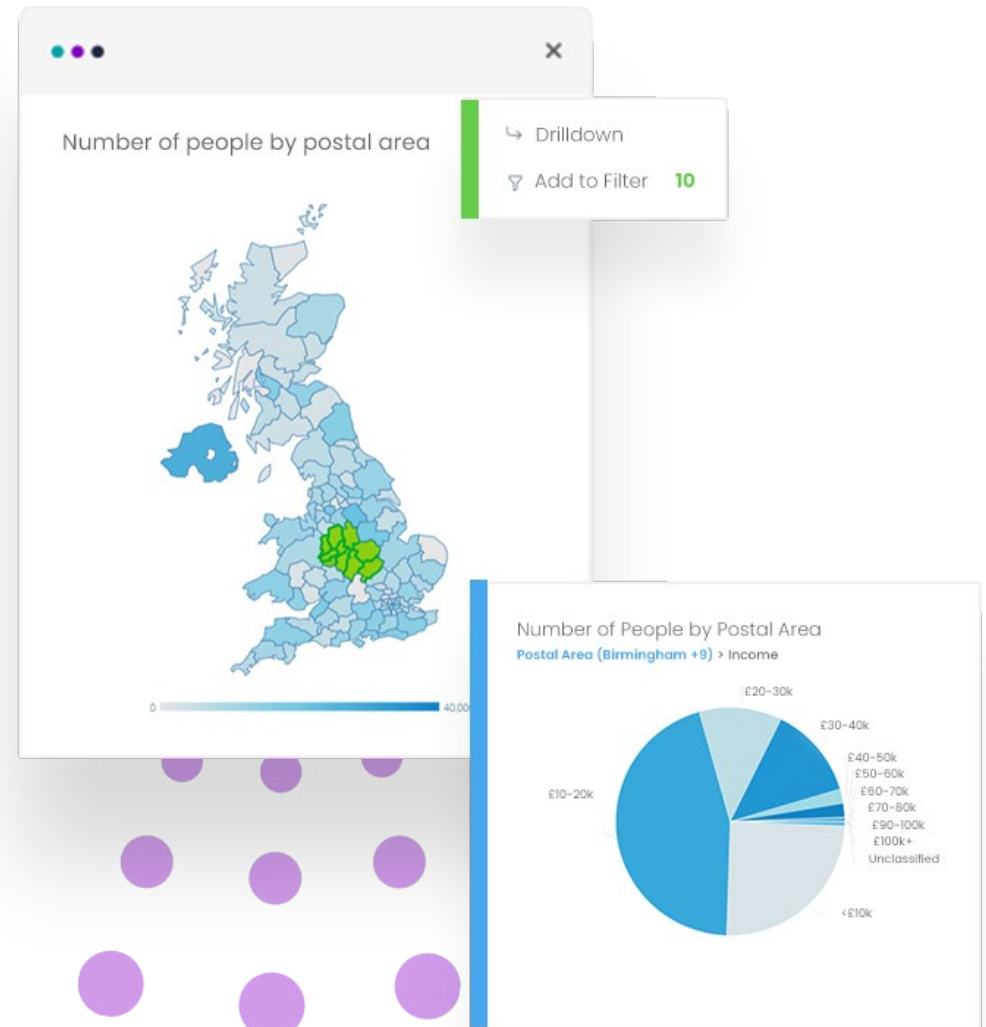
Interactive dashboards take things a step further. Users can see the interplay between elements, achieved by two key principles:



They can 'filter' information, which means restricting a specific aspect of the data to observe its effect on the other dashboard elements.



Alternatively they can 'drill-down', which means they can explore further a specific aspect of the data without affecting the other elements.





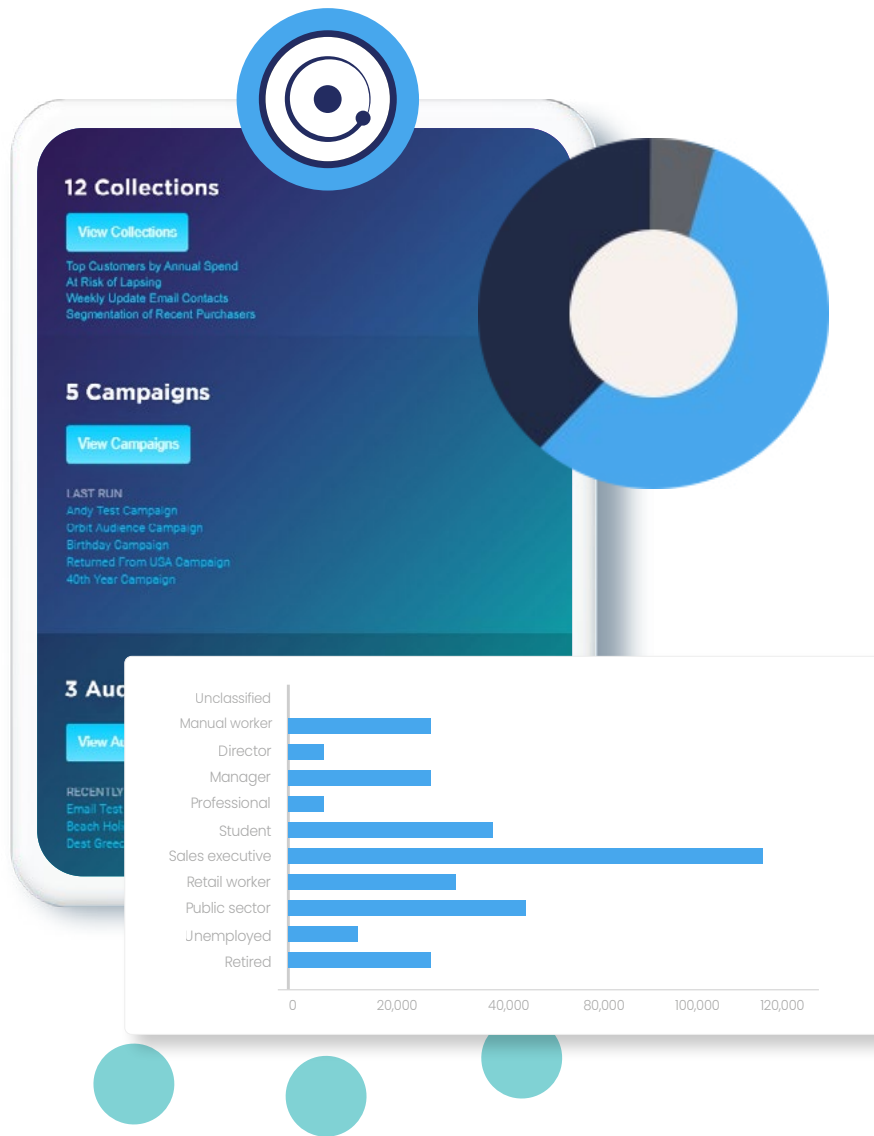
# Unlocking the stories hidden in your data

Psychologists have long believed that the human brain processes information visually, so choosing a dashboard presentation model makes sense. In fact instant visual access to key information allows marketers to change the way they look at their data.

By observing interplay between indicators, marketers can begin to find the stories hidden in their data. Using marketing data on a dashboard allows you to understand the customer's journey and their experience through the marketing and sales funnel, the [cornerstones of the modern campaign](#).

Suddenly, this is about more than numbers and statistics. Your team can see the stories and narratives about how customers really act, rather than relying on best guesses or surveys that suffer low responses rates.





With interactive dashboards, raw data comes to life. By drawing disparate data elements together, you can build multi-layered stories. Your personas become more realistic and well-formed – as do the campaigns you build around these people. You can expect more ‘lightbulb moments’, when the dashboards allow you to see previously hidden customer behaviour, and those insights become the foundation of new, finely-targeted marketing campaigns.

By better understanding your customer base, you can segment your audiences more accurately and effectively. You can create personalised messages that are more relevant and resonant. You can finally create campaigns that truly engage each new segment.

And the key to achieving this successfully is implementing a smart dashboard solution with the functionality to unite your data and allow you to create the ideal target audience.

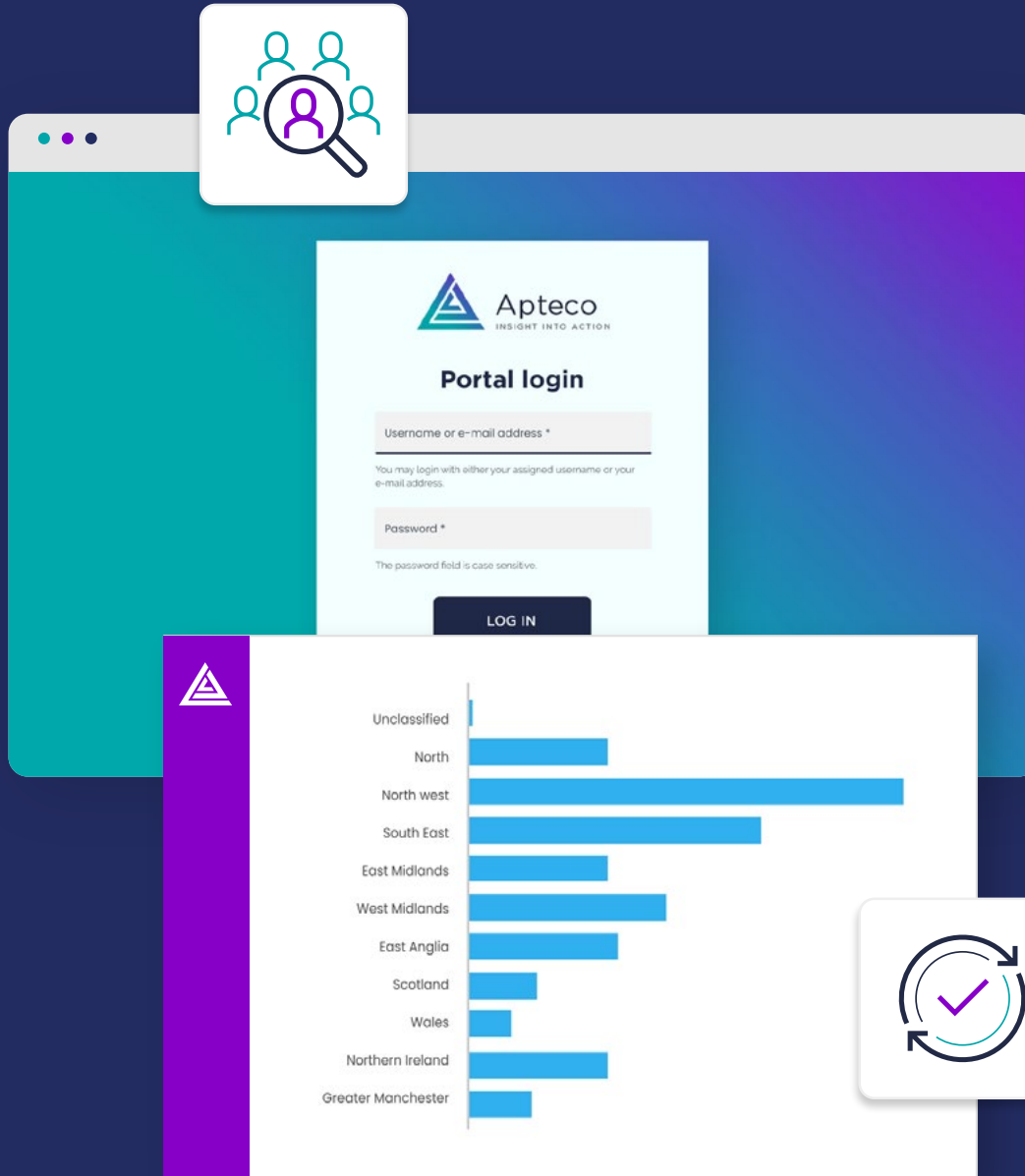
# Introducing Apteco Orbit™

[Apteco Orbit](#) enables you to seamlessly share critical data with internal stakeholders, giving them the information that's most important to them in a user-friendly format.

It's designed with marketers in mind. By providing interactive, at-a-glance access to data, your team can begin to truly understand customers existing and future.







Orbit is a platform for easy, visual, web-based access to the data in your CRM or marketing automation system.

The Apteco Marketing Suite™ integrates with a wide range of your corporate systems to unlock the data spread across your organisation. This increases the scope and depth of customer insight, allowing you to understand every interaction with your business, not just the ads they click or the products they buy.

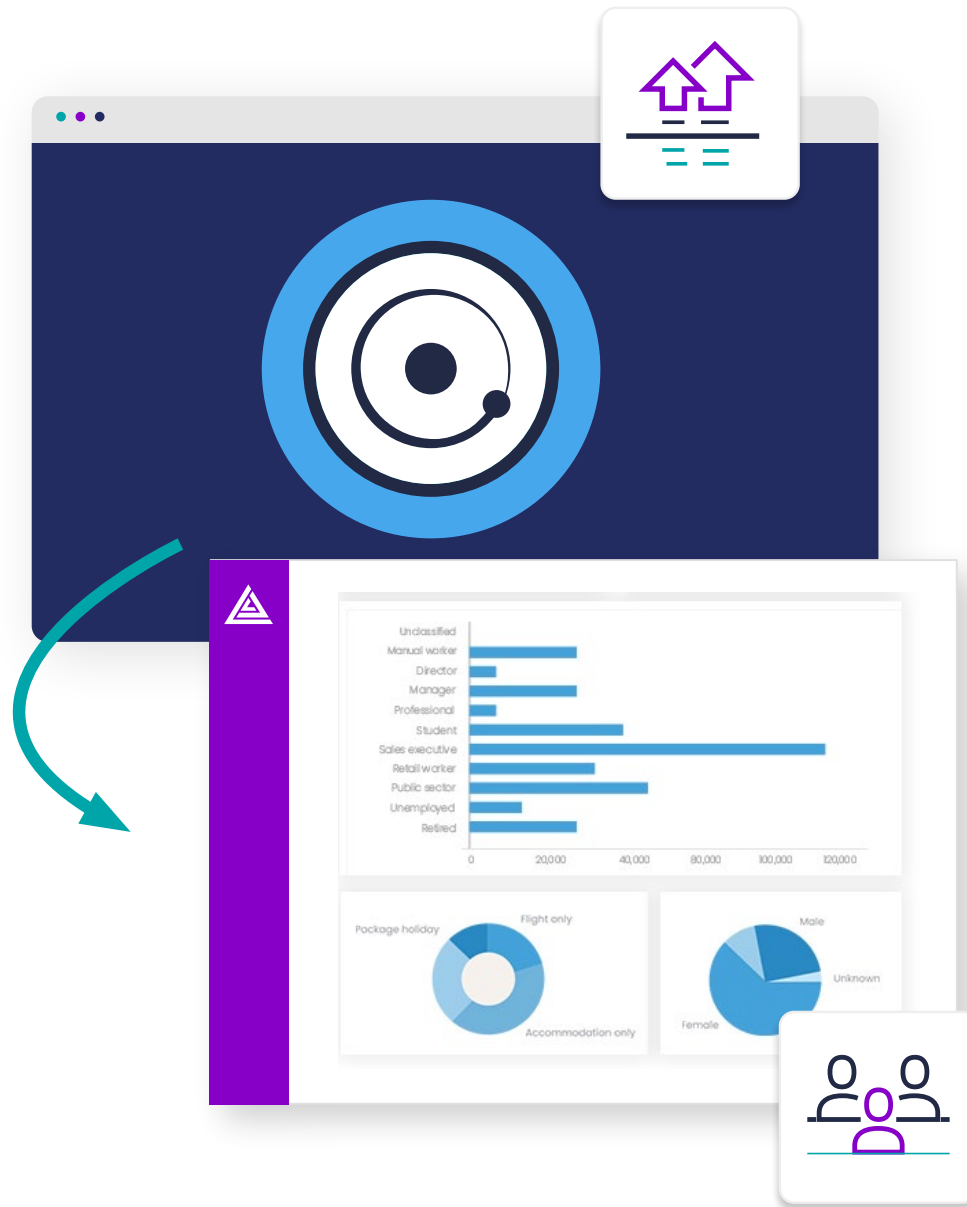
Using Orbit's Audience feature you can not only better identify target customers, but also understand the characteristics of those target groups before you deliver your marketing messages.

# You don't need to be a specialist

Connecting Apteco to your various data systems may require some technical expertise – but unlocking new insights from your data does not. Once you have been provided with an Orbit login, you can immediately begin the process of building and configuring an interactive dashboard that displays the metrics you really need for your audience development strategy.

Building interactive dashboards is quick and simple – anyone can do it with just a few minutes' training. Within moments you can begin working with the visualisations shown on your custom dashboard to unlock new insights. You can then filter data to focus on specific areas of interest, and to observe the effect on other key indicators. At any time, the filters can go on to form the basis of your new audience segments.





## From insight to action

A personal dashboard is useful for individual planning, but insights can – and where appropriate, should – be shared more widely. The audience insights you discover may have relevance to other business units, such as sales and service, and the way they deal with clients. And the same visual presentation of insights can be used to quickly explain campaign goals and outcomes to other stakeholders.

Alternatively, you may need to share your insights with third-party partners to create a rounded campaign brief. As part of the goal of democratising data and insight across your business, Orbit allows you to share your dashboards. You can email a link to anyone – even people who don't use the Apteco Marketing Suite™ – granting them access to your dashboard.





Then they too have the ability to drill and filter to better understand your customer journey – and to generate their own insights. There is no software to install, no software licence fee, and nothing to pay for read-only access to drill and filter on your dashboard.

Orbit also supports mobile web browsers so you can keep tabs on your dashboard while on the move. And when sharing dashboards you don't have to worry about the device being used by your partners, overcoming one of the common technical barriers to inter-business data access.

Orbit is an important tool in your quest to better understand your potential customers and to build a viable audience development strategy.



# Apteco Orbit and customer journey analysis

Identifying the ideal target audience is notoriously difficult, and marketers spend a good deal of their budget trying to understand the people to whom they want to sell. But the fact is that much of this information is already buried away in the various applications you use to run your business.

You can bring your first-party data together with third-party data to enrich your understanding and insight. Use data from legacy transactional systems as the basis for behavioural modelling and show the resulting target segments in your interactive marketing dashboard. Now your organisation will have the insight it needs to make decisions about your marketing plans.

Apteco Orbit provides a simple, user-friendly way to surface that information, displaying it using charts for at-a-glance insight. Importantly, it also allows you to shape that information using filter and drill-down functions to help you build workable audience segments quickly.



## Remember, when you choose Apteco Orbit, you benefit from:



A simple way to access and visualise important information about your customers and their preferences.



Simple-to-use dashboard charts that anyone can use without specialist training.



Speedy audience segmentation to better refine campaign targeting.



Great layout controls across desktop, laptop, tablet, and phone scale displays.



Configurable dashboards that allow you to shape data and reveal customer stories.



Access to the real data underlying the visualisations at any time, without any need to refer back to the data specialists.



Shareable dashboards so you can distribute data and insights with colleagues and partners – including those who don't use the Apteco Marketing Suite™.



Direct data integration into downstream channels using data layout templates and authorised sftp destinations.



Democratised data – access to valuable information and insights without needing help from your in-house data experts.



Auditable data use controls with configurable data limits for each user per day / week / month.

**Get in touch to learn more about Apteco  
Orbit and discover how you can visualise and  
share data using interactive dashboards.**

[BOOK A DEMO](#)

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