**Notes on Reporting with NinjaCat**

For all our clients, our goal is to set up their reporting as a customized plan. In order to do this to the best of our ability we need feedback from the clients and sales reps on what is missing or what they would like to see. Ultimately the following templates are what we are using to create these reports:

1. Custom Report by “Bucket”. This reporting template will have a breakdown set up by the client’s bucket. In addition, this is how their dashboard will also be set up. In this case you will see:
2. Report by Bucket
	1. If a client sets up their campaigns by Market, then that is how we will report, first focusing on Branding and then Lead Generation for each of the markets.
	2. If a client sets up their campaign by “brands” (for instance for a car dealer it might be Subaru, VW, Hyundai) then each of the brands will breakdown first Branding solutions and then Lead Generation.
	3. If a client isn’t set up for either of the first 2, then the default report will breakdown first by Branding and then by Lead Generation.

Included in each of the reports you will also see:

* 1. Re-Cap Notes slide (this is blank so the rep can drop in the re-cap notes)
	2. Goals & Current Marketing if applicable
	3. All Campaign Summary page- If a client has multiple CAT campaigns and multiple SEM campaigns, they will see an overall “SUMMARY OF ALL CAMPAIGNS” for each that apply. If this is NOT something the client cares to see, please send a note to the campaign team and they can delete that out of the reporting template for your client.
	4. Branding & Lead Generation Insights from campaign team where applicable
	5. 90-day strategy and Recommendations

Each month when you receive your reports for your clients, it is the responsibility of the sales rep to open the report and review. This is where you will add any of your own notes, add in the re-cap, add in any insights or highlights that you want to add as well as any strategy notes for next 90 days.

Below is a “cheat sheet” of talking points for each of the specific pages.

I will breakdown notes to comment on for any section where applicable.

* + 1. Re-Cap Page
		2. Goals/Benchmarks Page
		3. Current Marketing Page
		4. CAT All Campaigns Summary Page (this is a roll up of all CAT)
		5. SEM-All Campaigns Summary Page (this is a roll up of all S
		6. CAT- Specific Campaign Page
		7. CAT- Geo-Fencing / Geo-Conversion Page
		8. CAT Creative Performance
		9. Facebook Targeting Page
		10. Video Audience Targeting Page
		11. SEM- Specific Campaign Page
		12. SEM Segment Breakdown Page
		13. Next 90 Days and Strategy Recommendation Page
1. ***RE-CAP PAGE***

This is where you will put any re-cap notes from previous month. My suggestion is to put in the white space what you sent and then in the Scorecard portion (black section)- Put any notes that you want to talk about pertaining to the Re-cap or housekeeping items before you launch in to the report.

1. ***GOALS/BENCHMARKS PAGE***

This page will be the ROI page to show how the client is measuring the results of their digital marketing. Eventually our goal is to have this for ALL clients that will be an automatic feed.

1. ***MARKETING PAGE***

This is the page that you will be working on with your clients in order to show ALL the marketing they are currently doing, both digital and traditional, by month. The purpose of this page is to help to tell the story of what worked and what didn’t work in the previous month as well as talk about what other marketing is coming up. This page should help to decide what marketing is working and what isn’t based on the previous slide, which is the benchmarks/goals page.

1. ***ALL CAT CAMPAIGNS SUMMARY ROLL-UP***

This page is where you are just showing the results of ALL CAT campaigns combined. This is the ONLY SPOT that you will see the Reach & Frequency for each of the campaigns. It will not appear separate on the individual CAT campaign pages. This to highlight for this are:

* 1. Reach & Frequency- How is their frequency average? Remember that the Reach is defined as UNIQUE AUDIENCE PER DEVICE…so the frequency is also PER DEVICE. On an average the consumers are being delivered on 2 devices so you can double that number to see what it is. Our goal on a minimum is a 4-8 frequency. If it is 8-12 that is great!
	2. The Black box on the left is always referred to as the “score card”. You can comment on the TOTAL impressions, clicks & CTR for ALL CAMPAIGNS.
1. ***ALL SEM CAMPAIGNS SUMMARY ROLL-UP***
	1. Focus on the impression share average on the score card first.
	2. Then break down the impression share by google vs. Bing as well as the difference in CPC between the 2 search engines.
2. ***CAT SPECIFIC CAMPAIGN (by creative)***
	1. Review scorecard- total clicks & website view throughs as overall total actions
3. ***GEO-FENCING- SUMMARY PAGE***
	1. Give an explanation if needed that on this page we are reporting data from 2 different platforms. The geo-fence platform as well as the geo-conversion platform. Explain we do this in order to make sure that it is our “catch & balance” to make sure the campaign is performing correctly. We want to be transparent with all the data we collect to tell us the most accurate story. Start on this page with the Geo-Fencing in the middle- Walk the client down thru the page.
		1. Total Impressions
		2. Total Clicks
		3. Click Through Visits- Explain that this number is the # of people who clicked on the ad and then walked into the “conversion zone”. A lot of times this number is zero but that is ok, because it’s not about the click.
		4. View Through Visits- Technically this is a similar metric to the scorecard metric that is Campaign Converters. This is who was served the ad in the Target Zone and then walked back into the Conversion zone within 30 days.
	2. Geo-Conversion Stats- 2nd platform that we report from is on the conversion side.
		1. Total Impressions served.
		2. Natural Users- this number is who was detected in the Target Zone that we DID NOT serve an ad to. Why is this? Could be that they didn’t have their location data on or an app we could deliver the ad to, but most likely is that we didn’t have enough impressions to serve them. Remind the client that our goal is 5 target zones maximum for 10% of total impressions (usually 10K geo-fence impressions for every 100K campaign).
		3. Campaign Users- this is the number of people that we DID serve that ad to from the target zones.
		4. Campaign Converters- This is the number of people that we served an ad to that walked back into the Conversion zone. This number should be close to the View Through Visit Metric.
		5. New Campaign Converters- this is the number of people that we served that ad to that walked back into the conversion zone IN THE LAST 30 DAYS. This number weeds anyone out that came back more than once in the last 30 days…this is to hopefully eliminate employees etc. So, the actual number is somewhere between View Through Visits, Campaign converters and NEW campaign converters.
4. ***CAT CREATIVE PERFOMANCE***

Hit Control key and click on the link to open a new window to review creative

1. ***FACEBOOK TARGETING PAGE***
	1. Reach- Total amount of people we were able to reach
	2. Frequency- # of times we served them an ad
	3. Unique link clicks- between clicks and link clicks, this is the number where we only count them 1 time.
	4. Also touch on the amount of shares, loves, likes for an engagement metric.
	5. Review Creative.
2. ***VIDEO AUDIENCE TARGETING PAGE***

Same metrics for this as CAT Display- Other than review completion rates

1. ***SEM SPECIFIC CAMPAIGN PAGE***

Review the Scorecard- Impression share/Clicks/CTR

1. ***SEM SEGMENT BREAKDOWN PAGE***

Review the specific individual segments and what each impression share is as well as possibly the CPC and the total impressions to show how many people are searching for that segment.

1. ***NEXT 90 DAY- STRATEGY RECOMMENDATION PAGE***

This is where you may want to put anything that you recommend coming up or upsells, etc.