



# IN 4 STEPS TO YOUR ULTIMATE **DASHBOARD**



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# WHAT IS DASHBOARDING?

Dashboarding is alive at many companies and we noticed that at Marketing Guys. Every marketing and sales manager wants insight into results in order to make choices for the future. But how do you get that insight quickly and easily?

We have done many implementations with Klipfolio. Klipfolio is an extensive dashboard tool that can quickly link to your online marketing and sales data sources by means of, for

example, an API. Do you also want a dashboard with Klipfolio and be sure that this will be your ultimate dashboard? With this step-by-step plan we explain how you can achieve a dashboard with Klipfolio in four clear steps.

## WHAT IS DASHBOARDING?

A dashboard is a visual overview where you visually display the most important data for you or your organization. An overview on which you

can make decisions and adjust campaigns. The art of dashboarding is to keep it as simple as possible, so everyone in the organization will understand. Focus on the visual aspect and put less emphasis on the numbers, because that makes the dashboard less legible. Also, do not process too much data in a dashboard, because that does not benefit the quality. If you have a lot of data, you can choose to create multiple dashboards.



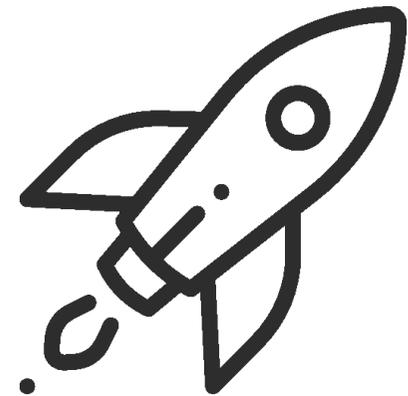
# WHAT IS KLIPFOLIO?

Klipfolio is a cloud-based platform that allows you to create dashboards with real-time information. In this way you quickly and effectively bring together the data sources that are important for your company or customers. You bring the data sources together in a “klip”. This klip contains the visual representation, possibly combined with additional functionalities. Handy if you want to know how your social media channels, newsletter, SEO or Ads campaigns perform. A Klipfolio dashboard is clear, visually strong and is distinguished by the extensive possibilities.

## WHY A KLIPFOLIO DASHBOARD?

The possibilities are almost endless with Klipfolio. Links with almost all known data sources are possible: Facebook, Google Ads, Twitter, LinkedIn, Mailchimp or, for example,

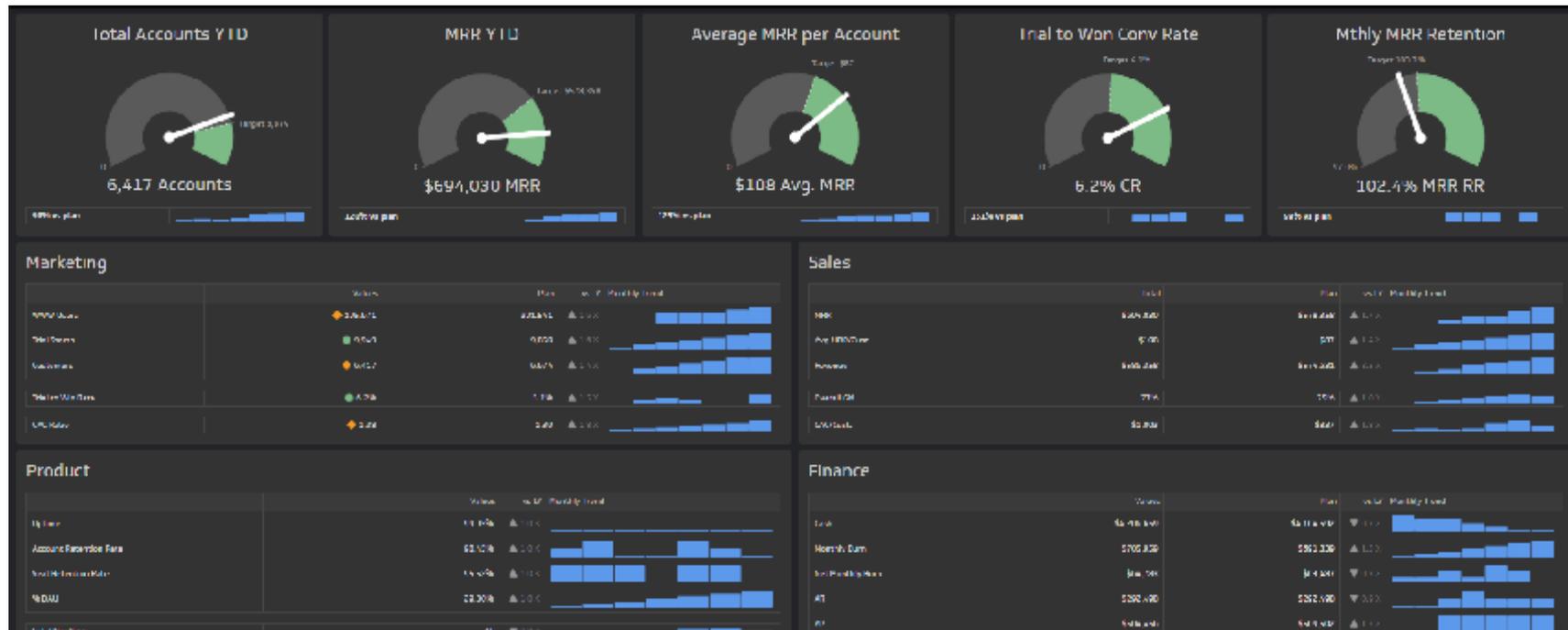
Google Analytics. The advantage is that Klipfolio develops a number of “standard Klips” (for example a graph or table) per data source. You can add these clips to your dashboard after authorization. In our opinion, the strength lies in providing insight into the data that is important to your organization. This means that you have to compile the data yourself based on, for example, an API. This way you have full control over the options and you can present the data as you wish. Or as we say: “If you torture the data long enough, it will confess.” We explain how to do this in our step-by-step plan.



# STEP 1: DETERMINE KPI's

A dashboard is ideal for showing your KPIs. KPIs stands for Key Performance Indicators and these are the most important measures to monitor the performance of your (online) marketing. You then formulate objectives that will contribute to your KPIs. These can be main goals, but also sub goals that support the main goal. KPIs are always SMART formulated. They are Specific, Measurable, Acceptable, Realistic and Timely.

You can determine KPIs internally with different teams or with the help of an online marketing agency. At Marketing Guys we do this in a brainstorm session. Together with you we make a journey through your business, determine your target group and formulate your objectives.





## STEP 2: DETERMINE DATA SOURCES

The data for your KPIs comes from different data sources. You ultimately bring these data sources together in one clear dashboard. For example, you get your visitor data and conversion data from Google Analytics, your advertising budget from Google Ads and likes and involvement from social media such as Facebook, Instagram and LinkedIn. Then you will investigate whether these data sources can be properly linked with Klipfolio and you will find out quickly enough whether this data can be properly designed. In addition, you investigate whether the data can be properly linked with Klipfolio, because there are still some things to keep in mind.

### WHICH LINKING OPTIONS DO YOU HAVE WITH KLIPFOLIO?

Klipfolio has a lot of options for linking your data. For example, you can upload data from an Excel sheet, make a connection with a Google sheet via Google Drive, an SQL or FTP server and you can link data directly via the various connectors that Klipfolio has. In addition, it is also possible to make a connection via an API. Not every API can talk directly to Klipfolio. On the next page the authentication methods are mentioned, so that you quickly know whether your API can be linked.



Bitly



Buffer



Campaign Monitor



comScore Digital Analytix



Facebook



Facebook Ads



Google AdWords



Google Analytics



Google Search Console



Google+



GoSquared



HubSpot



Infusionsoft



Instagram



Intercom



LinkedIn



Localytics



MailChimp



Mixpanel



Moz



Optimizely



Pinterest



Quintly



SEMrush

## **STEP 2: APIs**

### **OAuth:**

OAuth token authentication (OAuth) is an open standard for authentication and is used as a security measure when retrieving data from web services. Many external services require OAuth to be passed with the API request to ensure that the request and the data are secure. The disadvantage of this method is that some development takes place on the Klipfolio side. If your tool is not well known, it can take a long time to develop.

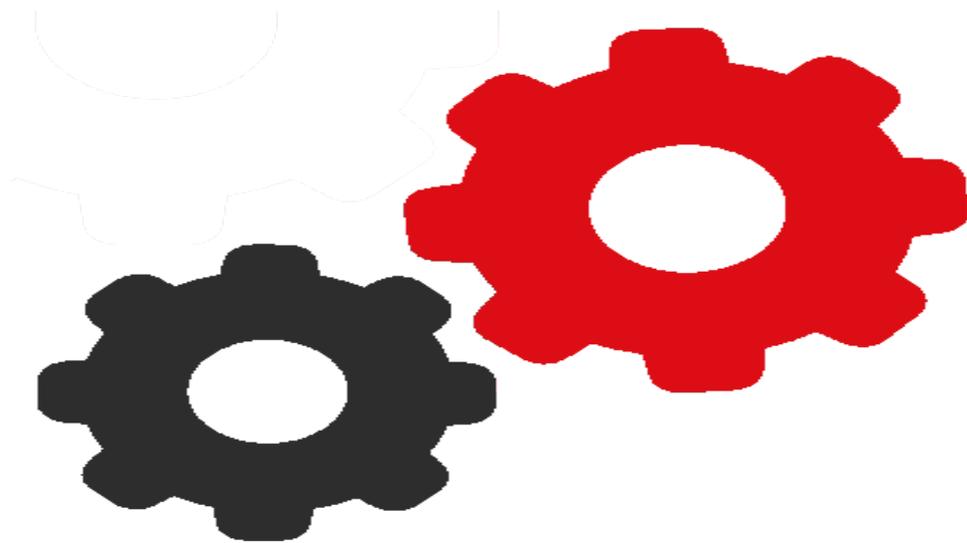
### **Basic HTTP:**

Basic HTTP authentication is an authentication method that requires passing valid credentials as part of the API call. In most cases, applicants must provide a username and password in the URL request. Requesters receive a “key” that is used as a query or header parameter. This is the most used and the easiest way to use your API in combination with Klipfolio. You then use the REST connector to make a connection.

### **2-step authentication:**

The 2-step verification method is used to securely connect to a REST / URL connector. This method consists of two steps:

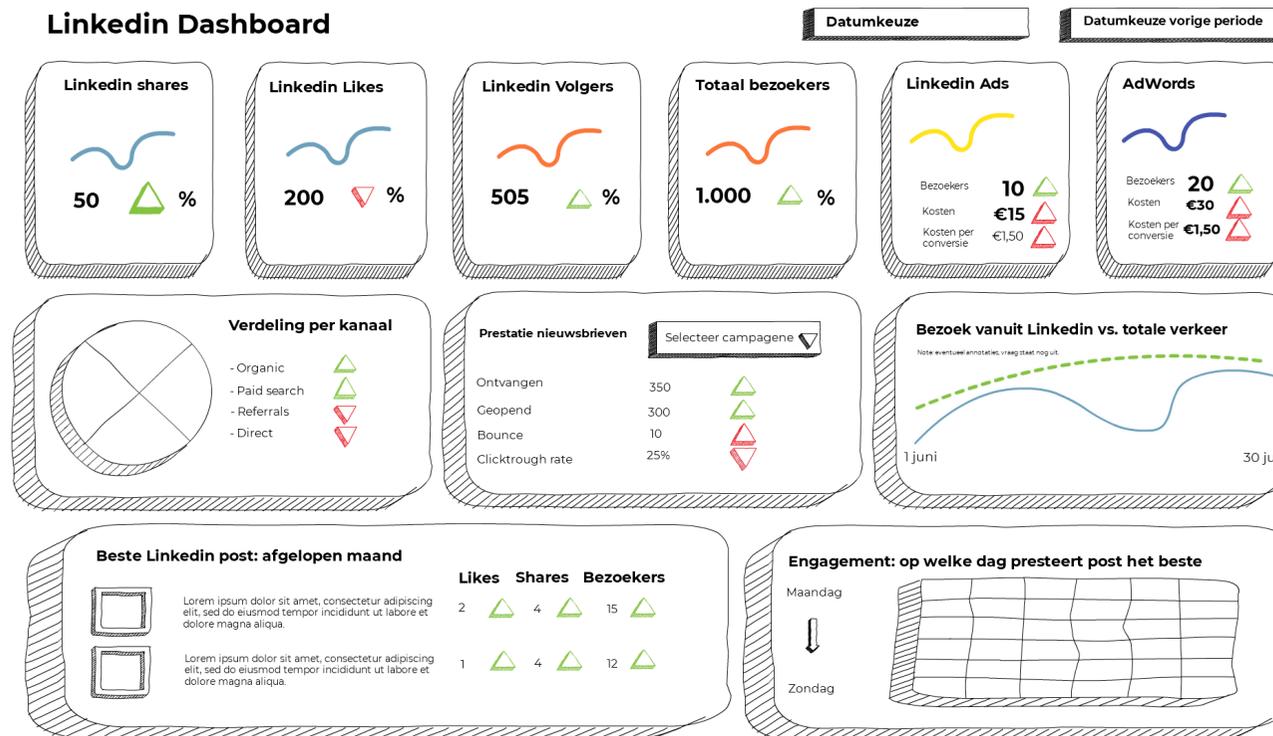
1. Send your information to a web service to create a unique verification key.
2. Use the verification key in the request URL to securely submit your request to that web service.



# STEP 3: SKETCH YOUR DASHBOARD

Developing a dashboard becomes a lot easier if you process the data in a sketch. This means that you represent the visual representation and the various functionalities in a sketch. In this way you force yourself to investigate what is possible with the data and you will not be faced with surprises during the implementation and development of the dashboard. That saves time.

You discuss the sketch with the most important people in your organization and based on the sketch you can easily give an internal cost estimate. Make sure you don't want too much information in your dashboard, because this makes the dashboard difficult to read and ensures that the dashboard has no added value, which is a shame.



# ➤ STEP 4: DEVELOPING AND CONTROLLING DATA

After the first three steps, the real work begins. You will start developing your dashboard. Klipfolio has a lot of possibilities, but stick to the basics and keep it simple. Build in a date component to view your data for different periods. In addition, a comparison with the previous period is a nice option, because it allows you to monitor your progress. Is your dashboard in the completion phase? Then check your data! A dashboard is only valuable if the data is correct.

## Benefits of Klipfolio

- Link various known data sources to your dashboard
- View your dashboard on mobile or tablet
- Stream your dashboard to a large TV screen
- Visually strong and a real eye-catcher
- Wide choice of templates
- Custom dashboards





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