



Seven Steps to Better Marketing Intelligence

It happens all too often: A sales and marketing team gathers for their weekly status meeting and each person is armed with the same report showing different results. A debate ensues as to whose report has the accurate numbers. Attentions are diverted, time is wasted and productivity is lost.

How strongly can you trust your marketing intelligence? What should you do when your system becomes more of a liability than an asset?

There is one basic truth I know about information systems: When it comes to number crunching, the reports you build are only as intelligent as the data you input and the filters you create to organize it. When installing a CRM system, I try to do the following at a minimum:

- 1) Designate a system owner and set user permission levels for accessing and editing data.**

- 2) Determine what intelligence needs reported to management.**

- 3) Determine what data fields are needed to report on that create this intelligence.**

- 4) Create your data fields in the proper, reportable format (i.e. if it's a number, create a numeric field, not a text field).**

- 5) Define your report filters based on the fields needed to report the intelligence.**

- 6) Build standard report templates that everyone has access to but cannot change without consent from the system owner.**

- 7) Communicate to staff using the system the importance of entering good quality data. Set required fields as needed.**

What are your thoughts? How do you ensure your marketing reports are trustworthy?

Demand Generation, Simplified.

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About the Author



A driven, goal and results oriented marketing professional, Brenda has over a decade of experience in a variety of b2b and consumer industries. She is as comfortable conceptualizing marketing campaigns as she is doing the actual "work" needed to generate and communicate results. A [Social Media Today](#) thought leader, she holds a Bachelor of Science degree in Marketing, an MBA from the University of Nevada, and is currently pursuing PMP certification from the Project Management Institute. In her spare time, she enjoys fitness, food & wine, travel and spending time with her three favorite boys. You can reach her via email at bsomich@gmail.com.

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