CANOPY

Canopy IQ:
Visualizing CRM Data Integration

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"It is a capital mistake to theorize before one has data."
- Sherlock Holmes

We wholeheartedly agree with Mr. Holmes, which is why we've invested so heavily in Datorama, one of the world's most powerful, AI-driven analytics and campaign management platforms.

Canopy's focus on implementing a world-class analytics service has paid off in multiple ways. One key payoff is our ability to harmonize third-party CRM data via our Canopy IQ integrated suite of reporting services. Quickly and effectively crunching massive amounts of data has greatly improved our ability to implement genuinely data driven decisions, and this commitment to accuracy is now a core component of all our campaign attribution modeling.

As detailed in Part 1 of this case study, (Canopy IQ: CRM Data Integration) merging third-party qualified lead data with campaign metrics enabled Canopy's account managers to qualify how many leads our campaigns were driving.Charting a path to success relies on highly accurate datasets that prove the source of leads and conversions from multiple channels. While this may seem like an obvious observation, achieving this goal in the digital advertising space is particularly challenging. Lead conversion is the number one KPI our partners expect us to deliver against. Sherlock Holmes' observation is more than a hundred years old, but his premise is unchanged: data rules.

Senior Living operators have increasingly turned to digital advertising over the last decade and this trend is only increasing, but something got lost during this transition. In the rush to adapt to the new digital landscape, results often took a backseat to experimentation. This is understandable. Consumers are fickle and the pressure to move quickly often results in less than stellar operational excellence.

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Canopy's investment in analytics directly correlates to an internal mandate: understand what creates a response from the target audience and assess the media spend that delivered this response. Achieving this goal means uncovering trends and identifying the insights that optimize strategy and can be applied to long-term business intelligence.

Numbers don't lie, but data can be messy, especially when it's integrated from multiple channels, locations, and timeframes. Avoiding messy data visualization requires powerful computing capabilities and the ability to visualize it in a clear and easily digestible manner.

Take the previous third-party CRM qualified lead data table (shown below) as an example. While this table does display crucial data and can be interactively filtered to break it down by source and location, there are some functionality drawbacks. Depending on what segment of data that needs to be viewed, it can be tedious, and time consuming for account managers and key stakeholders to manually interact and filter this kind of table to view qualified leads by source and community.

Another major problem arising from a lack of concise data visualization is the difficulty of comparing a filtered section of the third-party CRM lead table with other sections of the dashboard that display other sources of campaign data.

Activity T... ↓	Market S...	Lead Stat...	# New Leads	# Initial To...	# Deposits	# Initial Move in(Act)
Web Form	WE-SEO	Warm	1.00	0.00	0.00	0.00
Web Form	WE-Direct	Lost Lead	1.00	0.00	0.00	0.00
Web Form	WE-SEO	Warm	1.00	0.00	0.00	0.00
Web Form	WE-SEO	Warm	1.00	0.00	0.00	0.00
Web Form	WE-SEO	Warm	1.00	0.00	0.00	0.00
Web Form	WE-Direct	Warm	1.00	0.00	0.00	0.00
Web Form	WE-Direct	Warm	1.00	0.00	0.00	0.00
Web Form	WE-SEO	Warm	1.00	0.00	0.00	0.00
Web Form	WE - PPC - S...	Lost Lead	1.00	0.00	0.00	0.00
Web Form	WE-SEO	Warm	1.00	0.00	0.00	0.00
Web Form	WE - PPC - S...	Lost Lead	1.00	0.00	0.00	0.00
Web Form	WE-Direct	Warm	1.00	0.00	0.00	0.00
Web Form	WE-SEO	Warm	1.00	0.00	0.00	0.00
Web Form	WE-SEO	Warm	1.00	0.00	0.00	0.00
Web Form	WE-SEO	Warm	1.00	0.00	0.00	0.00
Web Form	WE - Referral	Warm	1.00	0.00	0.00	0.00
Web Form	WE-Direct	Warm	1.00	0.00	0.00	0.00
Web Form	WE-Commu...	Warm	1.00	0.00	0.00	0.00
Web Form	WE-SEO	Warm	2.00	0.00	0.00	0.00
Web Form	WE - PPC - S...	Warm	1.00	0.00	0.00	0.00
Web Form	WE - PPC - S...	Warm	1.00	0.00	0.00	0.00
Web F...	WE-SEO	W...	1.00	0.00	0.00	0.00
			130.00	12.00	0.00	0.00

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The Canopy IQ system was designed to implement clear visualizations with custom measurements so we could display critical conversion/lead metrics. In this case, the client wanted to know how many of Canopy's reported PPC ad conversions converted into market qualified leads. The qualified lead table could be filtered down to visualize only PPC sources by location and the number of PPC conversions is found in the Google Ads section lower in the dashboard. However, if a client or account manager wanted to view these comparisons to determine how to improve overall conversions, it would be frustrating to navigate up and down the dashboard page in search of a 'single source of truth'. Canopy IQ's data management system simplified this previously complex and time-consuming process for all parties.

Impressions	Clicks	CTR	Total Conversions	Conversions % Change	Conv. Rate	Conv. Rate % Change
2,395	491	20.50 %	32	▲ 256%	6.52 %	▲ 204% (4.37 %)
4,829	756	15.66 %	10	▲ 67%	1.32 %	▲ 68% (0.53 %)
1,807	179	9.91 %	4	▲ 33%	2.23 %	▲ 4% (0.09 %)
7,929	303	3.82 %	5	▲ 25%	1.65 %	▲ 45% (0.51 %)
61,146	230	0.38 %	--	--	0.00 %	▲ 0% (0.00 %)
286	28	9.79 %	2	--	7.14 %	--
2,709	461	17.02 %	29	▼ -9%	6.29 %	▲ 15% (0.84 %)
91,666	299	0.33 %	4	▼ -20%	1.34 %	▲ 22% (0.24 %)
2,755	54	1.96 %	--	▼ -100%	0.00 %	▼ -100% (-1.39 %)

The visuals displayed above represent a portion of the PPC/Google Ads source section of the Canopy IQ dashboard (note: location and campaign names have been removed for confidentiality purposes).

The first table displays the PPC campaign metrics for the selected locations including the number of conversions by campaign.

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It To give our clients a quick and easily digestible visual of the key metric comparison, we built custom measurements to create the bar charts shown above. Creating a custom measurement isolates a specific subsection of the third-party CRM data and allows us to visualize it against other defined system measurements. This functionality allows us to implement third-party lead data visuals for every source running ads and gives us a comprehensive, streamlined view of Canopy driven qualified leads.
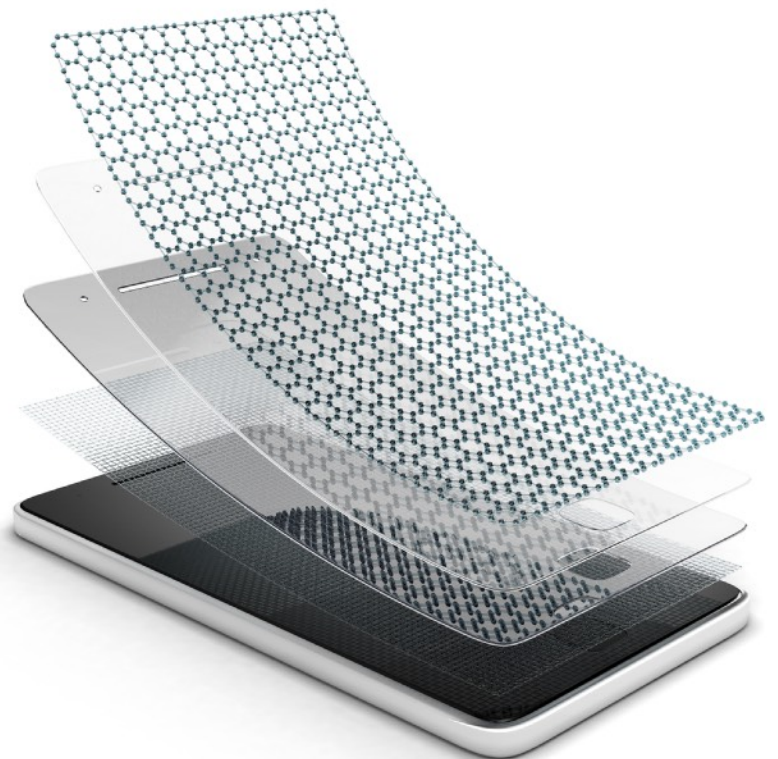
The ability to integrate third-party CRM data and visualize it based on specific KPIs has resulted in demonstrable positive outcomes. Our clients and account managers now use the time they used to spend trying to decipher campaign trends on actual optimization and future campaign improvement.

This strategy has also improved Canopy's ability to identify critical data within the campaign dashboard and reduce the chance that a digital 'bread crumb' has been overlooked.

Pro Tip: your data visualization capabilities should never be siloed.

Canopy is dedicated to consistently improving and refining our ability to integrate multiple sources of data so that we avoid the capital mistake Sherlock Holmes pointed out so accurately more than a century ago, "It is a capital mistake to theorize before one has data."

To learn more about Canopy IQ visit: https://canopyadco.com/canopy-iq/

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