Ready-to-Use
Marketing Dashboards
Your Starter Pack

CLICDATA

Getting Started with Marketing Dashboard Templates

Designing useful and attractive dashboards that fit your needs can take time, especially if this is your first time working with data visualization.

Even if you have some experience in building data visualization elements, sometimes you just need some inspiration & fresh ideas on how to start a new dashboard or a set of KPIs for your internal clients or teams.

To get there though there are some initial steps: you will first define and **set up data connections**, then **load** your data, after which you will most likely **clean**, **transform** and **aggregate** your data to prepare your KPIs. The final step is how to present that data.

However it is better to first design your end goal, your objective. Having a final state of what is important to measure, visualize and monitor, makes the building process easier and then helps you decide on which data to use and manage.

That's why we created a catalog of free dashboards templates you can use as a stepping stone.

This guide covers our portion of the catalog related to **Marketing** dashboards.

Included In This Guide:

Marketing Ad Overview Dashboards

These dashboards templates will give you a **broad overview** of **all Paid Marketing activities** of your company or teams. Their audience triggers a Marketing Manager or an Online Marketing Manager who needs to get a global understanding of current performances, brand awareness, and ROI.
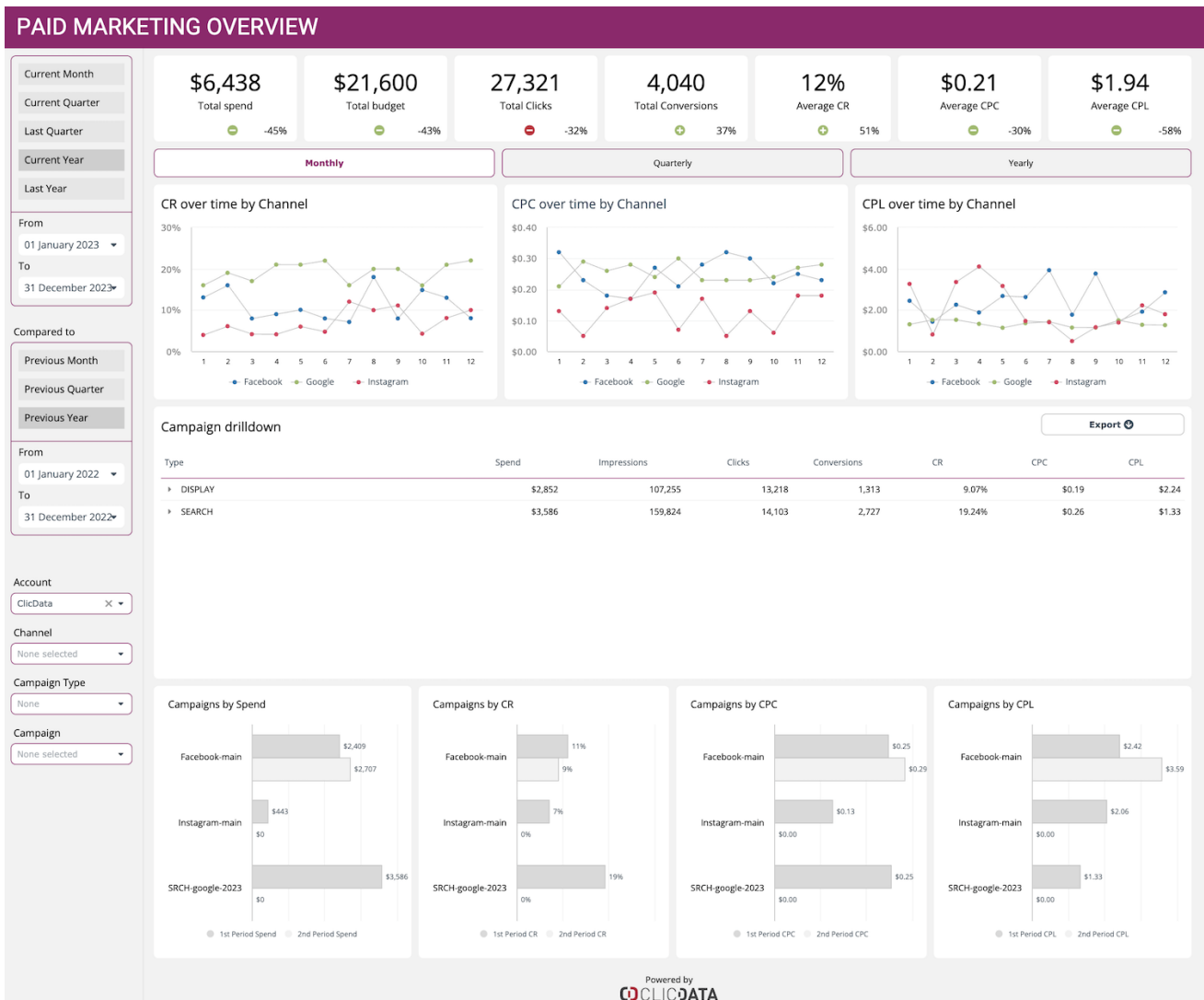
Answer Key Business Questions

- How many Leads were transformed into Customers in the last 6 months?
- What is the Customer Acquisition Cost (CAC)?
- Which campaign has the highest ROI?
- What is the trend of the Quarterly Revenue and ROI in the last year?
- What is the conversion rate of my marketing campaign across all channels?
- Which email campaign has the best conversion rate?
- Does my Open Rate trend up?
- How fast does my brand awareness progress on social media?

Template	Audience	KPIs	Connectors
Paid Marketing Overview	Marketing Manager	Spend, Budget, Conversions, CPC / CPM, CPL, CR	Google Ads, Facebook Ads, LinkedIn, Microsoft Advertising, GA4
Social Media Overview	Marketing Manager	Followers / Fans, Engagement rate	Facebook, Instagram, TikTok, YouTube, LinkedIn
Customer Acquisition	Marketing Manager	Leads Lifecycle, ROI, CAC, LTV / CAC	HubSpot, Keap, Pipedrive, SugarCRM, Netsuite, Salesforce, Sellsy, Mothernode, GA4
Emailing Performance	Marketing Manager	Open rate, Click rate, CVR, Subscribers, Unsubscribe rate	MailChimp, Constant Contact, GA4
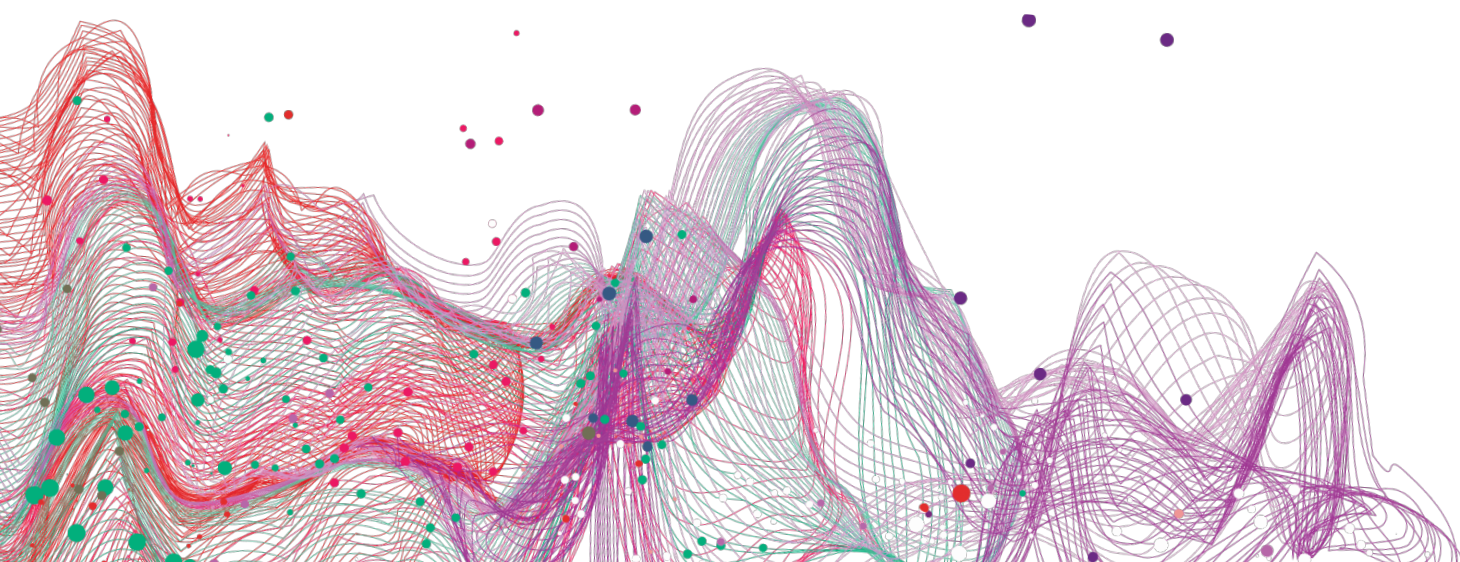
Social Media Overview Dashboards

These dashboards are designed to help you monitor your **online brand awareness** and the evolution of your social media presence and content. Multiple accounts for each platform can be combined into a dashboard. For instance, if you manage multiple Facebook pages, you can aggregate the results into a single Facebook dashboard and apply filters when you need to drill down into the analytics of a specific Facebook page.
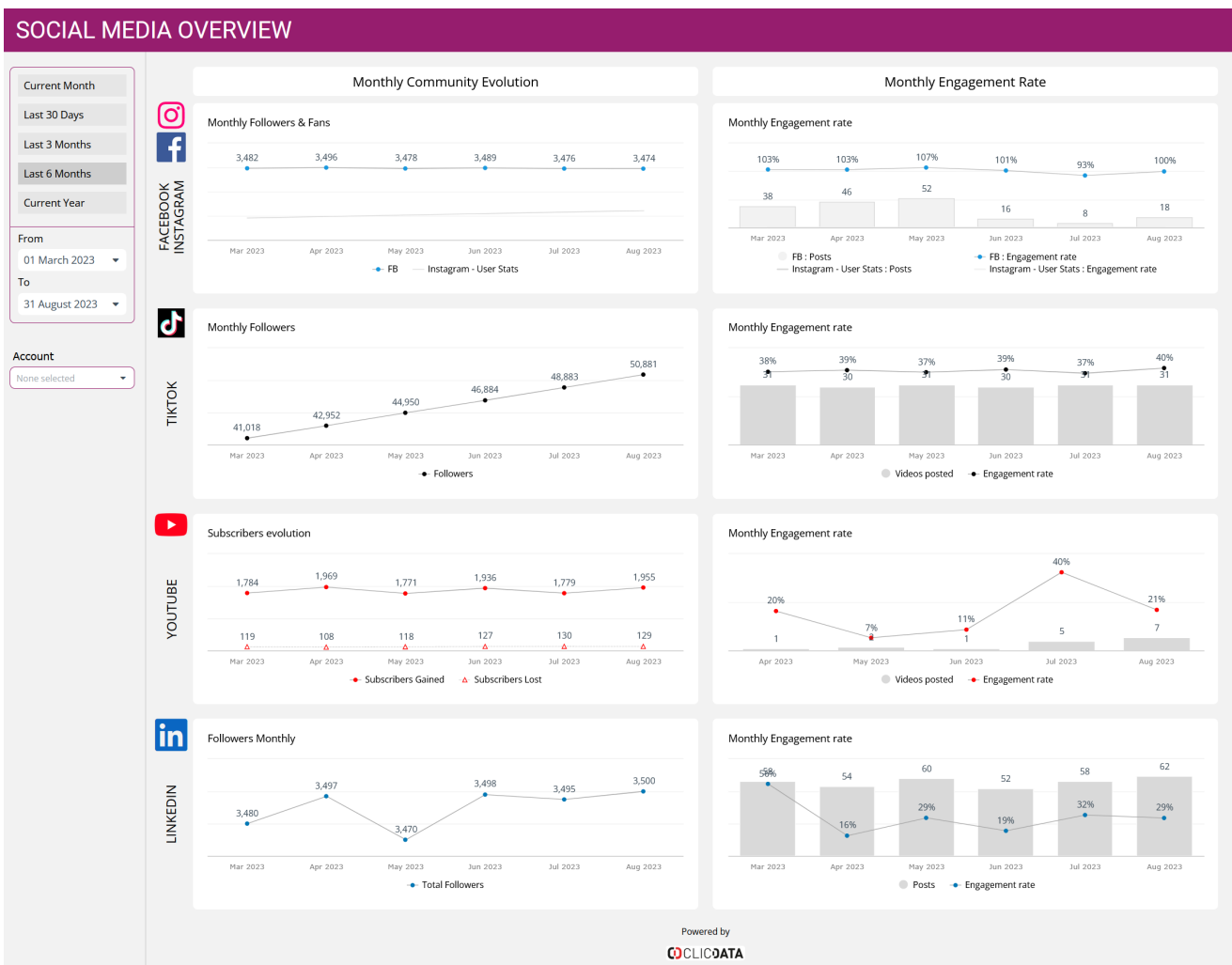
Answer Key Business Questions

- Does my Engagement Rate on LinkedIn improve over time?
- Which posts got the most visibility and did this improve engagement?
- Am I loosing Followers and Fans?
- Which type of content on Instagram gets the best Reach?
- How long do viewers watch my videos on TikTok or YouTube?

Template	Audience	KPIs	Connectors
LinkedIn Organic	Social Media Manager	Followers, Posts, Impressions, Engagements, Engagement rate	LinkedIn
Instagram Organic	Social Media Manager	Followers, Posts, Impressions, Reach, Engagement rate	Instagram for Business
Facebook Organic	Social Media Manager	Fans, Posts, Views, Likes, Engagements, Engagement rate	Facebook
TikTok Organic	Social Media Manager	Top Videos, Followers, Likes, Views, Duration, Engagement rate	TikTok
YouTube Organic	Social Media Manager	Subscribers, Videos, View Duration, Engagement rate	YouTube
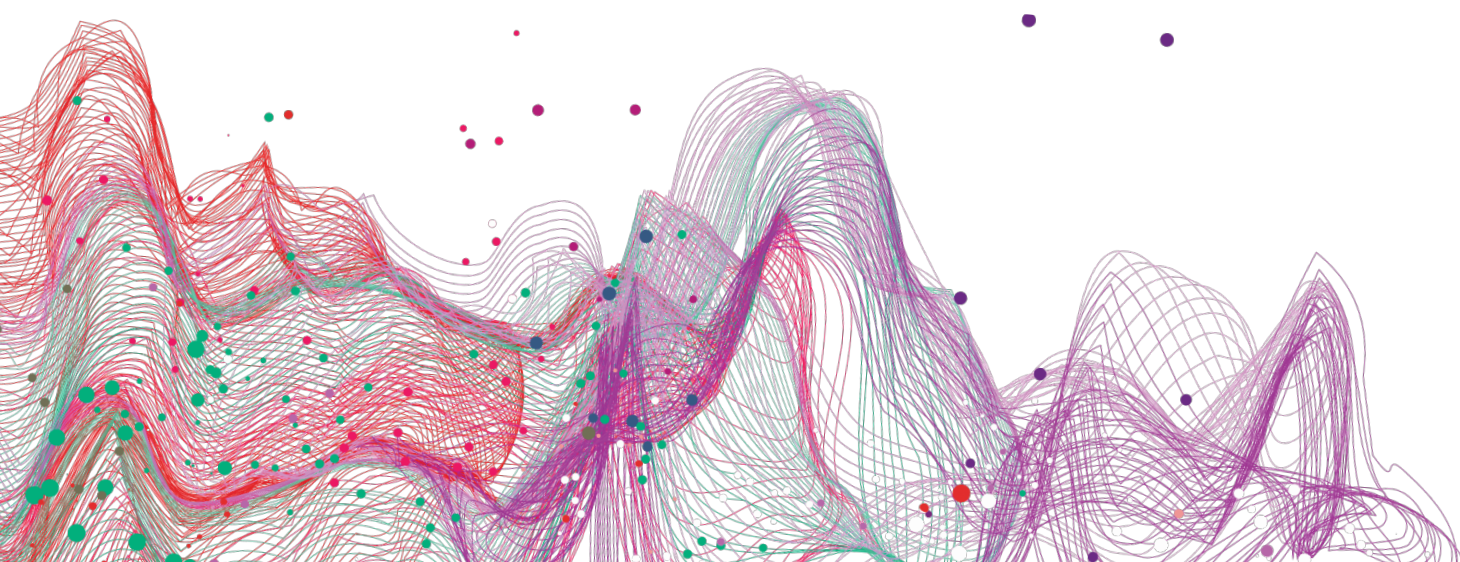
Customer Acquisition Dashboard Template

The **Customer Acquisition dashboard** provides an overview of the **customer funnel performance**, from lead to customer. Based on CRM and Marketing spend data, ROI and CAC are calculated down to the campaign level, so you can replicate your best results.

CUSTOMER ACQUISITION

| | 9,896 MQLs | 386 Customers | $231,545 Revenue | $1,369,520 Spend | 0.17 ROI | $3,547.98 CAC | Select a LTV $4,000 | 1.13 LTV / CAC |

Leads Lifecycle — Leads created in the selected period. Export ▾

Medium	Leads	MQL	SQL	Opportunities	Customers	CR Cust / MQL	Revenue	Spend	ROI	CAC	LTV / CAC
▸ AD	7,165	3,483	280	246	137	3.9%	$84,513	$114,752	0.74	$837.61	4.78
▸ CPC	6,793	3,348	268	233	133	4.0%	$79,367	$84,000	0.94	$631.58	6.33
▸ REFERRAL	1,193	558	50	39	26	4.7%	$13,823	$282,256	0.05	$10,856.00	0.37
▸ EMAIL	1,168	576	39	36	19	3.3%	$12,433	$121,424	0.10	$6,390.74	0.63
▸ PPL	1,156	562	51	40	24	4.3%	$14,100	$106,720	0.13	$4,446.67	0.90
▸ WEBSITE	474	242	27	26	17	7.0%	$10,230	$170,112	0.06	$10,006.59	0.40
▸ SOCIAL	472	208	26	23	16	7.7%	$8,264	$165,696	0.05	$10,356.00	0.39
▸ DIRECT	223	98	9	8	5	5.1%	$3,142	$0		$0.00	
▸ NETWORK	219	108	7	7	3	2.8%	$2,438	$86,848	0.03	$28,949.33	0.14
▸ n.a.	216	92	7	7	3	3.3%	$1,508	$0		$0.00	
▸ SEO	201	109	9	8	3	2.8%	$1,727	$237,712	0.01	$79,237.33	0.05
Total							**$231,545**	**$1,369,520**			

Filters: Current Month, Current Quarter, Last 6 Months, Current Year, Last Year. From 01 October 2022, To 20 April 2023. Owner: None. Industry: None. Role: None. Region: 4 selected. Country: None selected. Medium: 11 selected.

Quarterly Customers & Revenue — Customers, Revenue: Sep 2022: 193, $113,000; Dec 2022: 189, $103,834; Mar 2023: 156, $90,066; Jun 2023: 31, $19,387

Quarterly CAC & ROI — CAC, ROI: Sep 2022: $2,124.02, 0.28; Dec 2022: $2,364.44, 0.23; Mar 2023: $3,840.10, 0.15; Jun 2023: $19,174.19, 0.03

CAC & ROI by Region in selected period (select full months only) — CAC, ROI: APAC: $962.92, 0.61; EMEA: $1,132, 0.50; LATAM: $1,088.5, 0.54; NAM: $999.35, 0.56

Powered by CLICDATA

How To Use The Template?

On the left hand, a date range selector and **different filters** can be used to define the period and segment of leads and customers you are looking at. These selections will apply on **all the widgets** of the dashboard.

CUSTOMER ACQUISITION

4,188 New MQLs	2,759 New Customers	$204,878 Revenue	$1,294,688 Spend	0.16 ROI	

Filters:
- Current Month
- Current Quarter
- Last 6 Months
- Current Year
- Last Year

From: 01 February 2023
To: 31 July 2023

Owner: None
Industry: None
Role: None
Region: None selected
Country: None selected
Medium: None selected

Leads Lifecycle — Leads created in the selected period.

Medium	Leads	MQL	SQL	Opportunities	Customers	CR Cust / MQL	Revenue
AD	6,488	2,648	2,108	1,604	1,029	38.9%	$80,156
CPC	6,166	2,460	1,984	1,476	983	40.0%	$68,435
EMAIL	1,038	449	345	239	168	37.4%	$15,108
REFERRAL	1,025	405	320	240	155	38.3%	$10,771
PPL	995	389	317	225	149	38.3%	$11,204
WEBSITE	404	177	144	112	72	40.7%	$6,277
SOCIAL	400	154	120	87	63	40.9%	$1,298
NETWORK	216	86	67	49	34	39.5%	$1,973
SEO	213	100	70	55	40	40.0%	$4,214
n.a.	206	81	66	50	29	35.8%	$2,636
DIRECT	184	75	59	51	37	49.3%	$2,806

Total $204,878

Quarterly Customers & Revenue

	Dec 2022	Mar 2023	Jun 2023	Sep 2023
Customers	4,089	4,051	4,175	2,101
Revenue	$2,350,048	$2,329,508	$2,396,342	$1,208,052

○ Customers ○ Revenue

Quarterly CAC & ROI

	Dec 2022	Mar 2023	Jun 2023
CAC	$109.29	$147.88	$142.37
ROI	5.26	3.89	4.03

○ CAC ○ ROI

Powered by CLICDATA

Focusing On KPIs That Matter

In the top section, number indicators show **top level KPIs** for a **quick understanding of your funnel performance**. Use the LTV slider to change this value and related calculations such as LTV / CAC KPI positioned next to it and in the table.
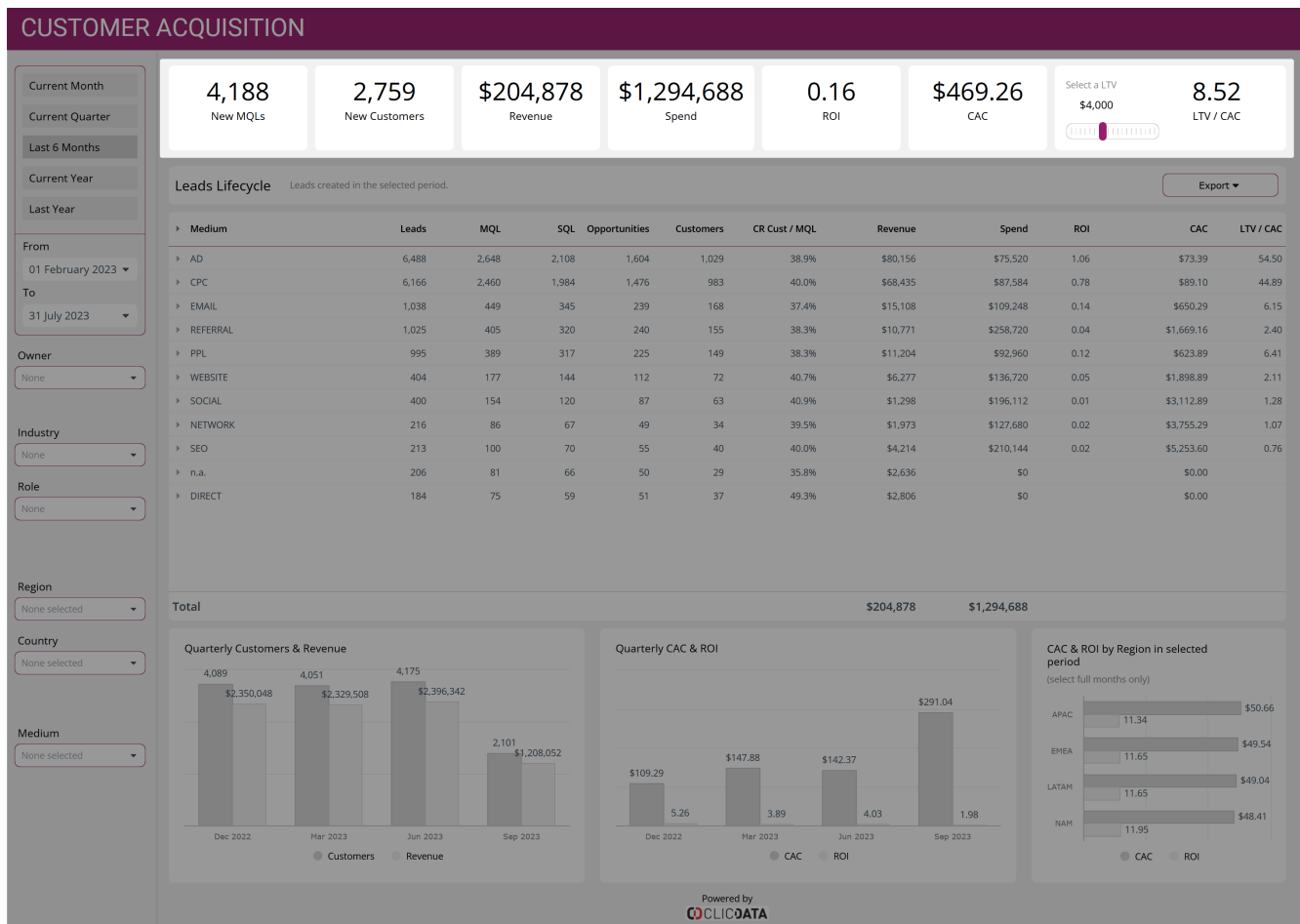
The first 4 KPIS are based off datasets.

- **New MQLs**: leads created in the period and that made it to the Opportunity stage
- **New Customers**: leads created in the period and that made it to the Customer stage
- **Revenue**: amount generated from new Customers
- **Spend**: Marketing spend in the selection period

ROI, CAC and LTV/CAC are calculated from the previous widgets.

- **ROI**: Revenue/Spend
- **CAC**: Spend/New customers
- **LTV/CAC**: CAC/LTV

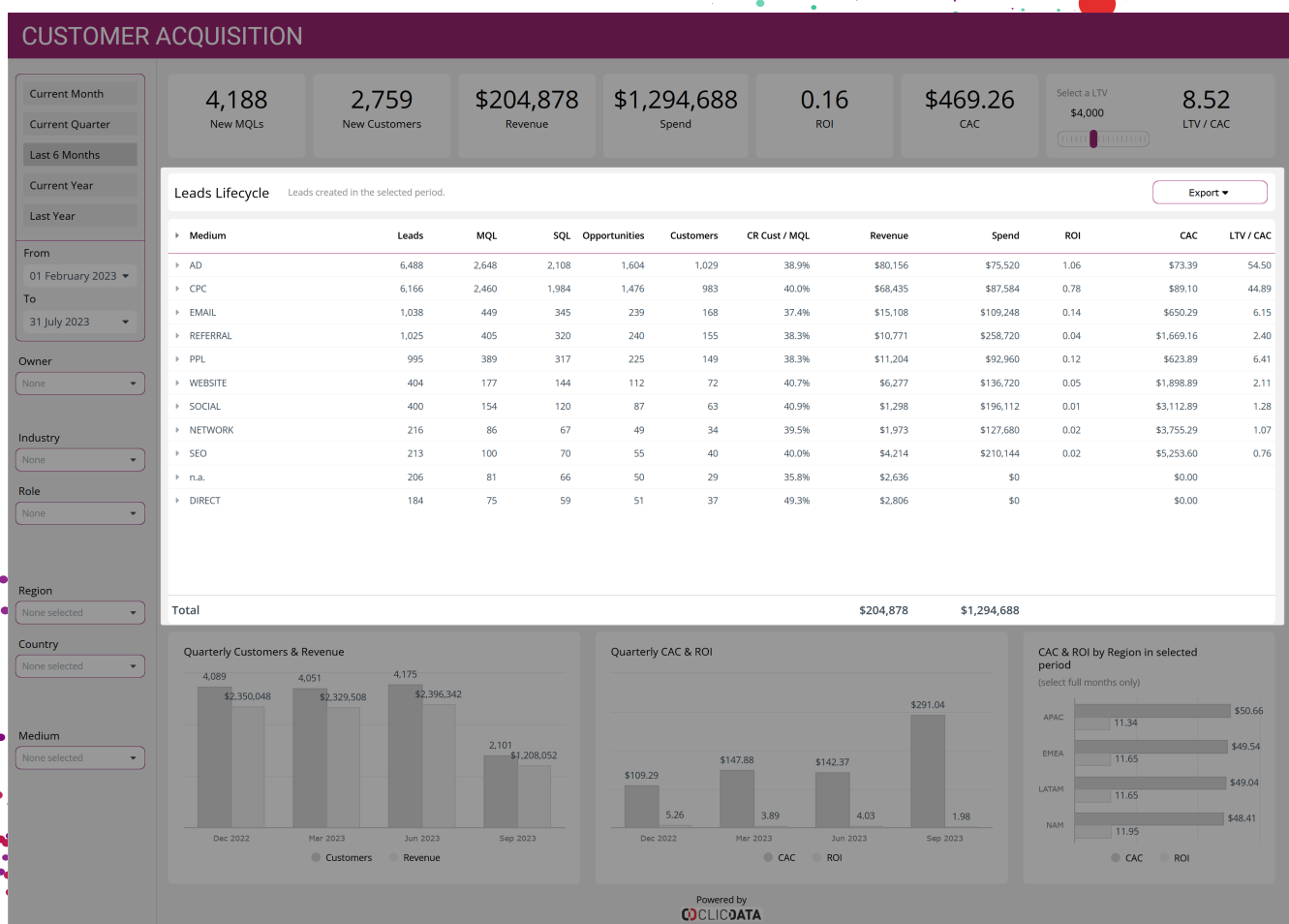# Bridge The Gaps In Your Lead Funnel

The detailed funnel of these top KPIs can be seen in the table below. Drill down into the analysis of the **Funnel by medium, source and campaign.**

Both top KPIs and table are filtered on leads that started in the selected period, meaning customers created within the period but which lead stage started before the selected period are not counted in the table.
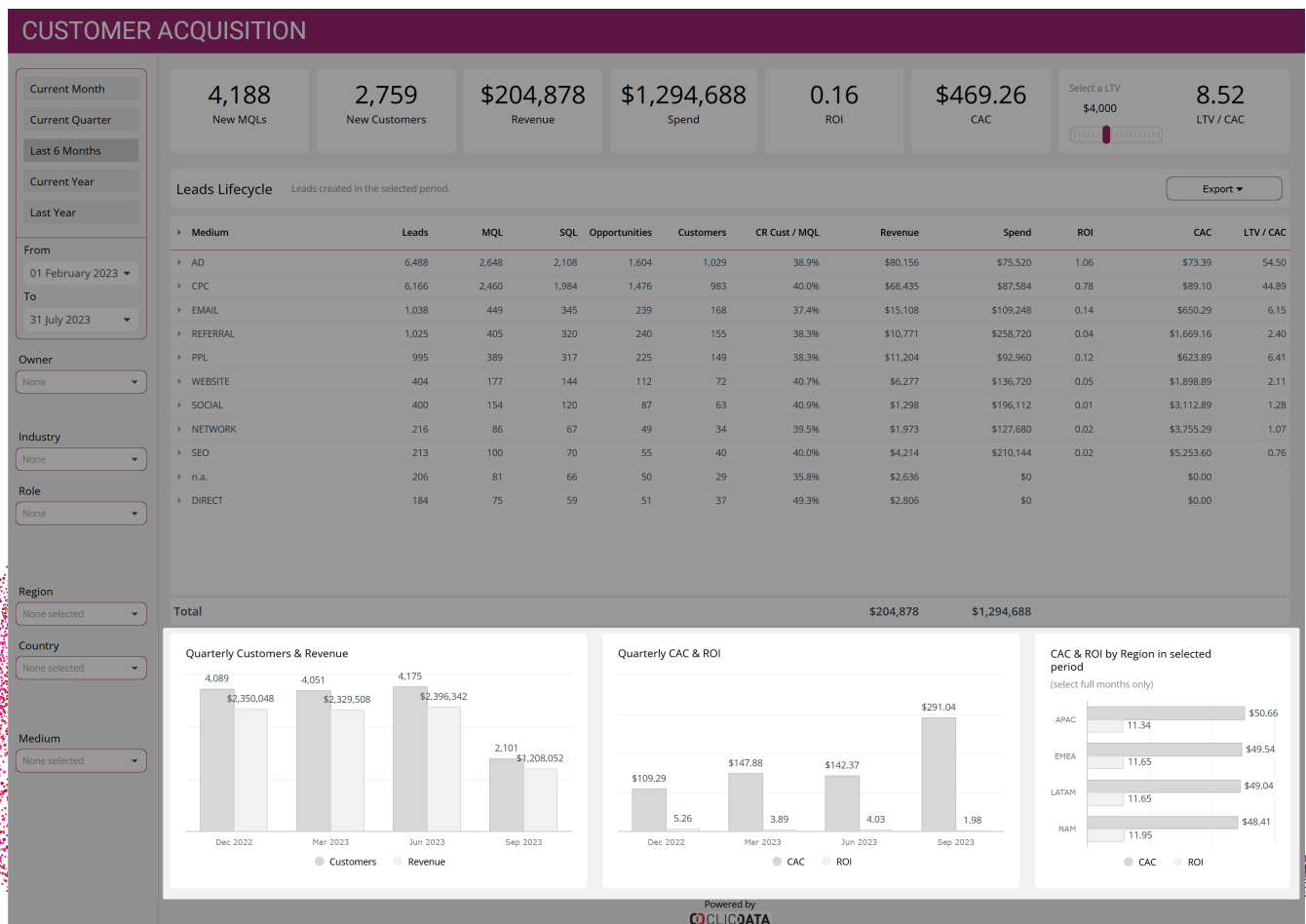
CUSTOMER ACQUISITION

4,188 New MQLs	2,759 New Customers	$204,878 Revenue	$1,294,688 Spend	0.16 ROI	$469.26 CAC	Select a LTV $4,000	8.52 LTV / CAC	

Filters:
- Current Month
- Current Quarter
- Last 6 Months
- Current Year
- Last Year

From: 01 February 2023
To: 31 July 2023

Owner: None
Industry: None
Role: None
Region: None selected
Country: None selected
Medium: None selected

Leads Lifecycle — Leads created in the selected period.   Export ▾

Medium	Leads	MQL	SQL	Opportunities	Customers	CR Cust / MQL	Revenue	Spend	ROI	CAC	LTV / CAC
▸ AD	6,488	2,648	2,108	1,604	1,029	38.9%	$80,156	$75,520	1.06	$73.39	54.50
▸ CPC	6,166	2,460	1,984	1,476	983	40.0%	$68,435	$87,584	0.78	$89.10	44.89
▸ EMAIL	1,038	449	345	239	168	37.4%	$15,108	$109,248	0.14	$650.29	6.15
▸ REFERRAL	1,025	405	320	240	155	38.3%	$10,771	$258,720	0.04	$1,669.16	2.40
▸ PPL	995	389	317	225	149	38.3%	$11,204	$92,960	0.12	$623.89	6.41
▸ WEBSITE	404	177	144	112	72	40.7%	$6,277	$136,720	0.05	$1,898.89	2.11
▸ SOCIAL	400	154	120	87	63	40.9%	$1,298	$196,112	0.01	$3,112.89	1.28
▸ NETWORK	216	86	67	49	34	39.5%	$1,973	$127,680	0.02	$3,755.29	1.07
▸ SEO	213	100	70	55	40	40.0%	$4,214	$210,144	0.02	$5,253.60	0.76
▸ n.a.	206	81	66	50	29	35.8%	$2,636	$0		$0.00	
▸ DIRECT	184	75	59	51	37	49.3%	$2,806	$0		$0.00	
Total							$204,878	$1,294,688			

Quarterly Customers & Revenue

	Dec 2022	Mar 2023	Jun 2023	Sep 2023
Customers	4,089	4,051	4,175	2,101
Revenue	$2,350,048	$2,329,508	$2,396,342	$1,208,052

Quarterly CAC & ROI

	Dec 2022	Mar 2023	Jun 2023	Sep 2023
CAC	$109.29	$147.88	$142.37	$291.04
ROI	5.26	3.89	4.03	1.98

CAC & ROI by Region in selected period
(select full months only)

Region	CAC	ROI
APAC	$50.66	11.34
EMEA	$49.54	11.65
LATAM	$49.04	11.65
NAM	$48.41	11.95

Gain a Consolidated View Of Your Performance Over Time

The 3 charts at the bottom display **aggregated KPIs** by Quarter (last 12 months) and by Region:

- Customers & Revenue
- CAC & ROI

All widgets and filters can be changed easily to your liking in a few clicks.

CUSTOMER ACQUISITION

4,188 New MQLs	**2,759** New Customers	**$204,878** Revenue	**$1,294,688** Spend	**0.16** ROI	**$469.26** CAC	Select a LTV $4,000	**8.52** LTV / CAC

Leads Lifecycle Leads created in the selected period.   Export ▾

Medium	Leads	MQL	SQL	Opportunities	Customers	CR Cust / MQL	Revenue	Spend	ROI	CAC	LTV / CAC
▸ AD	6,488	2,648	2,108	1,604	1,029	38.9%	$80,156	$75,520	1.06	$73.39	54.50
▸ CPC	6,166	2,460	1,984	1,476	983	40.0%	$68,435	$87,584	0.78	$89.10	44.89
▸ EMAIL	1,038	449	345	239	168	37.4%	$15,108	$109,248	0.14	$650.29	6.15
▸ REFERRAL	1,025	405	320	240	155	38.3%	$10,771	$258,720	0.04	$1,669.16	2.40
▸ PPL	995	389	317	225	149	38.3%	$11,204	$92,960	0.12	$623.89	6.41
▸ WEBSITE	404	177	144	112	72	40.7%	$6,277	$136,720	0.05	$1,898.89	2.11
▸ SOCIAL	400	154	120	87	63	40.9%	$1,298	$196,112	0.01	$3,112.89	1.28
▸ NETWORK	216	86	67	49	34	39.5%	$1,973	$127,680	0.02	$3,755.29	1.07
▸ SEO	213	100	70	55	40	40.0%	$4,214	$210,144	0.02	$5,253.60	0.76
▸ n.a.	206	81	66	50	29	35.8%	$2,636	$0		$0.00	
▸ DIRECT	184	75	59	51	37	49.3%	$2,806	$0		$0.00	

| Total | | | | | | | $204,878 | $1,294,688 | | | |

Quarterly Customers & Revenue

Dec 2022	Mar 2023	Jun 2023	Sep 2023
4,089 $2,350,048	4,051 $2,329,508	4,175 $2,396,342	2,101 $1,208,052

○ Customers ○ Revenue

Quarterly CAC & ROI

Dec 2022	Mar 2023	Jun 2023	Sep 2023
$109.29 5.26	$147.88 3.89	$142.37 4.03	$291.04 1.98

○ CAC ○ ROI

CAC & ROI by Region in selected period
(select full months only)

	CAC	ROI
APAC	$50.66	11.34
EMEA	$49.54	11.65
LATAM	$49.04	11.65
NAM	$48.41	11.95

○ CAC ○ ROI

Powered by CLICDATA

FAQ

How To Use These Templates?

A dashboard template can be used in different ways. Once the template is added to your account, it works like any other dashboard you may have created yourself.

The most straight forward usage is to simply use the template as is and rebind it to your own datasets. This way, the **dashboard will be ready to use out of the box**.

Another use would be to rebind it to your data, and then **adapt the design and visualizations** as wished. Remove widgets, change their design options, add new datasets, combine widgets from different dashboards together... the only limit is your creativity!

The third use case is to download a template to **learn how a dashboard is build**. In edit mode, open each widget to see how it has been set up, how it is filtered by other widgets, how conditional visibility is set or how formulas are used in filters or data bindings.

Bonus: When a dashboard template is added to your account, the **sample datasets** used for the dashboard are added as well. Explore them to get a good idea of the data schema needed to build a smart dashboard. Or use them for your own presentations of dashboard designs for your customers.

What Data Do The Templates Use?

The data used to feed these dashboard templates is dummy data, created for the purpose of the templates. Datasets cover the months from January 2022 to December 2024.

Each dashboard is based on one or more datasets that is the closest possible to the real datasets you would get from the sources needed to feed the dashboards.

Make It Your Own!

Rebinding a dashboard with your own data can be done in a few clicks. Simply follow the instructions described in our Help Center.

You may need to create a Data Flow to transform and aggregate your datasets slightly to adapt to the data schema used in the dashboards. Missing columns from your data will not be populated if used in the dashboard's widgets.

This operation should be of minimal effort, as the dashboard templates have been designed to fit the datasets provided by classic Marketing, CRM, Social Media, Web Traffic sources.

Are These Templates Free?

All dashboard templates are free to use! Pretty amazing, right?

And If I Need Extra Help?

Our Data Analysts from the Services Team are here to assist you in different ways! Whether it's to set up your dashboard templates, adapt them to your specific needs, or data sources.

Book a call with our team to see how we can help you hit the ground running!

We Have More Up Our Sleeves

Discover more off-the-shelf dashboard templates to **get the full picture of your marketing performance**.
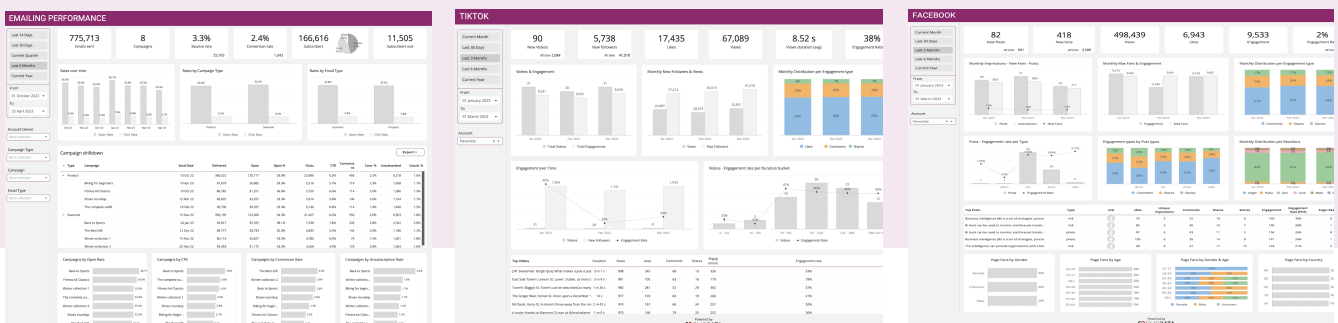
Get Your Dashboards Up And Running Today

<div style="button">Get the dashboard templates</div>

True Performance starts with a great Data Platform

CLICDATA