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HBX ANALYTICS TIPS & TRICKS

WebSideStory's HBX Analytics is one of the leading enterprise web measurement solutions. And like most mature enterprise software solutions, it provides a rich user interface with numerous tools and functions. That very richness can work against users, however. As software grows, it tends to accrete layers of functionality – often quite unknown to the vast majority of the user-base. And, of course, having so much functionality can make it hard to figure out just where the thing you need really is. So, we compiled some of our own secret tips and tricks from years of practice with this tool. Guess they're not secrets anymore, but making Web Analytics professionals lives a bit easier is what we're all about. Enjoy!

Longitudinal Analysis

"What do my visitors do after...." is probably the single most commonly asked question by web channel marketers. So it's a surprise that the main web analytic tools don't make this an easy question to answer – at least when the question is meant to cover a significant timeframe and not a single session. Because if you are interested in what happens after an event in a single session, there are a plethora of tools for helping you figure out what's going on (Events, Pathing, Visit Based Active Segments, Affinity). But suppose your visitors sign up for a class or an account or a tool and you want to know what the subsequent effect on their behavior is. It's not easy to do.

Your first inclination will probably be to use visitor-based segments (Active Segments where you specify a start and stop date). And you'd be right. But that's only half the answer. Suppose you want to track the before and after behavior for visitors who signed up for a class in July. You create an Active Segment for June through August and you specify the criteria to be...what? Suppose the class sign-up form has a specific Thank You page – so you set the Segment criteria to be anyone who hit that page. That may seem like the right answer but it won't really do the job. The problem is that your class sign-up could have occurred in June, July or August.

So you don't have a before and after comparison. Indeed, there is no straightforward way to define the Active Segment so that you get visitors who signed up for classes in July while also including their June and August behavior.

So here's the trick – and it's a powerful one. For key events that you want to track longitudinally, you should define an Internal Campaign that is period specific. In our example above, you create a July Class Sign-Up Campaign (Tagless, of course) that runs from July 1st to July 31st. Now, when you create your Active Segment, you specify as criteria visitors who converted on the July Class Sign-Up campaign – but you still pick June 1st to the end of August as your 3 month period. If you created June and August campaigns, you can even build the Active Segment to exclude these. Now, you have a "pure" segment of visitors who signed up for a class in July – and you can compare their before and after behavior by setting the time periods to June and August and looking at their behavior.

This is a tremendously powerful technique – one that almost any HBX Analytics analyst should have in their arsenal, but it's far from obvious. It's only real disadvantage is that you will need to know in advance what you are going to analyze – because you can't create the campaigns retroactively. So if it's near the end of the month, get busy creating those time-based campaigns!

Content Match Analysis

If your organization is an active SEM PPC buyer and uses Content Match, then this next tip is both marvelously simple and incredibly useful. Here's the deal: Content Match campaigns are run through Google (and other Search Engines) but they aren't like Search. When they show up at your site, they don't have a keyword associated with them. Why not? Well, these are visitors who saw your Ad on a publishing site other than Google Search. Many publishers sell ads via Google rather than directly – and PPC Buyers can place ads thousands of sites by turning on Content Match for an existing search campaign. Google matches your campaign's



search terms (by Ad Group) to the content on various sites and then chooses where it makes sense to advertise.

So there is no one search term associated with a visitor who lands on your site, how can you track Content Match effectiveness? Part one of this tip is to code your Ad Group in your Landing Page URL so that you can create tagless KNC (that's HBX Analytics lingo for PPC) campaigns on these Groups. In fact, the idea of coding your PPC URLs with Ad Group is a good one even if you aren't buying Content Match. Many individual search terms don't have enough volume to analyze with statistical meaningfulness – so coding Ad Group can give you dramatically better insight into the true performance of baskets of related search terms.

Now here's part two of this tip – when you buy Content Match campaigns, your buyer doesn't know which sites are sending you volume. That's right, the buyer knows how many Content Match clicks come in, but not what sites are sourcing the clicks. Is that important? Very!! You see, Google will often match poorly to sites – so a Content Match campaign can look like it's tanking – when, in fact, portions of it are doing fine. If you can identify the bad sites, you can tell Google to exclude them. But if you can't identify them, you can't optimize.

Easy? Not quite. You see, all of the referrals were talking about are from Google. Google does include the actual referring site as a parameter in its own referral (which will contain “-pub” when it's Content Match). If you go to the Referring Sites report in HBX Analytics, you won't see this parameter on your screen. The URL is much too long and the display is truncated. So you have to export the URL to Excel. When it's in Excel, you'll see the whole URL – including the publisher. You can pass on the obviously bad sites to be eliminated and you can setup tagless campaigns to analyze the performance of the remaining publishers with significant volume.

Now, you can tell your buyer something they've never known before – how to optimize their Content Match campaign!

Associated Keywords

Our last tip delves into one of those un-explored regions of HBX Analytics that most users never see. You're probably aware that HBX Analytics can track your Internal Search terms, show you

how often a search term is used, and even find out which Search Terms failed. That's all basic stuff (look under Navigation, Internal Search and you should see the data for your site).

But did you know that you can click on the “select” circle next to a Search term and, by picking “Related Searches,” you can see what search terms visitors entered after they entered the selected term? Probably not. This is a great feature if Search is heavily used on your site and you need to analyze the performance of the results for specific search terms.

That's quite common, since in our experience the overall performance of search is frequently a function of the term-specific optimizations you do more than the quality of the underlying engine!

Creating Page “Baskets”

There are many reasons why you might want to treat a group of pages as a single kind of thing. SEMphonic, for instance, has developed a methodology called Functionalism that provides a formal process for understanding and analyzing each discrete piece of a web site. Part of the Functionalism method is to assign pages on a site to a particular page type class – things like Closers, Convincers, and Routers. Suppose you want to understand how many visitors on your site actually reach a “Convincer” page (a page meant to provide information to a visitor that will “convince” him or her to convert). That's an interesting metric, because it tells you what percentage of site visitors are actually Engaged based on actually seeking and finding sales information (and not some abstract measure like viewed 4 pages). In addition, it can give you a way to measure the actual percentage of traffic your site has a reasonable chance to convert. Finally, you'd probably like to know how many unique visitors who reached any Convincer page actually converted over time. But if your site has lots of “Convincer” pages, you might have quite a hard time answering any of these three questions.

The obvious way to answer these questions is to create an Active Segment. But a Filter on an Active Segment gives you a very limited (10) number of slots. If you have more Convincer pages and you can't group them with a “Contains”, then you are out of luck.

At least with Active Segments. Using tagless campaigns you can answer these questions



quite neatly. There are actually a couple of different methods that will work:

Method 1:

Start by creating a campaign-specific “Conversion Rule” for each page you want to group into a basket. Each rule will simply point to one of the pages that are in the basket. So if you have fifty “Convincer” pages, you’ll need to create fifty rules. It’s a bit of pain, but each rule takes only a few seconds to complete.

Now create a Tagless Campaign. For Response, you’ll want to pick some criteria that’s true for every visitor on your site. One easy way to do this is to use URL contains and choose a part of your domain. For Conversion, simply select all of the conversion rules.

This campaign will track new responses (visitors) to conversions (lands on a Convincer page). And by creating an Active Segment of Campaign Converters, you have your de-duped statistics on the number of visitors who reached any Convincer page and the conversion statistics for that group.

Method 2:

Create a Tagless Campaign for each page in your basket. For these campaigns, the response should be the page you want to include. Conversion should be set to the appropriate Conversion Rules for your site. Make sure to name each Campaign with the same type (ILC is a common choice) and with a similar prefix. So your Campaign Names might be something like ILC-CLOSERPage1 and ILC-CLOSERPage50.

Now create an Active Segment for anyone who Responds to a campaign that Starts With ILC-CLOSER. As with Method 1, you now have a de-duped segment of all visitors who reached one of the pages on your site.

Checking Re-Surface Behaviors

Have you ever wondered if visitors use a page differently when they come back to it? It’s an interesting question, especially if it’s a page that contains cross-sell blocks or dynamic components. Unfortunately, there really aren’t any obvious ways to answer the question in HBX Analytics. Next Pages won’t work. Events doesn’t allow for a wide enough range of possible re-surface behaviors – and frequently has too much trimming. Pathing ought to be able to answer this question, but there’s frequently too much data trimming and, in any case,

analyzing groups of paths out of the path tool is painful.

Fortunately, with a clever use of Visit-based Active Segments, you can construct re-surface analyses quite easily. You will need to define a Visit-based Segment where your Filter should be all visits to the target page with Occurrences per Visit just one.

Now, you can compare the Next Pages report (which isn’t Data Trimmed) for the Active Segment to the Next Pages report for the entire universe. The difference between the two is the Next Pages for re-surface visitors.

Using the Content Hierarchy

In many cases, the most interesting unit of a web site isn’t a page – it’s a group of pages with similar content. Our trick for creating Market Baskets is one way to combine many pages into a single unit. But, if you are building tags or your site has a nice directory structure that matches your business, then you can take advantage of HBX Analytics’ built-in Content Hierarchy capabilities to do similar types of things.

Indeed, the statistic that managers and marketers generally want more than any thing else is the de-duped number of unique visitors who reached a site area in a given period. This is a core “reach” statistic – but it isn’t available and doesn’t fall-out of anything in the Pages reports within HBX Analytics.

It does fall out, however, from the Content Hierarchy. Within Content/Content Hierarchy, you can get Uniques for any hierarchy level at the Daily, Weekly and Monthly levels. This is also a very clean interface for understanding how many visits, page views and visitors are accessing whole areas of the site.

For many Management Reports, the statistics in this section of the report suite are perfect

So why isn’t the Content Menu used more frequently? First, I don’t think all users necessarily understand what it is. Then, too, many sites have a lousy content hierarchy – rendering this area of the site useless.

If you are using a Content Management System, there’s no excuse for not having a good hierarchy defined in the HBX Analytics Tag. If you aren’t, then should still think about whether your tag or directory structure can produce a good content hierarchy.



And if you do have a good hierarchy, then be sure to take advantage of this area both as an analyst and for management reporting.

Accessing HBX Analytics Data with SQL

Do you find yourself moving data from HBX Analytics into back-office systems or other marketing reports by hand? I hope not.

Of course one solution to this problem (and it's a good one) is the HBX Analytics Reportwriter. The Reportwriter tool is one of the nicest additions to HBX Analytics and I strongly encourage clients to buy and use it.

That being said, there are plenty of reporting systems where popping the info into Excel doesn't help much. You may not realize it, but HBX Analytics has a SQL-based API (Stream Reporting API) that can provide you with direct access to your HBX Analytics data. What's an API? That's short for Application Programming Interface – a way to connect two programs together. To use the API, you are either going to have be pretty technical (capable of using SQL and doing basic programming in a language like C# or Java) or have access to technical staff. That's a big disadvantage, of course, but the good news is that implementing the API is quite simple. Meaning that you shouldn't expect multi-month IT projects and massive costs just to implement a simple system.

The API is quite well documented and most programmers will find it a snap to use. Probably the most cumbersome (and worst-documented) part of the API is understanding how the HBX Analytics data is laid out in SQL tables. The first time we used the API, it took us about a day to access it productively. That's still pretty good – and if you need direct access to the data for an application or your just tired of moving data between systems by hand, the API is a very good way to make your life easier.

About SEMphonic:

SEMphonic is a leading tool-independent web and search engine marketing analytics consultancy. Founded in 1997 as a web-analytics consultancy and based in the San Francisco area, SEMphonic's clients have included some of world's largest, most complicated and sophisticated web sites. Supporting companies like Charles Schwab, AOL, Intuit, Cybertrader, Morgan Stanley and American Express, our mission has been to deliver analytic consulting that drives web channel success.

Our customers run a wide variety of web analytic solutions and PPC tools - tools like WebSideStory's HBX Analytics, Omniture's SiteCatalyst, Google Analytics, Webtrends, Clicktracks and more. We believe that practitioners with the deepest knowledge of web analytics are most likely to get the maximum value from a tool. Our experience across tools gives us a deeper and better appreciation of how web analytics can be done. www.SEMphonic.com

Summary

With software as feature rich and powerful as HBX Analytics, it's hopeless to think of a truly comprehensive set of Tips and Tricks. A book, even many books, probably wouldn't suffice. So in this paper we've tried to cover techniques that seem to us either particularly powerful or especially common in use. In many cases, we picked "tricks" that we believe suggest better ways to think about and do web analytics. Tools like tagless campaigns and active segments permit a very broad range of creative analytic solutions – and we've tried to suggest some new ways of thinking that will encourage their use in as broad a range of problems as possible.

No matter your experience level with web analytics and/or HBX Analytics, we hope this will give you at least a few good ideas on how to work better, faster and smarter!

To find an online version of this, see: www.SEMphonic.com/Resources

