

From Data To Smarter Decisions

A Step-By-Step Guide to Build A
Next Level D2C Marketing Reporting

[+ Bonus Monday Email Recap Template!]



About Me

I'm Anat, TAG's founder. With decades of D2C marketing experience, TAG helps brands grow smarter. We specialize in turning insights into actions by combining data-driven strategy with high-impact marketing tactics.

I created this guide to help you unlock powerful marketing insights that will drive better decision-making and ultimately better ROI. This framework, developed over my 20+ years in the e-commerce sector, has been honed through my experiences with industry giants like Victoria's Secret and GAP, and dynamic growing startups such as Sabon, Etsy, and Depop.

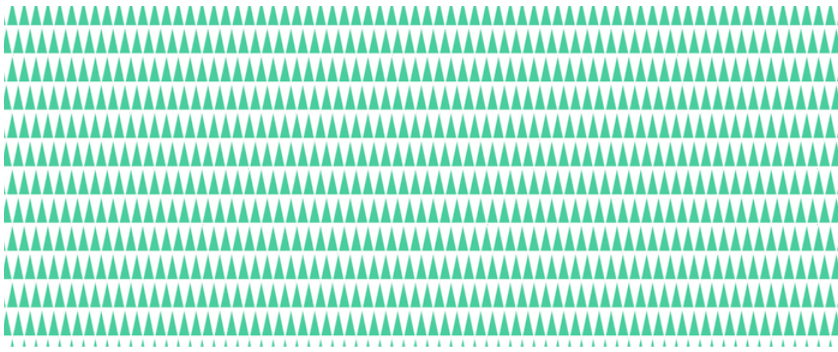
I apply this proven framework with each of my clients for maximum impact. My goal is to empower you to feel confident in the choices you make to grow your business.

With gratitude,

Anat

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Agenda

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Building Blocks

Elements For The Ultimate Marketing Report

Let's explore how to build a report that enables you to understand your business and helps make confident, data-driven decisions.

A great report is built on essential elements that elevate it from good to exceptional. These components provide clarity on past and present performance and guide strategic decisions for the future. Let's review these elements:

Remember! It's not about spending more; it's about spending smarter.

01. Establish a solid data framework: The foundation for reliable reporting

Consider this as a pre-step toward building a great reporting system. While this is not part of the actual report, I had to include this phase because the data we will be using will be directly drawn from the different platforms. If the data isn't accurate, neither will your reports be.

Typically your data sources may include:

- **GA4** (Google Analytics): A free tool providing insights into site traffic, user behavior, and key interactions.
- **eCommerce platform (i.e. Shopify)**: Sales and transaction data.
- **Email platform**: Open rates, click-through rates, and conversions.
- **Paid media Managers** (i.e. Meta, Google, TikTok, etc.): Ad spend and performance.
- **Other traffic sources**: Influencer platforms, PR, affiliate programs and more.

Remember! Make sure your data sources are set up correctly. I recommend working with a developer, platform expert, or agency to ensure everything is properly configured.

02. Design your reports From high to deep level. The order matters

A well-structured dashboard helps you process data effectively, enabling smarter decision-making. Here's how your report should be structured:

A. High level dashboard

This is your starting point for assessing overall business health. It should quickly answer:

- How did the business perform last week, month to date, year to date?
- How are key metrics trending in comparison to the previous week, month and year?
- Are my overall marketing efforts effective?

What key metrics should we look at?

- **Sales Performance:** Gross sales, net sales, returns, discounts.
- **Marketing Efficiency:** Total spend vs. sales (MER - Marketing Efficiency Ratio)
- **CAC and AOV or LTV metrics:** Customer acquisition costs vs LTV or AOV
- **Site Metrics:** Traffic, adds to cart, transactions, conversion rate (CR%).

B. The deeper level dashboards

Next, build detailed dashboards. Each business will have different detail tabs. These can proactively help identify opportunities and issues rather than relying on ad hoc analysis. Questions these tabs should answer:

- Which marketing channel drove increase/decrease in performance?
- What is going on with our marketing efforts on channel X?
- What are the decisions or directions we need to take?

Examples of detailed tabs could be:

- **New vs. Returning Customers:** Gross sales, net sales, returns, discounts.
- **Channel-Specific Insights (paid and non paid):** Sales, ROAS, CPM, CTR, CPC
- **Google Analytics Data:** Sessions, CR%, adds to cart, conversions, key landing pages.

03. Structure your report matrix: Time frames and time stamps

Comparing performance across different time frames and time stamps helps spot trends, peaks, and downturns. This is the part people typically find most overwhelming at first, however once you get used to the structure it flows easily.

Here is an example of how this looks in the main dashboard:

			WEEK				MONTH					YEAR			PLAN		
	Metrics	Source	Actual	Last week	% var to LW	Last Year	% var to LY	ACT MTD	LM MTD	% var MoM	LY MTD	% var to LY	ACT YTD	LY YTD	% var YoY	Month pace	Month plan

By having the ability to understand where you are not only right now but also in previous periods, you will have the ability to better see and predict trends in your performance. The \$ and % comparison units will give you a quick pulse gauge as you review the metrics.

Here is a detailed breakdown of the key time frames and time stamps to track:

Time Frame	Time Stamp	Comparison units
Week	Last Week (LW or actual) vs. Previous Week (LLW) & Same Week Last Year (LY)	\$, %
Month	Month-to-Date (MTD) vs. Last Month-to-Date & Same Month Last Year	\$, %
Quarter	Quarter-to-Date (QTD) vs. Last Quarter-to-Date & Same Quarter Last Year	\$, %
Year	Year-to-Date (YTD) vs. Last Year-to-Date	\$, %
Plan	Compared to the deepest business plan level (Month or week)	\$, %

04. Organize your data dumps: The backbone of accurate reporting

A crucial but often overlooked step is ensuring clean and structured data feeds into your reports. The secret in the reports I've developed throughout the years lies in **creating clean and readable data dumps**. It is what makes the dashboards read effortlessly.

Raw data should be organized and standardized to prevent errors and inconsistencies. A well-structured data dump simplifies reporting and reduces time spent troubleshooting data discrepancies.

Once the data dumps are ready and clean, the report is build in away that is automatically updated. Hence, all you need to do is to update the data dumps on a weekly basis and that's it- your report is ready to view!

Remember! The data dumps are the tabs where you can manipulate and customize data to ensure it appears on the dashboard exactly how you want to view your business. For example, you can streamline dates, key attributes, and naming conventions.

05. Maintain your reports: Keep data clean and insights reliable

Like any good system, reports require constant upkeep, especially when pulling from multiple data sources. Make it a habit to review your report on a weekly basis- this will help you catch any inconsistencies early and fix them quickly, before they turn into bigger problems. Not maintaining the report can lead to multiple issues and it will be difficult to identify and frustrating to fix. See below tips to make sure your report is staying up to date.

Report cleanup tips:



Block weekly time on your calendar for report maintenance and updates.



Verify data accuracy on a weekly basis- review each data dump.



Ensure data formats remain consistent across sources.



The Report

Finding Actionable Insights And Making Smarter Decisions

I'm a big fan of Google Sheets, which is where I build my reports—but these principles can be applied on any data tool you use.

[Download Free Report Template Here!](#)

01. How to read the report?

At first glance, this report may seem complex, but once you understand how to read it, you'll be able to assess your business quickly and identify key questions or decisions to explore further. I promise—it's easier than it looks!

How to read the report:

- ✓ **Start with the time comparisons (Left to Right):** Identify trends over weeks, months, and years.
- ✓ **Focus on % Variance:** Look for large increases or decreases to understand performance shifts.
- ✓ **Compare Actuals vs. Plan:** See if performance is on track to hit goals.
- ✓ **Connect the dots across metrics:** If sales are up, check if it's due to higher order volume, AOV, or marketing spend efficiency.
- ✓ **Once you have the high level story-** its time to deep dive to a specific channel of a different business view.

02. How to analyze the report? gross sales as an example

		WEEK						MONTH					YEAR				PLAN		
Metrics	Source	Actual	Last week	% var to LW	Last Year	% var to LY	ACT MTD	LM MTD	% var MoM	LY MTD	% var to LY	ACT YTD	LY YTD	% var YoY	Month pace	Month plan	% var to plan		
Gross Sales	Shopify	\$8,380	\$2,360	255%	\$7,080	18%	\$27,408	\$8,814	211%	\$26,965	2%	\$159,563	\$294,225	-46%	\$56,644	\$31,182	82%		
Discounts	Shopify	-\$951	-\$266	258%	-\$826	15%	-\$4,426	-\$2,032		-\$2,999	48%	-\$64,039	-\$55,490	15%	-	-			
Returns	Shopify	-\$1,057	-\$378	179%	-\$1,440	-27%	-\$2,436	-\$1,184		-\$1,529	59%	-\$9,578	-\$18,122	-47%	-	-			
Net sales	Shopify	\$6,373	\$1,716	271%	\$4,814	32%	\$20,547	\$5,598	267%	\$22,437	-8%	\$85,947	\$220,613	-61%	\$42,463	-			
Orders	Shopify	75	20	275%	65	15%	170	110	55%	250	-32%	1,115	1,878	-41%	351	207	70%		
AOV- Gross	Calc	\$112	\$118	-5%	\$109	3%	\$161	\$80	101%	\$108	49%	\$143	\$157	-9%	\$161	\$151	7%		
AOV- Net	Calc	\$85	\$86	-1%	\$74	15%	\$121	\$51	137%	\$90	35%	\$77	\$117	-34%	\$121				
Spend	Platforms	\$2,025	\$2,002	1%	\$2,812	-28%	\$6,328	\$4,321	46%	\$8,014	-21%	\$83,535	\$105,694	-21%	\$13,077	\$10,000	31%		
MER- Gross	Calc	4.14	1.18	251%	2.52	64%	4.33	2.04	112%	3.36	29%	1.91	2.78	-31%	4.33	3.12	39%		
MER- Net	Calc	3.15	0.86	267%	1.71	84%	3.25	1.30	151%	2.80	16%	1.03	2.09	-51%	3.25	-			
CAC	Calc	\$27	\$100	-73%	\$43	-38%	\$37	\$39	-5%	\$32	16%	\$74.92	\$56	33%	\$37	\$48	-23%		
COGS \$	Shopify	\$2,180	\$550	296%	\$1,645	33%	\$7,160	\$2,290		\$7,811	-8%	\$43,140	\$113,091		\$14,797	-			
Gross PM %	Calc	6,200	1,810	243%	5,435	14%	20,248	6,524	210%	19,154	6%	116,423	181,134	-36%	41,847	-			
Gross PM %	Calc	74%	77%	-4%	77%	-4%	74%	74%	0%	71%	4%	73%	62%	19%	74%	-			
NET PM \$	Calc	4,193	1,166	260%	3,169	32%	13,387	3,308	305%	14,626	-8%	42,807	107,522	-60%	27,666	-			
NET PM %	Calc	66%	68%	-3%	66%	0%	65%	59%	10%	65%	0%	50%	49%	2%	65%	-			
Impressions	Platforms	204,709	161,713	27%	2,156,722	-91%	408,708	89,397	357%	6,169,101	-93%	37,710,664	34,048,944	-30%	844,663	-			
Sessions	GA	2,510	2,065	22%	1,052	139%	5,875	6,560	-10%	3,283	79%	60,574	28,563	112%	12,142	8,337	46%		
Transactions	GA	32	8	300%	9	256%	69	19	263%	9	667%	147	59	149%	143	-			
CR% (GA)	Calc	1.27%	0.39%	229%	0.86%	49%	1.17%	0.29%	306%	0.27%	328%	0.24%	0.21%	17%	1.17%	-			
CR% (Shopify)	Calc	3.0%	1.0%	209%	6.2%	-52%	2.9%	1.7%	73%	7.6%	-62%	1.8%	6.6%	-72%	2.9%	2.5%	17%		
CPM	Calc	\$9.89	\$12.38	-20%	\$1.30	659%	\$15.48	\$48.33	-68%	\$1.30	1092%	\$2.22	\$1.96	13%	\$15.48	-			
CPS	Calc	\$1.2	\$1.0	20%	\$0.4	231%	\$0.9	\$1.5	-39%	\$0.4	127%	\$0.7	\$0.3	168%	\$0.9	-			

Week:

- Actual gross sales \$8,380, +255% to last week- Sales increased significantly compared to last week, indicating a significant revenue boost. What happened last week?
- Compared to the same week last year, sales are up 18%, suggesting solid year-over-year growth. What happened last year? What did we do differently this year?

Month to date:

- Actual MTD: \$27,408 is significantly higher than last month's pace, 211% MoM growth.
 - Tip:** ask the team what's working? Is it worth deep diving here further?
- Year-over-year growth is modest, +2% , meaning performance is similar to last year.
 - Tip:** discuss what happened last year, what worked and how can we grow further this year.
- The business is pacing to beat the plan by 82%.
 - Tip:** what can we learn from this? what happened that you might didn't expect?

Now continue to go down the metrics list in the same way!

Next steps would be:



Deep dive into the channels or the different business views.



Have a discussion with the cross functional team



Align on what smarter decisions you can make to push the business forward!



Bonus!

The Best Monday Email Recap Template

Once you've analyzed the business and identified key insights, the next step is communicating them effectively. I'm sharing my go-to template for a weekly marketing and sales recap email—a simple yet powerful way to help leaders stay informed and make smarter decisions.

This email follows the same high-level to deep-dive structure as the report. But instead of just sharing numbers, it adds context, making it easier to understand the "why" behind performance trends.

The secret to a great recap email

Spend 80% of your time on the actual report. Once you're clear on the story behind the numbers, applying it to the email should take just 20% of your time.

Use this structure, tweak it for your business, and watch how it improves decision-making across your team.

[Click Here For Free Email Template Link](#)

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Here's to better, smarter, and more informed decision-making!