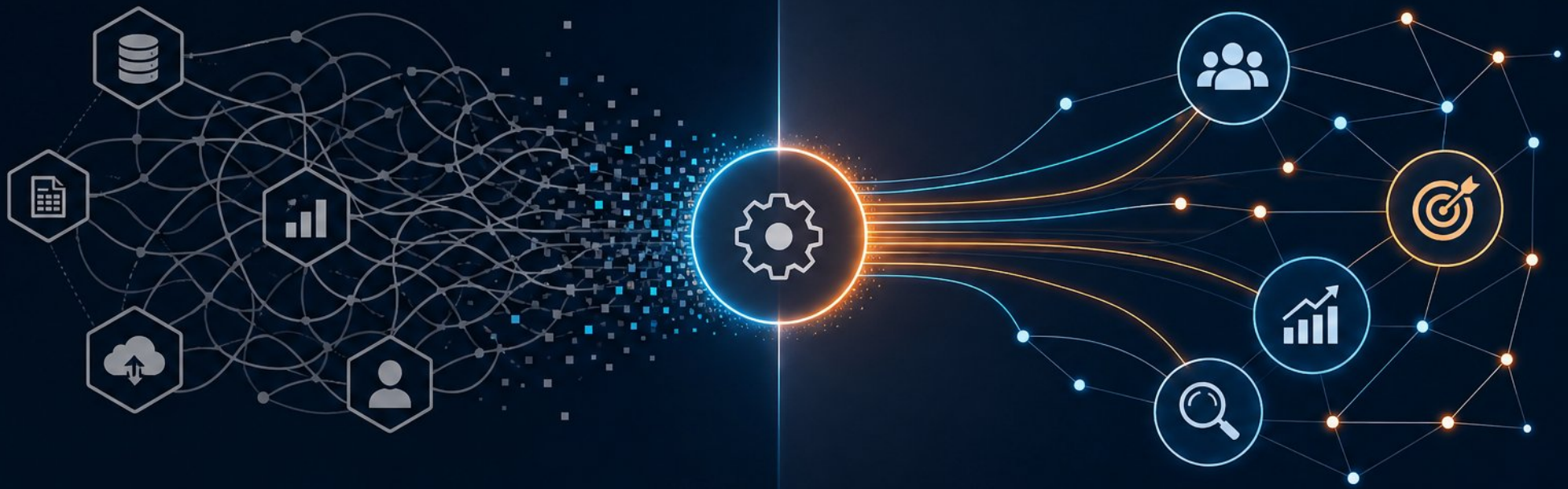




Marketing Automation Tools with Native Analytics



- Define scope: built-in analytics vs. separate BI stacks



- Why native analytics matters for strategy, growth, and analysis

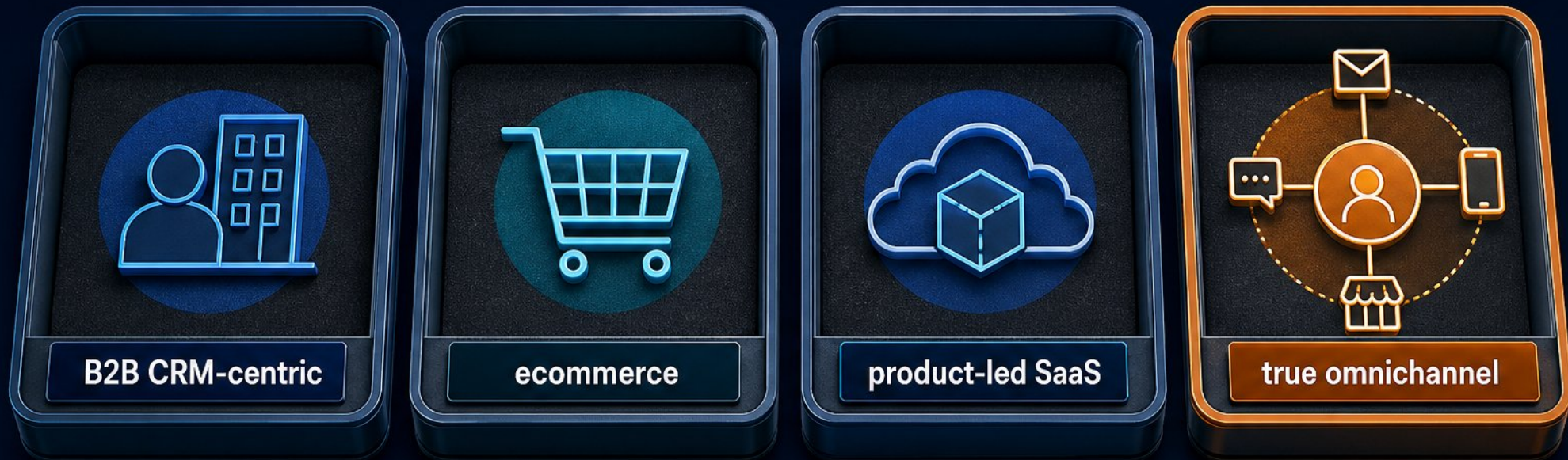


- 2026 context: AI decisioning, CRM-centric data, CDP integration



- Course roadmap and expected outcomes

2026 Landscape: Platforms, Categories, and Analytic Strengths



- Categories: B2B CRM-centric, ecommerce, product-led SaaS, true omnichannel
- Representative platforms: HubSpot, Marketo, Klaviyo, Customer.io, Braze, Iterable, MoEngage
- Analytic strengths and weaknesses vary by category
- Platform choice follows CRM choice and data architecture

Native vs. External Analytics: Strategic Trade-offs

NATIVE ANALYTICS



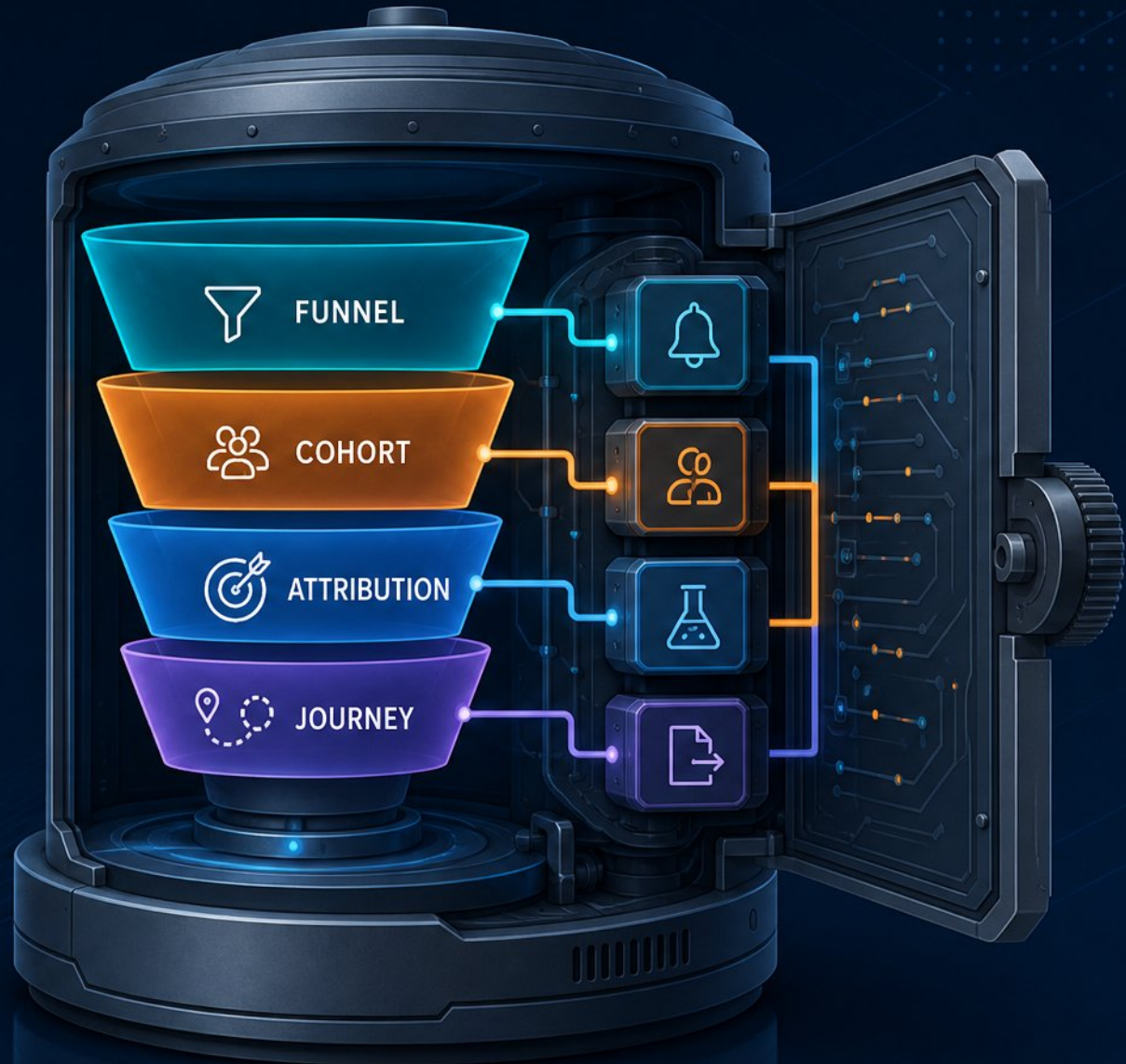
EXTERNAL BI



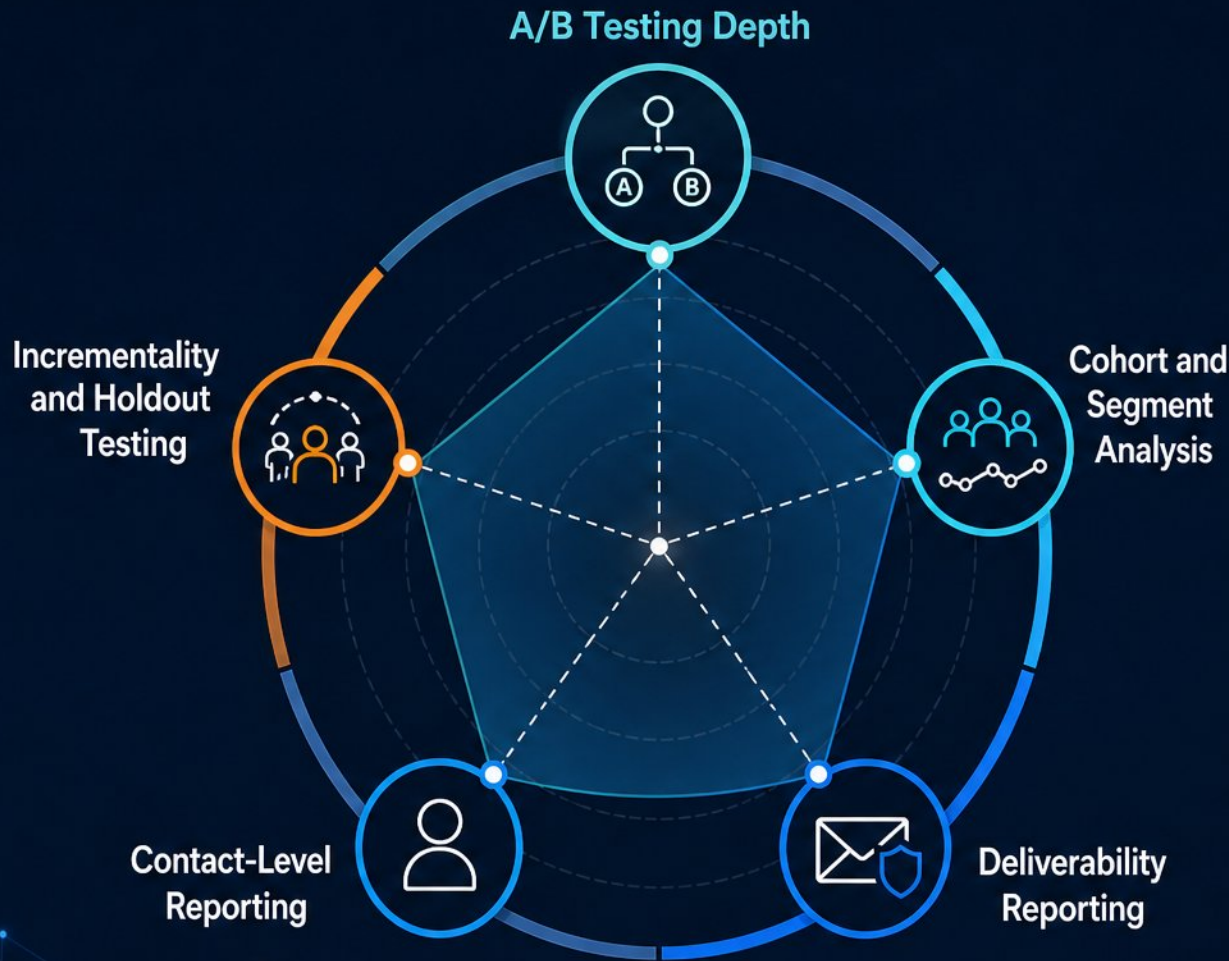
- Native = fast, owned insights; no BI engineer required
- Native limits: cross-channel joins, custom SQL, incrementality
- Signals to go external: multi-platform attribution, governed metrics
- Decision: optimize native until multi-source or governance thresholds hit

Core Native Analytics Capabilities

- Funnel, cohort, attribution, and journey analytics built in
- Ready-made dashboards, alerts, and segmentation for faster decisions
- A/B testing depth plus AI-powered insight generation
- Export and integration options for deeper downstream analysis



The Five Dimensions of Performance Measurement



- A/B testing depth: test journey branches and incentive thresholds, not just subject lines
- Cohort and segment analysis over time, beyond open/click rates
- Deliverability reporting: inbox placement and sender reputation, not just bounces
- Contact-level reporting vs. campaign-level aggregates: understanding individual journeys
- Incrementality and holdout testing: measuring true lift, not just influenced behavior

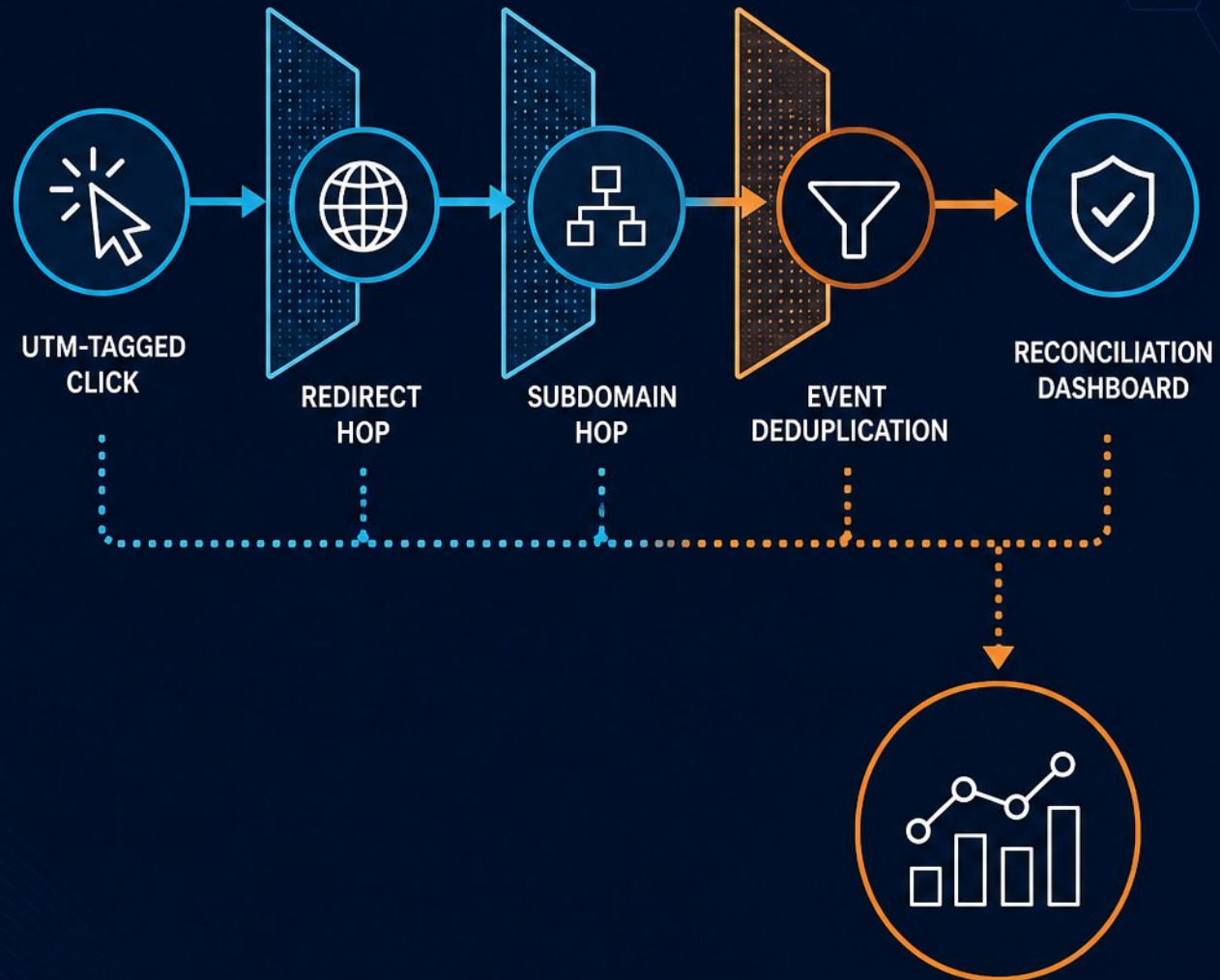
Measurement Framework for Automation Programs

- Define success metrics before selecting automation tools
- Align native analytics with business-level KPIs
- Track lead quality, conversion velocity, and customer lifetime value
- Distinguish automation-specific metrics from vanity metrics
- Use consistent definitions across marketing and data teams



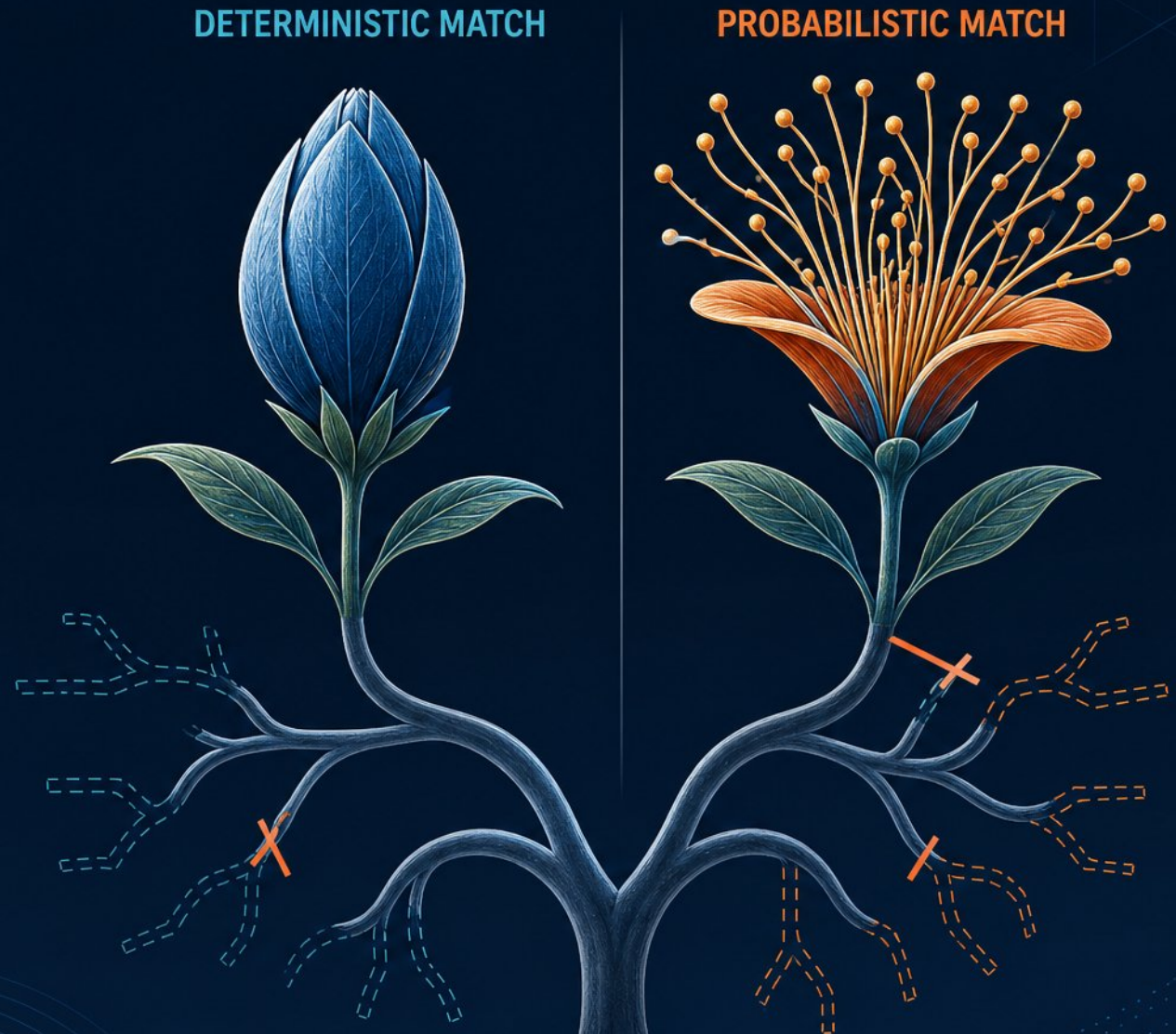
Data Governance and Attribution Trust

- Broken tracking inflates conversions and misallocates budget
- UTMs must survive every redirect hop and subdomain
- Deduplicate all event sources before import
- Build reconciliation dashboards to catch drift early



Identity Resolution and Consent in Native Analytics

- Deterministic matching for direct actions; probabilistic only for aggregate insight
- Merge rules must be explicit, disclosed, and auditable
- Consent state must propagate to every downstream system
- Real-time identity resolution is non-negotiable for AI-driven automation
- Enforcement at the data layer prevents consent-mismatched behavior



Integrating Native Insights into Growth Workflows



- ▶ - Replace quarterly retrospectives with weekly native analytics review loops
- ▶ - Set automated alerts for funnel breakage and metric anomalies
- ▶ - Connect platform data directly to A/B testing and campaign planning
- ▶ - Act on real-time pipeline attribution instead of waiting for quarter-end
- ▶ - Use native dashboards to monitor 50+ automated flows efficiently

Case Studies: Successes and Hidden Failures

- Wakefit: 64% CTR uplift via behavioral automation and AI optimization
- M6 Audio: 99.7% deliverability and marketing autonomy
- The \$60K tracking failure: how inflated metrics drove bad decisions
- AskNicely: 30% cost-per-opportunity reduction from unified data



When to Supplement Native Analytics

Signals you've outgrown native reporting:

- Can't write SQL or build custom attribution models
- Needs cross-platform joins: ads, CRM, sales data
- Cohort and holdout tests require manual CSV exports
- Execs need live sub-hour dashboards, native refresh too slow
- Choose by job: connector tools, data platforms, or BI stacks



Vendor Evaluation Checklist



- Score native analytics depth, exportability, and configurability



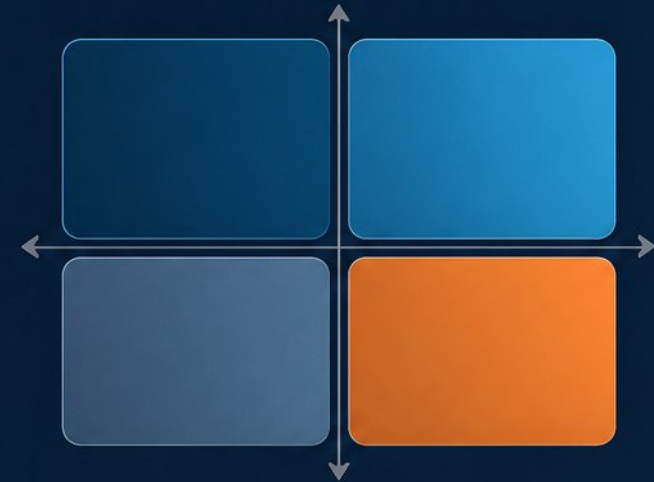
- Assess team readiness and training requirements



- Model three-year total cost, not entry pricing



- Avoid lock-in while maintaining speed of insight



Analytic Depth



Exportability



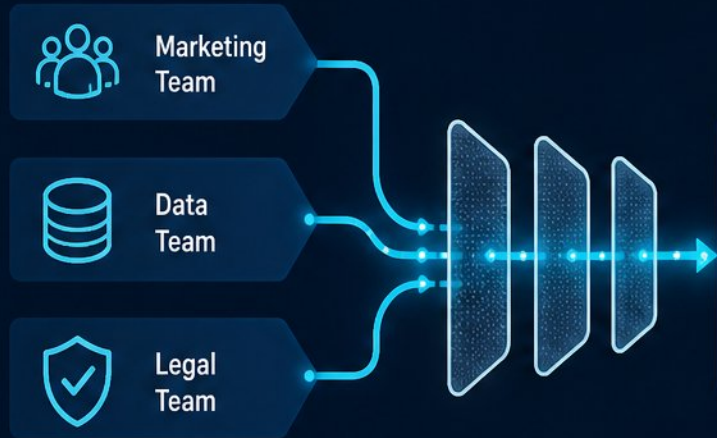
Configurability



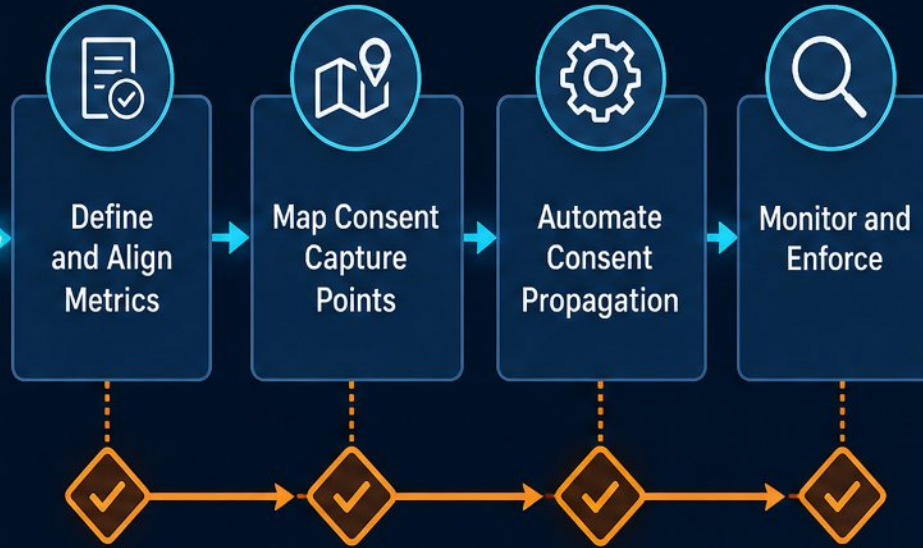
Three-Year
Total Cost

Governance and Adoption Roadmap

SHARED METRIC DEFINITION PIPELINE



GOVERNANCE ROADMAP



**AUTOMATED
CONSENT
LIFECYCLE**

CHANGE MANAGEMENT GATES

- ✓ - Align metric definitions across marketing, data, and legal teams
- ✓ - Map consent capture points; attach scope, purpose, and timestamp
- ✓ - Automate consent propagation to every activation and analytics system
- ✓ - Track valid-consent profile rates, revocation velocity, and enforcement lag
- ✓ - Run a data-layer audit before assuming the platform is the problem

Action Plan and Next Steps



- Prioritize analytics requirements before the next tool decision



- Build a measurement and governance roadmap for shared metrics



- Define first 30-60-90 day implementation goals



- Run a data-layer audit before concluding the platform is the problem



- Revisit AI and analytics depth as your list scales



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