



# Digital Insights for Marketers

How digital insights make everything better, easier,  
and more efficient



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## INTRODUCTION

# What do marketers do?

As a marketer, you know that your job basically involves two things:

- 1. Identify prospects and turn them into customers**
- 2. Do this efficiently**

Balancing the two of these is hard. You're always trying to reach a wide audience, but you also want to target the right customers. Cast too wide a net, and you're wasting time and money. Cast a narrow one and you lose out on potential leads.

The best marketers figure out who their ideal customers are, and deliver the message those customers want. But who is your ideal customer?

If your single goal is to deliver leads, it's anyone who might convert. But if those conversions end up being not right for the long-term success of the business, you have to get more focused.

At the same time, marketers are expected to maximize their efforts while minimizing their expenses, both in money and time. The success of a marketing campaign is often measured by the efficiency with which it accomplishes its goals.

It's a hard job! Luckily, there is help.

Welcome to **Digital Insights for Marketers**.

Here you can find out how to use behavioral data to know whom to target, how to target them, and how to leverage the tools in your stack to get better ROI. Read on to learn more.

## Is it digital insights, behavioral analytics, or product analytics?

Depending on the context, you may hear solutions use any of these terms. In general they all mean the same thing: solutions that give you quantitative or qualitative information about what users do on your website or product.



To learn more, read

["What is Product Analytics?"](#)

# Who is this book for?

The short answer: anyone who is trying to be better at marketing!

The longer answer: depending on your role, digital insights can help with any number of ways:

**Marketing Leadership** can benefit from behavioral analytics by knowing which audiences to target, in a way that delivers demonstrable ROI for the business. They can get the most from the stack the team uses, and can use behavioral analytics to accurately track the revenue they bring in. (What marketer doesn't want to do that?) All of these activities help leaders become more strategic, especially around segmentation and resource allocation.

**Digital Marketers** can benefit from behavioral analytics by using them to figure out who their ideal prospects are, and how to best message to them. Behavioral analytics also help measure the long-term effectiveness of your campaigns and ideas.

**Web Teams** can use behavioral analytics to understand what users do once they reach your site. This information is absolutely critical for Conversion Rate Optimization (CRO), as well as for personalization and A/B testing.

**Growth Marketers** can benefit from behavioral analytics by using it to segment customers, find the right channels to reach them, and — especially when invested in Product-Led Growth (PLG) — create a seamless experience from the marketing website to the product.

**Demand Generation** can benefit from behavioral analytics through better understanding of their audience, optimizing marketing campaigns, and personalizing approaches to different customers.

**Product Marketers** can use behavioral analytics to understand key audiences, develop accurate messaging, and hit goals related to feature adoption and long-term retention.

**Lifecycle Marketers** can use behavioral analytics to understand how different customers use your digital product, so you can personalize campaigns that encourage the right behaviors.

## PART 1

# Targeting the right people

*“Half the money I spend on advertising is wasted; the trouble is I don’t know which half.”* —John Wanamaker

As we all know, marketing is rarely an exact science. You may generally know which audiences will respond best to your campaigns. You work to be smart and creative to come up with messaging that works for those audiences. And over time you hope to iterate to something more precise.

But still, it’s hard to ignore the fact that in most cases, marketing work ends up being more inefficient than it could be — or should be.

But what if you didn’t have to work that way?

The truth is, **you know more about your potential customers than you might think.**

Let’s see how.



# How do you target now?

Let's think about how most marketers work. If you're doing things right, you probably focus on roles. You see how well different channels perform. You see which content gets downloaded by which people. You look at sales numbers and see who buys. You do market research and customer segmentation. You build buyer personas. You solicit customer feedback.

That's great! You're doing everything you're supposed to do.

Here's the thing, though. All of that work can help you get to a group of people who make an initial purchase. But they don't tell you how these leads or conversions impact the business.

**It's important to keep in mind that the true value of a lead lies in its potential to become a loyal, long-term customer.**

The prospects you engage with now mark the beginning of a relationship. Ideally a long-term, healthy relationship. The best prospects are the ones that become engaged customers. As a business, you want to ensure that your customers stay engaged and satisfied with your products or services.

What does that mean for marketers? It means that understanding a customer means understanding what kind of revenue they'll bring to the business. That's how you target the right customers — you figure out which ones are in it for the long haul.

How do you do that? By understanding how a customer can impact your business before they even become the customer.

This can be tricky, especially if you're hemmed in by using only the tactics that we listed out above.

# Don't just bring in customers. Bring in the *right* customers.

In most cases, a good marketing strategy doesn't focus on quantity over quality. Instead it balances the two.

But what does "quality" even mean? At a minimum you want to bring in customers with enough need for your product or service that they're willing to spend money on it.

When it comes to the business, however, conversion isn't the real metric. What is? Revenue.

**Right now most marketers measure Customer Acquisition Cost (CAC). They should be measuring payback period: how long it takes marketing to deliver money to the business.**

In many marketing organizations, MQLs, pipelines, and conversions are the north star metrics. This tends to optimize for a certain type of customer.

But what if you thought differently? After all, the right customers aren't just customers who make an initial purchase. They're the ones who stick around.

From the perspective of the business, the right customers are the ones that don't churn. They're customers that renew year after year, and who expand their contracts. They're the ones who align their priorities with your product.

They're the customers who are most active on your website and product. In doing so, they provide the most information on how to improve both.

Unfortunately, for many marketers LTV considerations — the impact of prospects to the business — can get lost. As a result, their marketing motions, even if done well, can tend towards the inefficient. Or the wrong targeting.

Luckily, there's a great fix for this.

# Introducing: Behavioral Analytics. For marketing teams.

If your goal is to make sure you're targeting the prospects that can bring in actual long-term revenue for the business, and that you can market to them effectively, there is no better data source than behavioral analytics.

What is behavioral analytics? Behavioral analytics is the process of collecting and analyzing data on how people interact with a product or service. That means tracking their actions (such as clicks, views, downloads, and purchases) to gain insight into their behavior and preferences. It means being able to see which parts of your product they use, and how.

In short, behavioral analytics tells you which users get the most out of your product, and how. **It's a critical dataset for giving you insights you need to make the changes that bring in the customers you want.**



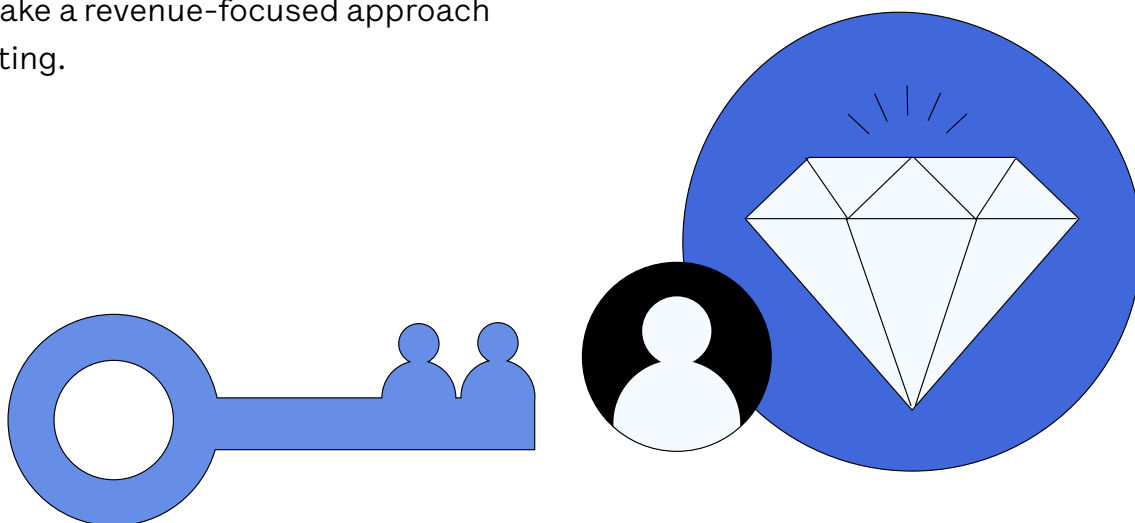
On your product, it tells you who is likely to be a happy, long-term customer, and who isn't. It lets you understand cross-device journeys. It tells you what actions on your part influence repeat purchases, activation, retention, and other key metrics. For SaaS marketers in particular, this information is gold.

**For marketers, behavioral analytics is the secret key that unlocks customer value.**

It doesn't just tell you who converts. It tells you what each customer means for the business.

As a marketer, you can take this information and build it into all of your marketing motions. Whom to target. What to say to them. What messages work and which don't work.

The key: when you're tracking behavioral analytics, you can see which prospects get the most value from your product. Finally, you can take a revenue-focused approach to marketing.



## What's wrong with marketing analytics?

If you're a good marketer, you're likely already using some sort of analytics to measure the impact of your GTM motions. Perhaps Google Analytics or something similar. What's wrong with that?

The answer is: nothing, as long as you're interested in potential pipeline. If you're interested in measuring actual business impact, **marketing analytics doesn't give you enough downstream information.**

When you use this downstream information to create your marketing segments and build your GTM motions, you'll be far better poised to bring in the customers that produce long-term value.

# Behavioral Analytics in practice

Here's how it works:

## Step 1:

Dig into your behavioral analytics tool to see who is getting value from your product

- Who uses which features?
- Who is more or less likely to churn?
- What sort of feature use predicts retention?
- How does product usage vary across verticals, segments, or geographies?

## Step 2:

Use this information to build your Go To Market (GTM) motions

- Segment users based on the value they get from the product
- Build your messaging around this value
- Deploy the channels that these segments are likely to consume

## Step 3:

Test and iterate

- Measure the effectiveness of your marketing motions with LTV in the forefront
- Experiment and learn

**All it takes is the right dataset. Poof! Efficient marketing that drives actual business success.**

To get hands-on advice for using an analytics solution to answer these questions, check out our [Heap Dashboard Templates](#).

# Showing your work

The other aspect of marketing that behavioral analytics can help with clearly demonstrating what is and isn't in your control – and how to know the difference.

For example, right now you may be using titles and roles to understand your prospects. But as you know, titles and roles shift. Jobs change. Certain roles take on more or less responsibility, given company structure and needs. In this scenario, building personas and basing segmentation on them can be hard to do.

Behavioral analytics provides a support beam for these activities. By providing more information about what your potential and current customers are doing than you could find on your own, it's a useful way to understand who exactly is getting value from your product, and how your campaigns are doing.

By seeing how your customers react to your efforts, you get a better sense of what you're doing that's working or not working.

And that makes it easier for you to track the impact of your efforts directly on your company's business outcomes.

Indeed, **behavioral analytics provide the long-needed solution for marketers to draw the line between marketing pipeline and business revenue.**

Behavioral analytics makes your impact clear, concise, and understandable. To all audiences: you, your marketing team, and company leadership.

## PART 2

# Unlocking the Marketing Stack

In the intro we said that the marketer's job is twofold:

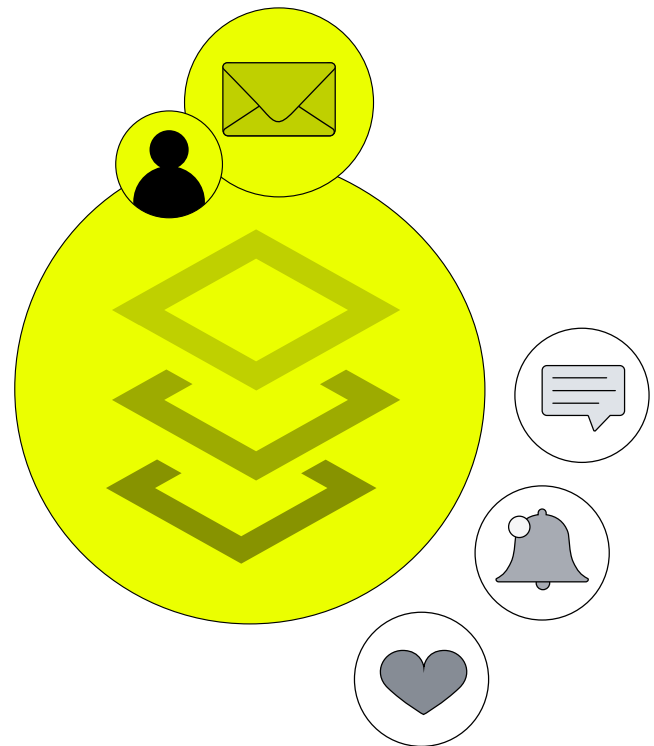
- 1. Identify prospects and turn them into customers**
- 2. Do this efficiently**

In Part 1 we talked about the first of these. It's time to talk about the second.

It's a cliché to say that we're always forced to do more with less. Unfortunately, it's also true. As marketers, our goal is always to be working smarter, not harder. And for a lot of marketing professionals, that means making your marketing tech stack work for you.

If you're like most marketing teams, you likely employ multiple tools to make your job easier. The problem is, it's hard to make them all work effectively on their own. And this doesn't even cover making them work together!

Again, there's an effective solution to all of this: Behavioral Analytics.



# What's wrong with Google Analytics?

Many marketing teams start with Google Analytics when trying to track user activity. And why not? It's ubiquitous, it's made by Google, and there's a free version.

But the problem with putting GA at the center of your marketing tech stack is this: **GA doesn't give you the detailed information you need to effectively power your marketing tools.**

To be fair, Google Analytics does give you high-level web analytics, especially around advertising spend and revenue. This can be useful. But if you're looking to get the most value from your tech stack, it makes more sense to use data that's focused on what users do, not just who they are.

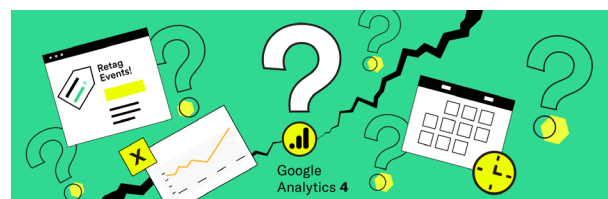
Doing marketing most effectively means understanding the downstream impacts of your customers. Doing this in GA requires you to pull data into BigQuery, and to have knowledge of SQL. Because GA still requires you to manually tag and manage

events on your product or website, you can't even see what users are doing without bringing in engineers to do this tagging for you!

GA4, the most recent iteration of GA, promises a host of new problems:

- You have to redo *all* your event tags
- Integrations are limited, making it difficult to power your entire stack
- Data governance in GA4 is limited, and not built for scale
- Data gating means that you'll lose most of your historical data!

Even without these issues, with GA4 it's just difficult to get the information about what customers do. That's why we suggest a more powerful alternative.



To learn more about GA4 and what it means, read our guide [here](#).

# Putting behavioral data at the center of your stack

Here's a solution: put behavioral analytics at the center of your stack. This allows it to unlock the power of your various marketing tools. Here's what it looks like in practice:



Email & Marketing  
automation tools



A/B Testing and  
Experimentation



Product Adoption  
Tools

# Email & marketing automation tools

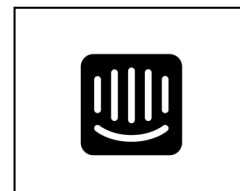
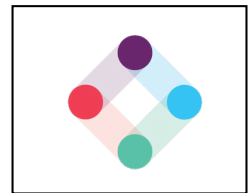
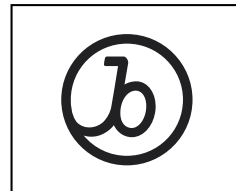
(Braze, Iterable, Intercom, Klaviyo, Marketo)

## What do these tools do?

This category of tools helps deliver targeted communications to your customers, whether through email, in-app notifications, mobile pushes, or SMS, and more. All of these communications can be automatically scheduled and sent.

Tools of this sort let you set up any number of custom campaigns, which can be personalized to different audiences and triggered based on how customers engage with your content.

Marketing automation tools can deliver messages through multiple channels to help with onboarding and support, send special offers, announce the latest updates, or make product and service recommendations.



## What does behavioral analytics add?

While email and marketing automation tools have some internal triggers that help them know what information to send to which customer or prospects, **adding behavioral data to these tools ensures you're targeting your messages in the most efficient way possible.** You can segment users who aren't taking certain actions, or should be taking different actions, in a way that messages feel personalized to those users' needs.

Earlier we talked about the advantages of segmenting users by behavior instead of role. (The short answer: roles are far less predictive of conversion, retention, and adoption than behaviors are!) When you bring behavioral analytics into your automation tools, you can take the powerful data you get from user behavior and use it to drive messaging. In this case, your messages are more likely to resonate, because you've captured behavioral buying signals beyond "I opened this email."

Growth or lifecycle marketers in particular can benefit from bringing behavioral data into their automation tools. This data lets them measure the effectiveness of their campaigns and messages, not just on conversions but on revenue and product usage. It lets them better segment users

to run campaigns for upsell and cross-sell opportunities. And it helps bring awareness to product updates.

Above all, effective messaging lowers CAC, as segmenting and targeting with the right analytics means less "hoping your message will land" and more "knowing your message will land."

### Pairing email and marketing automation tools with behavioral analytics: an example

Let's say your company just launched a new maternity product for your clothing line. As a marketer, you might segment users who have either a) added a previous maternity item to their cart, b) purchased maternity items, c) viewed similar items like baby and toddler toys, or d) purchased maternity items on mobile or web. Then you might use email and automation tools to announce the latest new item or deliver any special offers, and do so in the channel your users are most likely to engage with.

Conversely, you might want to know if the users who engaged with your communications are driving the action you want — purchasing that new maternity product. You might create segments of users who opened your email or clicked on your special offer and drive them to other offers or relevant products.



# A/B Testing and Experimentation

(Optimizely, A/B Tasty, LaunchDarkly, Kameleoon)

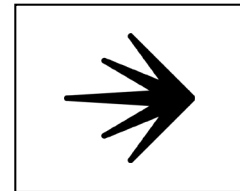
## What do these tools do?

A/B testing & experimentation tools help marketers test variations of their website or digital product to see which variation users prefer. Most tools allow marketers to perform dozens — if not hundreds — of tests at the same time. Marketers can use them to test different designs, messaging, copy, UX, user flows, and more.

A/B testing tools are also useful for testing and deploying personalization. Some A/B testing tools now use data science to automatically optimize. For marketers interested in CRO, A/B testing is usually an essential tool.

## What does behavioral analytics add?

On their own, A/B testing tools are great for improving click-through rates and conversion, as well as improving the digital experience on all platforms. They can also help inform segmentation and marketing strategy.



**The key thing behavioral analytics adds is the ability to track the downstream effects of your A/B tests.** When in the midst of a test, it's easy to lose sight of this. But what's important for your business isn't quite whether more people click one CTA over another. It's whether the people who do click on that CTA are worth more to the business.

Do they buy more expensive products?  
Do they use the features that predict retention? Are they more likely to be the kinds of customers you want?

It's these kinds of questions that can only be answered with behavioral analytics. Ideally, A/B tools aren't there to help with local optimizations. They're there to help the business.

## Using A/B tools with behavioral analytics: an example

You're a digital marketer for a SaaS company, trying to convert more users to download gated content from your paid ads. Your goal is to drive more prospects to fill out your form and engage with other content on your website.

You run the same ad on various channels to test which placement drives the most conversions. Then you send that data in to your analytics tool. There you can use behavioral data to learn:

- Which path users took before converting
- Where they navigated to after clicking on your ad
- How these different paths influence purchasing decisions

Using this information, you then create segments of users based on who opened your email or clicked on your special offer. You can then lead them to other offers or relevant products.

Ultimately, your experiments should tell you if you're attracting the right customer. Marketers can use behavioral analytics to measure the quality of conversions coming through, to help the business determine the best next steps.

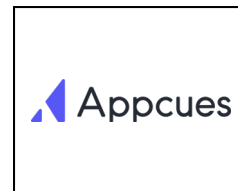
# Product Adoption Tools

(Appcues, WalkMe, Chameleon)

## What do these tools do?

Product adoption tools help users by showing customers notifications, recommendations, guides, microsurveys, or announcements that help them navigate your product. They're especially useful the first few times users encounter a product, when users are most confused about how to navigate. They're also fantastic for figuring out whether low adoption is a result of friction, or of a feature not being the thing users want.

These sorts of tools are most often used by product marketers and lifecycle marketers interested in increasing retention and feature adoption. They're also useful for growth marketers focused on Product-Led Growth (PLG). In the PLG scenario, marketers usually partner with the product team to create a seamless experience between the marketing website and the product.



## What does behavioral analytics add?

Behavioral analytics and product analytics are a natural pairing. One might even say an essential pairing!

This is because **user behavior provides the optimal triggers for tools like these to deliver notifications, announcements, surveys, and guides to users.** When a user performs — or skips — a certain action in the tool, they're giving your team information about what they see and what they care about. Ideally, in-app notifications and guides should be targeted to exactly these behaviors. Their goal is to nudge users to take certain paths, or to expose users to new features they may not have known about.

It's nearly impossible to meet these goals without behavioral analytics.

For growth marketers, especially those working on PLG, behavioral analytics are essential for helping users onboard and get to their “a-ha” moment without help from your sales team.

## Using Product Adoption tools with behavioral analytics: an example

You're a product or growth marketer, focused on product-led growth (PLG). Your goal is to convert more top-of-funnel traffic by getting them to view a demo of your product. Your hypothesis is that users who can sample the product first-hand are more likely to have a conversation with your sales team.

In this case you might use a product adoption tool to:

- Guide users to perform a specific action, like activating your product sandbox
- Gate parts of your product to encourage a sales conversation, or
- Measure microsurvey results to improve how users engage with your product.

Then you can use your behavioral analytics tool to see how effective your marketing strategies are in driving those conversions.

Conversely, you might have a more targeted goal of driving retention. In this case you might find users who may not have used certain features or submitted low engagement scores on your microsurveys. You can use your behavioral analytics tool to create those segments, then sync them to your product adoption tool. Then you can use your product adoption tool to send those segments guides or in-app notices that encourage higher engagement scores or increased feature adoption.

## DIGITAL INSIGHTS EXAMPLE

# klaviyo

Klaviyo is a marketing automation platform that helps eCommerce companies send targeted and personalized email and Facebook campaigns. Klaviyo is built on the premise that using user data to power better marketing decisions and campaigns is the only way to be successful in a highly competitive industry.

Before turning to behavioral analytics, Klaviyo used Google Analytics for basic reporting. This created some inextricable problems, according to Brian Whalley, Director of Product Marketing and Operations. Mostly, GA's metrics were not as in-depth enough to understand longer-term trends like attribution, or to know which lead sources performed best downstream.

The team was also bogged down by technical frustrations, mostly because they had to tag events by hand. As Brian put it, "One of the problems...for early

stage companies is that you don't know what kinds of questions you're going to be asking next month, or what you'll be interested in. It's pretty rare to have that much forethought or insight into your future."

Ultimately, the marketing team wanted to know which eCommerce platforms their potential customers used, so they could see which platform most indicated that a customer would convert.

What was the solution? Digital insights. By integrating data from their A/B tool with behavioral analytics, the team could correlate in-product activity with the experiments a user was subjected to.

**This let the team know which tests were producing the most engaged leads, and the leads most successful with their platform.**

One of the most valuable insights was understanding which Klaviyo product behavior trends result in higher revenue for their customers.

Because of the in-depth analysis that behavioral analytics gives them alongside other products in their tech stack, Klaviyo can segment customers based on how successful they are using the product. This segmentation helped Klaviyo understand which customers are the most retainable.

Finally, this activity allowed Klaviyo to do what marketers do best: show, conclusively, that using Klaviyo could increase customers' revenue.

“Having a [behavioral analytics] tool ... gives us a lot of confidence that we’re coming to the right conclusions and understanding our problems in the right way.”



**Brian Whalley**

Director of Product Marketing  
and Operations

**klaviyo**

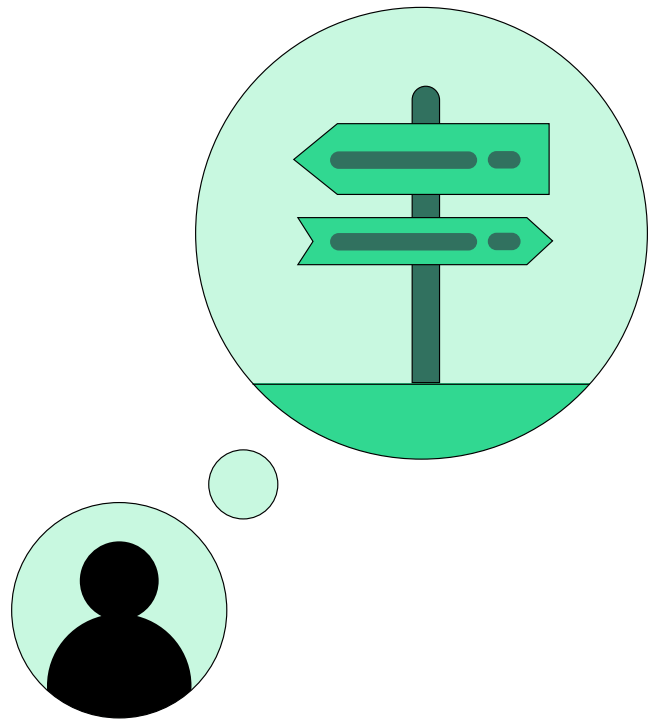
## CONCLUSION

# Marketing, the way it should be

As a marketer, your job is to bring in customers, and to do so efficiently. Both of these jobs are hard! But when done right, it's possible to do both of these in a way that generates not just leads, but demonstrable revenue.

With behavioral analytics, your job becomes less about telling the customer what to do and where to go. Instead, it's about letting them guide you towards what they want and need.

To learn more about what digital insights can do for you, feel free to [contact us](#). Or [give Heap a spin!](#) It's free, and you can start getting insights immediately.



# About Heap

Heap is the future of digital insights.

Heap's low-code, easy-to-use digital analytics software illuminates key digital behaviors and pinpoints valuable quantitative and qualitative insights so teams can quickly act with confidence and create the best possible digital experiences. Over 8,000 businesses trust Heap to increase revenue, improve conversion, accelerate decision-making, and drive business impact at scale.

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