

# Course : Building marketing dashboards

**From design to analysis: the keys to informed decision-making**  
**Practical course - 2d - 14h00 - Ref. TBM**  
**Price : 1590 CHF E.T.**

At the end of this course, you'll be able to effectively manage your marketing activities. You'll learn how to define relevant key performance indicators and translate them into customized dashboards. By mastering data visualization tools, you'll be able to transform your data into actionable information for strategic decision-making. This will enable you to optimize your campaigns, anticipate market trends and effectively communicate the results of your actions to your teams and management.

## Teaching objectives

**At the end of the training, the participant will be able to:**

- ✓ Define clear, measurable objectives (OKRs and KPIs) aligned with marketing strategies
- ✓ Create customized dashboards
- ✓ Automate data collection and tracking from various marketing sources (Google Analytics, CRM, etc.).
- ✓ Adapt marketing strategies based on dashboard insights
- ✓ Communicate results and recommendations clearly through relevant data visualizations

## Intended audience

Marketing managers, product managers.

## Prerequisites

Basic knowledge of marketing.

## Practical details

### Hands-on work

Theoretical input, practical exercises and exchange of best practices.

## Course schedule

### PARTICIPANTS

Marketing managers, product managers.

### PREREQUISITES

Basic knowledge of marketing.

### TRAINER QUALIFICATIONS

The experts leading the training are specialists in the covered subjects. They have been approved by our instructional teams for both their professional knowledge and their teaching ability, for each course they teach. They have at least five to ten years of experience in their field and hold (or have held) decision-making positions in companies.

### ASSESSMENT TERMS

The trainer evaluates each participant's academic progress throughout the training using multiple choice, scenarios, hands-on work and more.

Participants also complete a placement test before and after the course to measure the skills they've developed.

### TEACHING AIDS AND TECHNICAL RESOURCES

- The main teaching aids and instructional methods used in the training are audiovisual aids, documentation and course material, hands-on application exercises and corrected exercises for practical training courses, case studies and coverage of real cases for training seminars.
- At the end of each course or seminar, ORSYS provides participants with a course evaluation questionnaire that is analysed by our instructional teams.
- A check-in sheet for each half-day of attendance is provided at the end of the training, along with a course completion certificate if the trainee attended the entire session.

## 1 Dashboard design and objectives

- The importance of dashboards for marketing performance management (ROI, conversion, loyalty).
- Types of dashboard (strategic versus operational) and their role in marketing.
- The OKR (Objectives and Key Results) method applied to marketing.
- Definition of marketing objectives (growth, awareness, commitment).
- Selection of KPIs according to objectives (conversion rate, cost per acquisition, customer satisfaction).
- Definition of relevant KPIs for each campaign (acquisition, loyalty, engagement).

### Hands-on work

Définir des OKR et des KPI marketing pour son organisation. Priorisation des résultats clés à suivre via un tableau de bord. Exemples d'utilisation dans différentes stratégies marketing (digital, CRM, réseaux sociaux). Lancement d'un plan d'action.

#### TERMS AND DEADLINES

Registration must be completed 24 hours before the start of the training.

#### ACCESSIBILITY FOR PEOPLE WITH DISABILITIES

Do you need special accessibility accommodations? Contact Mrs. Fosse, Disability Manager, at psh-accueil@orsys.fr to review your request and its feasibility.

## 2 Dashboard creation and workflow automation

- Introducing and using Looker Studio.
- Creation of interactive dashboards.
- Data flow automation (connection to sources such as Google Analytics, CRM, social networks).

### Hands-on work

Création d'un tableau de bord avec des KPI personnalisés pour une campagne marketing réelle ou fictive. Exemples d'outils d'IA intégrés dans les tableaux de bord. Démonstration de Looker Studio, Power BI et Monday.com. Enrichissement du plan d'action.

## 3 Data analysis to optimize campaigns

- Use dashboards to analyze results in real time.
- Data interpretation to adjust marketing campaigns (A/B testing, continuous improvement).

### Hands-on work

Optimize campaigns in real time using dashboards and results visualization. Identify areas for improvement and adjust marketing strategies.

## 4 Customizing dashboards with first-party data in digital marketing

- Exploiting first-party data after the end of third-party cookies: audience segmentation, customer journey tracking.
- Customized dashboards to track campaign performance at a more granular level.

### Hands-on work

Presentation of campaign performance to explicitly communicate insights to other participants (or from the case study). Sharing of results and discussion of best practices for interpreting and communicating results.

## 5 Technological innovations in data analysis

- Technologies for measuring consumer attention and emotions: eye tracking and facial coding.
- AI for predictive marketing: anticipate trends, automate advanced analyses and adjust strategies.
- Marketing process automation tools (MarTech): presentation of machine learning and automation functionalities.
- When and how to work with specialized agencies.

### Hands-on work

Finalization of individual action plan to integrate marketing dashboards into business strategies.

## Dates and locations

### REMOTE CLASS

2026 : 2 Apr., 28 May, 15 Oct., 3 Dec.