

HOW TO OPTIMIZE

your

GROWTH

with KISSMETRICS



MARKETERS HAVE AN ENDLESS NUMBER OF PROJECTS TO WORK ON and metrics to track, including countless channels, tons of traffic sources, and unlimited conversion hacks.

But, which ones actually matter? Which projects are worthwhile, and which metrics impact the bottom line? What's going to improve your business today?

Metrics and marketing analytics tell you.

In this detailed guide, we're going to show you how Kissmetrics delivers this information. We've organized the guide into three sections — Optimizing Your Conversions, Finding More Customers, and a Kissmetrics Overview. You'll see how Kissmetrics can help you optimize every step, from pre-purchase to post-purchase.

This is a big guide. You certainly don't need to read it from beginning to end before using Kissmetrics. We recommend that you start with the table of contents, find the section that tackles your biggest problem, and begin improving your marketing machine right away.

Keep this guide as a reference for when you want to dive deeper into Kissmetrics.



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1

Optimizing Your Conversions

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How SaaS Companies Can Use the Kissmetrics Funnel Report to Drive Their Growth

Every SaaS (Software as a Service) company needs a set of conversion funnels that track how many people convert into users or customers. Companies can also use conversion funnels to track important actions such as filling out a form or using a feature.

In this section, we'll run through an **acquisition** funnel. We'll see how it performs at each step and identify the bottlenecks that are impeding growth. Then, we'll run through a process for tackling the bottlenecks and learn methods to improve them.

Let's begin by looking at a basic SaaS acquisition funnel.

SAAS ACQUISITION FUNNEL

Most SaaS companies need a high level, bird's eye view of how their website performs at converting visitors to customers. This is known as an acquisition funnel, and in many cases, it would look something like this:

1. Visited Site.

The top of the funnel; this is the number of people who come to your site.

2. Trial Signup (Trial or Freemium Signup)

Most SaaS companies offer some kind of free trial. After a person visits your site, this would traditionally be the next step in the funnel.

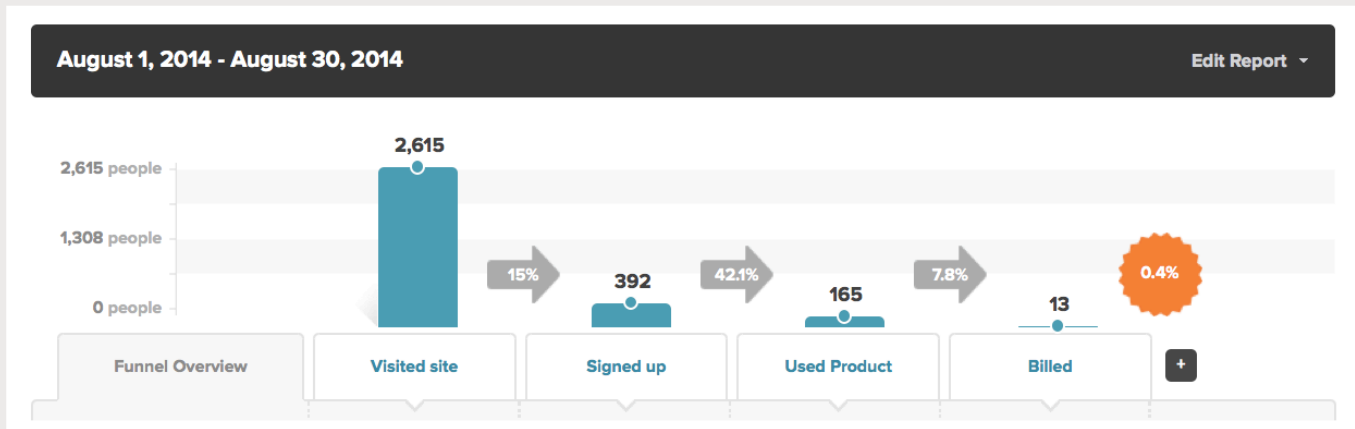
3. Used Product

Getting people to sign up for a trial is great, but not all of them will actually begin using your product. You'll want to track the ones who do and the ones who do not in this step.

4. Paying

What every company needs — paying customers. This is the last step of the acquisition funnel; it triggers when a customer pays.

In Kissmetrics, the funnel may look something like this:



The Kissmetrics funnel report shows the number of people in each step. It doesn't matter if one person makes 10 separate visits to your site, they are counted only once. **It also doesn't matter what WEB-PAGE they landed on when they visit your site.** This allows you to get the actual conversion rate.

ANALYZING A FUNNEL

1. Find the Bottleneck

The first task in conducting a funnel analysis is to identify the bottleneck. In other words, identify the one step that doesn't convert well.

Here's what we've found in the example funnel above:

- The top of our funnel has a good sample size. We'd have to look at historical traffic to know whether or not this is a healthy level of traffic. But, for now, let's assume it is. We'll continue down the funnel to see if it's our main issue.
- Our website does a good job of converting people into trials. The conversion from Visited Site to Signed Up is solid. Most SaaS companies have a 1-10% conversion rate to free trials, so our 15% rate is definitely healthy. There's always room for improvement, but it's not our main bottleneck at the moment.
- A good number of people who sign up actually start using the product. We could focus on this at some point down the road, but it isn't our main hurdle in getting people to convert to paying.
- Billed is the step that is our main bottleneck. Of the people who used the product in the Used Product step, only 7.8% actually converted to paying for it. This is a clear barrier to growth, and our focus now should be on understanding why users don't want to pay for our product.

2. Learn Why There Is a Bottleneck

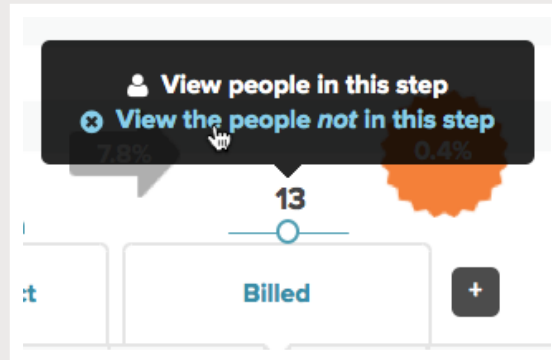
We've learned where the bottleneck is. Now, we need to learn why there's a bottleneck. More specifically, we need to find out why our free trial users don't convert to paying customers.

The best tactic for improving conversions is to talk to the people who did and did not convert. We want to discover the different experiences of each group, and we can consider the following questions to help us do that:

Is a particular feature hard to find? Did the users who did convert have any particular attributes or come from a particular source? Are the people paying for our product the same people we're trying to sell to? Listen to what both groups have to say, and you'll begin to understand the differences.

But, before we can talk to the people in either group, **we'll need to know who they are**. Luckily, the Kissmetrics funnel report tells us each person who did or did not convert. You can view this for any step of any funnel report you create.

To find your non-converted users, just hover over the conversion step and choose to view the people not in this step. In our case, we'll hover over the Billed step.



We click on that and get a list of people who made it to Used Product but decided not to pay. Here they are:

List People from Funnel Report

Add more data to your search results:

Person + Add another column

Search

Person ▾

- abby@apple.com
- asante@nfl.com
- bailey@clearchannel.com
- bob@kissmetrics.com
- bryanna@microsoft.com
- chris@twitter.com
- chuck@facebook.com
- deanna@nhl.com
- ernie@hbo.com
- frederick@appleseed.com

Export Data

Showing: 10 1 - 10 of 2543

Since they signed up, Kissmetrics has identified these people and assigned them the email address they used.

Given that they didn't convert to paying customers, we can email them asking for feedback on where we missed the mark. Once we get this feedback, we know what to focus on improving.

Now, let's look at a more detailed funnel that can help you find bottlenecks within a specific area of your site.

SEGMENTING BY PROPERTY TO FURTHER ANALYZE YOUR FUNNEL

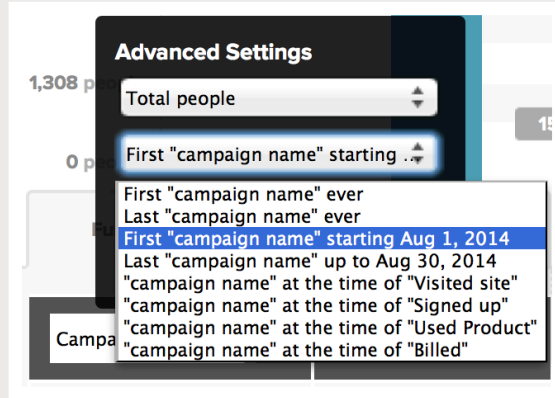
Properties tell us various characteristics about each person. Their best use case is segmenting people into groups. And with the Kissmetrics funnel report, you can segment people by any **property**.

For our example funnel report, we'll segment people by campaign name. This property is triggered through a UTM parameter. So, a person might visit your website by clicking on a link like this:

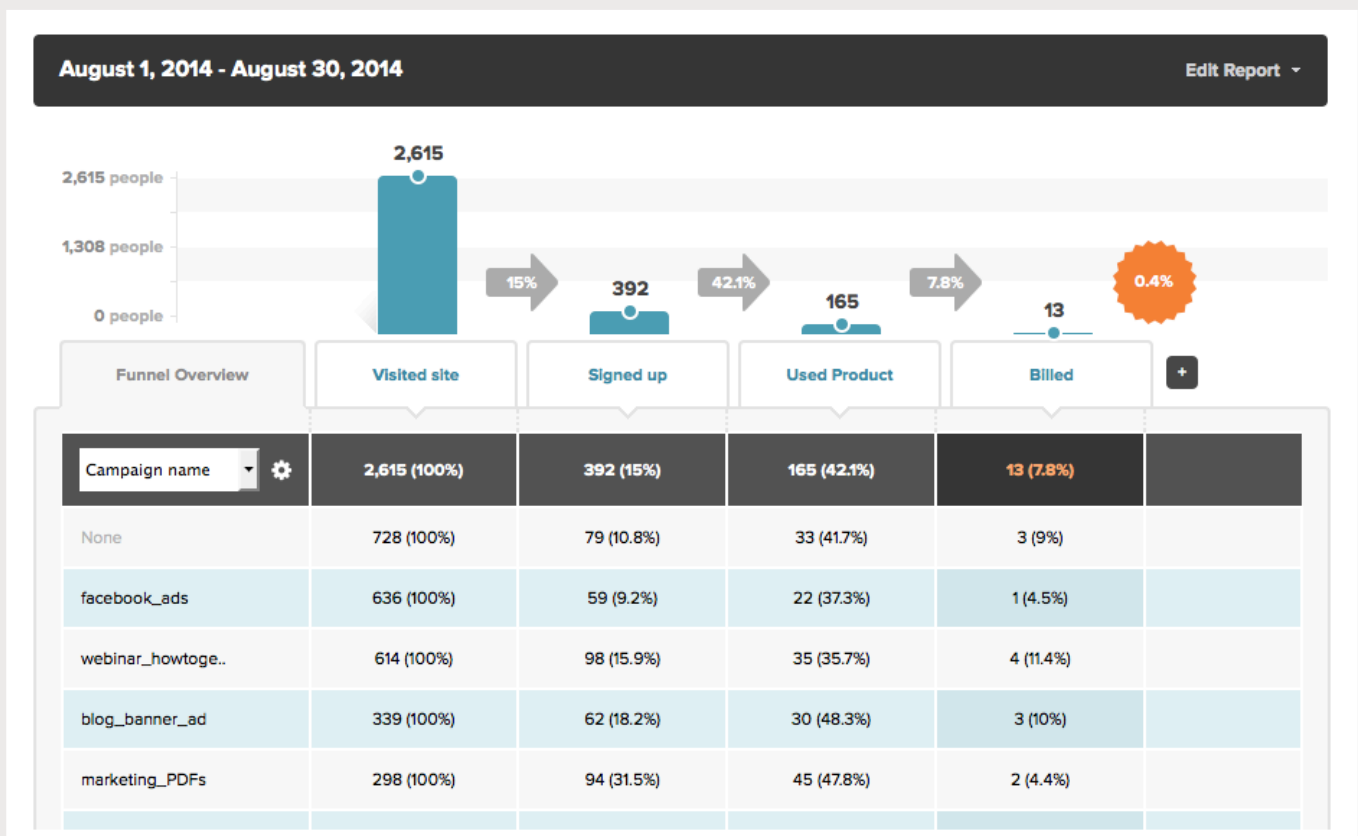
```
http://www.example.com/?utm_source=twitter&utm_medium=social&utm_term=guides&utm_content=PDF&utm_campaign=awesomePDF
```

Their campaign name property will be "awesomePDF." We know this because `utm_campaign` signals the campaign name, and `=awesomePDF` defines the campaign name property.

We'll be viewing the people whose first campaign name triggered during our selected date range. This will show us how well each campaign performed at bringing us traffic and customers during our specified date range.



Here, we are segmenting by the campaign name property on our funnel report:



All our traffic this month came from five separate sources.

The five traffic sources:

1. **None** — This includes people who have no campaign value assigned to them, or their campaign name was out of our date range.
2. **Facebook_ads** — These are people who came to us via a paid Facebook ad.
3. **Webinar_howtogetleads** — The name of a webinar we've done recently. Triggers when someone clicks on the link to attend the webinar.
4. **Blog_banner_ad** — The blog has a banner ad that links back to the homepage. Those who visit the blog and click that banner ad are tied to this campaign name.
5. **Marketing_PDFs** — Our PDF guides have links at the bottom footer of every page that link back to the homepage with this campaign name.

By looking at each of these campaigns, we can see how well each of them performed throughout every step of the funnel. Let's break down each campaign:

The None category is an average-to-below-average performer for us. The None category can be considered a benchmark. It's the conversion rate for everyone else, so your campaigns can be compared against it. It's not necessarily good or bad, but it helps you judge what's good and bad.

The Facebook ads campaign is tough to judge at the moment. Since our overall funnel isn't performing well, it's hard to determine the effectiveness of our Facebook ads. For now, we'll have to turn off Facebook ads until we get our funnel fixed and are acquiring more customers. Once that happens, we can try paid acquisition again.

This particular webinar ("Webinar_howtogetleads" listed above) performed well for us. We might want to try promoting our webinars more heavily to see if they help convey the value of the product better and increase the conversion from engaged user to paying customer.

The blog banner ad converts the best through nearly every step of the funnel. Chalk up another point for our inbound marketing efforts, which so far outperforms our Facebook paid advertising.

Our PDFs bring nearly 300 people to our site and do remarkably well at getting people to sign up for the free trial. The momentum continues in getting people to use the product and eventually pay for it. Once again, inbound marketing produces customers. We'll have to produce more of these and find ways to get them better distribution.

ZOOM IN ON YOUR ACQUISITION FUNNEL

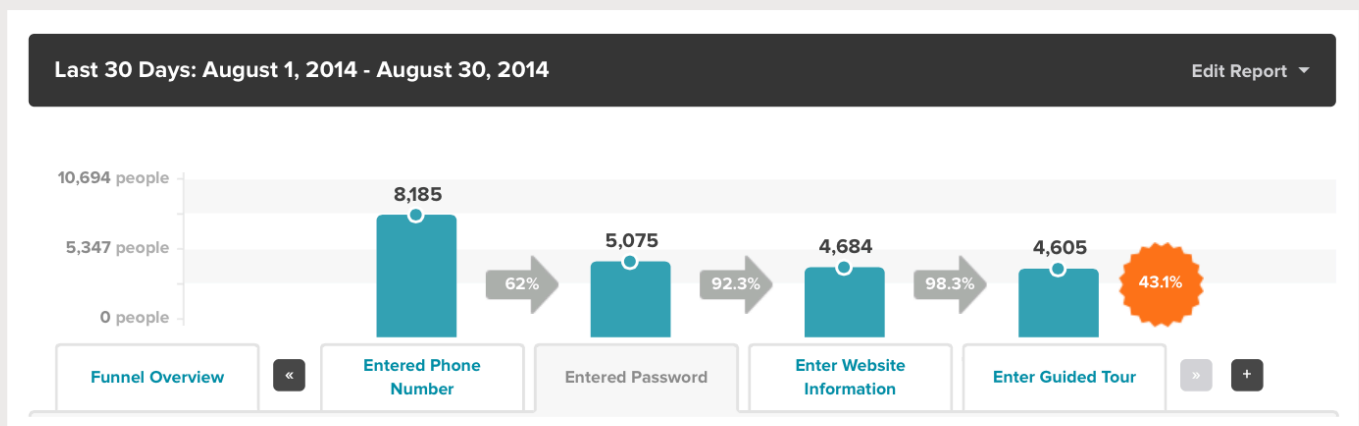
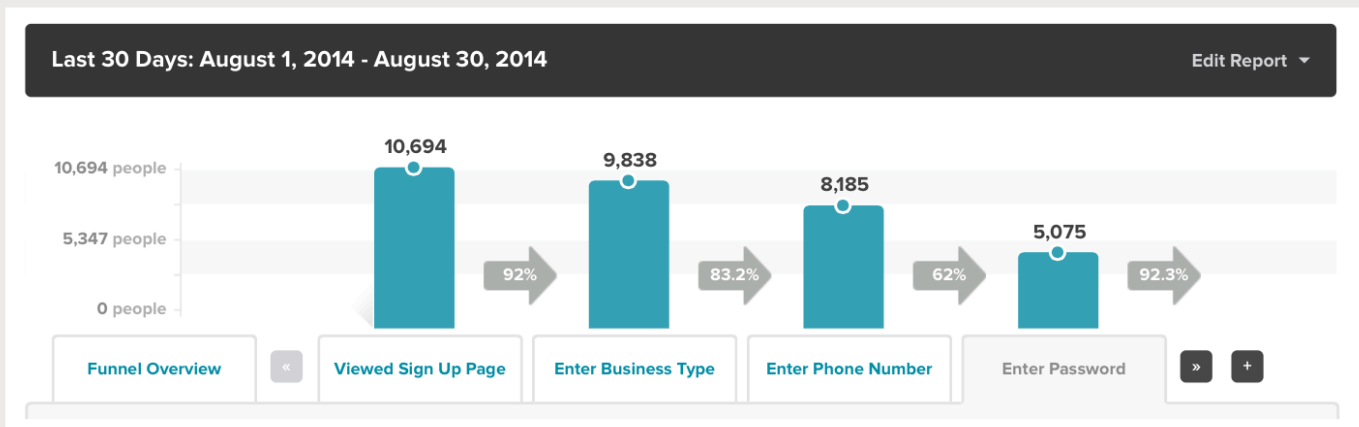
Our example funnel gave us a bird's eye view of our acquisition funnel. If we want to understand each step of our acquisition funnel in detail, we'll have to set up a more detailed micro funnel.

Many SaaS companies would find it useful to track how people convert through their signup flow. Here's an example signup flow:

1. **Viewed Sign Up page** — This step is triggered when a person views our Sign Up page.
2. **Entered Business Type** — After they sign up, they are prompted to enter their business type.
3. **Entered Phone Number** — Once they enter the business type, they are prompted to enter their phone number.
4. **Entered password** — Users create their password after entering their phone number.
5. **Entered Website Information** — Users enter their URL.
6. **Entered Guided Tour** — After all these steps, they enter a guided tour of the product.

For this example, there is no option to skip any of these steps. Users have to enter their business type, phone number, password, and website information before they can move to the next step.

Here's how the funnel looks:



Since it's long and detailed funnel we had to break into two screens.

We can see that each step brings the vast majority of people to the succeeding step in the funnel. The area where the most people drop off is the Enter Phone Number page.

Now, we apply the same process we did to our acquisition funnel. The only challenge this time is that we do not have the contact information for the people who did not convert.

Our best option is to use a [Qualaroo survey](#) on the Enter Phone Number page, setting it to appear after 10 seconds. It will ask the user if they have any hesitations, and if so, what those hesitations are. It's an open question.

We'll learn the differences between those who did and did not convert, find the pain points, and iterate. We may find that the people who didn't enter their phone number were not in our target market. The only way to learn this is to gather the data.

USE FUNNELS TO SEE HOW HEALTHY YOUR ACQUISITION IS

The Kissmetrics funnel report is *the* tool for understanding how healthy your acquisition is. It can help you identify roadblocks to growth by showing you where most visitors drop off. With segmenting, you can learn which channels are the most and least effective at driving your growth.

By setting up smaller, micro funnels, you'll be able to understand each step of your acquisition process. You'll see which areas need improvement, as well as which areas are succeeding. In turn, getting more focused on improving these micro funnels will have a positive impact on your acquisition funnel, and thus your growth.

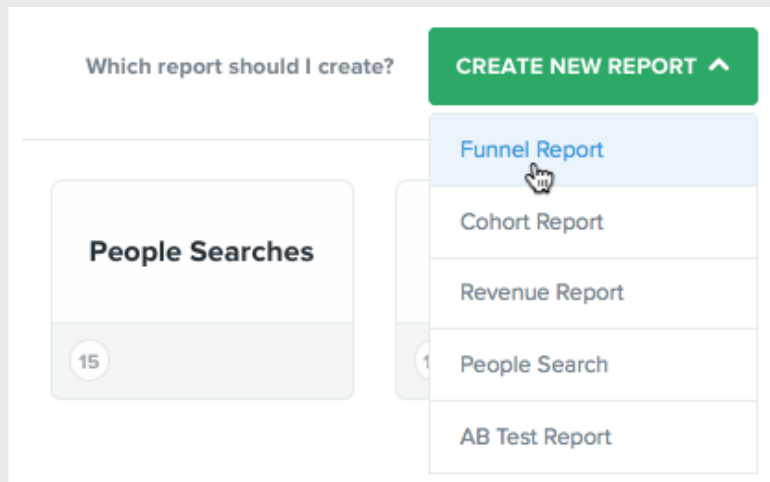
How to Use Kissmetrics to Improve an Ecommerce Checkout Funnel

Now let's focus on improving an ecommerce funnel. We'll begin by viewing a funnel report and finding areas that need improvement. Then, we'll form a hypothesis setting out changes that might improve conversions. We'll run a test. And, then, we'll close by viewing the hypothetical results.

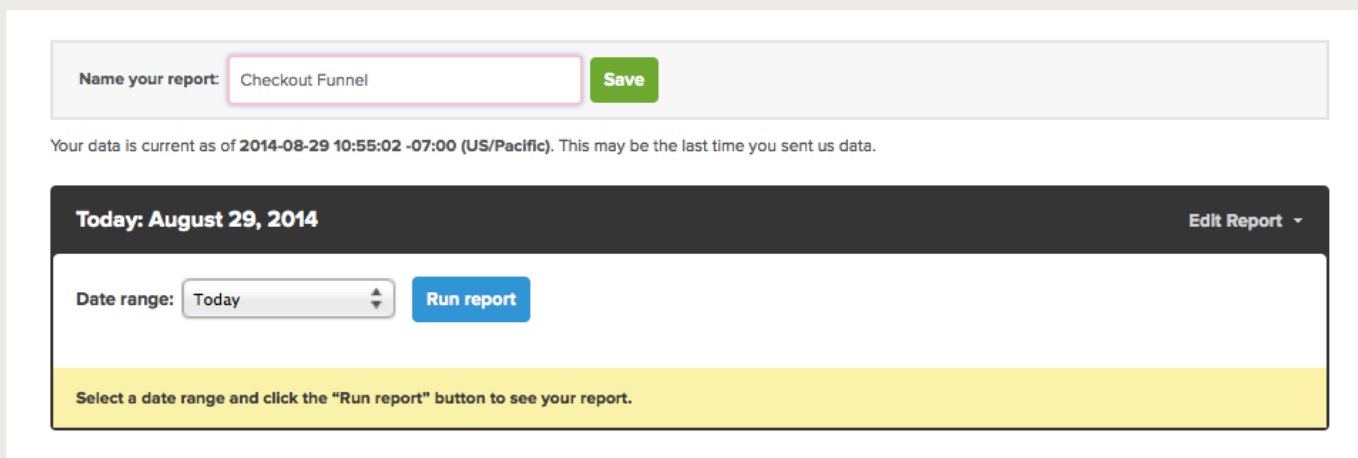
1. VIEW THE DATA

Our company, Acme Widgets, sells home goods. We've grown steadily over the years, but the bottom of our funnel (sales) hasn't done very well when compared with our traffic. We want to get into the nitty-gritty to understand how each step performs and find the bottlenecks we can improve.

We've [installed the JavaScript tracking code and created our events](#). Now, we need to set up our funnel. To do this, we go to the Reports section of Kissmetrics, click on Create New Report and select Funnel Report:

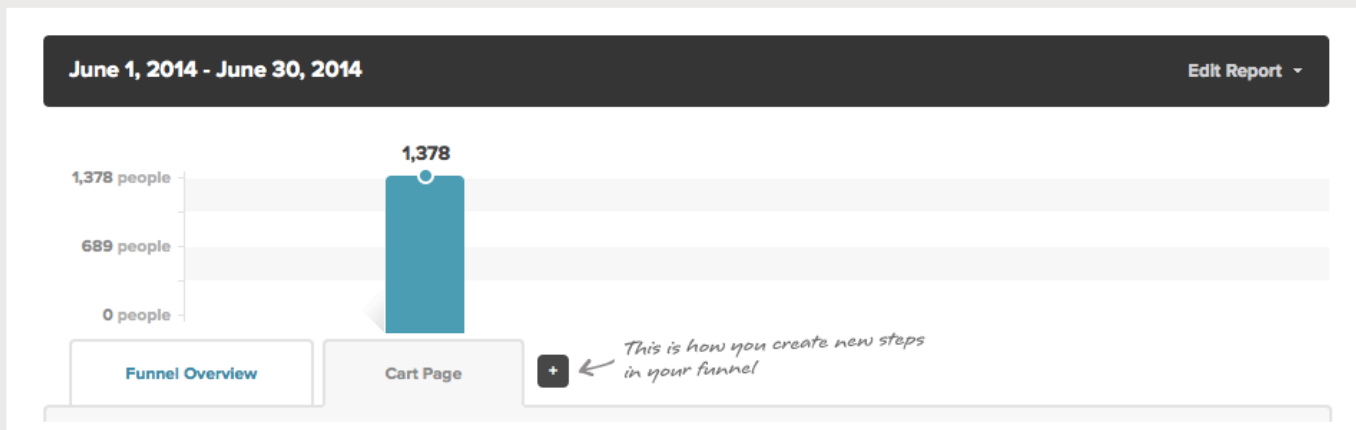


We'll name our report "Checkout Funnel":



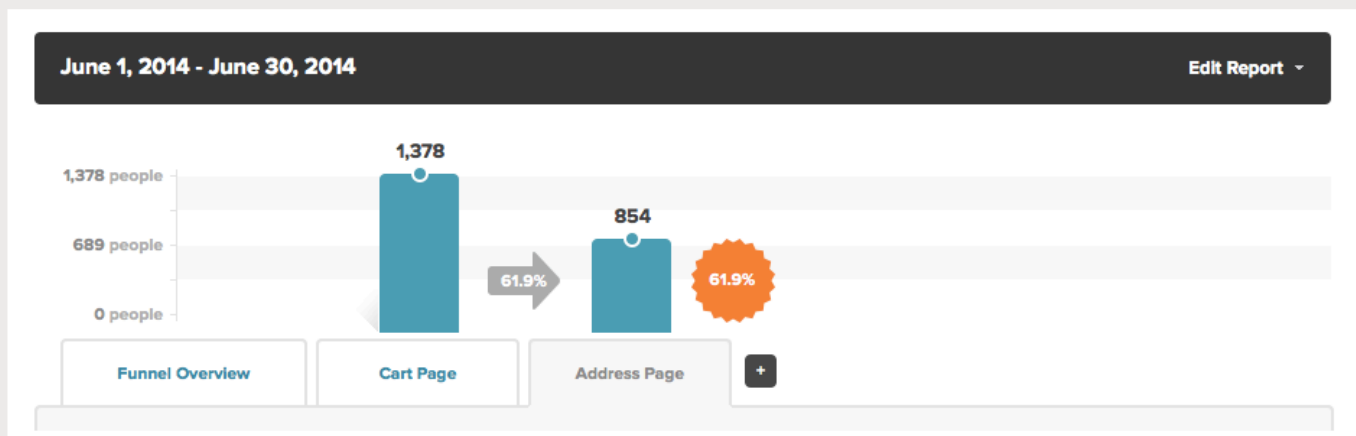
We want to track a month's worth of data, so we changed our date range to June 1 – 30, 2014.

We'll start with people who have put at least one item in their cart. The name for this event is "Cart Page":



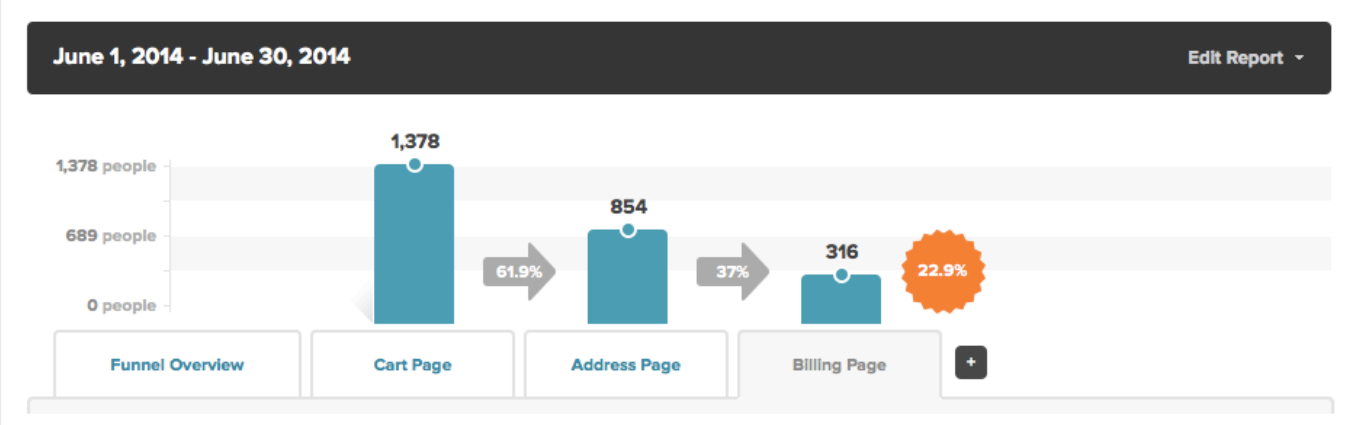
The next step of our checkout funnel asks visitors to enter their shipping address, along with their name and email address.

This event is called "Address Page." We click on the + sign in our funnel, add this event, and hit enter:



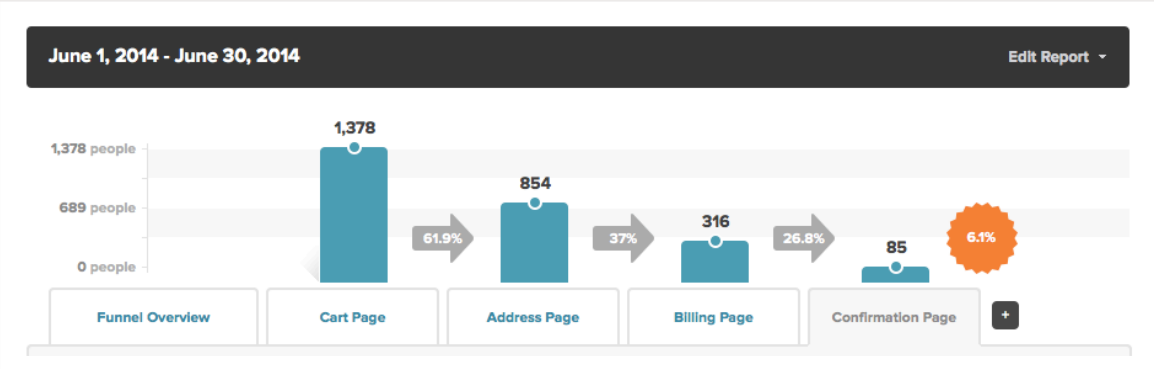
Once we enter the Address Page event, Kissmetrics runs the report. We see that 62% of people who placed an item in their cart went on to the Address Page. That means that a good percentage of people who place an item in their cart have the intention to buy (or at least want to see what the next step is).

The next step of our checkout asks users to enter their billing information. This event is called “Billing Page.” We add this event to the funnel:

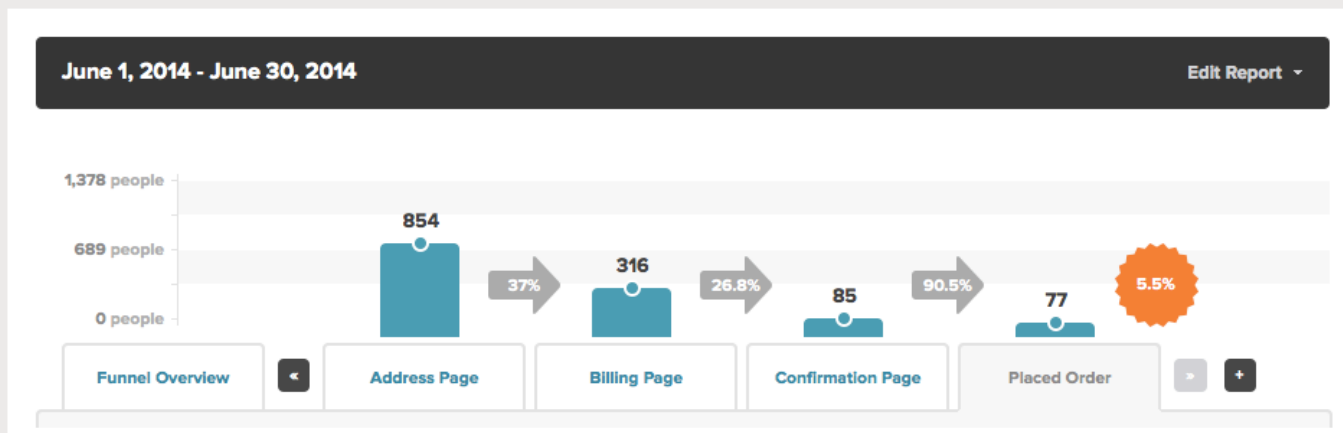


We see that there is a drop-off of people. We’ll continue creating our funnel to see if it’s our major bottleneck.

After our billing page, there is a confirmation page. It’s a summary of the order and a few forms for ordering, as well as a gift wrapping option. We’ve named this event “Confirmation Page.” We add it to our funnel and see our results:



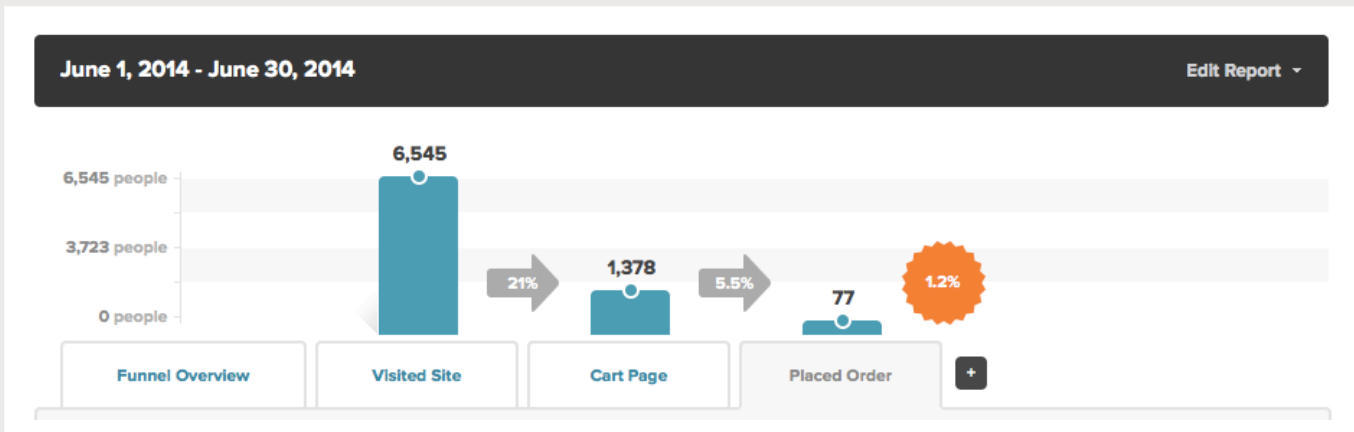
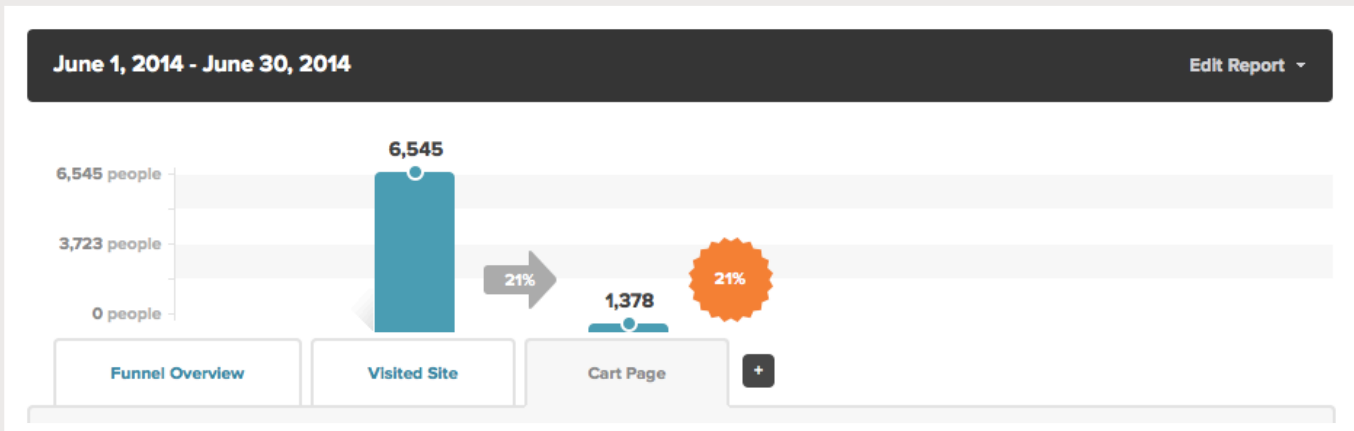
The last step of our checkout funnel is the “Placed Order” page. After the user confirms their order, they are taken to a webpage thanking them for their order. As the last step of our funnel, we add this event:



We see that we have about a 91% conversion rate from Confirmation Page to Placed Order. When people get this far in the funnel, few exit. The biggest drop-off in our funnel is our Billing Page. People see the page where they enter their payment information, get cold feet, and bounce.

Overall, our conversion rate from Cart Page to Placed Order is only a little over 5%. We think there is room for improvement.

We also want to see the big picture and get our overall site conversion, so we'll set up a report for that as well. We'll track people who visited our site, made it to cart page (triggered when a product was put in their cart), and placed their order:



Out of the 6,545 people who visited our site in June, 1.2% converted to purchasing a product. We think we can do better than this. We'll start by focusing on improving our checkout funnel.

2. FORM A HYPOTHESIS

When conducting a funnel analysis, we need to pay special attention to those who decided not to purchase from us. Learning why people chose not to make a purchase can provide us with actionable insight for overcoming those barriers to purchasing.

We decide to run a survey to get a better understanding of these barriers. We'll use Qualaroo and ask our visitors, "If you did not make a purchase today, can you tell us why not?" It's an open question. There are no pre-set multiple-choice answers.

The survey displays after the visitor has been viewing a page for 20 seconds.

Many people stated that they didn't feel comfortable purchasing. They had doubts about the security and lack of general information about the company.

The first thing we'll need to address is the doubts around security. To make visitors feel more comfortable with purchasing on our site, we'll be adding a few security elements throughout our website and on our cart page.

Our Hypothesis: Adding Security Elements Will Improve Checkout Conversions

Each page of the website will have the "Norton Secured" symbol in the bottom footer. This will provide visitors with reassurance that their data is safe because the website is protected by a known internet security company.

We've also recently become a [Google Trusted Store](#) and will be embedding that symbol in our bottom footer.

We'll have both symbols on our cart page, along with a message stating that we've shipped over 5,000 orders since our founding just 3 years ago. Also, the following message will appear on the cart page:

“Our website uses a 256-bit AES encryption to protect all your information. Your credit card will be processed through PayPal, which has handled well over \$1 billion in transactions. Click here to learn more about our security practices.”

The link takes visitors to a newly created webpage that outlines the security measures we’ve taken on our website.

We believe adding these elements will provide reassurances to customers that our site is secure and our business is reputable.

3. RUN THE TEST AND VIEW THE RESULTS

Our test will go live for every person who visits our site. We’ll let the test run for a month, and afterward we’ll see if our hypothesis proves correct.

When testing changes to your website, you can either eyeball your data or run an A/B test.

When you eyeball your data, you make changes to your website, all visitors to your site get the change, and you view your data to see if the change increases conversions.

There are a few cases where you want to eyeball your data:

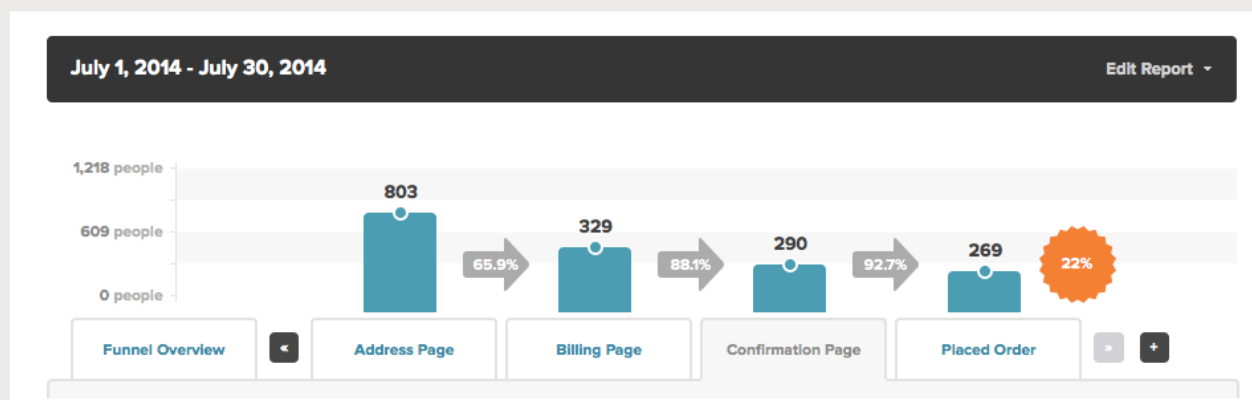
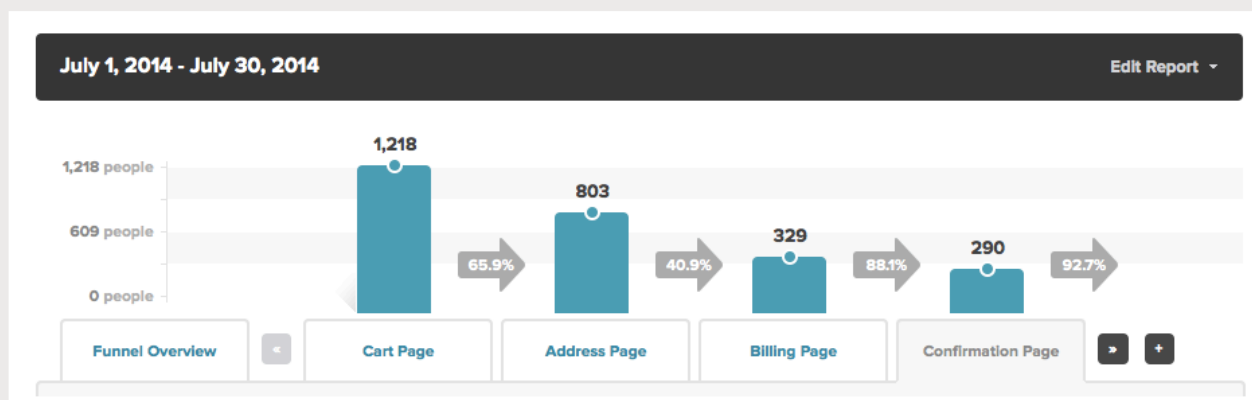
- If you’re a young company that doesn’t have a lot of traffic. In this case, it’ll take too much time to run an A/B test. Keep your focus at the top of the funnel and earning more traffic before you A/B test. Until then, eyeball top-of-the-funnel conversions, such as sign-up rate.
- If you’re a high price / low volume sales company. If you get only a few sales annually, keep to eyeballing your data.
- If you are, as in our case, responding to overwhelming feedback from visitors. For us, they’ve made it clear that they do not trust making a purchase from us.

In some cases, you'll want to set up an A/B test. The following situations generally warrant an A/B test:

- If you have enough traffic to run an A/B test. More traffic will allow you to get much more reliable results.
- If you're making small changes that may not result in big conversion changes.
- If you're expecting less than 30% improvement. Small changes need an A/B test in order to see an impact. Otherwise, the small improvement just gets lost in the noise of the data's natural fluctuations.

If you fit the A/B testing criteria, you'll want to sign up for a service like Optimizely or Visual Website Optimizer. Kissmetrics has an A/B test report that integrates with these services, and you'll be able to view those results in Kissmetrics. The benefit of using the A/B test report is that you can view actual people who did or didn't convert in an experiment.

Going with our eyeball test, we come back one month later, and we view our funnel report. We select July 2014 for our date range. Our report loads, and here's how it looks:

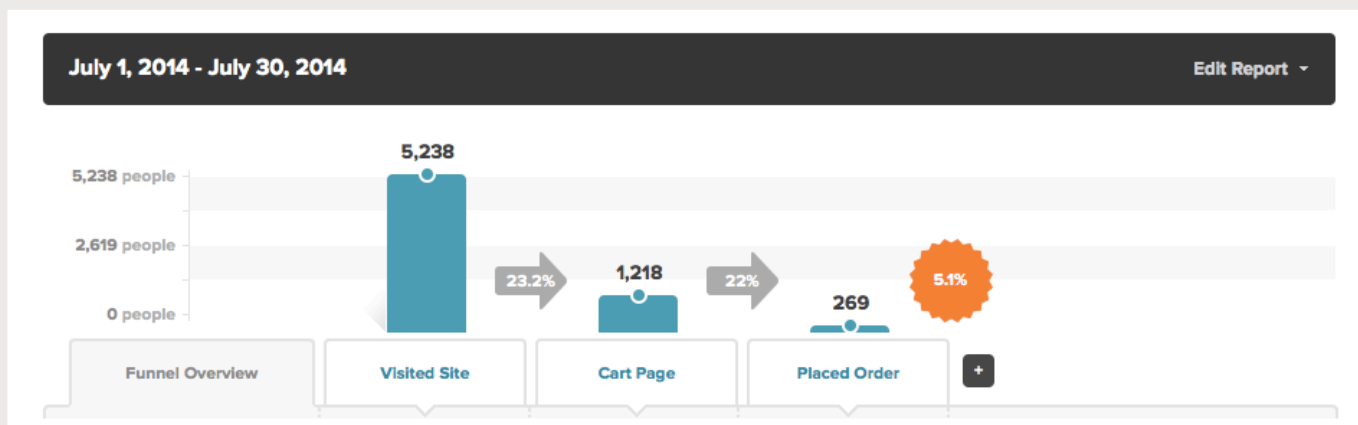


Here are a few initial impressions:

- The number of people who placed items in their cart was lower than in June. This is because of less traffic to our site, which we'll soon see in our main acquisition funnel. In the future, we may want to add the "Visited Site" event to our checkout funnel. This will show us how our checkout funnel performs relative to our traffic.
- Every step of our checkout funnel had an improvement in the percentage of conversions compared with last month, especially in the last 2 steps.
- Despite lower traffic, we still had many more customers place orders with us.
- Our conversion rate quadrupled. About one in every five people who placed an item in their cart completed their purchase.

This is awesome news. It appears that our hypothesis was correct and the changes we made to our site instilled confidence in visitors, who were then more likely to buy.

Now, we'll run the report for our overall site conversion. Remember, in this one we're tracking total people to our site, then people who put an item in their cart, and then those who proceed with their purchase.



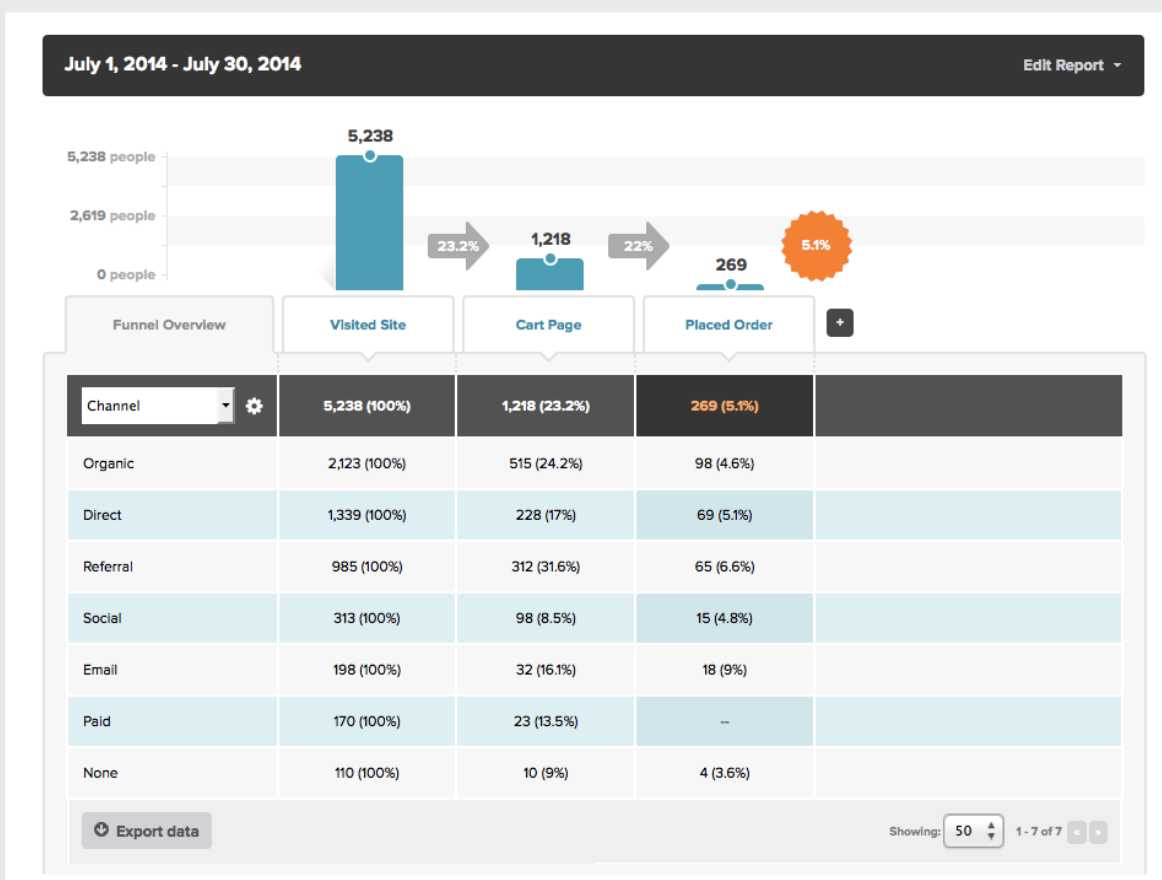
At the top of our funnel, we can see that we had less traffic in July than in June. But, a larger percentage of the visitors put items in their cart and placed orders. We got more customers on less traffic! Throughout our funnel, larger percentages of people converted to the next event step, especially in the last 2 steps.

We have the essence of our main conversion funnel. It gives us a bird's eye view of how well our website converts. If we want to further understand what's driving it, we can segment these people in this funnel by properties. [Properties](#) are various characteristics about the people.

A common example of a property is "returning," which tracks whether the person is a new visitor or returning. Also, if someone came to your site via a search engine, the property "search engine" will display which search engine the person came from.

Segmenting the Data

For this funnel report, we'll segment our visitors by the property "channel." It categorizes traffic into referrer segments. Here's how it looks:



For more information about the channel property, check out our article on [Channel Definitions](#).

This report shows us how each channel performs, not just in bringing visitors, but throughout the funnel.

We see that one of our strongest, top-of-the-funnel channels is organic. A lot of people find us by search, and a fair number of them convert to place an item in the cart and then purchase.

A high-converting channel is Referral. These include sites that link to us. Since it's successful for us, the more links we can get, the better.

We see that our paid efforts bring us visitors and some of them place an item in their cart, but none of them place an order. We may want to consider some remarketing efforts for the people who abandon their cart. If we don't want to add to our costs, we may want to cut off paid acquisition. But before we do, we'll have to view our cohort report to see if some of these visitors make purchases later than those from other channels. We'll get into the cohort report a little later.

Email appears to be a strong channel for us. We may want to promote our email newsletter more. Here are some ideas for how to do that:

- Offer 5% off for new visitors who sign up for our email newsletter
- Place a modal on our homepage offering our newsletter
- Once customers place an order, have a message suggesting that they may want to sign up for the newsletter

Throughout all messages, we need to explain the value of our newsletter, as well as how often subscribers are emailed. We could mention the tips we provide, exclusive deals, and new product arrivals.

Using Cohorts to Track Your True Conversion Rate

A cohort is a group of people who share a common characteristic or experience within a defined period of time.

Part of what distinguishes cohort analysis from other data analysis methods is that it allows you to track groups of people over long periods of time. In most cases, when you're tracking data, everyone is blended together. You can segment people, but you can't group them together and track their activity apart from other groups.

Why does this matter?

When you can put people into different groups based on their activity and track them over long periods of time, you will get an idea of what works and what doesn't. Did one group see one marketing message that the other didn't? Are free trial users who submit support tickets more likely to convert to customers? Which features or products do customers keep coming back to use or buy? How "sticky" is your product for new users?

These questions can be answered with cohorts.

THE ONE MAJOR ADVANTAGE OF COHORTS OVER FUNNELS

You're probably thinking to yourself: *Why not just use funnels to track conversions?*

The big reason is that cohorts keep people separated over time. Funnel reports blend people together and can't separate them. Use funnels for the primary purpose of identifying bottlenecks and roadblocks where people get stuck.

Let's say you want to track how long it takes people to sign up after visiting your site. With a funnel report, the only thing you can do is select a date range and find the conversions within that time frame. In a cohort report, you can see the exact minute, hour, day, week, or month they converted.

Below is a simplified cohort report that tracks conversions from "visited site" to "signed up." We're using it to show you how cohorts work.

People are grouped by the month they visited, and they are split into buckets by the percentage of them who signed up each month:

Number of users who did visited site .		Percentage of users that did signed up after doing visited site .					
		1 month	2 months	3 months	4 months	5 months	6 months
April 2013	352,754	35%	12%	10%	8%	3%	1%
May 2013	332,986	30%	10%	10%	8%	8%	1%
June 2013	327,535	35%	1%	1%	1%	1%	1%
July 2013	337,179	25%	1%	20%	5%	1%	1%
August 2013	310,777	20%	10%	10%	10%	1%	1%
September 2013	322,740	18%	5%	1%	1%	1%	1%

On the left side of the report, we see six months (groups) along with the number of people who visited the site during that month. People are sorted by when they first visited the site. So, if someone visits in April and again in June (and doesn't sign up), they'll be kept in the April group. On the right, we see the percentage of people in each group who signed up after they visited the site. They are sorted by month. If they visited the site and signed up within a month, they are put in the "1 month" bucket.

Viewing the data, we see that most people sign up within a month of visiting the site for the first time.

Putting people into these groups allows us to better understand the effectiveness of marketing activities. We see that April-June had higher first-month conversions. The July-September first-month conversions were not as strong, but 50% of the people who visited in August signed up within four months. If you were testing different marketing practices during those months, you'd see just how that marketing affected conversion rates.

THE KISSMETRICS COHORT REPORT

The core of Kissmetrics is its people-tracking platform. It doesn't track sessions or visits. It tracks the real people who visit your site.

From the very first time a person visits your site until the last time, all the visits get counted and recorded as one person in Kissmetrics. As long as you have some way of identifying users, you can track people in Kissmetrics.

And, it doesn't matter if the person visits your site on their tablet, phone, and/or desktop. Once the person is identified, all the visits merge and you'll see exactly what the person did.

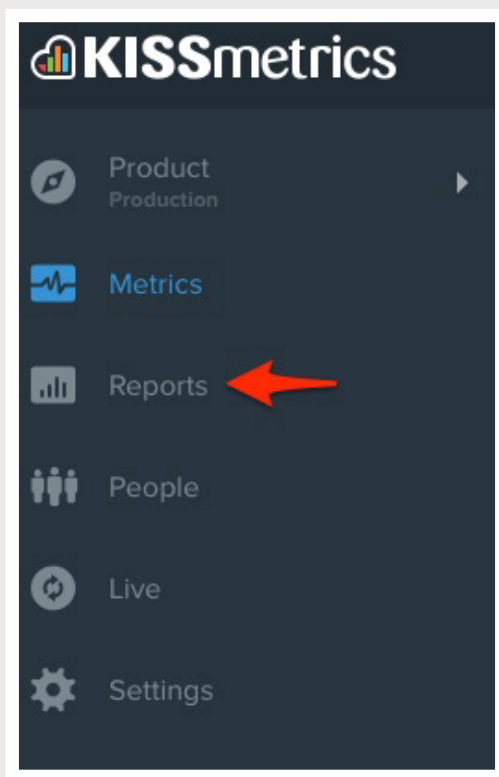
When running a cohort report, you'll need to keep people straight. No one should be counted more than once, and no user activity should be automatically deleted after a certain time period. As we've seen, measuring cohorts can take months. If you're using a platform that doesn't track people or

doesn't remember them after a certain time period, you'll end up with bad data.

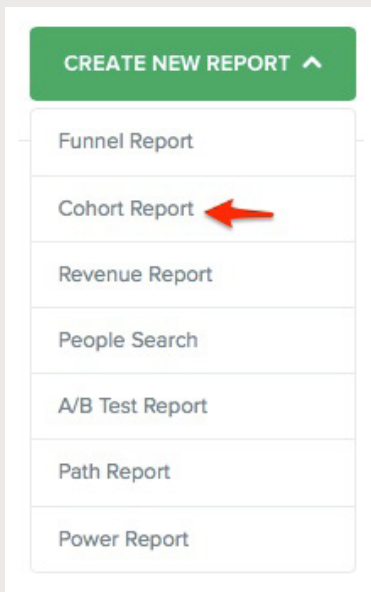
Whichever cohort groups you use, you'll need to be sure they are super accurate and data isn't limited. What makes Kissmetrics's Cohort Report so awesome is that your data is accurate and the data doesn't expire. It is exact and granular. You can drill down and see the exact people in each group and bucket. This allows you to reach out and get feedback from any user group you want to target. Without the people tracking you get in Kissmetrics, you wouldn't have this flexibility.

Create a Cohort Report

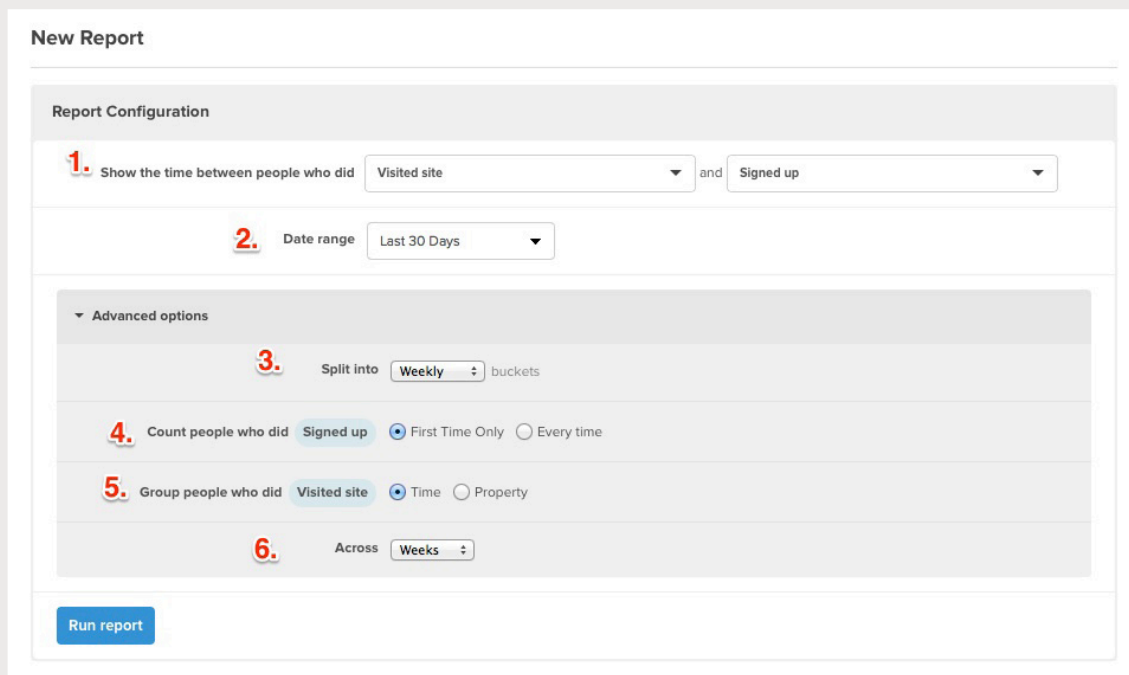
To create a Kissmetrics Cohort Report, go to the "Reports" tab:



Go to “Create New Report” and select “Cohort Report”:



You'll be presented with your report configuration:



This is where you set the parameters of what you want to track, as follows:

1. Choose the two events you want to track. In the example above, we're tracking the people who visited the site and converted to signed up. "Visited site" is an automatically tracked event, while "Signed up" is not. You'll want to be sure to get your tracking set up and get many of your events and properties in place before you begin creating a report.
2. The date range is not limited to 30 days. You can choose one week, two weeks, a month, ninety days, six months, twelve months, or you can pick a custom date range.
3. Choose the time frame for the buckets you want to split the "Signed up" people into. We can split them by minute, hour, day, week, or month. What we split them by cannot exceed the date range. So, in our case, since we're looking at the last 30 days, we cannot split them into months because that would exceed the 30-day range we've set.
4. We can choose to count people who did the event "Signed up" every time or just the first time. Since people sign up only once, we'll stick with "First Time Only." (In some cases, you'll want to choose "Every time." For example, if you're interested in tracking how often people log in, you'll set it to "Every time.")
5. Choose whether to group people by time or property. [Properties tell us various things about each person](#) and are used to segment people. We'll get into more detail later about which properties can help provide the best insights for specific reports.
6. If we choose to group people by time, we can group them by day, week, or month. If we choose to group people by property, we'll get four options:

These options apply to any property you choose. They are not exclusive to the Referrer property. Here are definitions/explanations of each of the four options:

The screenshot shows a configuration interface for a report. At the top, it says "Group people who did" followed by two radio buttons: "Visited site" (selected) and "Time". Below this, there is a section labeled "Use the" with a dropdown menu. The dropdown menu is open, showing four options: "First" (checked), "Last", "First (starting Nov 4, 2014)", and "Last (ending Dec 3, 2014)". To the right of the dropdown is another dropdown menu labeled "Referrer". At the bottom left, there is a blue button labeled "Run report".

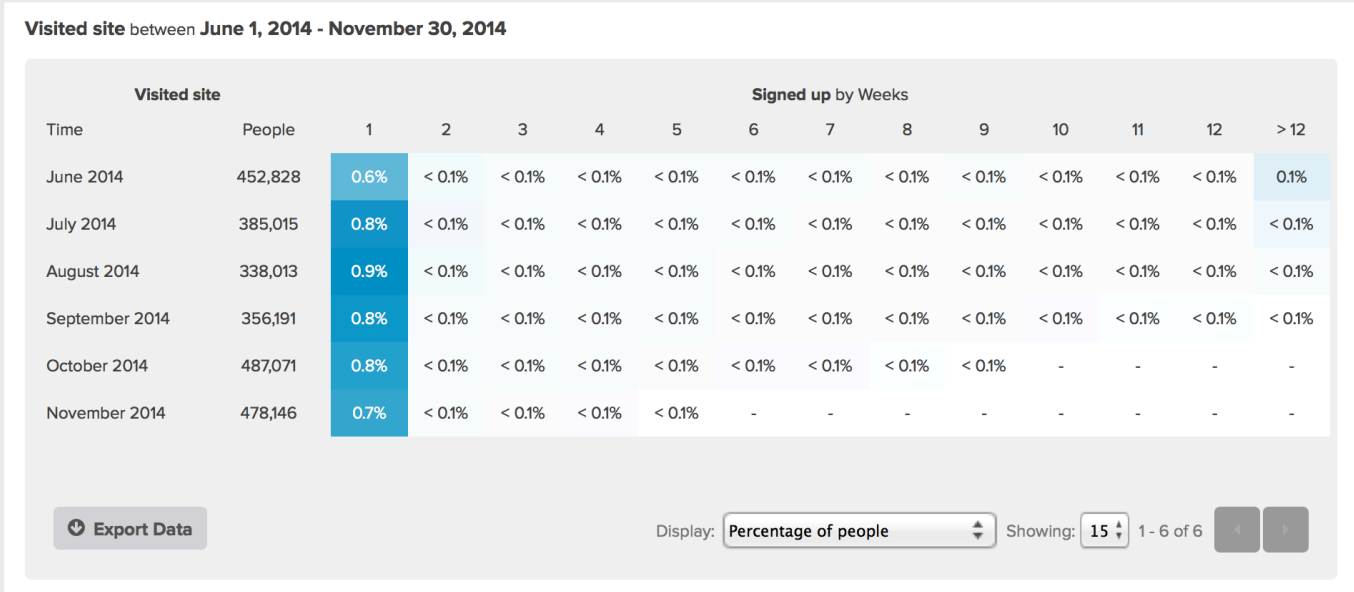
- 1. First** — When this option is selected, you'll be viewing the first ever occurrence of the property. In this example, we're looking at the Referrer property, which groups people by the URL that referred them. Whatever their first referrer was, gets grouped here. So, if they first came to the site on July 4, 2012 from espn.com, they'll be grouped by that referrer.
- 2. Last** — This will give you the most recent value for the property. In the case of the Referrer property, it's the last site that the person came from regardless of the date range on the cohort.
- 3. First (starting date range)** — This referrer is the first one within the selected date range. The first ever referrer is ignored. Whoever the person's first referrer was within the date range is the one used here.
- 4. Last (ending date range)** — In this sorting, people are grouped by the last referrer within the date range.

Before we run our report, we'll change the date range to the last 6 months (step 2. above). This way, we'll get a bigger sample size than we would from the last 30 days we previously set. Also, since the length of our date range is 6 months, we'll make a change under "Advanced options." We'll group the people who did the event "Visited site" across months, not weeks (step 6. above). Here's how the revised report configuration looks:

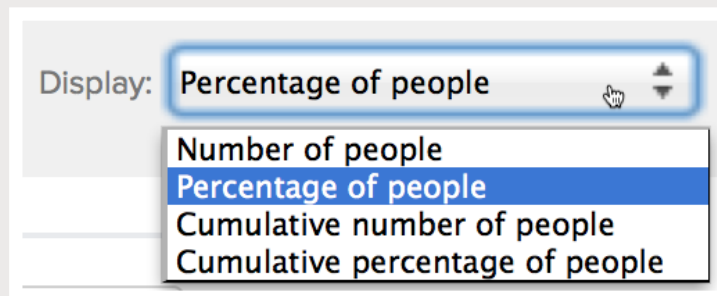
The screenshot shows a 'New Report' configuration form. At the top, it says 'Report Configuration'. Below that, there are two dropdown menus for 'Show the time between people who did' with 'Visited site' and 'Signed up' selected, separated by 'and'. The 'Date range' is set to 'Last 12 Months'. Under 'Advanced options', 'Split into' is set to 'Weekly' buckets. For 'Count people who did', 'Signed up' is selected, and 'First Time Only' is selected with a radio button. For 'Group people who did', 'Visited site' is selected, and 'Time' is selected with a radio button. The 'Across' dropdown is set to 'Weeks'. A blue 'Run report' button is at the bottom.

Run a Cohort Report and View Your Data

We'll click "Run report" and get our data:

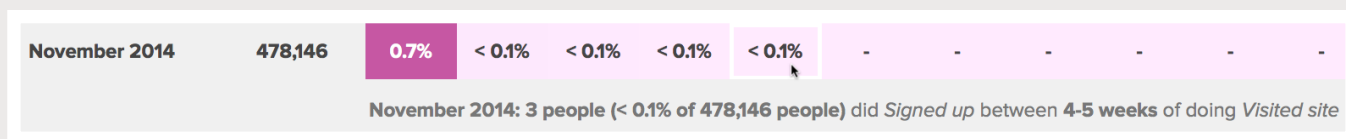


On the left, we're looking at the number of people who visited the site during a specified month (group). To the right, we're looking at the percentage of people who signed up after they visited the site (split into weekly buckets). Below the chart, we have a range of display options:



- 1. Number of people** — This display will show the number of people in each bucket. Use this if you don't necessarily care about a strict conversion percentage and just want the raw numbers.
- 2. Percentage of people** — This is what we used in the above example. If you are interested in tracking conversion rates over time, use this.
- 3. Cumulative number of people** — When this option is chosen, each bucket will include the data before it. It will add up over time (assuming you don't have 0) and give you the running totals. Use this when you want to see if the totals are increasing with each new batch of people.
- 4. Cumulative percentage of people** — The exact same as above, except with percentages. Use this to see how your conversion rate progresses through time.

We can hover over various buckets within the report to get a quick synopsis:

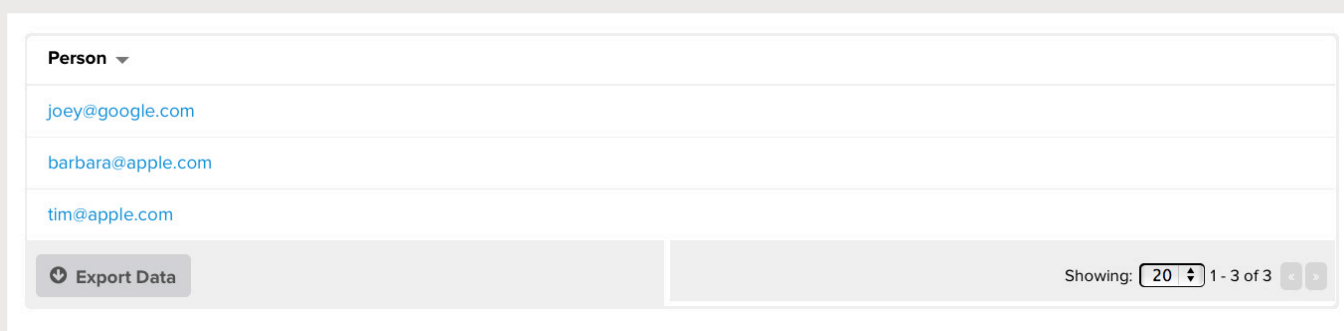


If we click on a bucket, we get the option to view the exact people who signed up during the time frame:



Remember, Kissmetrics connects all your data to real people. This means you can instantly pull a list of people who are in any particular cohort. To see who these people are, just click on the “View the 3 people” link, and you’ll get a list of the people and their email addresses.

Then, you can click on each person and get a person details report. (If you want to get more information on our person details report, head over to the [People, Events, and Properties section](#).)



Now that we’ve discussed how to set up and read the Kissmetrics Cohort Report, let’s get into detail about how these reports can benefit your business.

USE THE COHORT REPORT TO MEASURE RETENTION

Businesses live and die by their ability to acquire and retain customers. Acquisition and retention need to be balanced for a business to survive and grow. If you can’t do either well enough, growth will stagnate, and the business could eventually die.

So how do you avoid this?

In both acquisition and retention, the Kissmetrics Cohort Report is one of the best tools you'll come across. It's included in every Kissmetrics plan and is super easy to set up and use. Let's run through some examples of how you can use this report to help you understand and improve your acquisition and retention.

Track Signup Rates

When tracking your signup conversion rates, you'll want to use two separate reports:

- **Funnel Report** — Use this report to identify roadblocks to conversion.
- **Cohort Report** — Use this to put people into groups and learn the amount of time it takes them to convert.

To set up a cohort group for signup conversions, load the Cohort Report in Kissmetrics. Select the events “Visited Site” and “Signed Up”:

The screenshot shows the 'New Report' configuration interface in Kissmetrics. It features a 'Report Configuration' section with the following elements:

- A label: "Show the time between people who did"
- A dropdown menu: "Visited site" with a downward arrow.
- The word "and" in the center.
- A dropdown menu: "Signed up" with a downward arrow.
- A label: "Date range"
- A dropdown menu: "Last 30 Days" with up and down arrows.
- A button: "Advanced options" with a right-pointing arrow.
- A blue button: "Run report".

We'll want to get a good sample size, so we'll change our date range from the last 30 days (as shown above) to the last 12 months. We'll also need to make a change under the "Advanced options":

New Report

Report Configuration

Show the time between people who did **Visited site** and **Signed up**

Date range **Last 12 Months**

Advanced options

Split into **Weekly** buckets

Count people who did **Signed up** First Time Only Every time

Group people who did **Visited site** Time Property

Across **Weeks**

Run report

Since the length of our date range is 12 months, we'll group people across months instead of weeks (as shown above):

Report Configuration

Show the time between people who did Visited site and Signed up

Date range Last 12 Months

Advanced options

Split into Weekly buckets

Count people who did Signed up First Time Only Every time

Group people who did Visited site Time Property

Across Months

Run report

We'll click "Run report" and get our data:

Visited site between December 1, 2013 - November 30, 2014

Time	Visited site People	Signed up by Weeks													
		1	2	3	4	5	6	7	8	9	10	11	12	> 12	
December 2013	389,188	0.3%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	0.2%
January 2014	403,439	0.5%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	0.1%
February 2014	481,434	0.5%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%
March 2014	550,846	0.4%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%
April 2014	555,573	0.4%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%
May 2014	470,344	0.4%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%
June 2014	379,925	0.5%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%
July 2014	354,888	0.8%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%
August 2014	320,389	0.9%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%
September 2014	343,317	0.8%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%
October 2014	475,040	0.7%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	-	-	-	-	-
November 2014	470,039	0.7%	< 0.1%	< 0.1%	< 0.1%	-	-	-	-	-	-	-	-	-	-

Export Data

Display: Percentage of people Showing: 15 1 - 12 of 12

We see that in every month (group) shown in the list on the left, the bulk of signups occurred within the first week. Any time after one week, there's only a small chance of conversions.

The good news is that conversions improved as the months went by. In December, .3% of visitors converted to Signed up within the first week (bucket). Then, up until June, conversions stayed within .4% and .5%. Beginning with July, conversion rates nearly doubled from where they were previously.

Let's change our "Visited site" grouping from time to property. We'll look at the Channel property to see how different channels affect conversions. (We'll look at the channel of the person's first ever visit.) The Channel property categorizes your traffic referrals into 7 groups:

- **Direct** — Visits from direct referrers, typing your site into the browser, or bookmarks
- **Organic** — Visits from search engines
- **Referral** — Visits from other domains
- **Email** — Visits from emails
- **Paid** — Visits from paid sources such as cpc, cpm, display, ppc, and more
- **Social** — Visits from social networks/sites
- **None**

New Report

Report Configuration

Show the time between people who did **Visited site** and **Signed up**

Date range **Last 12 Months**

Advanced options

Split into **Weekly** buckets

Count people who did **Signed up** First Time Only Every time

Group people who did **Visited site** Time Property

Use the **First** **Channel**

Run report

Visited site between December 1, 2013 - November 30, 2014

Visited site		Signed up by Months													
Property	People	1	2	3	4	5	6	7	8	9	10	11	12	> 12	
Organic	3,313,221	0.5%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	
Direct	962,597	0.7%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	
Referral	386,443	1.7%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	
Social	350,990	0.4%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	
None	123,742	0.6%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	
Email	43,464	0.4%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	< 0.1%	-	< 0.1%	-	-	
Paid	13,963	0.4%	-	-	< 0.1%	-	< 0.1%	-	-	-	-	-	-	-	

Export Data

Display: Percentage of people Showing: 15 1 - 7 of 7

To get more concrete numbers, we'll change the display option below the chart from "Percentage of people" to "Number of People":

Visited site between December 1, 2013 - November 30, 2014

Visited site		Signed up by Weeks													
Property	People	1	2	3	4	5	6	7	8	9	10	11	12	> 12	
Organic	3,313,221	15,221	740	524	420	349	308	303	232	229	175	164	164	1,855	
Direct	962,597	6,138	215	172	123	111	85	88	85	71	42	56	38	668	
Referral	386,439	6,037	160	105	87	73	48	47	42	39	27	30	33	330	
Social	350,990	1,062	69	48	47	45	33	26	25	25	25	14	26	242	
None	123,740	622	37	19	18	9	7	12	8	7	8	14	7	90	
Email	43,465	136	17	22	14	7	3	2	4	8	6	5	3	34	
Paid	13,963	50	-	-	-	-	-	-	-	-	-	-	-	2	

Export Data

Display: Number of people Showing: 15 1 - 7 of 7

Viewing both the percentage of people and the number of people, we see that organic delivers the most visitors and the most signups. But, compared with the other channels, organic has an average conversion rate. Referral has more than double the percentage of conversions of any other channel.

Actions to Take Based on These Insights

Given that referral is such a strong group in the Channel property, you'll need to do what you can to increase the number of referrals you get from other sites. PR, outreach campaigns, and guest blogging should all be in the cards.

Measure Login Retention after Signup

Let's say you're a SaaS company and you want to know how many people log back in after signing up. This will help you understand the "stickiness" of your product and the effectiveness of your new user onboarding.

To start, load the Cohort Report and select the events "Signed Up" and "Logged In." These events are not automatically tracked in Kissmetrics, so you'll have to set them up yourself.

New Report

Report Configuration

Show the time between people who did and

Date range

▶ **Advanced options**

Run report

This report will show us the people who visited the site and eventually signed up.

Since we're interested in new user login retention, we'll change our date range to the last 90 days.

We'll also take a look at the Advanced options:

New Report

Report Configuration

Show the time between people who did **Signed up** and **Logged in**

Date range **Last 90 Days**

Advanced options

Split into **Daily** buckets

Count people who did **Logged in** First Time Only Every time

Group people who did **Signed up** Time Property

Across **Weeks**

Run report

Since the length of our date range is only 90 days, we'll split people into daily buckets.

We'll count people who "Logged in" "Every time" (instead of "First Time Only" as shown above).

We'll group people who "Signed up" across weeks.

We'll click "Run report" and get our data:

Signed up between September 2, 2014 - November 30, 2014

Signed up		Logged in by Days												
Time	People	1	2	3	4	5	6	7	8	9	10	11	12	> 12
Week of Sep 2, 2014	913	84.7%	4.9%	4.6%	5.8%	3.4%	2.8%	3.4%	4.3%	3.1%	2.4%	2%	3.3%	13%
Week of Sep 9, 2014	954	86%	7.1%	5%	5.9%	4%	4%	3.8%	3.4%	2.8%	2.4%	0.9%	2.5%	11.6%
Week of Sep 16, 2014	996	84.4%	5.5%	4.1%	4.4%	3.1%	3%	2.9%	3.1%	2.8%	2.2%	2%	2.3%	10.9%
Week of Sep 23, 2014	951	84.8%	6.4%	5.7%	6.1%	4.2%	3.5%	4.5%	4.1%	2.5%	2.1%	2%	2.8%	11%
Week of Sep 30, 2014	891	89.8%	7.7%	4.2%	4.7%	3.5%	3.3%	2.2%	3.1%	2%	1.5%	1%	2.4%	7.9%
Week of Oct 7, 2014	949	86.9%	7.1%	6.2%	4.3%	3.4%	3.8%	3.2%	2.4%	2.7%	2.1%	2.5%	2%	10.2%
Week of Oct 14, 2014	1,166	88.6%	6%	5.1%	4.7%	3.5%	2.3%	2.7%	2.7%	1.7%	1.5%	1.1%	1.6%	8.9%
Week of Oct 21, 2014	1,134	89.4%	7.1%	5.1%	4%	3.3%	3.3%	5.4%	4.1%	3.2%	2.5%	2.6%	3.5%	9.6%
Week of Oct 28, 2014	1,607	85.4%	4.1%	4.5%	3%	2.1%	3.2%	2.9%	2.1%	2.4%	1.8%	1.6%	1.7%	6.3%
Week of Nov 4, 2014	1,168	87.7%	5.4%	3.9%	4.4%	2.7%	2.6%	2.7%	2.7%	1.5%	1.7%	1.4%	2.2%	5.3%
Week of Nov 11, 2014	1,101	86.6%	5.8%	4.7%	3.9%	2.7%	3%	2.4%	2.5%	1.5%	1.2%	1.5%	1.8%	3.2%
Week of Nov 18, 2014	1,116	89.8%	4.7%	3.5%	3.5%	3.5%	3%	3%	2%	1.2%	1%	0.9%	0.6%	0.5%
Week of Nov 25, 2014	889	91.9%	3.5%	2.5%	3%	1.1%	1.3%	0.2%	-	-	-	-	-	-

Export Data
 Display: Percentage of people
 Showing: 15 1 - 13 of 13

On the left side, we're grouping people who signed up by week. We see a week (group) along with the number of people who signed up during that week. On the right, we see the percentage of people who logged in after signing up (split into weekly buckets). We selected "Every time" under the Advanced options, so we're tracking each time a person logs in.

It's not surprising that most people log in the same day they sign up. But, after the first day, we see a big drop off, and the retention continues to drop off as the days go by. The ">12" column is the percentage of people who continue to log in after 12 days of signing up.

To get more insight out of this report, let's group those people who signed up by the plan they selected. To do this, we go back to our report setup (report configuration). Under Advanced options, we go to our options for the way we group people. We change the way we group people from time to property, and we select "Subscription plan level" as our property. This property is not automatically tracked in Kissmetrics, so you'll have to set it up yourself. (We'll look at the Subscription plan level of the person's first ever plan.)

Advanced options

Split into Daily buckets

Count people who did Logged in First Time Only Every time

Group people who did Signed up Time Property

Use the First Subscription plan level

Run report Save report

Signed up between September 2, 2014 - November 30, 2014

Signed up		Logged in by Days													
Property	People	1	2	3	4	5	6	7	8	9	10	11	12	> 12	
Basic	265	92.8%	32.5%	27.9%	30.6%	22.6%	21.9%	26%	28.3%	25.3%	22.6%	18.1%	23.8%	70.6%	
Medium	251	89.2%	16.7%	12.7%	15.1%	11.6%	12%	13.5%	12.4%	12.7%	9.2%	9.6%	11.2%	44.2%	
Professional	120	89.2%	30%	21.7%	23.3%	20%	22.5%	20%	15%	11.7%	14.2%	14.2%	13.3%	35.8%	
custom basic monthly	18	88.9%	33.3%	38.9%	38.9%	16.7%	38.9%	33.3%	44.4%	38.9%	27.8%	27.8%	27.8%	61.1%	
Enterprise	9	88.9%	11.1%	-	11.1%	22.2%	-	11.1%	-	-	-	-	-	33.3%	
custom starter	7	85.7%	14.3%	-	28.6%	14.3%	14.3%	28.6%	28.6%	14.3%	28.6%	14.3%	14.3%	28.6%	
custom starter monthly	7	85.7%	71.4%	57.1%	42.9%	42.9%	42.9%	28.6%	14.3%	42.9%	-	28.6%	42.9%	71.4%	
professional 2	5	80%	20%	20%	40%	20%	20%	40%	-	-	20%	20%	20%	40%	
Gold	3	66.7%	33.3%	-	-	-	-	-	-	-	-	33.3%	-	-	
30 day offer plan	3	100%	-	-	-	33.3%	-	33.3%	-	33.3%	-	-	-	66.7%	
sumo plan	2	50%	-	50%	-	50%	-	50%	50%	-	50%	50%	50%	50%	
conference plan	2	50%	-	-	-	50%	50%	-	-	-	-	-	-	50%	
basic annual	1	-	-	-	-	-	-	-	-	-	-	-	-	-	

Export Data

Display: Percentage of people Showing: 15 1 - 15 of 22

Here, we have all the plans (groups) listed along with the number of people in each plan. On the far right, we see that our top four plans have relatively solid engagement, with anywhere from 35.8% to 70.6% of people continuing to log in after 12 days of signing up.

The other plans have a much smaller sample size. We shouldn't pay too much attention to those because they make up a small percentage of users, and there really aren't enough people in those groups to get reliable insights. To make informed decisions based on data, we'll definitely need more than 10 people in each group.

The Basic plan has solid retention. The majority of people who sign up for this plan are still logging in 12 days later.

Medium and Professional plans both have a good number of users; but after 12 days, their retention isn't as solid as the Basic plan.

Actions to Take Based on These Insights

To get inactive users logging in with the product, you could send them emails asking if they have any questions or feedback. You also could test a new onboarding system to try to get more people logging in and getting use out of the product.

Track Repurchase Rate

Repurchase rate is a critical retention metric for ecommerce companies. It tracks how often a customer repurchases and really signifies how solid your business is in terms of service and pricing. Also, it can warn you ahead of time if purchases begin to dwindle.

We'll track the event "Purchase" twice. This event is not automatically tracked in Kissmetrics, so you'll have to set it up yourself. We'll set our date range at the last 12 months. For ecommerce companies, repurchase rates can vary greatly depending on industry. If you sell diapers, you'll ideally have a much higher repurchase rate than a company selling windows.

Report Configuration

Show the time between people who did and

Date range

▶ **Advanced options**

Under Advanced options, we'll split people into weekly buckets. Again, this really depends on the type of ecommerce store.

Since we're tracking the repurchase rate, we'll need to count "Every time" a person purchases.

We'll group people by time across months.

Report Configuration

Show the time between people who did and

Date range

▼ **Advanced options**

Split into buckets

Count people who did First Time Only Every time

Group people who did Time Property

Across

Now, let's click on "Run report" and get our data:

Purchase between **December 1, 2013 - November 30, 2014**

Purchase		Purchase again by Weeks												
Time	People	1	2	3	4	5	6	7	8	9	10	11	12	> 12
December 2013	4,920	48.7%	35.6%	29%	21%	25%	25.3%	27%	27.6%	26.7%	26.7%	25.5%	25.7%	51.6%
January 2014	3,872	31.8%	17.9%	13.2%	11.3%	10.3%	9.3%	9.1%	9.1%	8.3%	8.2%	7.4%	7.4%	24.3%
February 2014	4,192	28.3%	13.8%	9.3%	7.3%	6.6%	5.8%	5.4%	4.9%	5%	4.5%	4.5%	4.5%	15.6%
March 2014	4,216	28.9%	15.2%	10.6%	7.7%	7%	6.8%	5.7%	5.7%	5.3%	5.1%	5.3%	4.5%	14.6%
April 2014	4,255	29%	15%	9.7%	7.7%	7.3%	6%	5.9%	5.4%	5.2%	5%	5.2%	4.8%	12.1%
May 2014	3,765	30.9%	15.5%	10.1%	8.2%	7.3%	6.3%	6.3%	6.2%	5.8%	5.6%	5.3%	5.3%	13%
June 2014	3,738	28.1%	14.3%	9.5%	7.5%	7%	6%	5.3%	5.3%	5.5%	5.2%	4.8%	4.3%	10.2%
July 2014	4,771	24.5%	12%	7.7%	6.3%	5.2%	4.5%	4.1%	3.9%	4.2%	3.7%	3.3%	3.4%	7.4%
August 2014	4,718	27.2%	12.6%	7.8%	6.2%	5.7%	5.1%	4.8%	4.6%	4.4%	3.9%	4%	3.8%	5.7%
September 2014	4,685	25.9%	12.8%	8.2%	6.4%	6%	5.4%	5%	4.6%	4.2%	4.1%	2.8%	1.9%	1.1%
October 2014	5,797	25.4%	11.6%	7.6%	5.7%	4.7%	3.7%	2.6%	1.5%	0.8%	0.1%	-	-	-
November 2014	5,104	21%	7.4%	3.4%	1.7%	0.5%	-	-	-	-	-	-	-	-

Export Data
Display: Percentage of people
Showing: 15
1 - 12 of 12

We see that customers who purchased in December had a high likelihood of repurchasing in the weeks afterward. For the bulk of the other months (groups), repurchases are high within the first few weeks; but after that, they fall to around 5%. Then, after 12 weeks, repurchases reach slightly above 10%.

Keep in mind that we're counting every time a person purchases. If they purchased in January and then they purchased again 2 weeks later and 6 weeks later, they'll be counted in both the 2nd and 6th buckets.

To get more insight out of this report, let's group people by product category to see if any category increases the likelihood of repurchase. To do this, we go back to our report setup (report configuration). Under Advanced options, we go to our options for the way we group people. We change the way we group people from time to property, and we select "Product Category" as our property. (We'll look at the product category of the person's first ever purchase.)

Report Configuration

Show the time between people who did Purchase and Purchase

Date range Last 12 Months

Advanced options

Split into Weekly buckets

Count people who did Purchase First Time Only Every time

Group people who did Purchase Time Property

Use the First Product Category

Run report Save report

Purchase		Purchase by Weeks													
Property	People	1	2	3	4	5	6	7	8	9	10	11	12	>12	
button-ups	14,098	34.2%	18.9%	13.9%	11%	10.3%	9.1%	9%	8.7%	8.6%	8%	7.4%	7.2%	17.7%	
sweaters	6,678	29.9%	14.6%	8.8%	6.7%	5.7%	5.1%	4.6%	4.3%	4%	3.7%	3.2%	3.1%	8.4%	
tennis shoes	1,585	16.7%	8.3%	4%	2.4%	1.3%	1.7%	1.3%	0.9%	1.3%	0.9%	1.4%	0.9%	3.5%	
slippers	1,313	25.5%	13.8%	8%	5.6%	5.6%	5.9%	5.3%	4.6%	4.1%	3.7%	3.7%	3.4%	8.4%	
jeans	1,274	14.1%	3.9%	2.6%	1.7%	1%	0.9%	0.8%	0.5%	0.5%	0.6%	0.5%	0.5%	1.8%	
belts	917	49.2%	31.8%	24.1%	17.4%	18.2%	17.4%	16.9%	17.9%	17.1%	16.7%	16%	15.7%	23.6%	
sandals	613	29.2%	12.9%	8.5%	5.7%	6%	4.9%	4.1%	4.1%	4.2%	3.6%	3.6%	3.4%	9.1%	
vests	543	25.8%	10.9%	7.2%	5.2%	3.1%	3.9%	3.7%	3.3%	2.9%	2.8%	2.8%	2.6%	8.8%	
socks	404	24.3%	12.1%	7.4%	4.7%	5%	3.5%	4%	2.7%	3.5%	3.5%	2.5%	3%	5.7%	
purses	385	24.4%	12.2%	6.5%	4.9%	4.2%	3.9%	3.6%	3.4%	3.4%	2.6%	3.6%	1.8%	7.3%	
shoe laces	336	41.4%	32.1%	26.8%	18.2%	22%	19.9%	24.7%	24.1%	25%	24.7%	23.2%	24.7%	53.3%	
leather jacket	323	34.1%	13.6%	6.8%	5.6%	6.5%	5%	4%	4.6%	2.8%	2.8%	1.2%	1.9%	7.4%	
overalls	320	20.6%	13.1%	7.5%	5%	4.7%	3.4%	4.4%	1.9%	2.5%	3.1%	2.5%	3.1%	6.3%	
pyjamas	317	62.5%	42.9%	34.1%	28.7%	29%	25.2%	25.9%	22.7%	22.7%	21.8%	20.8%	18.6%	40.4%	
dresses	311	33.1%	13.5%	8.4%	6.1%	5.5%	3.5%	3.2%	3.2%	2.6%	1.9%	2.3%	2.3%	3.5%	

Export Data Display: Percentage of people Showing: 15 1 - 15 of 15

This data is grouping people by their product category. We see the most popular categories at the top, with the majority of people ordering button-ups. Pajamas, belts, shoe laces, and button-ups are some of our most popular repurchase items.

Actions to Take Based on These Insights

The data reveals the most popular product categories that lead to consistent repurchasing. You may want to consider expanding these product categories by adding more products and promoting them more aggressively through emails and paid channels. You also could feature them more throughout the site. Trying these tactics will likely lead to increased sales.

THE THREE TAKEAWAYS YOU NEED TO KNOW ABOUT COHORTS

A quick summary of the main points:

- Cohorts allow you to track and group people over long periods of time. This makes cohorts a great tool for tracking conversions. Funnels do not separate people over time. They throw them all under one umbrella. Use funnels to identify the roadblocks to conversion.
- Cohorts can provide insights for both acquisition and retention. SaaS companies can track signup rates, feature engagement, upgrade rates, and whatever else matters to their business. Ecommerce companies can track purchase rates, repurchase rates, and acquisition time (add to cart > purchase), etc. Slice and dice your data by time or property to maximize your insights.
- The Kissmetrics Cohort Report is awesome because it tracks people, the data is accurate, and the data doesn't expire. This makes it possible to look as far as you've been tracking to see how behaviors have changed over time. You don't need to worry about accuracy because Kissmetrics ties all your data to real people. In view of that, you can get very granular with your data and see each person in a report. Rest easy knowing you don't have time constraints on your data and it's all accurate.

Kissmetrics A/B Test Report: Know How Your Tests Impact Your Customer Acquisition Funnel

A/B tests tell you whether changes you want to make will improve your conversions. The most common example is a test that compares two website headlines. Half of the people who visit the website receive one headline (control), while the other visitors see the other headline (variant). The purpose of the test is to determine which headline wins at converting people to sign up.

We've written a bunch of blog posts and produced many webinars on the value of A/B testing. For an overview on how A/B tests work, check out these resources:

Blog Posts:

- [10 Things Every Marketer Should Know About A/B Testing](#)
- [How to Run A/B Tests That Give Your Business Big Wins](#)
- [How to Find a Winning A/B Testing Hypothesis](#)

Webinars:

- [A/B tests for 7 Stages of Your Company's Growth](#)
- [11 Obvious A/B Tests To Do Today](#)
- [How to Keep Your Gains from A/B Tests Without Accidentally Killing Them Later](#)

In this section, we'll discuss running an A/B test in Kissmetrics. We'll go through why Kissmetrics is a great tool for tracking your A/B tests. You'll learn how to run and optimize your A/B testing process using one of the best A/B test reporting tools on the market.

Let's get started.

WHY YOU SHOULD USE KISSMETRICS TO TRACK A/B TESTS

With the Kissmetrics A/B Test Report, you can track how your A/B tests impact an entire funnel. You aren't limited to running open-rate or click-through tests. Instead, you can test against actions that actually matter to your business.

You can run a test at the top of the funnel (i.e., homepage headline test) and see how it impacts actions further down the funnel (sign ups). And, you can go as deep (far down) in the funnel as you'd like. The A/B Test Report doesn't stop at sign ups. Use the Report to measure variables that actually move the critical levers of your business.

All Your Data is Tied to People

Kissmetrics tracks real people, not visitors or sessions; real people.

Why does this matter?

Because if you want to run A/B tests that go deep in your funnel, you'll need people-tracking analytics. Running tests for outcomes deep in the funnel typically require multiple visits on multiple devices and take an extended period of time. The only way to accomplish this accurately is to track each person.

And, since you've already set up tracking in Kissmetrics, you don't need to spend additional time with another tool tracking your data. This allows you to spend less time tracking and more time building.

Less Time Tracking, More Time Building

Because you'll spend less time tracking tests and more time building, you'll be able to get tests out the door quicker.

This matters because the more tests you run, the higher your conversions will be. If you run high quality tests back to back, you'll eventually find the variables that increase conversions. Then, you can build off those variables and keep testing to further increase your success. You can pitch out the variables that don't move the needle and quickly move on to your next test.

Flexible Integration Regardless of What Tool You Use

If all your funnels are already in Kissmetrics, the only thing you need to worry about is tagging each group of test visitors with a Kissmetrics property. Each group of visitors in a test should be assigned whichever variation they were in.

If you're using one of our integrations, Kissmetrics automatically tags visitors with the appropriate property, depending on which test they were in.

If you're running the A/B test yourself, you can set up property tracking.

If you're using a marketing automation, email, or landing page tool to run tests, you just need to tag each group of visitors with a Kissmetrics property.

With Kissmetrics, you have the flexibility to choose what works best for your needs. If you want to run some light A/B tests, you can use Optimizely, Visual Website Optimizer, or any of our other integrations. If you want to run a more major test, you can build the test yourself. Or, if you use a marketing automation tool such as HubSpot or Marketo, you can build your tests there and track the data in Kissmetrics.

Integration Takes Less Than 2 Minutes

If you have both your A/B testing tool and Kissmetrics code installed on your site, integrating is easy. There's no code to add or back-end modifications to make. With many of our integrations, it's as easy as flipping a switch or checking a box.

Using one of our integrations, you can use whichever tool you prefer to run tests, and you'll have the benefits of using Kissmetrics to track how the tests affect your funnel.

Also, you can build your tests the way you normally do. Once you've integrated, the data collected from the test will also be sent to Kissmetrics.

After a test has started, you'll need to know how long it should run. Let's get into that now.



HOW TO BUILD AND TRACK YOUR TESTS

To build an A/B test and track it in Kissmetrics, you can either use one of our integrations or build it yourself in Kissmetrics. [We integrate with the following tools:](#)

- [Optimizely](#)
- [Visual Website Optimizer](#)
- [AB Tasty](#)
- [Convert](#)
- [Unbounce](#)

If you're running the test yourself, you can easily set up tracking. Check out our documentation if you're interested in running a test using our [JavaScript library](#) or [your own server side code](#).

When creating the test, name the property the name of your test. You then split control people by giving them a control value on the property, and you split variant people by giving them a variant value on the same property.

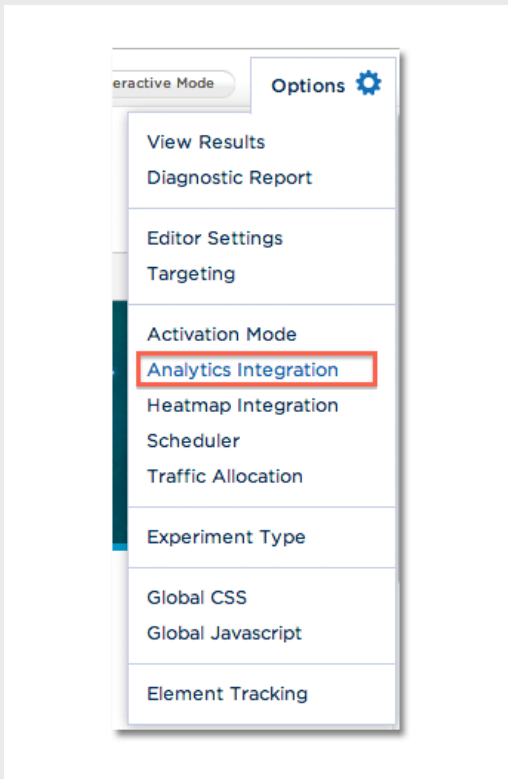
At Kissmetrics, we create the test ourselves for any major test we run (full page redesigns, product redesigns, sign up flows, etc.).

The Two Steps for Integrating Optimizely into Kissmetrics

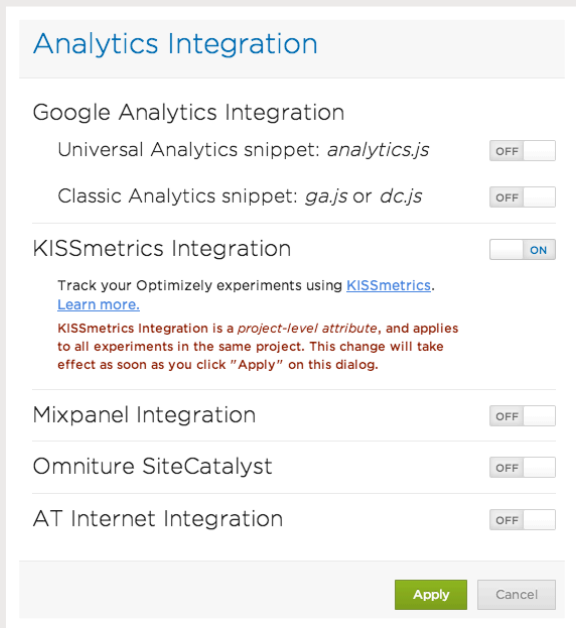
If you're using Optimizely to build your tests, you'll need to do a couple of things to get the data into Kissmetrics:



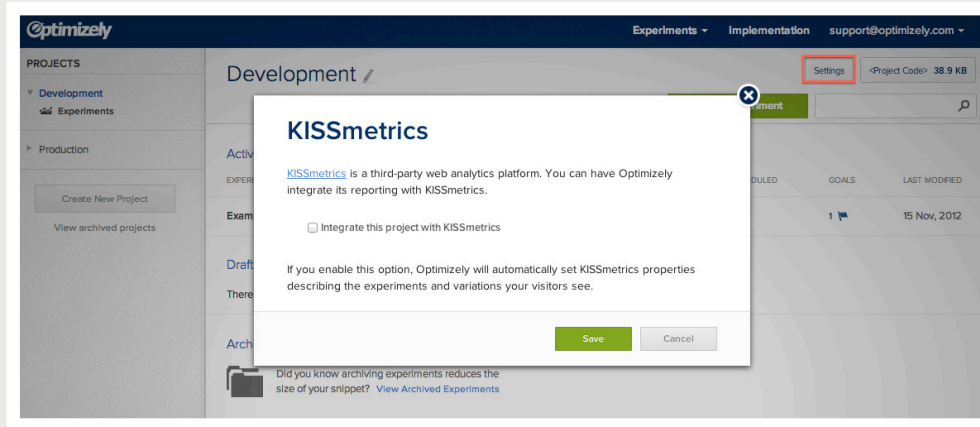
1. Go to the options icon, and click on “Analytics Integration”:



2. Flip “Kissmetrics Integration” to ON:



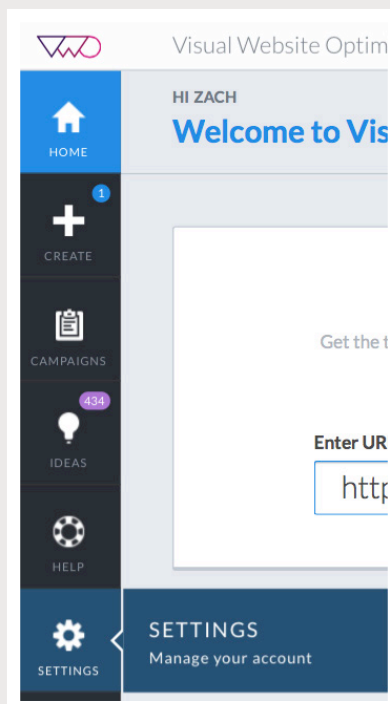
You also can go to your Optimizely dashboard, click on Settings > Kissmetrics Integration and check the box for “Integrate this project with Kissmetrics”:



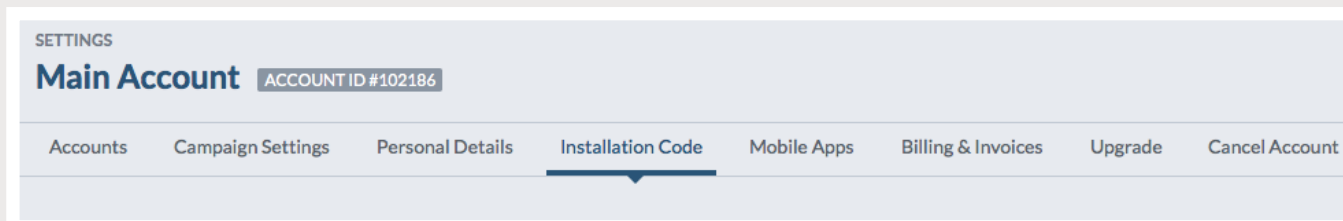
The Three Steps for Integrating Visual Website Optimizer into Kissmetrics

If you're using Visual Website Optimizer to build your tests, you'll need to do a few things to get the data into Kissmetrics:

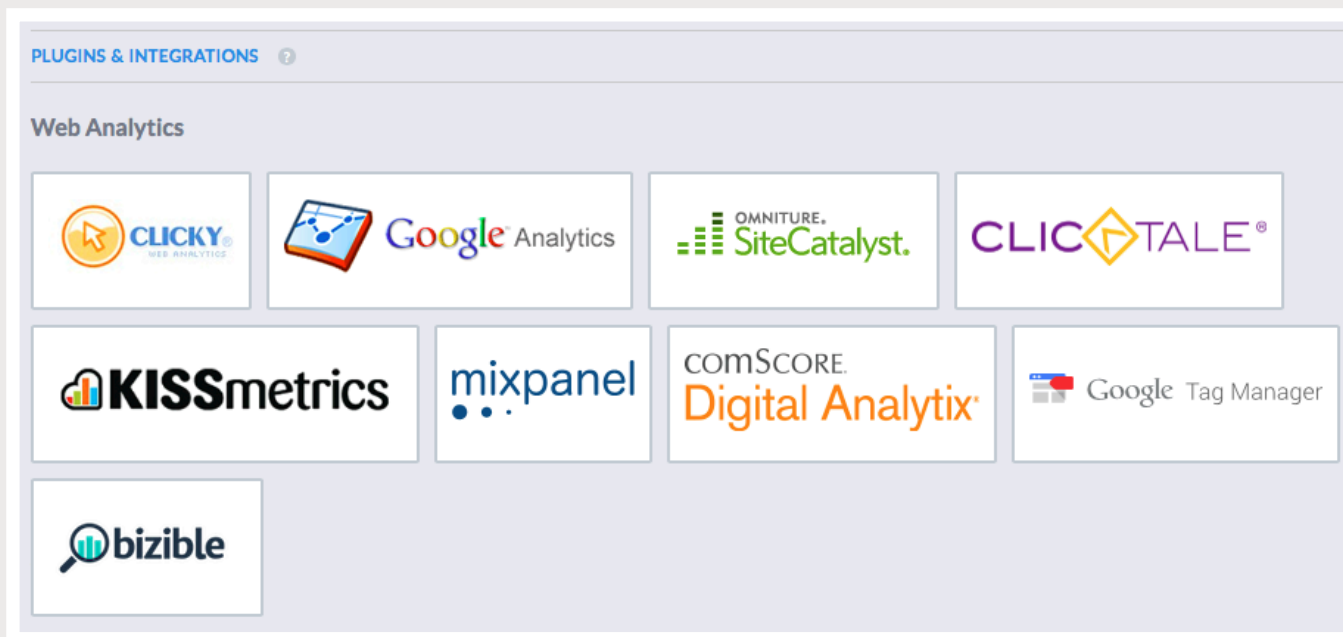
1. Go to the Settings tab:



2. Click on “Installation Code”:



3. Scroll down to “Web Analytics,” click on Kissmetrics, and follow the two-step instructions:



HOW LONG YOU NEED TO RUN YOUR TEST

Data is very volatile in the first few days of a test. Even if you're testing on a high traffic site, you'll still want to wait at least one week. Because the sample size is smaller in the first few days of a test, a small number of people will have a big impact.

The A/B Test Report recommends that you let a test run for at least a week. This will help ensure that sufficient data is received and that false positives have a minimal impact.

There are different rules of thumb that suggest how long you should run a test. The Report uses 95% certainty and 1 week of data before it calls a winner. At Kissmetrics, we let our tests run at least 1 week; we make sure at least 2000 people get in the test; and we wait until we reach 99% certainty.

There is an opportunity cost for letting tests run too long. For example, if you let a test that gives you a 6% boost run for 6 months, you could have found two 20-30% wins in that same time, which would have a much larger impact on your growth. At Kissmetrics, we kill tests if the impact looks like it's less than 10% when the test has been running for 1 month.

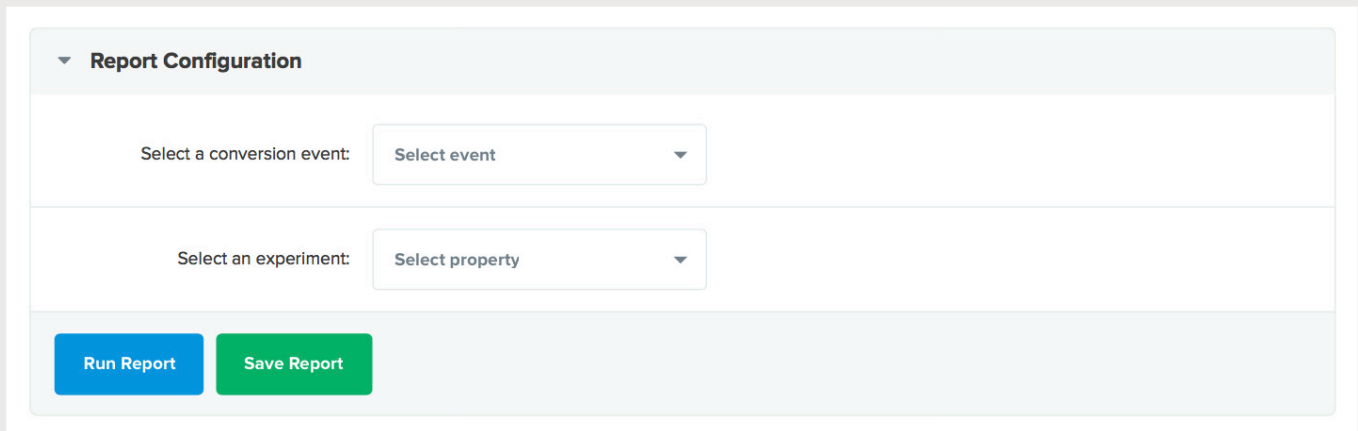
You'll need to find the balance between getting enough data and making sure you don't run a test too long. If too many tests run longer than necessary, you'll have fewer overall tests and it will take you longer to find the variables that move the needle. This is why it's important to get your workflow set before you run tests. Before you begin a test, you'll need to know what will determine a winner, and when it will be called.

If you're looking for more information on choosing winners, check out [our blog post](#) where our Data Scientist [Will Kurt](#) discusses this topic.

CHECK YOUR RESULTS IN KISSMETRICS

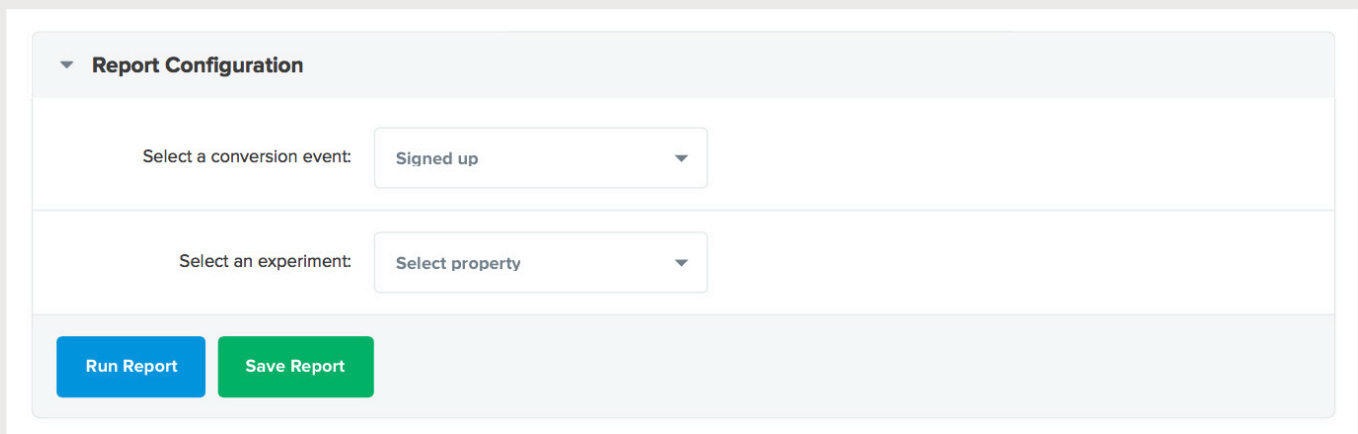
Now, let's go back to our common example of comparing two website headlines.

We'll wait one week, and then we'll use the A/B Test Report to see how things are progressing. When using this Report, we first need to select the Event we're tracking. In our case, we're looking at how signup rates compare for our two headlines.



The screenshot shows a 'Report Configuration' section with two dropdown menus and two buttons. The first dropdown is labeled 'Select a conversion event:' and currently shows 'Select event'. The second dropdown is labeled 'Select an experiment:' and currently shows 'Select property'. At the bottom, there are two buttons: 'Run Report' (blue) and 'Save Report' (green).

We'll click the dropdown box and select the event "Signed up":



This screenshot is identical to the previous one, but the 'Select a conversion event:' dropdown menu now displays 'Signed up' instead of 'Select event'. The 'Select an experiment:' dropdown remains 'Select property', and the 'Run Report' and 'Save Report' buttons are still present at the bottom.

Remember that Optimizely (and many of our other integrations) automatically saves the test name as property. If you build your own test, the name of your property will be the name of your test.

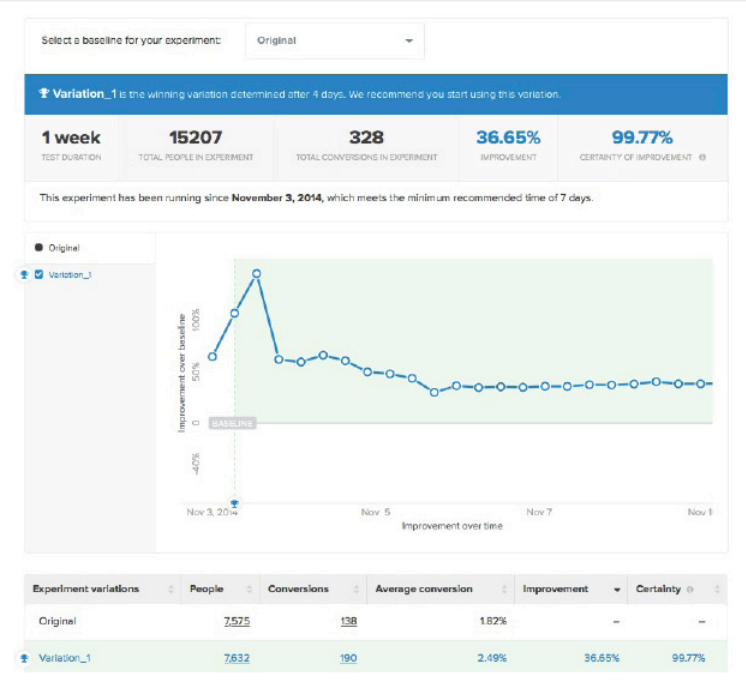
For our example test, we'll select the property "Optimizely Homepage Headline Test GA," which was a previous test we ran in Optimizely:

Report Configuration

Select a conversion event:

Select an experiment:

We click "Run Report" and get our data:



This is how our A/B Test Report looks. At the top, we select the baseline for our experiment. In our case, we're choosing the original headline and comparing it against the variant. As you can see, highlighted in bright blue, the Report has declared the variation headline a winner after 4 days of running the test.

Below that declaration, we see various metrics about the number of people in the experiment, the percentage improvement, and how certain it is. "Certainty" in Kissmetrics means statistical significance. When a test is statistically significant, it basically means that the data has become reliable enough to call a winner.

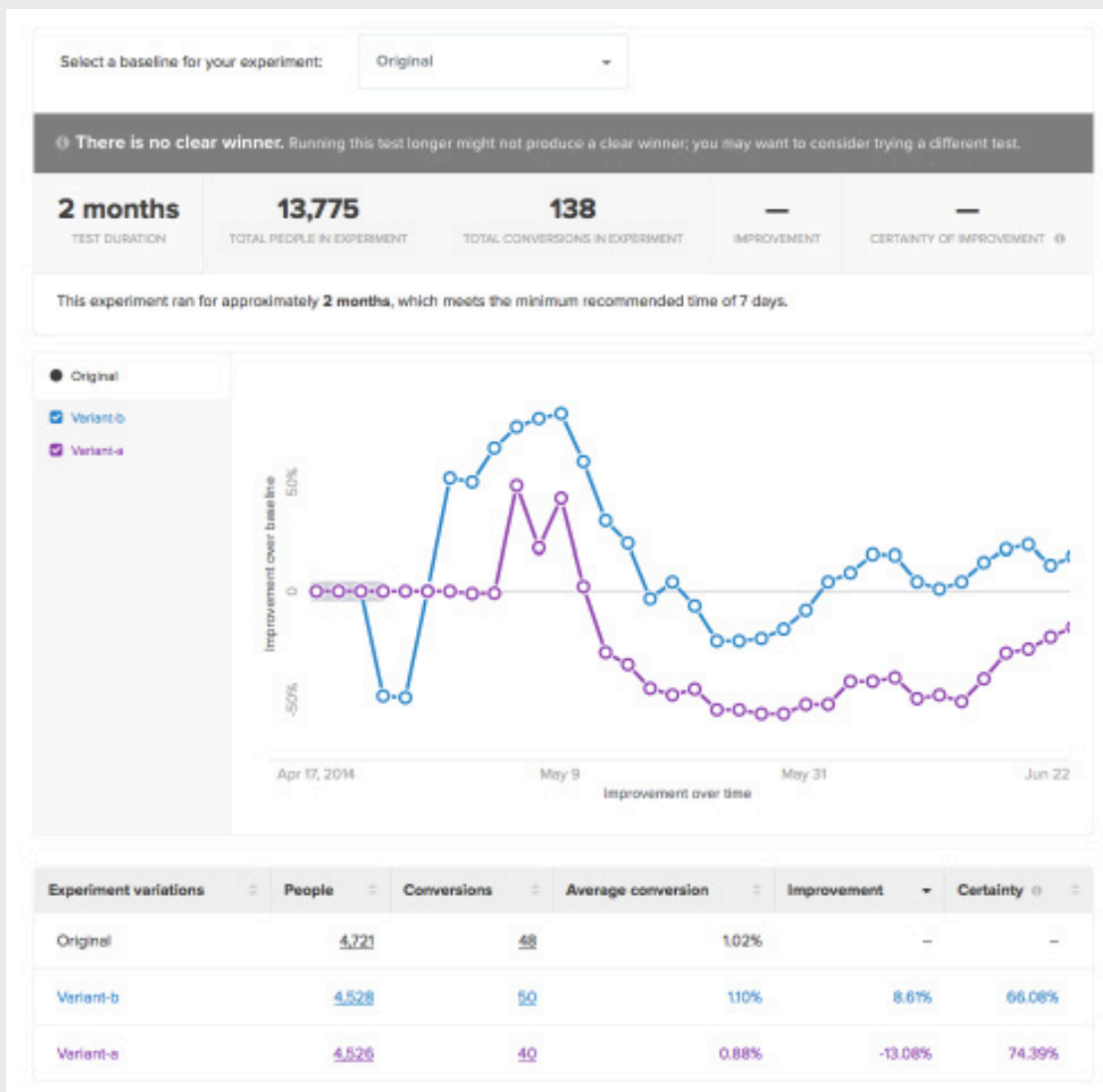
Next, we see a graph. The dotted line represents how the variation headline performed against the original headline.

And, in the last section, we see the number of people who saw each headline, how many people converted, the conversion rate for each headline, the percentage of improvement, and the certainty of improvement. In this test, the variation is the winner with a 36.65% improvement over our control, and the certainty is over 99%.

Using Multiple Variants

The A/B Test Report isn't limited to one variant. In fact, the report can handle as many variations as you need.

Here's how the Report appears with multiple variants:



In this test, we tested two variants against the original control. We selected the original as our baseline. The test ran for 2 months, had over 13,000 people in the experiment, and did not produce a clear winner. We'll stick with the original.

LAUNCH THE VARIANT IF IT'S A WINNER WITH AT LEAST 95% CERTAINTY

As mentioned, you'll want to launch a variant only if it has achieved certainty. Data in the first few days of a test is unstable and can change wildly with only a couple of conversions. To ensure that you reach certainty with your test, you'll need enough people in the test to minimize false positives, or variations that appear to be winners but actually aren't. The industry standard says it's safe to call a test when it reaches 95% certainty. If you want to be extra careful to minimize false positives, make changes only when certainty reaches 99%. At Kissmetrics, we always wait for 99% certainty.

THE FIVE-STEP A/B TEST PROCESS

Let's recap a few of the main points:

- **Why use the A/B Test Report** — With this Report, you'll be able to **test against actions that matter**. You're not limited to click-through or open-rate tests. You can test for outcomes that actually matter to your business, no matter how far down the funnel. You can do this because **all your data gets tied back to people**. This makes it a super accurate platform for A/B testing. And because you've got tracking set up in Kissmetrics, there is no need to spend any extra time setting up additional tracking. This matters because **the more tests you run, the higher your conversions will be**. You'll find the few variables that actually matter and you'll be able to build off of them.
- **Easily track your A/B tools using Kissmetrics** — The A/B Test Report does not create the test for you. It reports the results of the test, does the math to give you a recommendation, and ties all that back to people. We have [five integrations](#) that you can use to tie your data back to Kissmetrics. Or, if you prefer you can build your own A/B testing tool and integrate it into Kissmetrics.

- **Run your tests until a winner is determined** — Most A/B tests will take at least one week to produce a clear winner. And, typically, the data will be volatile in the first few days of a test. A couple of conversions have a bigger impact than they should. You usually have to wait at least a week, or until at least 2000 people are in the test. At Kissmetrics, we like to wait until our tests hit 99% certainty. The industry standard says you can determine a winner at 95%. Whichever percentage of certainty you choose, you'll want to make sure a clear winner is established.
- **Only two steps are required to track the test in Kissmetrics** — The first thing you'll need to do is select the Event you are testing. Then, select the property.
- **Launch the variant if you achieve at least 95% certainty** — It is bad A/B testing practice to declare a winner before it achieves certainty. Ensuring you reach certainty will reduce the number of false positives, or variations that appear to be winners but are not. If you don't wait for enough certainty, you'll lower your conversion rates accidentally. This is why many companies have difficulty raising conversion rates over time. They launch false positives too often, which eventually kills the effects of any of their real wins.

How the Kissmetrics Path Report Helps You Discover the Events That Lead to Conversion

We're all familiar with funnel reports that track how many people convert along a string of events. This is useful for discovering the conversion rates of the events along the funnels and the overall conversion rates of the funnels themselves.

You can think of the Path Report as a reverse funnel report. You choose a starting event and an ending event, and then the Path Report discovers the events people perform that lead up to the ending event.

You will find patterns in the events that trigger conversions, and you can use those insights to increase conversions.

In this section, we'll discuss how to set up the Path Report, and we'll go through 5 use cases to show what can be learned from it.

SET UP THE PATH REPORT

Before we get into specific use cases, let's talk about setting up a Path Report.

Here's how the setup form looks:

The screenshot shows a 'New Report' configuration form. At the top right, there is an 'Edit Name' button. The main section is titled 'Path Report Configuration' and contains four numbered steps:

- 1.** Show me the 5 most common
- 2.** Starting with
- 3.** that leads to
- 4.** and happens between

Below step 4, there is a note: *This date range is applied to your selected conversion event.*

At the bottom of the form, there are two buttons: 'Run Report' (blue) and 'Save Report' (green).

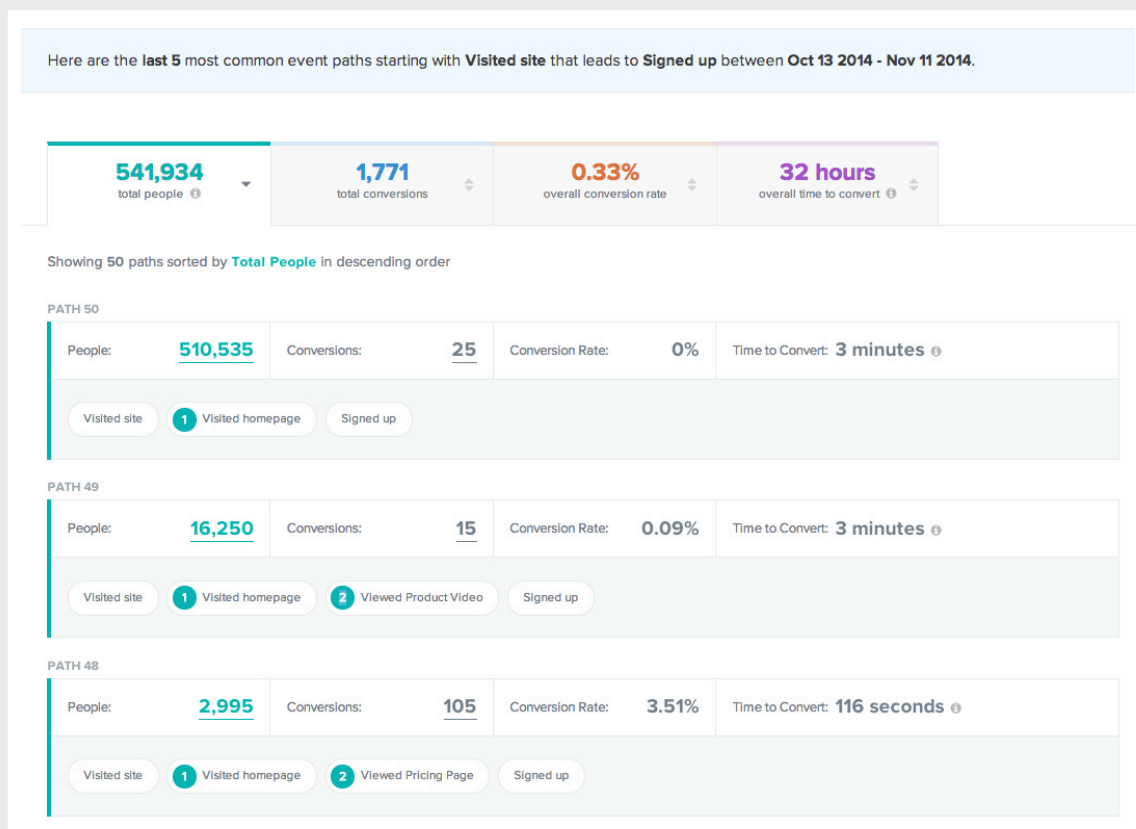
I've numbered each section of the Path Report setup in order to describe them in detail:

1. You can choose to show either the first 5 or the last 5 most common events or properties that lead to a conversion event. Showing the first 5 events is useful for discovering the initial steps that lead to a conversion event; whereas, showing the last 5 events is useful for discovering the immediate steps that lead to a conversion event. You can choose to have the Path Report display events or properties.
2. This is where you choose the first event people start with (e.g., Visited site).
3. The event people end with will go here (e.g., Signed up).
4. Select the date range for the occurrence of all these events.

Now, let's get into specific use cases for SaaS and ecommerce companies.

1. SaaS — Goal of Increasing Signups

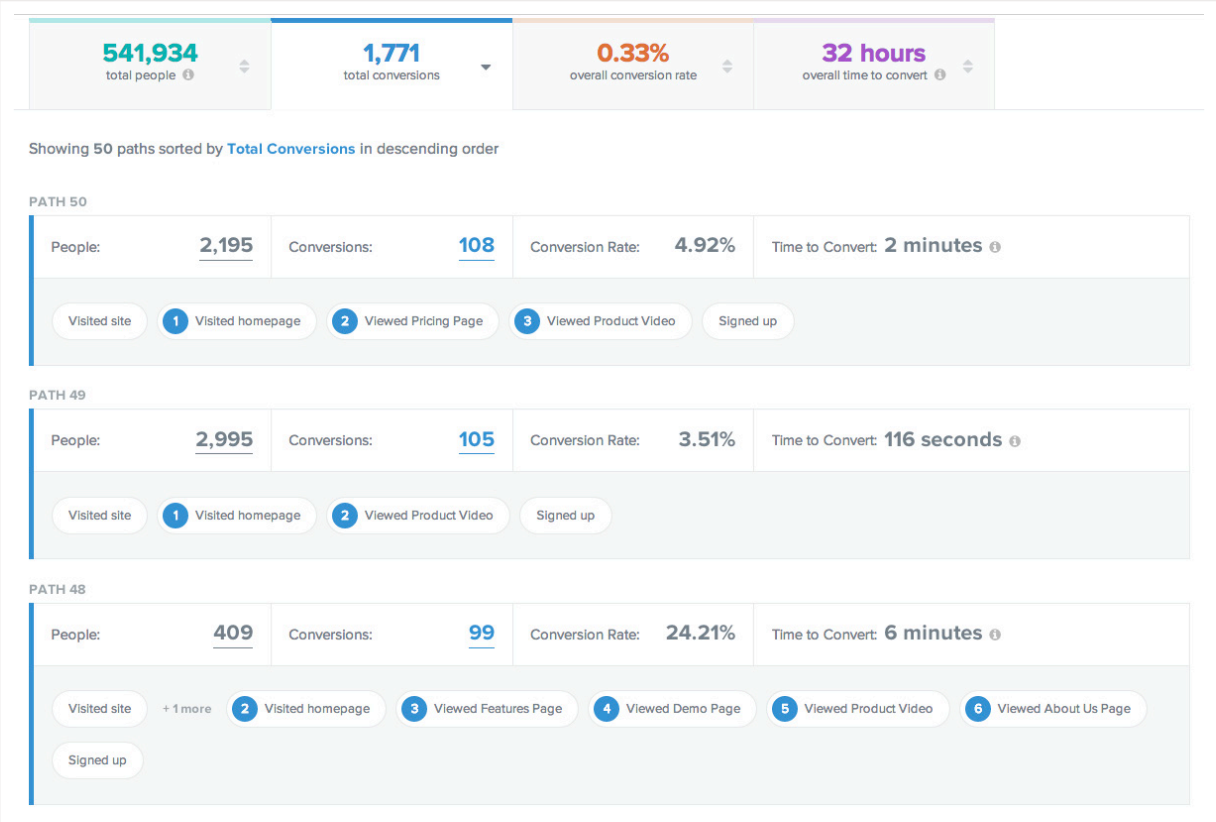
Let's say we're a SaaS company and want to discover the most common paths people take to sign up. To find this out, we'll load the Path Report and view the last 5 events from "Visited site" to "Signed up," receiving data from the last 30 days:



This report finds the people who have performed the event “Visited site” and, later, the event “Signed up.” It finds the events they took from the starting event “Visited site” to the ending event “Signed up.” It’s sorted by people, but we can choose to sort it by total number of conversions, conversion rate, or the overall time it took people to convert.

Getting Insights from this Report

The main use case for this report is to find the triggers that lead people to sign up. If we want to get insights about how we can increase conversions, we’ll sort by total conversions:



This view shows us the paths that lead to the most conversions. As we can see from this report, most people go through only a few events before converting. These top three paths show us that most people view the product video before they convert. We can look through other paths and see if viewing the product video is a common path people take before converting. If we find that it's a trigger that leads to conversions, we'll want to feature the product video more prominently on our website.

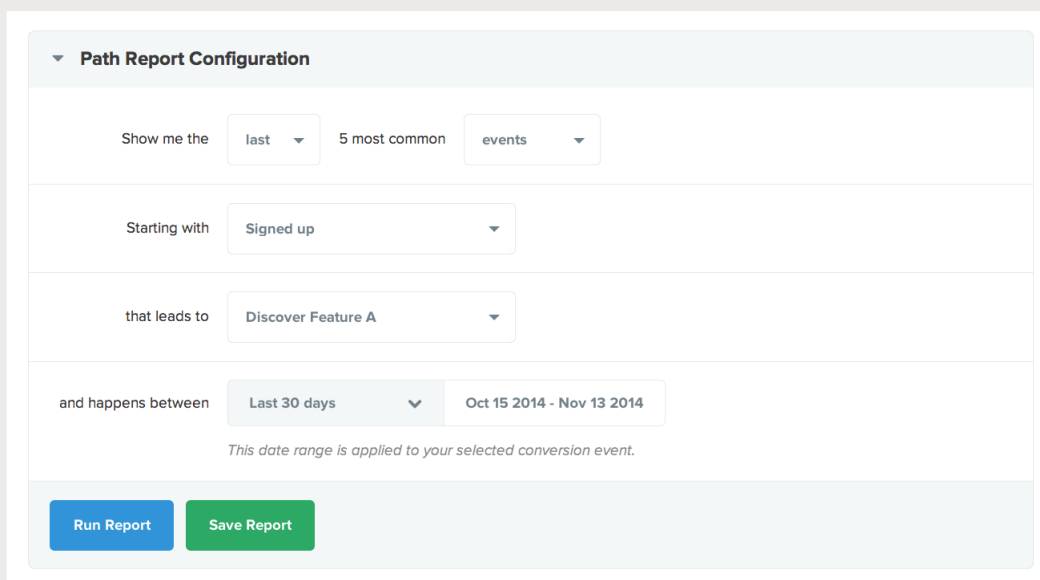
Insight Discovered — People who view the product video appear to have a higher likelihood of converting to “Signed up.” The more eyeballs we can get on this video, the more signups we'll get.

2. SaaS — Goal of Understanding How Users Discover Features

If we're a SaaS company, we want users to discover the value of our product as quickly as possible in order to get them hooked. In most companies, there isn't a lot of time for this to happen because users have a short attention span and are limited by the constraints of a free trial period.

The value of our product is typically a feature. To learn how users discover features, we'll set up a Path Report, setting our events from “Signed up” to “Discover Feature A,” looking at the last 5 events that led up to the discovery of that feature. Feature A is the prime feature of this SaaS product, and we want to get as many people as possible discovering it, as quickly as possible. (“Signed up” and “Discover Feature A” are not automatically tracked events, so you'll have to set them up yourself.)

Here's our Report Configuration:



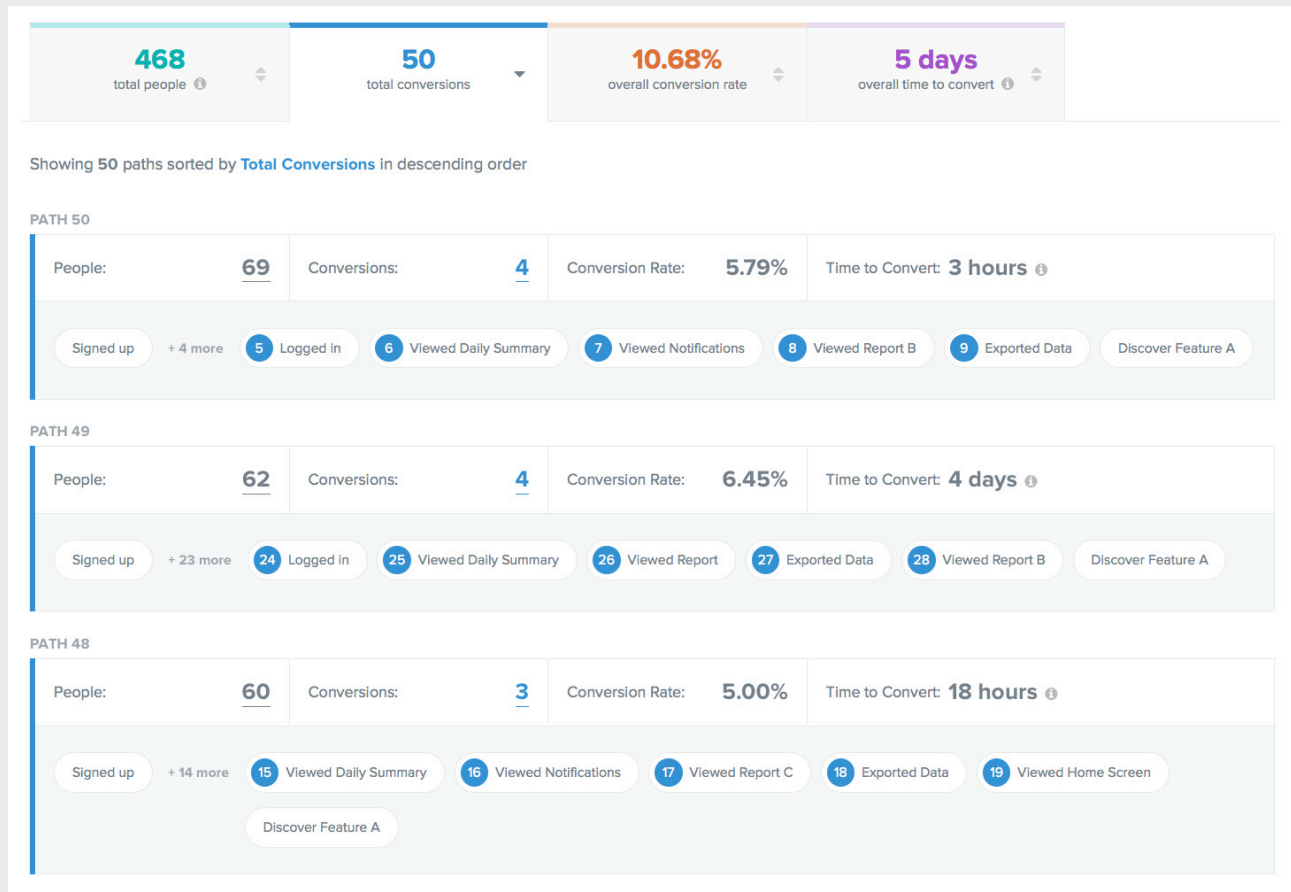
The screenshot shows a 'Path Report Configuration' form with the following fields and options:

- Show me the**: A dropdown menu set to 'last', followed by the text '5 most common', and another dropdown menu set to 'events'.
- Starting with**: A dropdown menu set to 'Signed up'.
- that leads to**: A dropdown menu set to 'Discover Feature A'.
- and happens between**: A dropdown menu set to 'Last 30 days' and a date range field containing 'Oct 15 2014 - Nov 13 2014'.

Below the date range field, there is a note: *This date range is applied to your selected conversion event.*

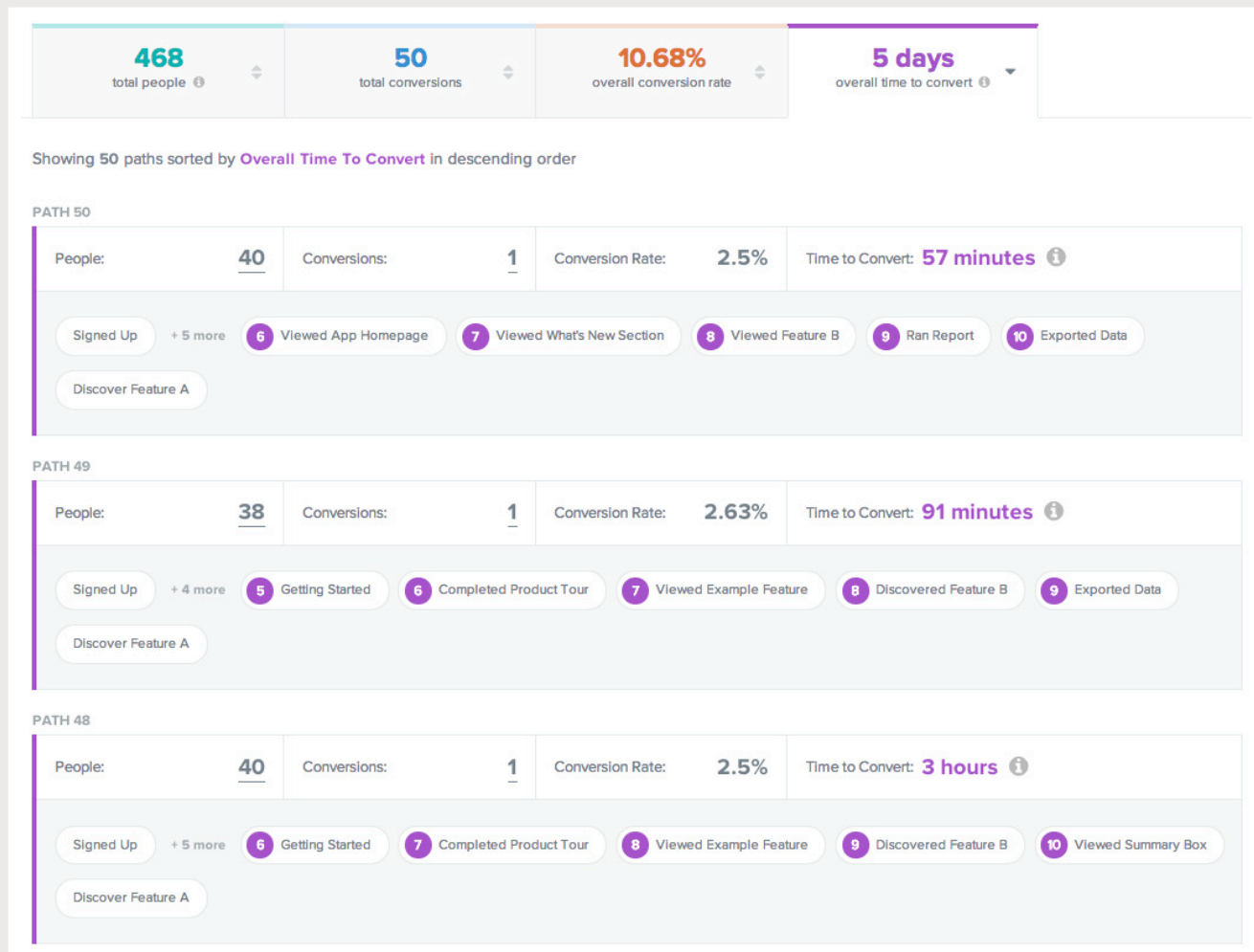
At the bottom of the form, there are two buttons: a blue 'Run Report' button and a green 'Save Report' button.

Here are our paths, sorted by total conversions:



Judging by total conversions, it looks like we have low engagement for this feature. Out of 468 people, just 50 of them converted. When we look at the most people who converted, we see that it usually took them dozens of steps before they discovered Feature A.

Since we want users to discover Feature A quickly, we're also interested in seeing the paths that take the least amount of time, so we'll sort by overall time to convert:



These people convert the quickest, and since we want more of our free trial users discovering Feature A quickly, we'll need to study these paths to identify patterns.

What we find is that most of the people who discover Feature A quickly do so by going through the product tour.

Insight Discovered — Most people who discover Feature A quickly do so by viewing the product tour. We'll have to make the product tour more prominent in the onboarding.

3. Ecommerce — Goal of Increasing “Added Item to Cart” Events

A big hurdle that ecommerce companies have to jump over is getting visitors who browse for a product to have enough interest to add it to their cart. To increase the number of conversions to placing an item in a cart, we'll first need to understand what paths people take to the conversion from visitor to adding an item to their cart.

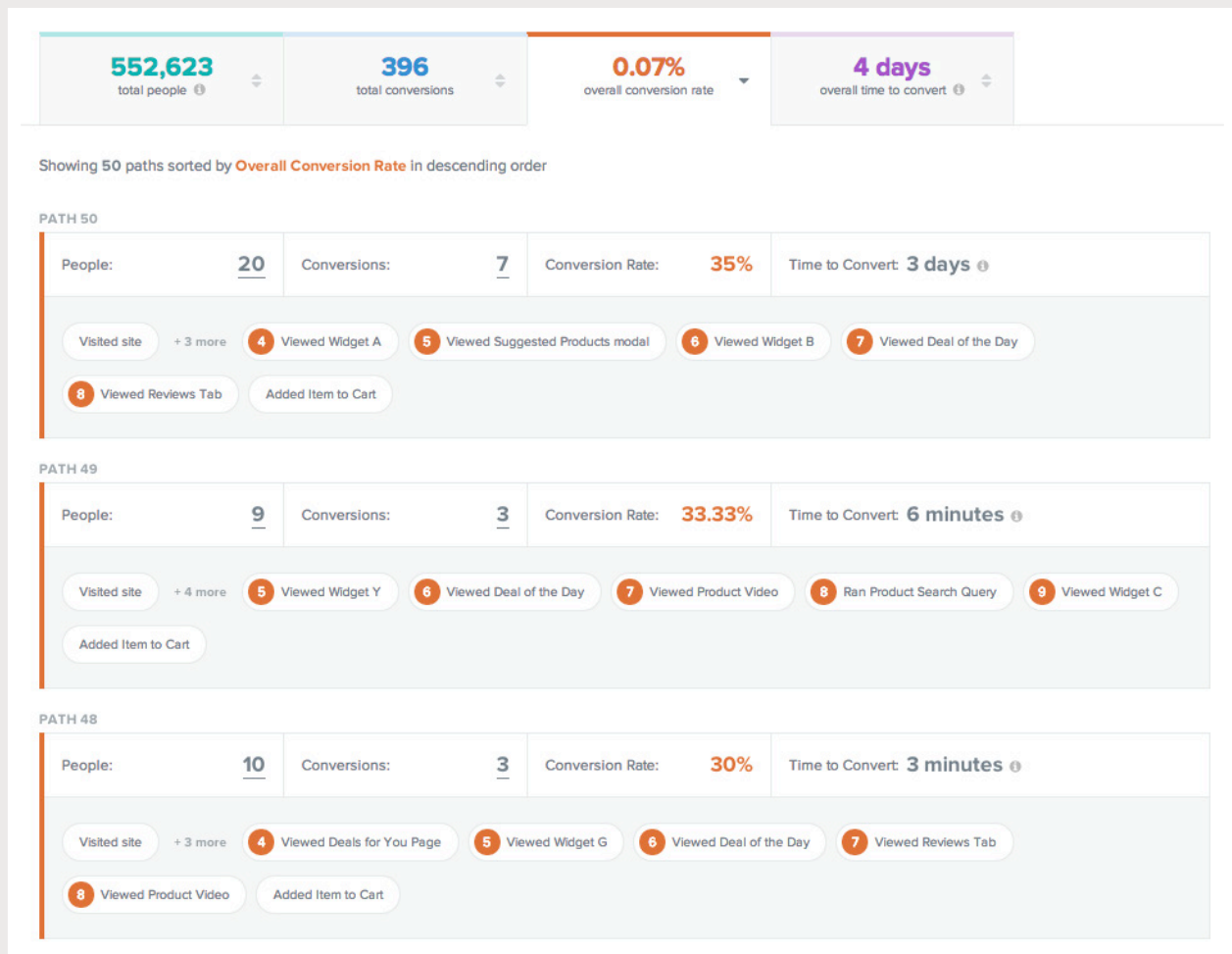
We'll set our events as people who started with “Visited site” and ended with “Added Item to Cart.” (“Added Item to Cart” is not an event that is automatically tracked in Kissmetrics, so you'll have to set it up yourself.)

Here's our Report Configuration:

The screenshot shows the 'Path Report Configuration' interface. It includes the following elements:

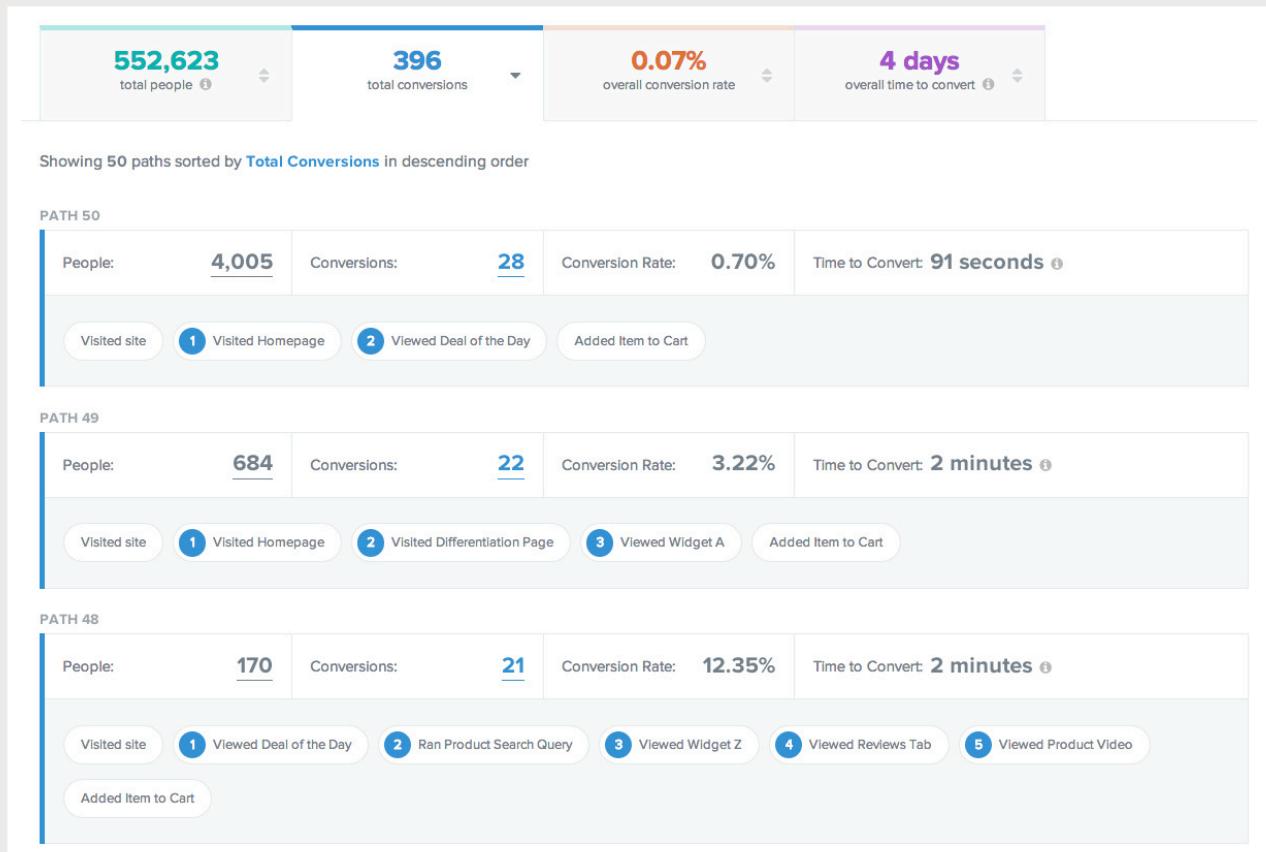
- Path Report Configuration** (Section Header)
- Show me the** (Label) with a dropdown menu set to **last** and a text input field containing **5 most common**.
- events** (Label) with a dropdown menu set to **events**.
- Starting with** (Label) with a dropdown menu set to **Visited site**.
- that leads to** (Label) with a dropdown menu set to **Added Item to Cart**.
- and happens between** (Label) with a dropdown menu set to **Last 7 days** and a date range input field containing **Nov 6 2014 - Nov 12 2014**.
- A note below the date range: *This date range is applied to your selected conversion event.*
- Run Report** (Blue button)
- Save Report** (Green button)

And, here are the paths, sorted by best conversion rate:



These are our top 3 highest converted paths. This data shows us that many people who add an item to their cart are likely to view the Deal of the Day.

Let's look at our top conversion paths and see if they also are viewing Deal of the Day:



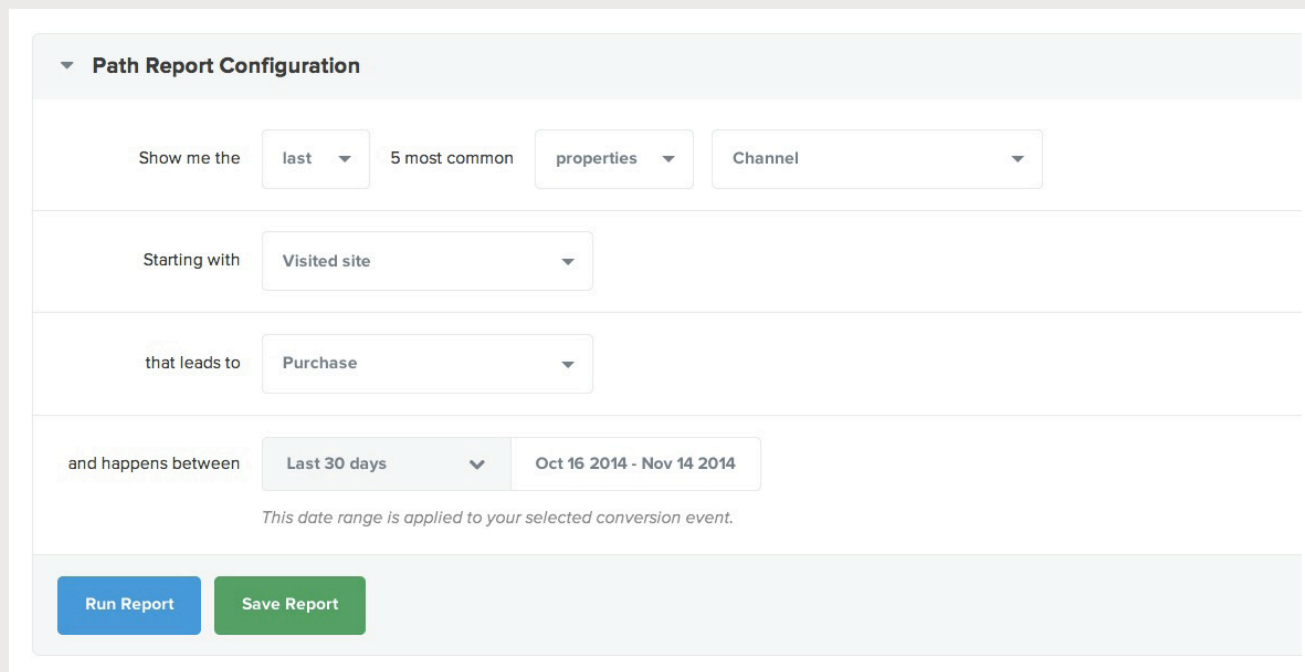
We see that our top converting path is “Visited Homepage,” then “Viewed Deal of the Day,” and then “Added Item to Cart.”

Insight Discovered — Viewing Deal of the Day is one of the major events leading to conversions to adding an item to a cart. We'll want to feature this more prominently throughout our website.

4. Ecommerce - Goal of Learning Which Channels Lead to Purchase

Finding out where your customers come from shouldn't be a challenge. With the Path Report, you can quickly find which marketing channels convert and which ones don't. Let's go through an example.

Here's our Report Configuration. We're looking at the last 5 [channels](#) that lead to "Purchase":

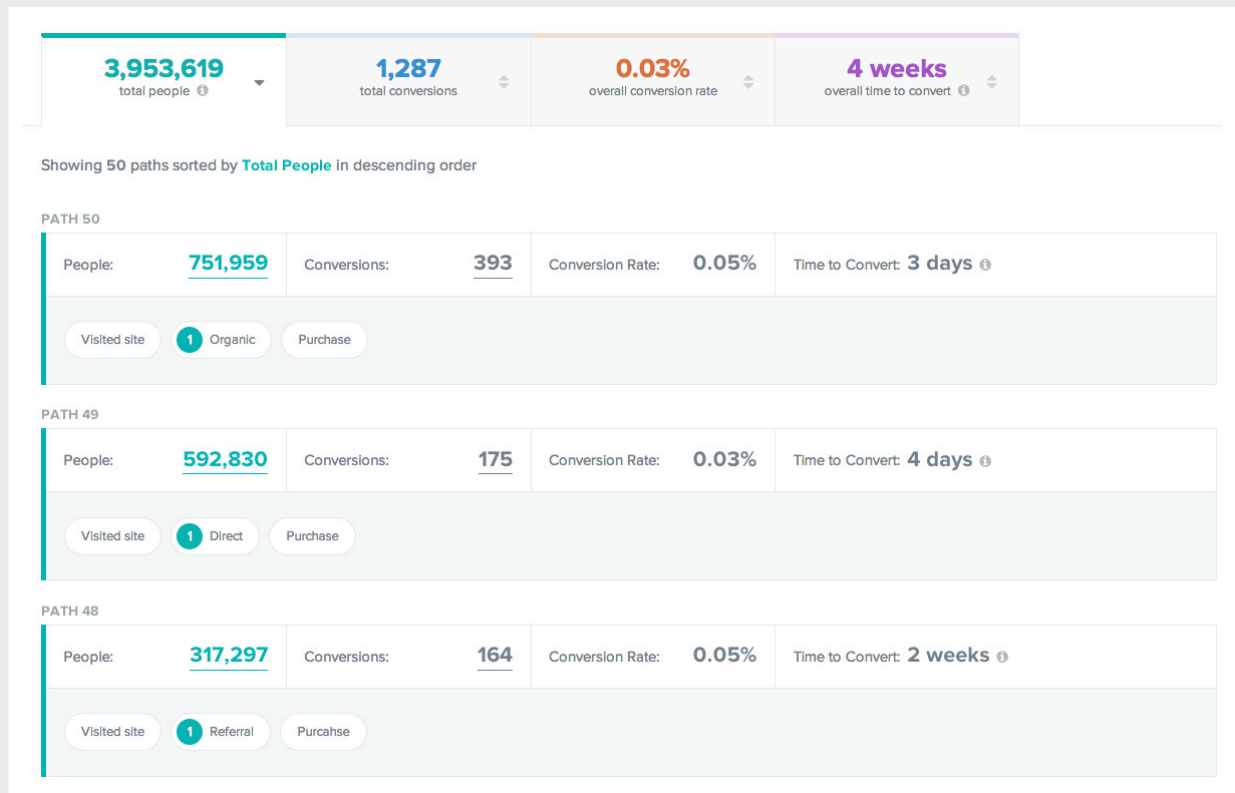


The screenshot shows the 'Path Report Configuration' interface. It includes several dropdown menus and buttons:

- Path Report Configuration** (Section Header)
- Show me the** (Label) followed by a dropdown menu set to **last**.
- 5 most common** (Text) followed by a dropdown menu set to **properties**.
- Channel** (Text) followed by a dropdown menu.
- Starting with** (Label) followed by a dropdown menu set to **Visited site**.
- that leads to** (Label) followed by a dropdown menu set to **Purchase**.
- and happens between** (Label) followed by a dropdown menu set to **Last 30 days** and a date range field set to **Oct 16 2014 - Nov 14 2014**.
- A note below the date range: *This date range is applied to your selected conversion event.*
- Run Report** (Blue Button)
- Save Report** (Green Button)

As a reminder, "Purchase" is not an automatically tracked event. You'll have to set it up yourself.

Here's our data, sorted by total people:

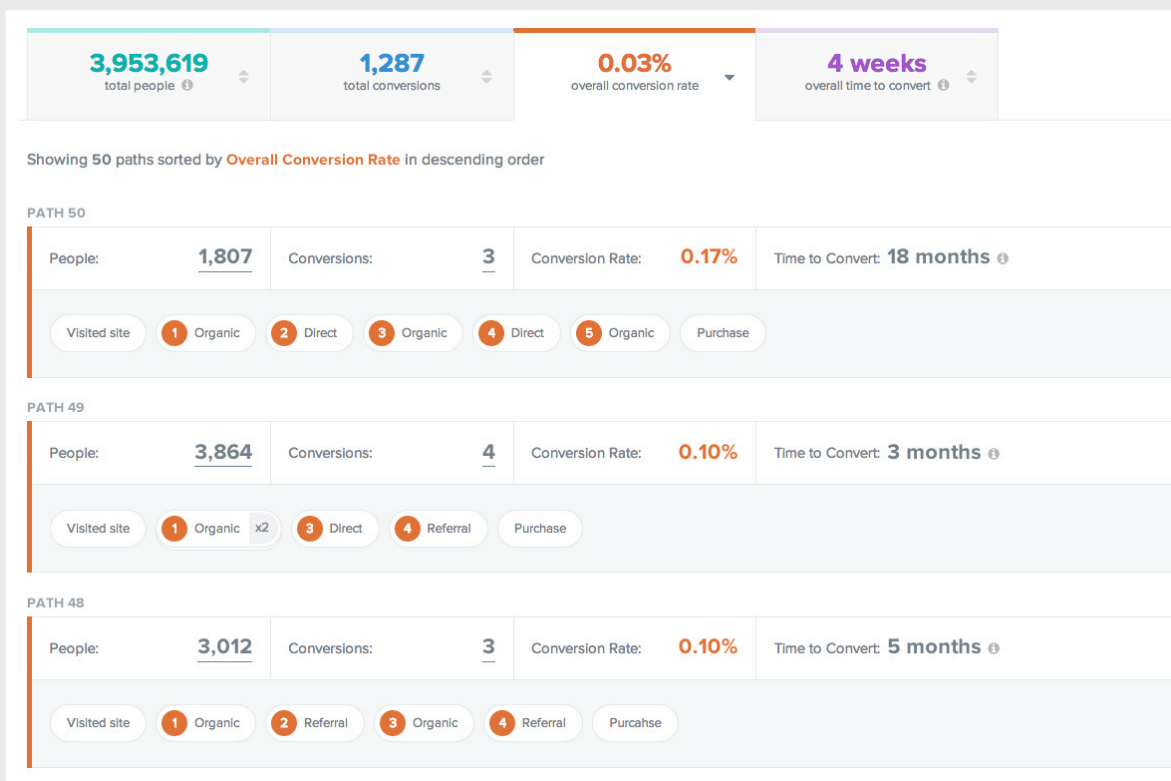


We see that Organic search brings a large number of people. While not many of them convert, the ones who do convert do so relatively quickly.

Direct visits are generally people who type the URL into their address bar or come to the site through a bookmark.

Our third path, Referral, is made up of people who come to the site via a referral from a non-social media site, search engine, or advertisement. These are typically visitors who come via a direct link from a third party site. Only 0.05% of these people convert, and those who do take about 2 weeks.

Next, let's look at the highest converting paths:



Our highest converting customers go through a longer cycle. They typically go through multiple channels before converting. But, the three paths we're looking at begin with an Organic search. For 2 of the 3 paths, the last channel before conversion is Referral.

Insight Discovered — Most of the people who converted to “Purchase” first came via an Organic search. Given this, we should continue our SEO effort because it is the best customer acquisition channel.

5. SaaS - Goal of Learning Which Channels Drive Signups

Many small-to-medium-sized SaaS companies still don't know which channels drive customer acquisition. This gap in knowledge leaves many companies in the dark, unaware of where their customers and users come from.

If these companies use Kissmetrics's Path Report, they'll know which channels drive acquisition for their businesses.

Let's run an example in Path Report, looking at people who have visited the site and signed up.

▼ **Path Report Configuration**

Show me the 5 most common

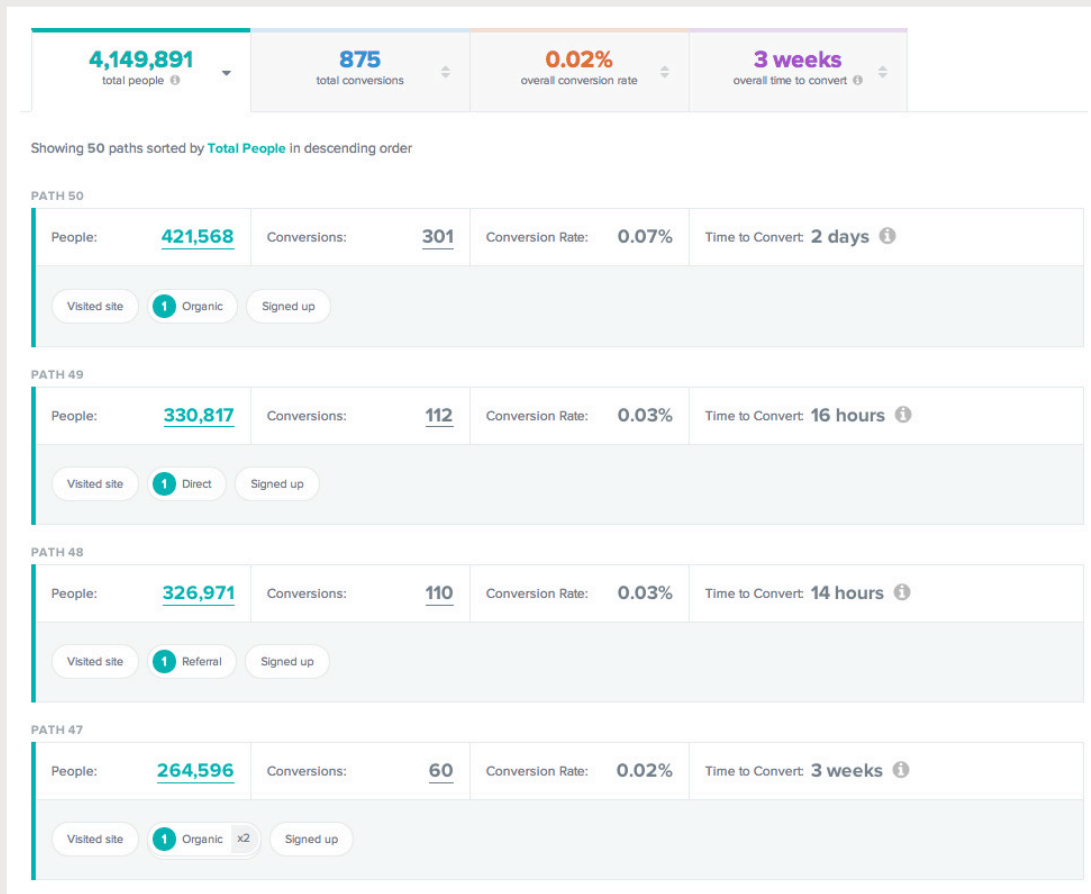
Starting with

that leads to

and happens between

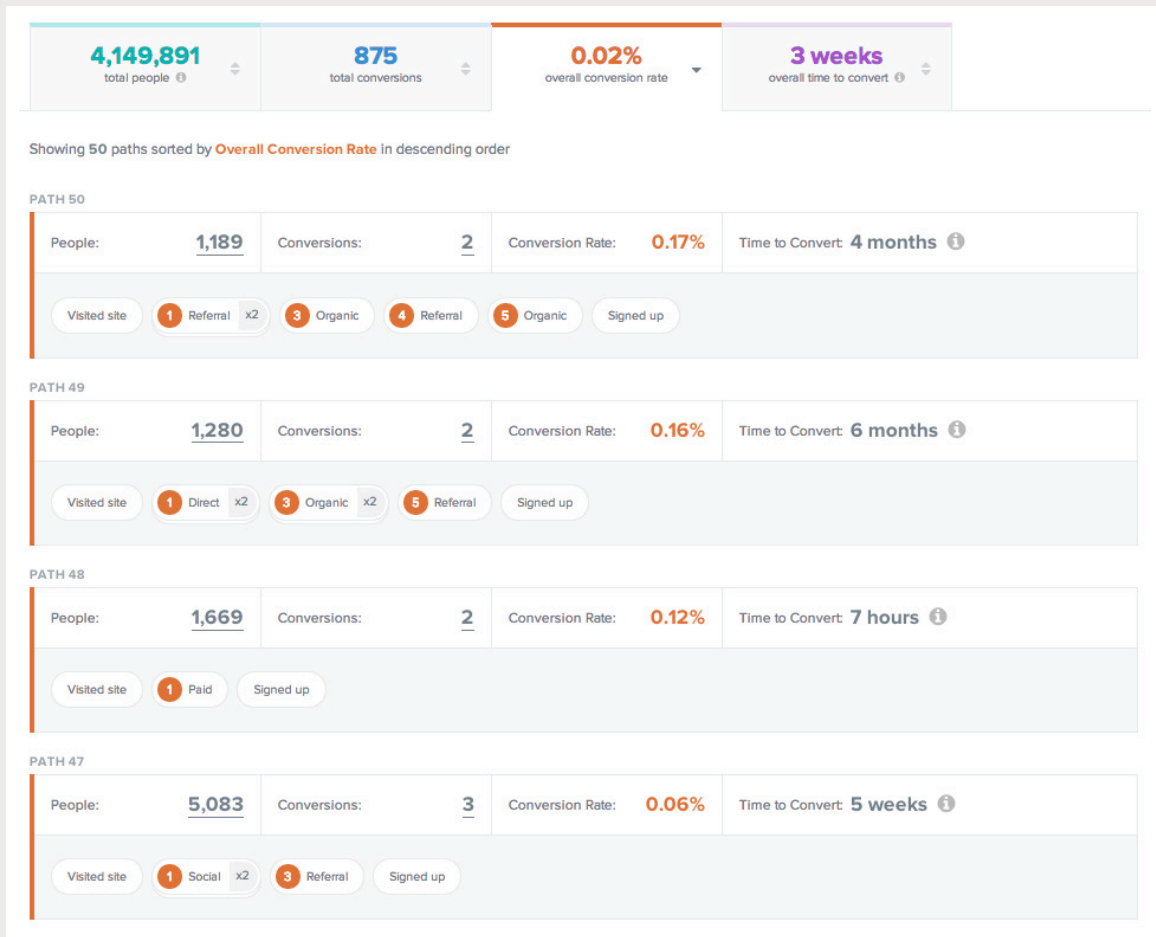
This date range is applied to your selected conversion event.

Here are our paths:



This shows us that Organic is a channel that brings in a lot of visitors and customers. Direct and Referral bring in a healthy number of visitors and manage to convert them relatively quickly.

Since we're also interested in conversion rate, we'll sort by that path as well:



We see that our top converting paths involve multiple touches and generally take around a half year to convert. This tells us that we have a long sales cycle and most of our visitors who convert take a while to do so.

Insight Discovered — Many of the people who visit our site and convert take 4-6 months to do so. This involves multiple touches with our business from a variety of sites, with Organic involved in nearly all of them. Referral is also an important channel for us, with many of our customers first hearing about us through a referral link. Given this, we should focus a lot of our efforts on increasing referral links to our site.

USE THE PATH REPORT TO LEARN WHAT'S WORKING AND WHAT'S NOT

To summarize:

- The Path Report can be thought of as a reverse funnel report. Pick an event that's important to your business (e.g., Sign Up, Purchase, Subscription, etc.), and then run the Path Report to discover the most common events that lead to that event.
- Use the Path Report when you want to discover what's working and what's not. Would you like to learn what triggers people to convert to signing up? Use the Path Report and view the events the highest converting visitors take before signing up. Would you like to know which channels drive conversions? Simple, just search by channel and view where your customers come from right before they convert.

2

Finding More Customers

- [Using Channels in Kissmetrics to Learn Where Your Most Valuable Customers Come From](#)
- [Tracking Marketing Campaigns in Kissmetrics](#)

Using Channels in Kissmetrics to Learn Where Your Most Valuable Customers Come From

Marketers need to know where customers come from. Otherwise, they can't grow a business.

If marketers can get a complete picture of all their marketing channels that shows which ones are acquiring customers, they'll know where to focus their acquisition dollars. But, many marketers don't have information about where customers are coming from and how they can make informed decisions for marketing funds.

Businesses try to fill in the gap with a "How did you hear about us?" form, but those aren't 100% reliable, because many people make something up, have already forgotten, or skip the question.

This is where channel segmentation in Kissmetrics helps. It not only shows you where people come from, **but also how valuable** they are as customers.

In this section, we'll break down channel segmentation. By the end, you'll know how people and customers find you and which channels are most effective in terms of both acquisition and retention.

We'll start with explaining the channel property in Kissmetrics.

HOW THE CHANNEL PROPERTY WORKS

We've written extensively on properties, so if you want a refresher, we recommend [checking out the section](#) in the guide that covers properties. In short, properties give us various characteristics about each person, such as where they came from (referrer), which campaign sent them, which URL they first landed on when they visited, etc.

One of the automatically tracked properties in Kissmetrics is Channel. This property categorizes people based on their referrer. We have seven channels:

- **Direct** — These are people who come from a direct referrer. In many cases, these are people who come to you directly by typing your URL into their browser.
- **Organic** — People who come to your website via a search engine are included in this channel. Also, people who set up a UTM parameter and have the utm_medium as “organic” or “search” will be put in this channel.
- **Referral** — This channel is for those who come to your site via a third party that isn’t a search engine or social site. If they aren’t from those referrers, they’ll be put in this channel.
- **Email** — People who are referred via an email campaign with the utm_medium as “email” or “email” are put in this channel.
- **Paid** — This channel includes people who come from a paid campaign. They’ll be put in this channel if their referring URL has the [gclid parameter](#) or a utm_medium of “cpc,” “cpm,” “display,” “cpv,” “cpa,” “cpp,” or “ppc.”
- **Social** — These are people who come from a social network. We have a list of 276 domains and subdomains for such networks. If any visitor comes from one on our list, they’ll be put in the social channel. Also, people who come from a campaign URL with the utm_medium as “social,” “social-network,” “social-media,” “sm,” “social network,” or “social media” will be put in this channel.
- **None** — People who don’t fit into any of the above channels will be put into the None channel.

When you segment people by the Channel property, they will be broken down by one of the seven channels above. You also can choose the Channel: Origin property, which will display one of the seven channels and the specific URL or source. We’ll use an example of this in the Revenue Report segmentation a little later.

KISSMETRICS GIVES YOU THE FIRST TOUCH OF YOUR CUSTOMERS

Many SaaS and ecommerce companies have long sales cycles. A person’s first visit to a business (also known as first touch) and signing up rarely happen at the same time. People may visit, browse around the site, and then leave, shop around, and sleep on it. After a few weeks, they may return (or not) to sign up or purchase.

Kissmetrics tracks every touch, from the very first to the last. You can see the very first traffic source and the very first channel that brought a customer to you.

Viewing first touch channels is important because it shows which channels brought people into the top of your funnel. With most analytics tools, you can't get those kinds of insights. Kissmetrics tells you the very first channel that brought you each customer, each signup, each conversion.

A typical visitor > customer timeline may look something like this:

1. Visitor visits Kissmetrics.com through a Google search (this is important)
2. Six days later, visitor visits Kissmetrics.com by typing the URL into their browser
3. One month later, visitor visits Kissmetrics.com from Twitter
4. Three days later, visitor visits Kissmetrics.com directly and signs up for a free trial

In this example, the visitor's first touch channel was an organic search. Chalk one up for organic because we know it has brought a user.

Now, imagine this on a much larger scale with thousands of people. You'll see what brings users and what doesn't. And, when you know this, you'll know what to focus on. You'll also know what not to spend time and money on. This means a better ROI for your marketing dollars.

We've discussed the Channel property and we understand why first touch is important for building more efficient marketing. Now, let's quickly discuss using segmentation in Kissmetrics.

A QUICK RUNDOWN ON SEGMENTATION IN KISSMETRICS

We primarily use properties to segment people. When you segment people, you're putting them into various groups based on a property. This is beneficial because you don't just get one big bunch of people.

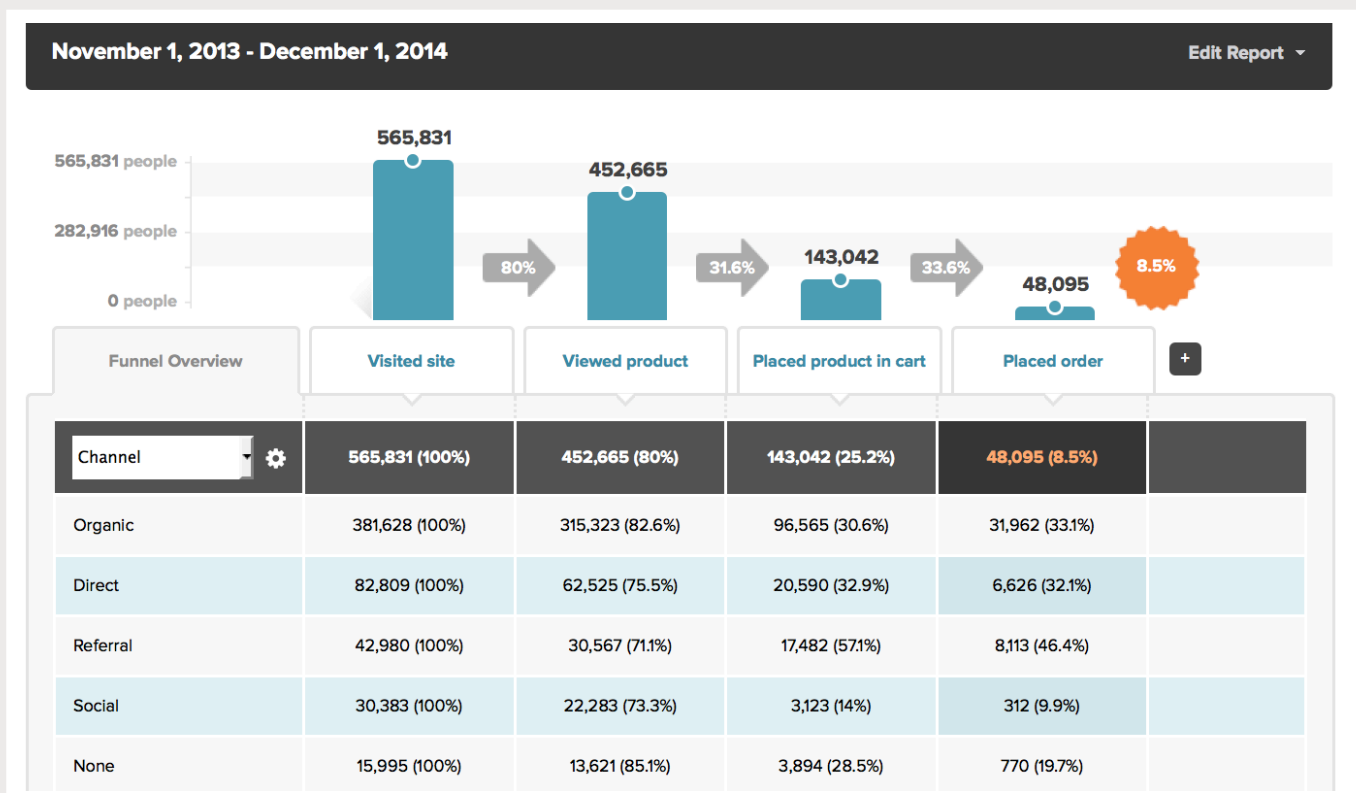
You see how each segment performs, and you can compare them against each other. If you get enough data, you'll see clear winners and losers. When you get these insights, you'll know where to focus more time and money because you'll see what works.

Next, we'll run through a couple of examples of using segmentation by the Channel property in a funnel report.

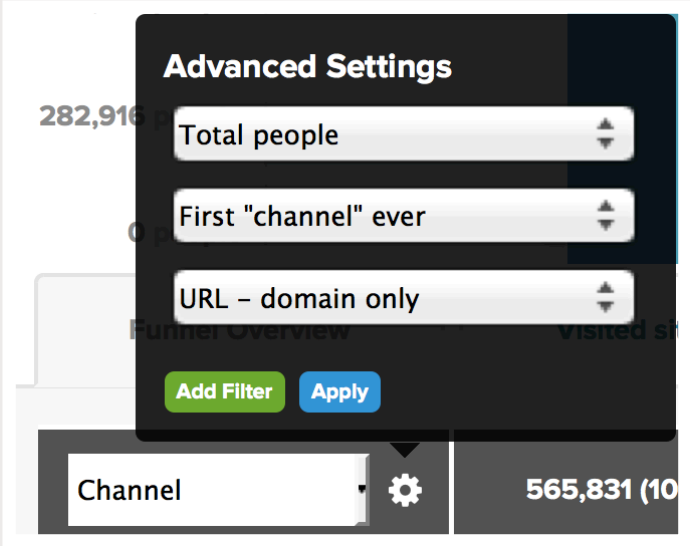
CHANNEL SEGMENTATION IN A FUNNEL REPORT

We'll be using a basic signup funnel and segmenting people by first touch. This will show us the first ever channel that people were referred by. First touch channels are important because they show us how people are hearing about us and what is bringing them to our site.

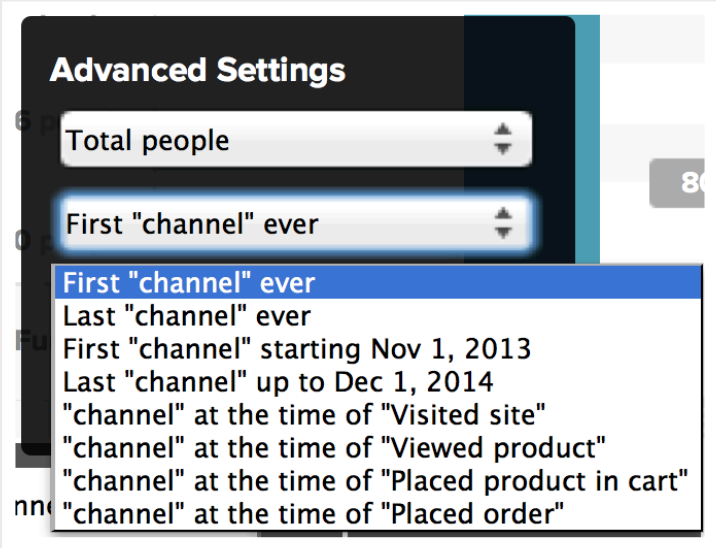
Here's an example funnel, using the Channel property to segment people and track them through each step of the conversion process:



This is a typical ecommerce funnel that's tracking people from their first visit to placing an order. We're segmenting people by their first channel ever:



We have a few options for sorting people:



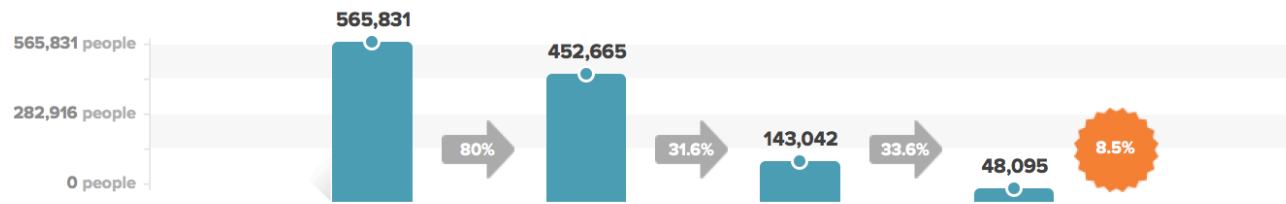
You'll get these options with any property you select; they aren't limited to the Channel property. Here's a quick description for each option:

- 1. First "channel" ever** — This is what is known as "first touch." When a person first came to your site, this is the channel that referred them. It doesn't matter if the first touch happened five years ago or yesterday, whichever channel was their first ever is used here.
- 2. Last "channel" ever** — If you think of channel as a timeline, the last "channel" ever is always the most recent. It doesn't matter if it fits into a date range, you get the most recent value for that property.
- 3. First "channel" starting Nov 1, 2013** — Kissmetrics will show the first referrer that drove a person to your site within the selected funnel dates. The date here will be replaced by the date chosen in your funnel.
- 4. Last "channel" up to Dec 1, 2014** — For this option, Kissmetrics will show the referrer that drove a person to your site the most recent time within the selected funnel dates. Once again, the Dec 1 date will be replaced with whatever end date you chose.
- 5. "Channel" at the time of "event"** — Just as it says, whatever channel a person came from when they triggered an event. This is super useful because you'll be able to see which channel they came from right before they performed an event in your funnel. This means that it can tell you which channel immediately preceded the conversion event.

Let's break down each channel and see how they performed at bringing people to the site, and get the conversion rate for each channel:

November 1, 2013 - December 1, 2014

Edit Report ▾



Channel	Visited site	Viewed product	Placed product in cart	Placed order
Organic	381,628 (100%)	315,323 (82.6%)	96,565 (30.6%)	31,962 (33.1%)
Direct	82,809 (100%)	62,525 (75.5%)	20,590 (32.9%)	6,626 (32.1%)
Referral	42,980 (100%)	30,567 (71.1%)	17,482 (57.1%)	8,113 (46.4%)
Social	30,383 (100%)	22,283 (73.3%)	3,123 (14%)	312 (9.9%)
None	15,995 (100%)	13,621 (85.1%)	3,894 (28.5%)	770 (19.7%)
Email	8,176 (100%)	6,820 (83.4%)	926 (13.5%)	256 (27.6%)
Paid	3,860 (100%)	1,526 (39.5%)	462 (30.2%)	56 (12.1%)

Export data

Showing: 20 1 - 7 of 7

- **Organic** — By bringing over 380,000 people, organic delivers the most people to the site. Of the 381,628 who visited, 31,962 converted to placing an order. This channel has a solid conversion rate of 8.4%.
- **Direct** — Of the people who visited the site, 82,809 first came directly. Of those, 6,626 people converted. Those who came directly converted relatively well through the funnel.

- **Referral** — If this isn't the best channel, it's very close. It brought in 42,980 people, which is enough for 3rd best. But, its real strength is the conversion rate. With 8,113 people placing an order, the conversion rate is 18.9%.
- **Social** — This channel's conversion rate is one of the poorer ones: 312 of the 30,383 people converted to placing an order, making the conversion rate 1%. We should not spend any more time on this channel.
- **None** — This channel can't tell us much. We'll ignore it because we cannot make informed decisions when there is no data.
- **Email** — This channel doesn't bring in many people, but its conversion rate is decent. Since we have other channels that perform much better, we shouldn't spend any additional time on email marketing.
- **Paid** — Before this channel is ruled out altogether, we may want to try testing different platforms (AdWords, Facebook, Twitter, etc.).

Based on this data, we should focus a lot of our efforts on the organic and referral channels. The direct channel does well, but there really isn't much we can do to improve that besides just "getting our name out." Most people who visit a site directly hear about it through an advertisement, conference, or word of mouth. Direct also includes any traffic that doesn't have a referrer with a URL (i.e., PDFs).

How do we get more organic and referral traffic? Here are a few ideas:

- **PR** — Getting the site on various media outlets will increase referral traffic. The more we can scale this, the more customers we'll have.
- **Guest blogging** — Writing content on sites in a similar niche is an important part of getting referrals.
- **Ramping up our own content** — More content = more traffic. The more quality we can produce, the more organic and referral traffic we'll get as people link to our content.

CHANNEL SEGMENTATION IN A REVENUE REPORT

This is one of the coolest features of Kissmetrics and really builds off the channel segmentation in a funnel report.

What if you could see how valuable those customers are? The actual revenue, churn, and lifetime value generated by those customers? You'd know exactly which channels were growing your business. Our Revenue Report gives you this information.

Setting up a Revenue Report

Here's the starting report configuration:

The screenshot shows the 'New Revenue Report' configuration interface. At the top right, there is an 'Edit name' button. Below the title, there is a 'Report Configuration' section with a dropdown arrow. Under this section, there are three main fields: 'Calculate revenue from:' with a dropdown menu showing 'Subscription billing amou...', 'Date range:' with a 'Select specific dates...' button, 'Start date:' with a calendar icon and the date 'Dec 5, 2012', and 'End date:' with a calendar icon and the date 'Dec 7, 2014'. Below these fields is an 'Advanced options' section with a right-pointing arrow. At the bottom of the configuration area, there are two buttons: 'Run Report' (blue) and 'Save Report' (green).

When you begin sending your revenue data to Kissmetrics, you'll set up and name the property that records how much a customer pays. For us, that property is called Subscription billing amount.

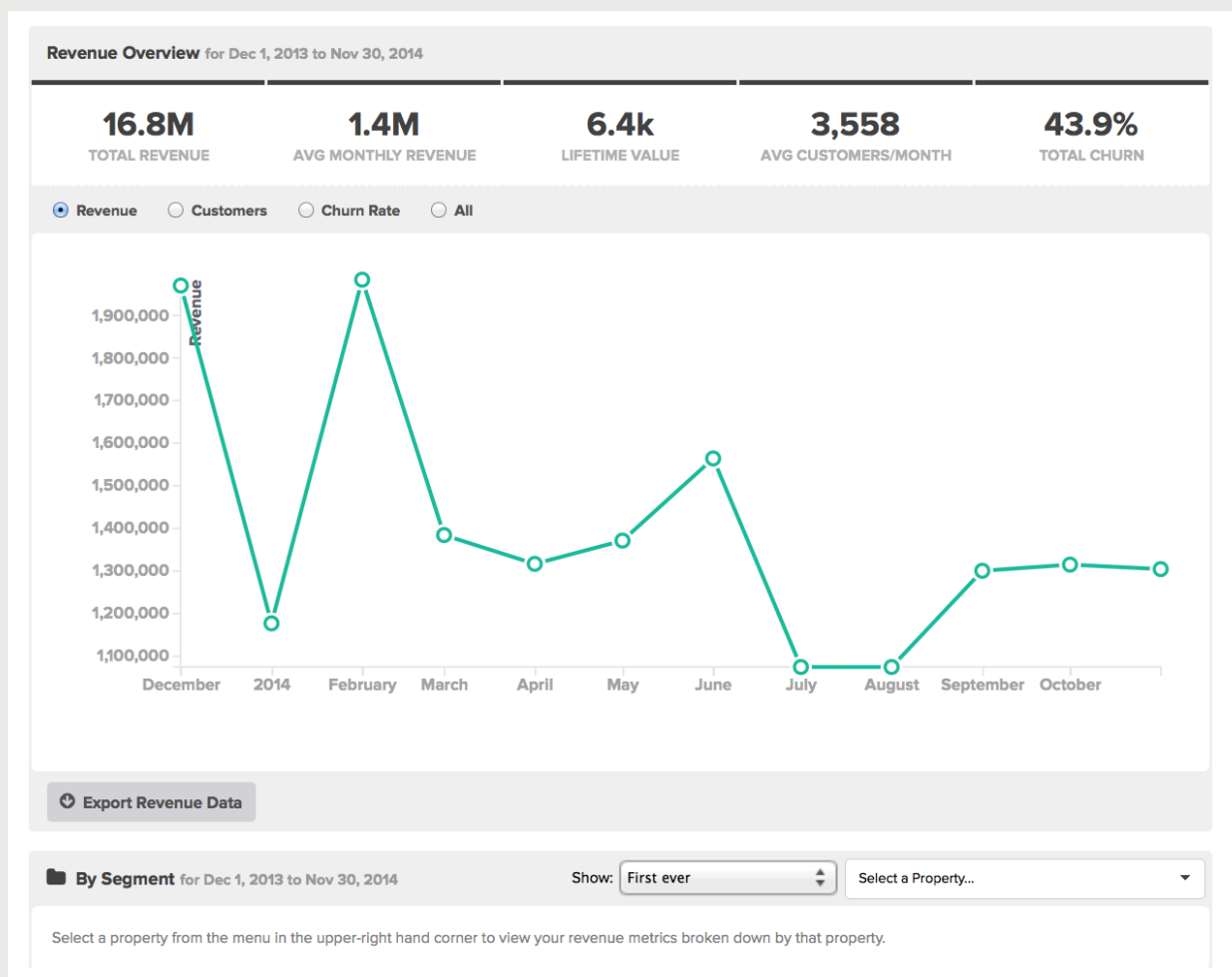
The date range shows the amount of revenue you've recorded during that time frame. We'll want a big sample size because we'll be making important decisions off this data and we want to make sure the data is settled. We'll choose December 1, 2013 – November 30, 2014.

Under Advanced options, we get a few more choices for setting up the parameters of the report.

The screenshot shows the 'Report Configuration' section of the Kissmetrics interface. It includes a dropdown for 'Calculate revenue from:' set to 'Subscription billing amou...'. Below this is the 'Date range:' section with a 'Select specific dates...' button, 'Start date:' set to 'Dec 1, 2013', and 'End date:' set to 'Nov 30, 2014'. The 'Advanced options' section contains 'Show revenue in' set to 'Monthly' buckets, 'Calculate churn by:' set to 'Event only', and 'Using churn event:' set to 'Subscription canceled'. At the bottom are 'Run Report' and 'Save Report' buttons.

We'll show our revenue by month, and we'll calculate churn by an event we've set up (Subscription canceled). Churn events are not automatically tracked in Kissmetrics, so you'll have to set this up yourself.

We'll click Run Report, and get our data:



The bottom section “By Segment” is where we’ll be focusing our time. We have four options on our segmentation:

By Segment for Dec 1, 2013 to Nov 30, 2014

Show: **First ever** Select a Property..

Select a property from the menu in the upper-right hand corner to view your revenue by property.

- First ever
- Last ever
- First (starting Dec 1, 2013)
- Last (ending Nov 30, 2014)

Once again, we see that we can choose first touch, last touch, first touch within date range, and last touch within date range.

We’ll stick with “First ever,” and we’ll use the Channel property:

By Segment for Dec 1, 2013 to Nov 30, 2014

Show: **First ever** Channel

Channel	Total Revenue	Avg Revenue/Person	Lifetime Value	Paying Customers	Total Churn
None	5,890,670.94	4,773.64	16,594.08	1,234 people	2.8%
Organic	5,186,185.66	2,509.04	5,050.54	2,067 people	4.7%
Direct	3,815,155	2,246.85	4,790.41	1,698 people	4.9%
Referral	1,536,412	1,967.24	4,493.41	781 people	4.8%
Social	221,068	1,812.03	3,711.74	122 people	4.8%
Email	181,674	2,299.67	3,942.29	79 people	5.3%
Paid	1,800	900	1,800	2 people	50%

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[Export Property Data](#)

In this segmentation, we're looking at all the revenue that was recorded during our date range and breaking people down by their first ever channel, as well as exact origin. We get five metrics in each channel:

- **Total Revenue** — The total amount of revenue recorded from customers in the channel. We are sorting people by this metric.
- **Average Revenue/Person** — This is total revenue divided by the number of people.
- **Lifetime Value** - The total amount of money you should expect to receive from your customers. (This metric provides an estimate of the lifetime value you'll receive from each customer by dividing average revenue per person by total churn).
- **Paying Customers** — The number of people who are still actively paying. These are people Kissmetrics has recorded revenue from who have not churned.
- **Total Churn** — The percentage of customer churn in the channel. As a reminder, churn is a canceled subscription.

Let's break down each channel to see which ones bring us the most valuable customers:

- **Organic** — This channel brings the most revenue, highest revenue per person, highest lifetime value, and most paying customers. Its churn is right about average with the rest. This is the strongest channel.
- **Direct** — This channel brings a lot of valuable customers with an average churn rate. Its lifetime value is a strong point, achieving almost \$4,800 per customer.
- **Referral** — Total revenue takes a little dip here. This is due to a smaller customer base. Other than that, the metrics line up well with the other channels. This is a good channel for growth.
- **Social** — A small customer base and shrinking lifetime value are the reasons for the diminished revenue numbers. This is not a good channel for growth.
- **Email** — The unique thing about this channel is that despite its high churn, it still has solid revenue per person. If this channel could bring in more customers and get them to stick around, it could become the strongest channel.

- **Paid** — This is a small channel, with only 2 customers. To make this a more valuable channel, we'll have to do a lot of testing to get more data before we know how this channel really performs. The churn rate at this point doesn't mean much as the base is so small.

We'll also select the Channel: Origin property. This will show the referring URL or source in addition to the channel. In the email channel, it will display the campaign name you chose in the UTM parameter. We'll look at the top 15 in the Channel: Origin property. In this example, there are 270 total.

By Segment for Dec 1, 2013 to Nov 30, 2014 Show: First ever Channel: Origin

Channel: Origin	Total Revenue -	Avg Revenue/Person	Lifetime Value	Paying Customers	Total Churn
None	5,921,565.94	4,790.91	16,679.47	1,236 people	2.8%
Organic: Google	5,059,609.66	2,478.99	4,992.79	2,041 people	4.7%
Direct	3,814,439	2,247.75	4,789.63	1,697 people	4.9%
Referral: cnn.com	454,734	1,612.53	4,709.87	282 people	3.4%
Referral: techcrunch...	319,598	2,853.55	6,100.70	112 people	4.8%
Referral: theverge.c...	96,099	96,099	192,198	1 person	50%
Social: Twitter	90,973	1,819.46	3,153.73	50 people	5.7%
Email: 4-tools	85,285	8,528.50	11,371.33	10 people	7.5%
Referral: news.ycomb...	62,150	10,358.33	18,127.08	6 people	57.1%
Social: Facebook	56,856	4,373.54	10,933.85	13 people	4.0%
Referral: quicksprou...	46,397	1,784.50	2,729.24	26 people	6.5%
Referral: engadget.co...	45,018	11,254.50	?	4 people	0%
Email: Webinars	40,266	1,438.07	2,476.68	28 people	5.8%
Referral: twittv	36,757	2,297.31	4,594.63	16 people	5.0%
Organic: Bing	34,542	2,878.50	5,345.79	12 people	5.8%

Showing: 15 of 270

The most important thing to do is reduce churn rate. The lower the churn rate, the more revenue we'll have. If we can get it consistently below 4%, we'll increase our revenue. Organic, direct, and referral are strong channels. Email has brought valuable customers, so we should step up our email marketing program.

THREE KEY TAKEAWAYS

1. To have efficient marketing, you need to know where your customers come from and which channels bring the most valuable customers. Kissmetrics has an automatically tracked property called Channel. It categorizes people into seven different channels based on their referrer.
2. In the Kissmetrics funnel and revenue reports, you can segment people by any property, not just channel. Using Kissmetrics's channel segmentation, you can get an understanding of where your customers come from. Since Kissmetrics connects every touchpoint to your customer, you can get the very first touchpoint and the very first channel that brought someone to you. You'll be able to see how the channels at the very top of your funnel perform.
3. When you know who is sending you visitors and customers, you'll know where to target your time and money. You'll also see which channels don't work. Simply put, channel segmentation allows you to make better marketing decisions.

Tracking Marketing Campaigns in Kissmetrics

Campaigns are the lifeblood of a marketing team. Budgets and annual plans are built around them. Promotions and layoffs depend on whether they deliver results.

What marketing manager wouldn't want to see exactly how their campaigns impact ROI? The better you understand what works, the more likely you are to deliver the growth your company needs to reach the next level.

In this section, we'll be discussing how to track your campaigns in Kissmetrics. We'll discuss how to set them up so you can track them correctly. Also, we'll use reports in Kissmetrics that will help you identify which campaigns are the best for customer acquisition, ROI, and customer retention.

Let's begin with an explanation of how Kissmetrics tracks campaigns.

A QUICK RUNDOWN ON UTMS

As a marketer, you are likely running a few dozen online campaigns. You might have a paid search campaign, an email campaign, various content marketing activities (webinars, PDFs, etc.), and a paid campaign on a social channel. How do you keep track of all these campaigns and differentiate one campaign from another?

Enter UTMs.

A UTM (urchin tracking module) is a snippet of text added to the end of a URL. They are used for tracking marketing campaigns.

You may have seen them around the web. They look like this:

```
http://www.example.com/?utm_source=facebook&utm_medium=cpc&utm_campaign=10off
```

There are five variables, also known as parameters, in a UTM:

- **Campaign source (utm_source) (required)** — Used to identify a specific source within a channel, such as AdWords, Facebook ads, or Twitter ads to distinguish paid ads.

- **Campaign medium (utm_medium) (required)** — Used to identify a marketing channel like email, paid, etc.
- **Campaign term (utm_term)** — Records the keywords used in paid search.
- **Campaign content (utm_content)** — Used to differentiate ads or links in the same piece of content.
- **Campaign name (utm_campaign) (required)** — Used to identify your campaign, such as your website, a specific sale, etc.

In our example (shown again below), we used three variables:

```
http://www.example.com/?utm_source=facebook&utm_medium=cpc&utm_campaign=10off
```

- **Source** — In this case, “Facebook” is the source.
- **Medium** — This specifies that it is a paid link.
- **Campaign name** — This is an ad for an ecommerce company offering people 10% off their first order.

UTMs have become the standard since Google Analytics uses them to track campaigns. We deliberately structured Kissmetrics so that it could take advantage of the same tracking. This makes it very easy for you since there is nothing to change. Kissmetrics will grab the same campaign data.

HOW UTMS WORK IN KISSMETRICS

When a person visits from a URL that contains the campaign source (utm_source), Kissmetrics will automatically record the event Ad Campaign Hit. All the variables in the UTM are recorded as properties. Take a look at the following URL:

```
http://www.example.com/?utm_source=newsletter&utm_medium=email&utm_campaign=Jan_deals
```

If a person visits from this URL, Kissmetrics will trigger the event Ad Campaign Hit and record the following properties:

- Campaign source: newsletter
- Campaign medium: email
- Campaign name: Jan_deals

Variables are recorded as properties in Kissmetrics. And, when these properties are recorded, you can use Kissmetrics to track a campaign's effectiveness in acquiring and retaining customers.

In this section, we'll use an ecommerce site as an example, but you can use UTMs for anything. They aren't limited to ecommerce.

We'll run through four separate campaigns:

- Email
- Paid search
- Social
- PDF

We'll track them from the start of creating a link all the way through to revenue. Let's begin with email campaigns.

USING UTMS WITH EMAIL CAMPAIGNS

Many email marketing programs allow you to track links, but only as far as which links get clicked. To track links all the way to revenue, you'll need to use Kissmetrics.

Let's say we're an ecommerce company selling nutritional supplements. We run an email newsletter that people can sign up for on the website. We usually send health tips in the newsletter, but the next

email will announce our 20% off campaign. The newsletter will go out to all subscribers, and the sale will apply to everyone, whether they're a customer or not. The sale will last five days.

We're going to keep the email simple, with the subject line mentioning the sale. The body of the email will contain links to three of our best selling products. These links will have UTMs attached to them.

To create a UTM, we'll use [Google's URL builder](#) and enter the following variables:

Step 1: Enter the URL of your website.

Website URL *

(e.g. http://www.urchin.com/download.html)

Step 2: Fill in the fields below. **Campaign Source, Campaign Medium and Campaign Name** should always be used.

Campaign Source *

(referrer: google, citysearch, newsletter4)

Campaign Medium *

(marketing medium: cpc, banner, email)

Campaign Term

(identify the paid keywords)

Campaign Content

(use to differentiate ads)

Campaign Name *

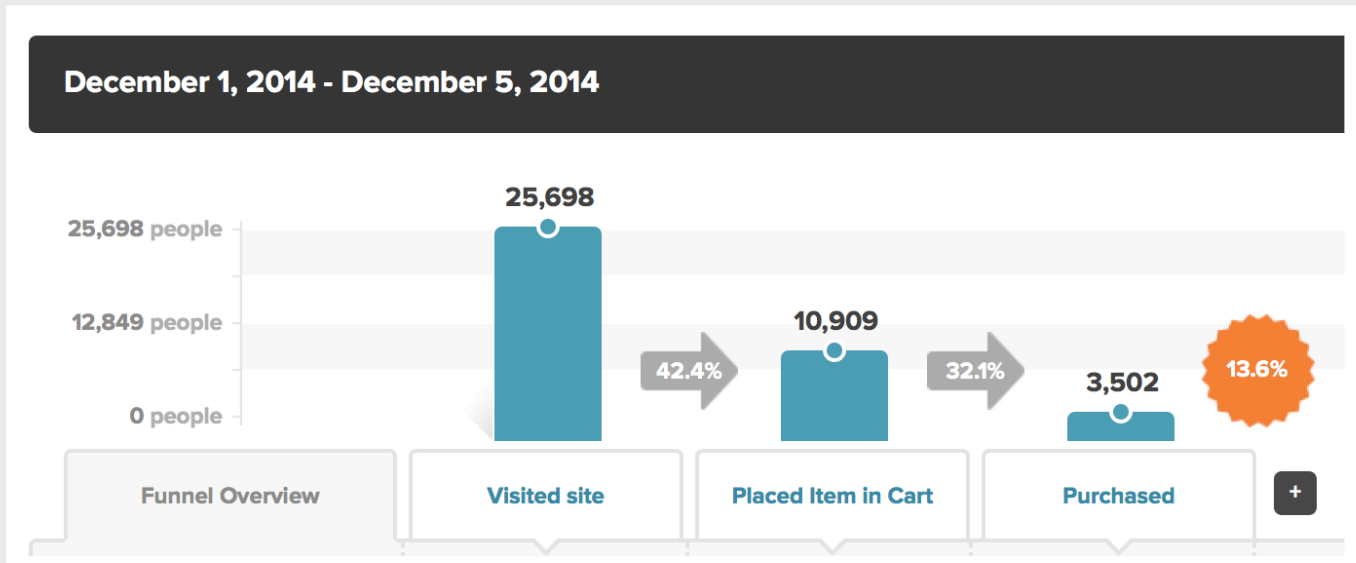
(product, promo code, or slogan)

`http://www.urchin.com/productone.html?utm_source=newsletter&utm_medium=email&utm_campaign=five_day_sale`

We can add this UTM to all the links in the email. Now, let's see how we can track this with a funnel.

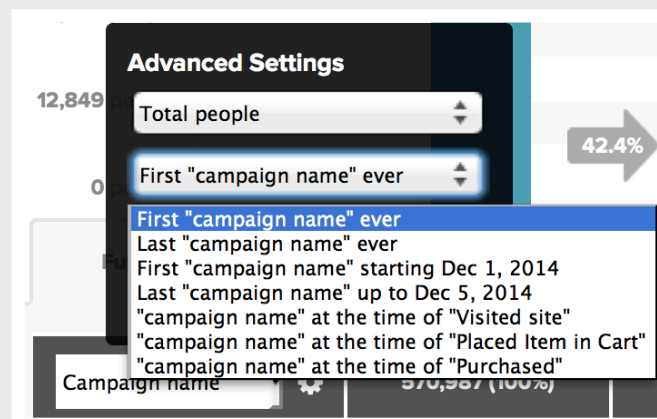
Tracking Purchases from This Email Campaign

To see if this email converted readers into buyers, we'll set up a basic funnel report to track people who visited the site, placed an item in their cart, and purchased:

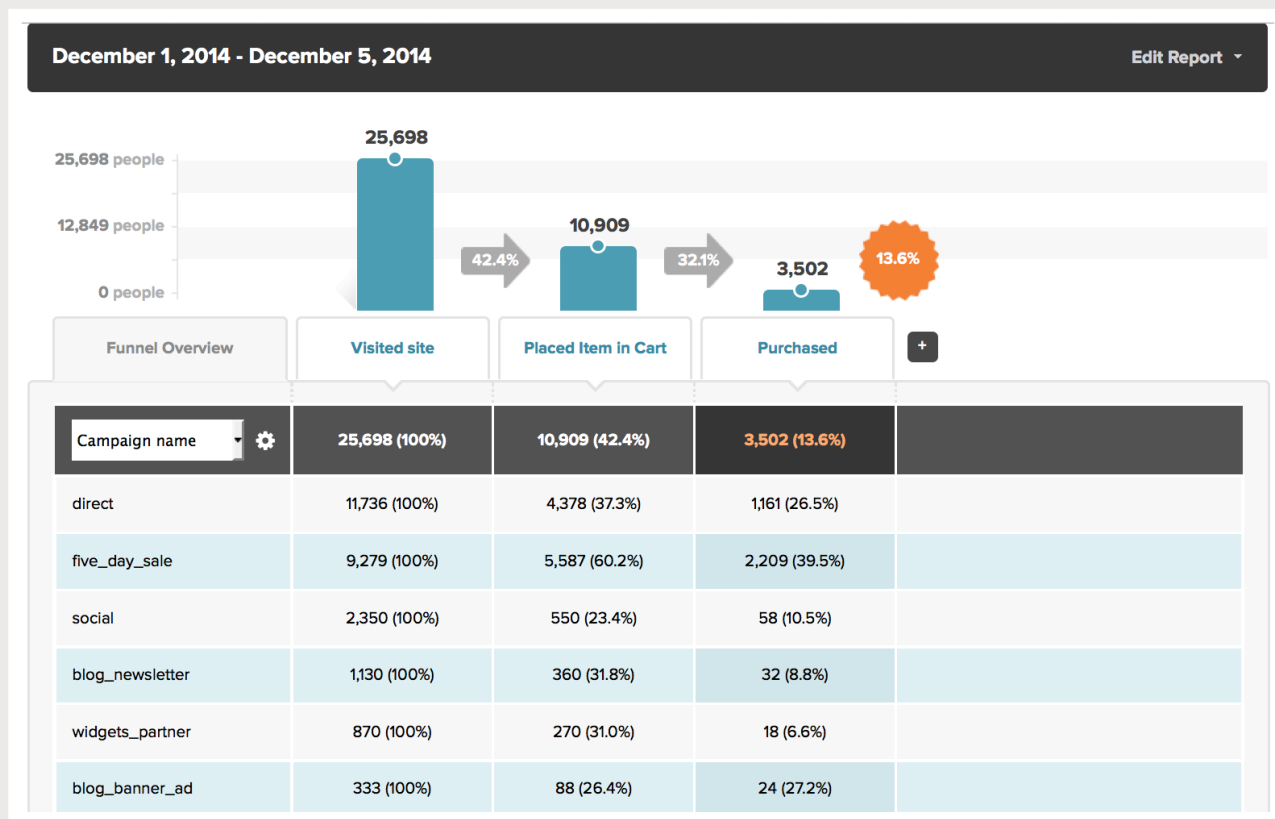


To track the email campaign's effectiveness, we'll need to segment people by campaign name. Keep in mind that this email campaign used *five_day_sale* as the campaign name variable.

Here are our options for segmentation:



We'll choose "campaign name" at the time of "Purchased." This tells Kissmetrics to segment people by the campaign name they had when they purchased. Now, we'll see all the people who have purchased and which campaign they came from:



This report shows us all the campaigns we've set up with the UTM variable "Campaign name."

Our most recent campaign had the variable *five_day_sale*. This campaign can be considered a success because the conversion rate is solid, with nearly 24% of those who visited the site converting to purchase. This is nearly double our average conversion rate.

USING UTMS WITH PAID SEARCH CAMPAIGNS (ADWORDS)

The most popular way to import your AdWords data into Google Analytics is to enable auto-tagging. This places a parameter called `gclid` in URLs. It looks like this:

```
www.example.com/?gclid=123xyz
```

This `gclid` information is only for Google Analytics. No other tool, including Kissmetrics, has access to that data.

When you use Kissmetrics and a person clicks on a URL containing the `gclid` parameter, an event called *Ad Campaign Hit* will be recorded. But, Kissmetrics (and other analytics tools) will not be able to get any information about which campaign the link is from, which keywords were used, etc.

To get that information into Kissmetrics, you'll need to use a UTM. You can use `gclid` and UTM parameters at the same time without issue. Google Analytics will read the `gclid` data, while other tools (including Kissmetrics) will read the UTM data.

Going back to our previous example of an ecommerce company, we also have multiple ads through AdWords. We use `gclid` parameters to get that data into Google Analytics, but we also want to track the ad campaigns in Kissmetrics. We'll set our UTM variables:

Website URL *

(e.g. <http://www.urchin.com/download.html>)

Step 2: Fill in the fields below. **Campaign Source, Campaign Medium and Campaign Name** should always be used.

Campaign Source *

(referrer: google, citysearch, newsletter4)

Campaign Medium *

(marketing medium: cpc, banner, email)

Campaign Term

(identify the paid keywords)

Campaign Content

(use to differentiate ads)

Campaign Name *

(product, promo code, or slogan)

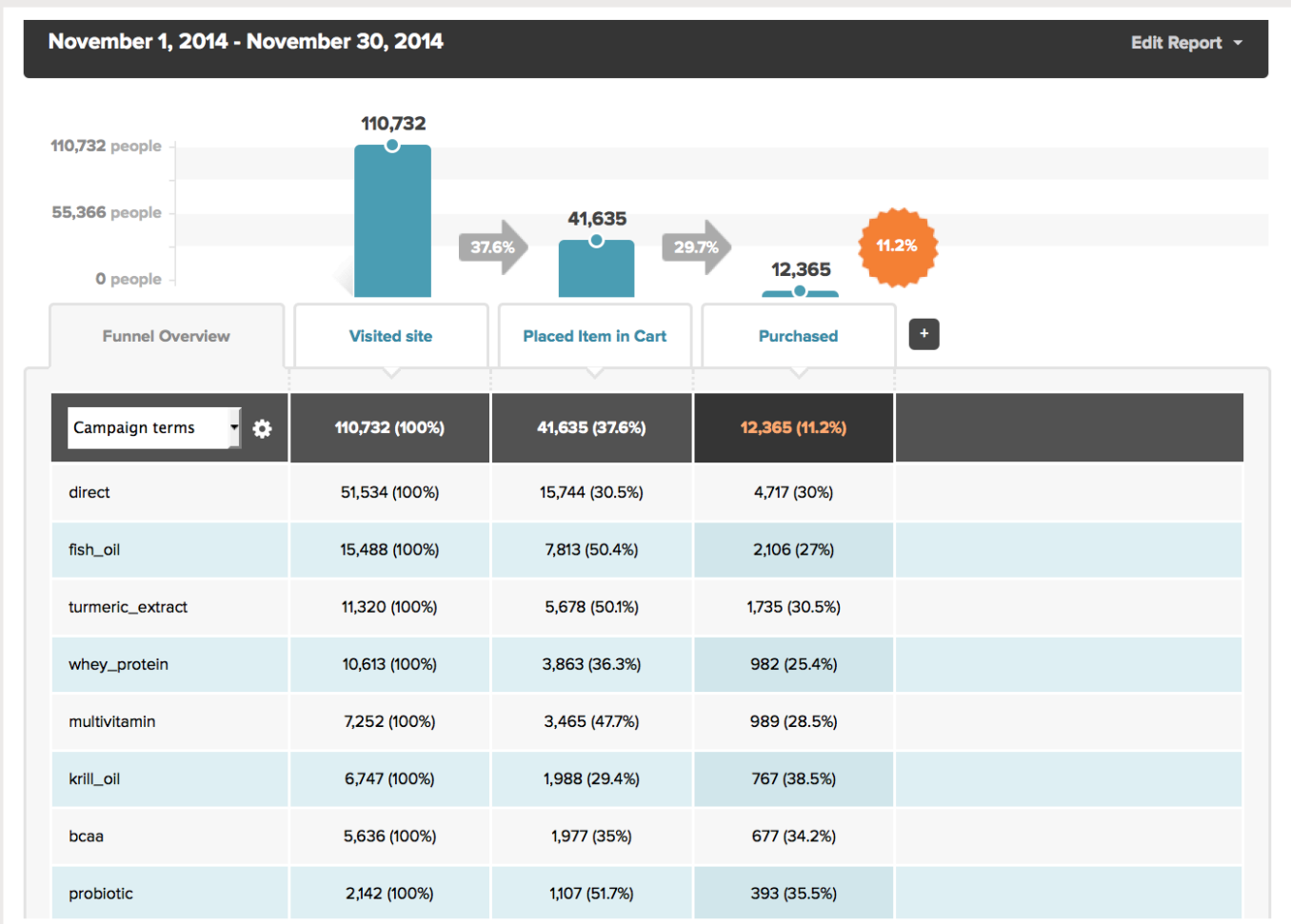
Submit

```
http://www.example.com/productone.html?utm_source=adwords&utm_medium=cpc&utm_term=multivitamin&utm_campaign=exclusive_product
```

This UTM will tell us that people who click on this link are from an AdWords campaign. They will click on a multivitamin offer, and our main messaging in the ad is that we are the only ones selling this product. The campaign medium tells us that it's a paid channel.

For this funnel report, we'll test keywords against each other. We'll segment people by Campaign term.

At the end of the month, this funnel report shows us a list of all the paid keywords that have brought us traffic:



Most of these keywords have a solid conversion rate throughout the funnel, with an average conversion rate of 11.2% from Visited Site > Purchased.

Raw sales numbers are great, especially when you're tracking campaign effectiveness. But to really judge these paid campaigns, we'll need to know how much revenue they've brought us. For that, we'll use the revenue report.

When segmenting people in the revenue report, we'll look at the first ever Channel: Origin. The channel property groups people into seven channels based on their referrer or campaign. Channel: Origin displays the specific referring URL or campaign name. It's the next level of segmentation into the channel.

You can add custom channels with the campaign medium UTM. Simply name the channel what you'd like, place it in the medium variable, and Kissmetrics will automatically pick it up as a channel. By default, Kissmetrics tracks seven channels:

- **Direct** — Visits from direct referrers, or typing the site into the browser, or bookmarks
- **Organic** — Visits from search engines
- **Referral** — Visits from 3rd parties
- **Email** — Visits from emails
- **Paid** — Visits from paid sources
- **Social** — Visits from social networks/sites
- **None** — Anyone who doesn't fit into any of the above channels (or any that you create) will be put in None.

One of the channels is Paid. When we attach the gclid parameter to our URLs, Kissmetrics automatically categorizes that traffic into the Paid channel and assigns them the AdWords origin. Here's our data:

The screenshot shows a web analytics interface for the period of Nov 1, 2014 to Nov 30, 2014. It features a 'By Segment' header, a 'Show:' dropdown set to 'First ever', and a 'Channel: Origin' dropdown. Below this is a table with six columns: Channel: Origin, Total Revenue, Avg Revenue/Person, Lifetime Value, Paying Customers, and Total Churn. The 'Paid: AdWords' row is highlighted in light blue and includes small bar charts under the Total Revenue and Total Churn columns.

Channel: Origin ^	Total Revenue	Avg Revenue/Person	Lifetime Value	Paying Customers	Total Churn
Paid: AdWords	275,636	22.29	891.60	12,365 people	2.5%

We've received over \$275,636 from this channel, and we have a large volume of customers, with over 12,000 coming from AdWords.

To know if this is a profitable channel for us, we'll have to look at our AdWords spending. Lifetime value (LTV) is also an important metric. It's only an estimate, but revenue report calculates that each customer coming from Paid will spend around \$900 during their lifetime. Churn rate is factored into our LTV calculation, so if we can keep it low, we'll maintain a strong lifetime value. Ideally, our LTV needs to be high enough to cover the cost of acquisition.

To get a deeper analysis of retention, we'll use the cohort report and track repurchase rates. To do that, we'll set the two events to "Purchased." This tells the cohort report to find the people who have purchased, and then track them to see how many purchased again.

The event "Purchased" is triggered when a person makes a purchase on our website. This event is not automatically tracked in Kissmetrics, so you'll have to set it up yourself.

Here is the Report Configuration:

The screenshot shows the 'Report Configuration' interface in Kissmetrics. At the top, it says 'Report Configuration'. Below that, there are two dropdown menus for events, both set to 'Purchased', with the text 'Show the time between people who did' and 'and' between them. Underneath, there are date selection options: 'Date range' with a 'Select specific dates...' button, 'Start date' set to 'Nov 1, 2014', and 'End date' set to 'Dec 30, 2014'. A section titled 'Advanced options' is expanded, showing 'Split into' set to 'Weekly' buckets. There are two radio button options for 'Count people who did': 'First Time Only' (unselected) and 'Every time' (selected). Below that, there are two radio button options for 'Group people who did': 'Time' (unselected) and 'Property' (selected). At the bottom of the advanced options, there are two dropdown menus: 'Use the' set to 'First' and 'Channel: Origin'. A blue 'Run report' button is located at the bottom left of the configuration area.

Now, here's the data:

Purchased between **November 1, 2014 - December 30, 2014**

Purchased		Purchased again by Weeks													
Property	People	1	2	3	4	5	6	7	8	9	10	11	12	>12	
Organic: Google	15,573	9.5%	3.1%	2.4%	1.9%	1.5%	1.2%	1%	0.7%	0.5%	0.4%	0.2%	< 0.1%	-	
Direct	14,588	14.1%	5.5%	4.5%	3.8%	3.2%	2.6%	2.2%	1.7%	1.4%	1.1%	0.7%	0.3%	-	
Social: Twitter	13,494	15.4%	8.1%	6.7%	5.5%	4.7%	4%	3%	2.6%	1.9%	1.6%	0.9%	0.3%	-	
Paid: AdWords	12,365	12.2%	4.8%	4%	3.5%	2.9%	2.2%	1.6%	1.5%	1.1%	1%	0.7%	0.1%	-	

I've highlighted the cohort we're focusing on. We see that many people repurchase a few weeks after placing their first order. This means that we're likely getting a good ROI on our AdWords spending. It would be advantageous for us to continue this marketing channel.

USING UTMS WITH SOCIAL CAMPAIGNS

UTMs are used everywhere on social media. Go to your Twitter feed, click on a few links, and you'll likely come across at least one that has a UTM. This makes sense because the people who shared the link want to know more than just how many times it was clicked or the total traffic they get from a particular social platform. They want to be able to tie campaign data to it.

Continuing with the ecommerce example, we can create a UTM for each link we share. It may look like this:

```
http://www.example.com/productone.html?utm_source=twitter&utm_medium=social&utm_content=fish_oil&utm_campaign=product_launch
```

We're using four variables. Our source is Twitter, the medium is social, the content is the name of the product, and the campaign is a product launch. The content name, fish_oil, is important here because it distinguishes itself from the other products we share on Twitter. The campaign name, product_launch, is assigned to tweets that announce a new product we sell.

USING UTMS TO TRACK PDF CAMPAIGNS

Many ecommerce and SaaS companies use PDFs to garner prospect leads, generate interest, and show thought leadership in their space. Ecommerce companies offer product catalogs in the form of downloadable PDFs. SaaS companies use PDFs to explain which problems their product solves and why people should try their solution.

A big issue with PDFs is that they have no referrer. If someone downloads a PDF, clicks a normal, non-UTM link in the PDF that takes them back to your site, and then they purchase, the PDF doesn't get credit for the sale. Fortunately, we can track the effectiveness of these PDFs by adding UTMs to every link.

If we're an ecommerce business, we may create a product catalog that links to hundreds of products. We can use UTMs to track which products garner the most interest. If we're a SaaS company describing our product, we may link back to a features page on our site using a UTM.

For all sources that don't have a referrer (such as a PDF), we'll need to use UTMs to track where people come from.

MEASURING ALL CAMPAIGNS AGAINST EACH OTHER

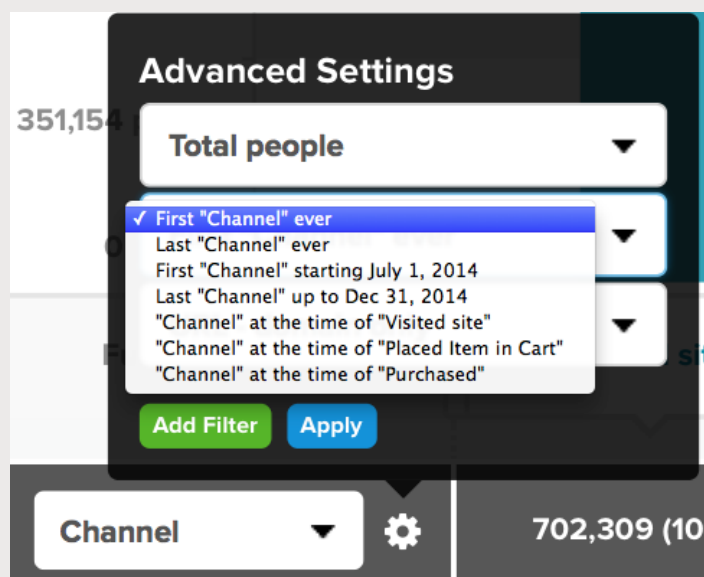
Measuring one campaign is great, but to find the campaigns that lead to the most growth, we'll need to compare them against each other.

We don't need to use any reports other than the ones we've already used. We can get all our data with a funnel, revenue, and cohort report. The funnel report will give us acquisition metrics, the revenue report tells us the money we've received, and the cohort report tracks retention.

Let's get started with the funnel report.

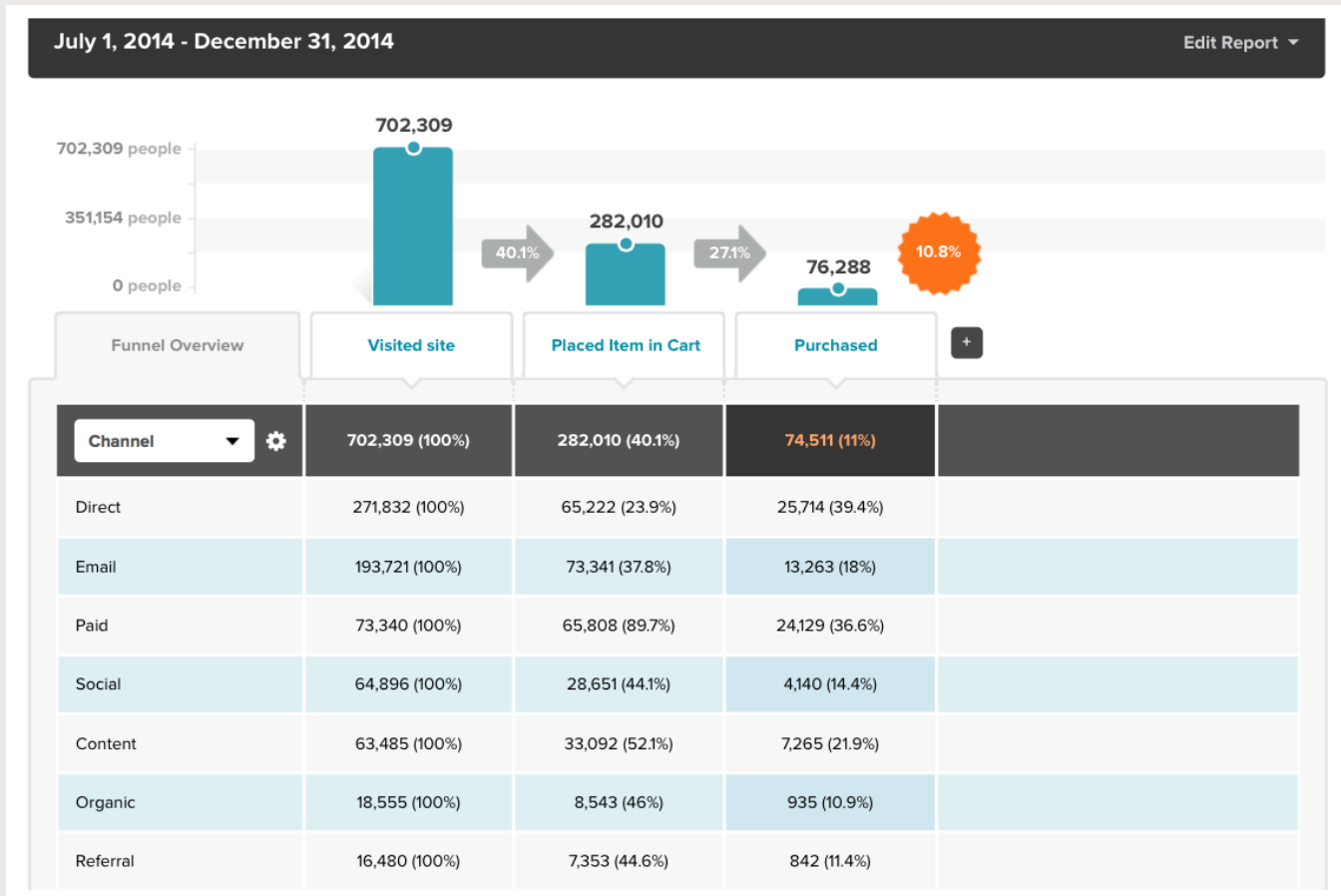
Funnel Report (Track Customer Acquisition)

We'll be segmenting people by their first ever Channel. To set this, all we have to do is click on the gear icon and select *first "Channel" ever*:



This will sort people by first touch, meaning we will show the channel that drove a person to your site the very first time, even if their first visit came before the start date of the funnel.

We'll run a funnel report that tracks people who visited the site, placed an item in their cart, and purchased. We want a large amount of data, so we'll make our date range six months:



At the top of the funnel, we see that Direct and Email both bring us a solid amount of traffic. These are good channels for us because the traffic is free. Both have given us a good number of customers as well.

The Paid channel is a high performer because it brings a lot of people, many of whom went on to purchase. Social brings a good amount of traffic, but has one of the lower purchase rates. Only about 6% of those who visited the site went on to purchase.

Content is a good channel and has a solid conversion rate throughout the funnel. Much like Direct, Organic is essentially free traffic for us. During our six month time frame, 935 people who came from an organic search converted to purchasing.

Revenue Report (Track ROI)

To track the money we've received from each of these channels, we'll load the revenue report and sort people by first ever Channel:

By Segment for Jul 1, 2014 to Dec 31, 2014 Show: First ever Channel

Channel	Total Revenue ~	Avg Revenue/Person	Lifetime Value	Paying Customers	Total Churn
Direct	664,772.07	25.85	738.57	25,714 people	3.5%
Paid	497,302.66	24.56	430.87	20,244 people	5.7%
Email	173,038.27	16.33	320.19	10,590 people	5.1%
Social	87,650	21.17	470.44	4,140 people	4.5%
Content	53,236	14.28	269.43	3,727 people	5.3%
Organic	29,874	15.51	250.16	1,925 people	6.2%
Referral	9,800	11.69	365.31	838 people	3.2%

Showing: 15 1 - 7 of 7

Export Property Data

One of the strongest channels here is Direct. It brings in a lot of customers and revenue, has a good churn rate, and a high lifetime value. Paid is another solid channel. It brings in a lot of customers and has a good lifetime value. We'll have to look at what we're spending to know if this is a profitable channel for us.

Email also has a large customer base that brought revenue in the six figures during our date range. Since it's a low cost channel, we'll continue to work on getting more subscribers on board.

The other four channels bring us solid revenue and a healthy dose of customers. Social brought over 4,000 customers during our time frame. This is a good channel for growth.

Content brought a good amount of revenue; we'll have to see if we should ramp up our efforts to get more growth out of that channel.

Referral has brought the least amount of money and has a low average revenue/person metric, but it has strong lifetime value due to its low churn rate. If we can get more links back to our site, this channel has the potential to become a better performer.

Cohort Report (Track Customer Retention)

Now, we'll run a cohort report looking at repurchase rates for each campaign. We're grouping people based on the campaign they came from, and then tracking the ones who purchased to see how many purchased again:

Purchased between July 1, 2014 - December 31, 2014

Time	Purchased		Purchased again by Weeks												
	People		1	2	3	4	5	6	7	8	9	10	11	12	> 12
Direct	271,832		16.1%	8.1%	7.1%	6.3%	5.3%	4.9%	4.5%	4.2%	3.9%	3.7%	3.6%	3.3%	10.8%
Email	193,721		12.2%	5.2%	3.9%	3.3%	2.9%	2.5%	2.4%	2.1%	2%	1.9%	1.7%	1.5%	7.6%
Paid	73,340		11.3%	4.3%	3%	2.9%	2.4%	2.1%	2%	1.8%	1.7%	1.5%	1.3%	1.2%	6.8%
Social	64,896		11.1%	3.6%	3%	2.4%	2.1%	1.8%	1.7%	1.5%	1.4%	1.3%	1.2%	1.2%	6.2%
Content	52,930		10.5%	3.7%	2.7%	2.2%	1.9%	1.7%	1.6%	1.3%	1.2%	1.1%	1.1%	1.1%	5.5%
Referral	18,555		10.4%	3.4%	2.6%	2%	1.9%	1.7%	1.5%	1.3%	1.2%	1.2%	1.1%	1.1%	5.4%
Organic	86,999		10.5%	3.3%	2.5%	2%	1.7%	1.5%	1.3%	1.1%	1.2%	1.1%	1.1%	1%	4.6%

In every campaign, about 10-16% of customers repurchased within the first week. That drops off in the following weeks; but after 12 weeks, we see that about 4-10% of customers repurchased. There's a lot of parity with these campaigns, but the best ones for repurchases are Direct, Paid, and Email.

THE FOUR TAKEAWAYS TO REMEMBER

If you only remember four things from this section, remember this:

- **UTMs allow you to track campaigns** — You can build UTMs using Google's [URL Builder](#) and track them in Google Analytics, Kissmetrics, and many other tools.
- **Use the funnel report to track customer acquisition** — This report will show you how many people came to your site and what percentage of them converted to purchasing.
- **Use the revenue report to track ROI** — This report shows you how much money you've received from each campaign. The amount is especially useful if you know how much you're spending on each campaign, because then you'll have a better idea of which campaigns are profitably bringing you growth.
- **Use the cohort report to track customer retention** — To thrive, ecommerce companies need customers to repurchase and SaaS companies need customers to stick around for a while. To track how well you're doing in these retention efforts, you can set up and track your data in a cohort report.

Also, with all these reports, you'll be able to compare your campaigns against each other in Kissmetrics.



Kissmetrics Overview

- [What is Customer Analytics?](#)
- [The Benefits of Tracking People with Analytics](#)
- [The Foundation of Kissmetrics: People, Events, and Properties](#)
- [What is the Difference Between Google Analytics and Kissmetrics?](#)

What is Customer Analytics?

Tracking your customers step-by-step as they use your website or mobile app allows you to gather extremely important information about your online business.

If you run a SaaS, ecommerce, or any other website that requires member signup or login, you'll be able to understand the path each person took to sign up, how long it took them to sign up, what pages they viewed, what devices they used, and how they are using your product.

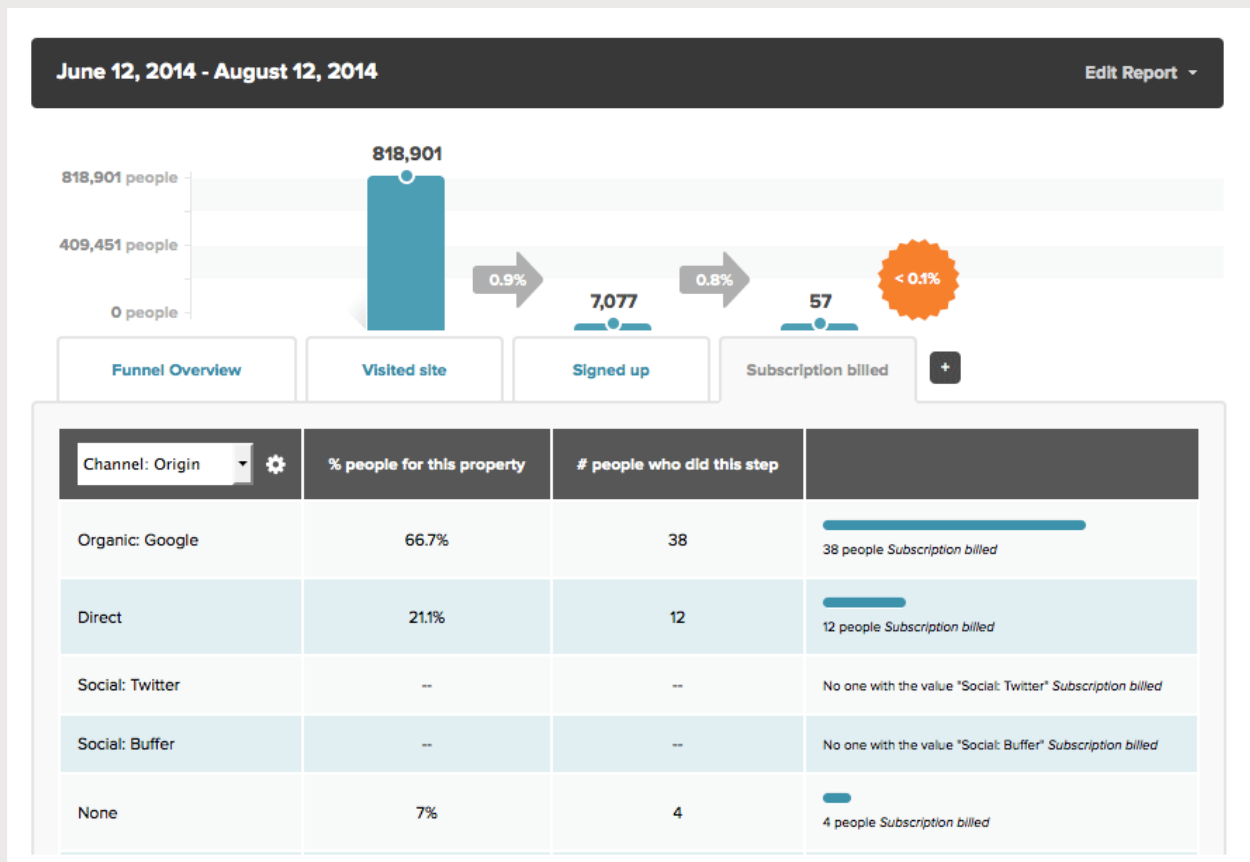
You'll be able to see everything from pre- to post-purchase activities. This is at the core of customer analytics, and it gives you a deep understanding of how each person interacts on your website.

Let's run through two use cases where customer analytics can provide invaluable insights.

YOU'LL KNOW WHERE YOUR CUSTOMERS ARE COMING FROM

Origination data about your customers is nothing new, but knowing which source creates the best customers for you is very powerful information. With a Kissmetrics funnel report, you can see where your customers came from and which channels are your most popular, *as well as which ones are the most profitable.*

Here is a common funnel report for a SaaS company:



This is a Kissmetrics conversion funnel. We are tracking the number of people who convert to paying customers.

We're tracking the number of people who come to our site, sign up for a trial, and then convert to paying for the product. Here are a few of our immediate takeaways from this report:

- The top of our funnel is doing great. Over 800,000 visitors in 2 months is spectacular.
- There are not a lot of people who sign up for our service. Less than 1 out of every 100 visitors sign up for a trial.

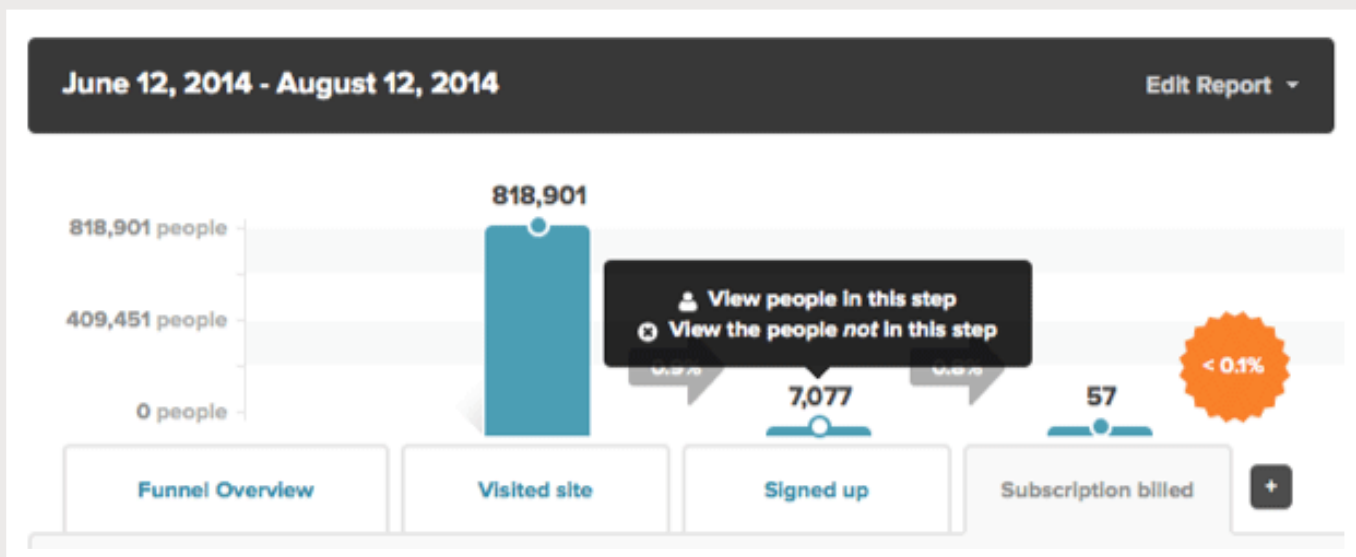
- Once people sign up for a trial, few actually convert to paying for our service.
- A lot of those who sign up for our service come from a Google search or simply type our web address into their browser.

This funnel report tells us we don't need to focus on the top of the funnel. We already get loads of traffic. Instead, we should focus on converting the traffic we already have. And, once we get people to sign up for a trial, we need to get them to convert to paying customers.

So, what are the next steps we need to take?

Here are a few ideas:

- Run A/B tests on our website to try to find ways to get more visitors to sign up for a trial.
- Find reasons trial users don't convert to paying customers. We can do this by asking our trial users what prevented them from converting. We can view these people simply by clicking on our "Signed Up" bar.



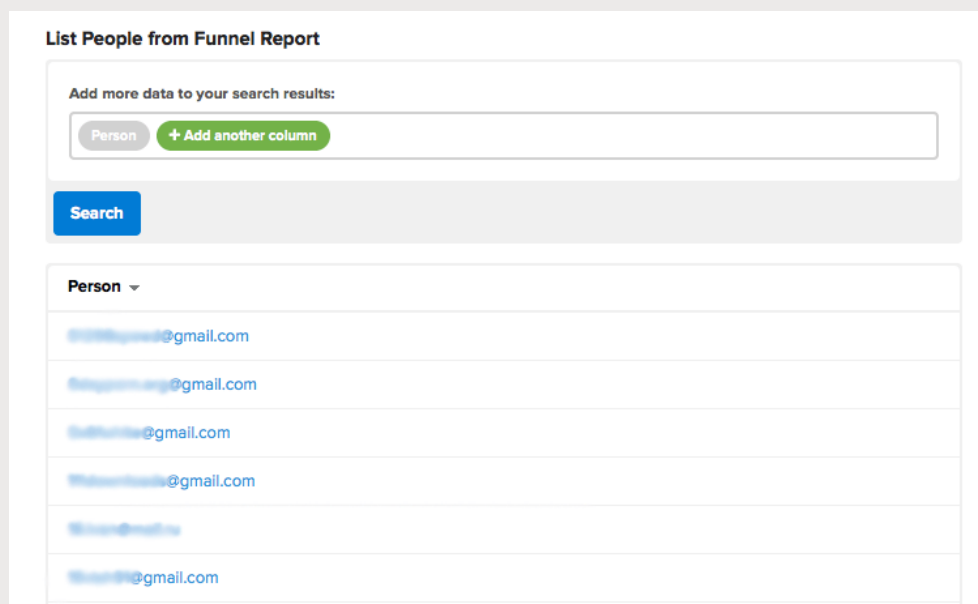
We have the option to view the people who have not converted to signing up for a trial, as well as the people who have signed up for a trial.

We then select people who have signed up for a trial:



We simply click on one of the two options.

And we get a big list of people who have signed up for a trial:



This is a list of people who have signed up for a trial.

We get a long list of email addresses. We can filter these users by event or property, but for now, we'll just click on a user:

The screenshot displays a user profile for an email address ending in @gmail.com. The profile includes a 'Configure Metrics' button and three summary cards: 'Last Seen' (3 days ago), 'Total visits' (11 visits), and 'Total Revenue' (\$0). To the right, an 'Acquisition Metrics' section lists: First referrer (Direct), First search term (not provided), Num visits to signup (2), First visit to signup (57 days), and Signup to upgrade time (no data available).

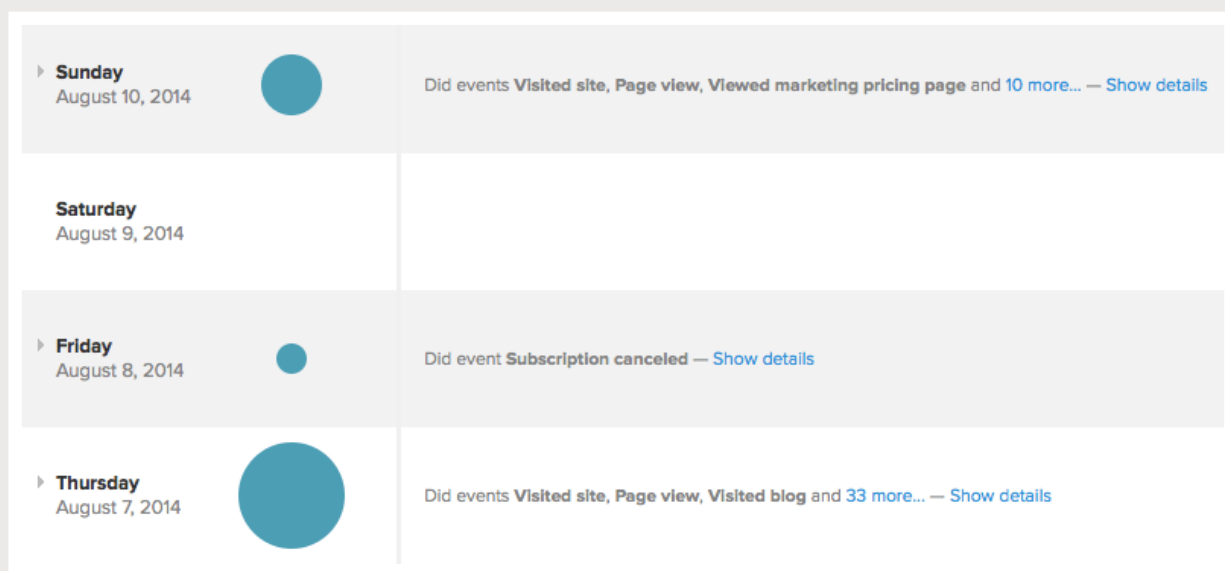
Below the summary cards is a timeline for the period 'June 12, 2014 to June 18, 2014'. The timeline is organized by day, with tabs for 'Timeline', 'Events', and 'Properties'. The events shown are:

- Wednesday, June 18, 2014
- Tuesday, June 17, 2014
- Monday, June 16, 2014
- Sunday, June 15, 2014 (indicated by a small blue dot)
- Saturday, June 14, 2014
- Friday, June 13, 2014
- Thursday, June 12, 2014 (indicated by a large blue circle)

The Thursday event entry includes a description: 'Did events Visited site, Search engine hit, Page view and 24 more...' with a 'Show details' link.

A person report. You'll get this with every person who has come to your site. You'll know the exact actions they've taken, as well as their contact information (if they have provided it via signing up for your service).

Our timeline tells us that the user signed up on June 12. They last visited our website just a few days ago, only two days after cancelling their trial:



A list of events the user did on a specific day. The bigger the bubble, the more events (and thus more engagement) on your website.

We can send the user an email (or telephone them) asking what prevented them from converting to a paying customer. We know we're still top of mind with them since they visited our site just a couple of days ago.

After gathering enough feedback from enough people, we can prioritize what we need to work on. Then, we can go forward with this feedback and work on projects that will convert more of our trial users into paying customers.

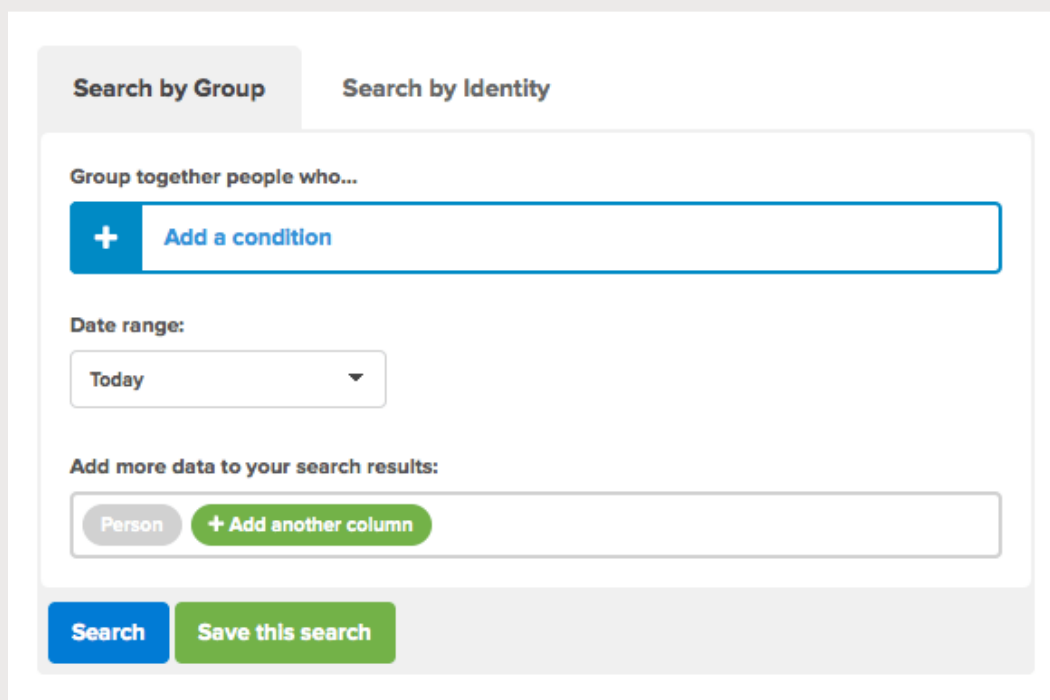
This is part of customer analytics: understanding how each user and customer interacted with your website and product. You can look at aggregate data, break it down to each person, and then work to improve your business.

The above is an example of how customer analytics can help you improve your marketing and sales. Now, we'll look at how customer analytics can help you build a better product.

UNDERSTANDING CUSTOMER ENGAGEMENT ON A FEATURE

Let's say you released a new feature last month and you want to see how many customers have used it. To do this, we can use the Kissmetrics People Report.

We'll need to set up event tracking on the feature. After we do that, we can run a people search to find the customers who have used the new feature:



The image shows a user interface for searching customer data. It features two tabs: "Search by Group" (selected) and "Search by Identity". Below the tabs is a section titled "Group together people who..." containing a blue button with a plus sign and the text "Add a condition". Underneath is a "Date range:" section with a dropdown menu currently set to "Today". Below that is a section titled "Add more data to your search results:" containing a grey button labeled "Person" and a green button with a plus sign and the text "Add another column". At the bottom of the interface are two buttons: a blue "Search" button and a green "Save this search" button.

The form for the Kissmetrics People Search. You can search by finding a group of people who have done a specific activity or search for a specific person via an identity such as an email address.

The screenshot displays the Kissmetrics People Search interface. At the top, there are two tabs: "Search by Group" (selected) and "Search by Identity". Below the tabs, the main search area is titled "Group together people who...". It contains a search bar with the following criteria: "Have done event", "Used Awesome Feature", "at least", "1", and "time(s)". Below the search bar is a blue button with a plus sign and the text "Add a condition". Underneath, there is a "Date range:" section with a dropdown menu set to "Today". Below that, there is a section titled "Add more data to your search results:" with a search bar containing "Person", "Used Awesome Feature", and a green button with a plus sign and the text "Add another column". At the bottom left, there is a blue "Search" button. A dropdown menu is open, showing the following options: "Choose an Event or Property...", "Date of First Time for Date Range", "Date of Last Time for Date Range", "Date of First Time Ever", "Date of Last Time Ever", "Total Times for Date Range" (selected), and "Total Times Ever". An "OK" button is at the bottom of the dropdown menu.

When tracking by event (in this case, searching for people who have used our feature), we can search how many times people have done the event, and many other options. In this case, we want People Search to tell us the total number of times a customer has used our feature within the last 30 days.

We then get a list of people who have used our new feature at least one time in the last 30 days:

The screenshot shows the Kissmetrics search interface. At the top, there are two tabs: "Search by Group" and "Search by Identity". Below the tabs, a search box contains the criteria: "Have done event **Used Awesome Feature** at least 1 time(s)". Below the search box is a button labeled "+ Add a condition". Underneath, the "Date range:" is set to "Last 30 Days". Below that, there is a section "Add more data to your search results:" with a button labeled "Person" and a button labeled "Used Awesome Feature" with a pencil icon and an 'x' icon, followed by a button labeled "+ Add another column". At the bottom of the search interface are two buttons: "Search" and "Save this search".

Person	Used Awesome Feature <small>Total Times for Date Range</small>
steve@forbes.com	123
johnny@appleseed.com	2
hiten@kissmetrics.com	22
anna@twitter.com	29
joey@crazyegg.com	5
patty@tubebox.fm	2
austin@ford.com	1
bobby@cnn.com	6
eric@theleanstartup.com	2
alan@amazon.com	3
billy@qz.com	3

After we hit search, our report runs, and we get a list of people under our specified search criteria.

This can be great for finding the power users of this particular feature. We also can find the ones who use it less often and get some feedback from them about why they used it only once or a few times.

USE CUSTOMER ANALYTICS TO UNDERSTAND AND OPTIMIZE HOW EACH PERSON USES YOUR PRODUCT

When you understand your customers, you understand what you need to do to build a better product. Kissmetrics is one tool that helps you understand how people use your product. We integrate with many [external tools](#) to help you get a more complete view of your customers.

The Benefits of Tracking People with Analytics

Tools like Google Analytics are great, but they have one major weakness.

You get only aggregate data.

THE LIMITS OF AGGREGATE DATA

Averages, totals – these methods of measuring are known as aggregate. They provide an overall picture of how an area of a business or a product is performing. It's frequently used in the web analytics field.

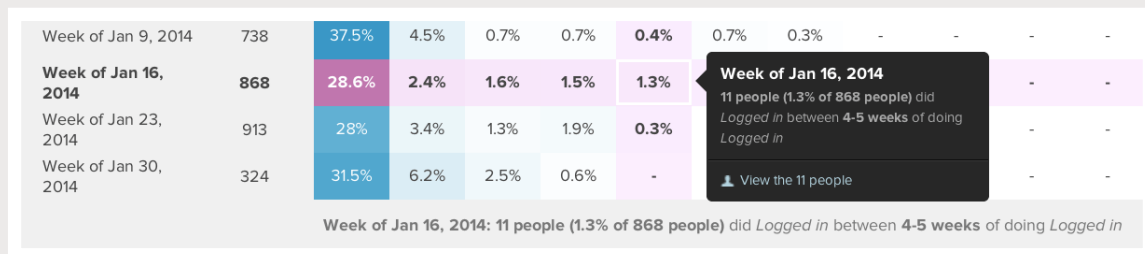
Aggregate data has its usefulness. Page views, bounce rate, time on page, and referral data are generally best displayed in aggregate form. But what if you actually want to dig deeply into the data to uncover insights that can improve your business? It's difficult to do this when you have only aggregate data.

BUILD A BETTER BUSINESS BY UNDERSTANDING PEOPLE

Kissmetrics is software that tracks customers (i.e., *real* people). With Kissmetrics, every interaction on your website gets tied back to an actual person. Once you get your hands on this data, your mind will run wild with all the opportunities you'll have to uncover useful insights.

What if you want to view the “power users” of your app? These users can give you great insights about your product and which features they use the most. Ultimately, they can help you build a better product. With aggregate data, you would never know who these people are. With Kissmetrics, you know exactly who to contact to get the feedback you need to improve your product.

What if you want to track the metric *login retention* and reach out to your least engaged and most engaged users? Aggregate data is useful for getting a “bird’s eye view”; but in order to improve this metric, you’ll need to talk to the people who log in. With Kissmetrics, you can do just that. Simply set up a cohort report for *login retention* and track the frequency with which people log in. Find the users you would like to talk to by selecting a group.



This is a small screenshot of the Kissmetrics cohort report. We see that if we click on one of the boxes, we have the option to view each person who falls into a certain cell (we like to call them buckets, as in “buckets” of people). For instance, we could track *login retention* over time with the cohort report. After we set up all our data, we would be able to view each person who logged in during a specified time period.

USING INDIVIDUAL DATA TO UNDERSTAND WHAT'S DRIVING YOUR AGGREGATE DATA

It makes sense to focus your data analysis around people, because after all, it's people who impact your business. Kissmetrics is a people-tracking web analytics tool. You won't be getting unique sessions or visitors. Use Google Analytics for that data.

To understand what's driving your aggregate data, you need to dig deeper and get your hands a little dirty. Looking at daily active users and monthly active users is great in aggregate; but to understand what's driving those numbers, you need to look at individual data. What's causing one person to use your service daily while another uses it less often?

Let's take the engagement metric *login retention*, for example. It's a good engagement metric that is normally viewed in aggregate, but **should be analyzed in cohorts**. The reason is aggregate data won't show you important trending changes over time. Here's how that cohort report would look in Kissmetrics:

Logged in between February 1, 2014 - July 31, 2014

Logged in		Logged in again by Weeks												
Time	People	1	2	3	4	5	6	7	8	9	10	11	12	> 12
Week of Feb 1, 2014	2,958	56.5%	7.5%	2.5%	1.9%	1.5%	0.9%	0.4%	0.3%	0.4%	0.4%	0.3%	0.3%	1.7%
Week of Feb 8, 2014	1,492	35.5%	5.9%	3%	2%	2.1%	1.7%	0.6%	0.7%	0.6%	0.4%	0.4%	0.7%	2.8%
Week of Feb 15, 2014	1,589	30.1%	4.4%	2%	1.6%	1.1%	1%	0.8%	0.5%	0.2%	0.7%	0.2%	0.6%	2.5%
Week of Feb 22, 2014	1,100	30.7%	4.2%	2.3%	1.7%	2.3%	0.8%	0.9%	0.4%	0.3%	0.2%	0.6%	0.3%	2.1%
Week of Mar 1, 2014	1,059	29.8%	4.6%	2.5%	1.9%	1%	0.6%	0.7%	0.4%	0.5%	0.2%	0.2%	-	2.3%
Week of Mar 8, 2014	1,107	31.3%	3.7%	2.7%	1.3%	0.8%	0.8%	0.7%	0.6%	0.5%	0.4%	0.4%	0.2%	1.4%
Week of Mar 15, 2014	1,045	30.7%	4.6%	1.4%	1.1%	0.7%	0.9%	0.6%	0.3%	0.6%	0.3%	0.3%	< 0.1%	2.1%
Week of Mar 22, 2014	1,084	27.7%	4.6%	2.4%	0.9%	0.7%	0.7%	0.6%	0.2%	0.6%	0.3%	0.2%	0.2%	1.3%
Week of Mar 29, 2014	1,125	26.5%	5.2%	1.2%	0.5%	0.4%	0.5%	0.7%	0.3%	0.4%	0.6%	-	0.3%	1.1%
Week of Apr 5, 2014	1,091	28.8%	2.7%	1.8%	0.8%	1.2%	0.6%	0.3%	0.6%	0.6%	0.6%	0.5%	< 0.1%	1.5%
Week of Apr 12, 2014	965	28.1%	4.5%	0.9%	0.7%	0.6%	0.2%	0.5%	0.4%	0.3%	0.4%	0.3%	0.4%	1.1%
Week of Apr 19, 2014	992	30.3%	3.2%	1.7%	1%	0.7%	0.5%	0.6%	0.1%	0.5%	0.1%	0.2%	0.2%	0.4%
Week of Apr 26, 2014	891	33.1%	3.9%	1.5%	1.1%	1%	0.3%	0.3%	0.2%	0.4%	0.4%	0.7%	0.2%	0.3%
Week of May 3, 2014	883	30.5%	2.7%	2%	1.5%	0.1%	0.8%	0.6%	0.7%	-	0.3%	0.1%	0.1%	0.2%
Week of May 10, 2014	959	31.9%	3.3%	1.4%	1.6%	0.9%	0.5%	0.4%	0.3%	0.4%	0.4%	0.3%	0.2%	0.1%

Week of Feb 1, 2014: 1,672 people (56.5% of 2,958 people) did Logged in within 1 week of doing Logged in

Export Data

Display: Percentage of people Showing: 15 1-15 of 26

This report tells us the people who signed in during a specified week and then signed in again after a specified time period. For instance, we see that during the week of February 1, 56.5% of the people who logged in that week logged in again within a week. And .3% of the people who logged in during the week of February 1 logged in again 8 weeks later. If we click on this box, we see that we can view those people who logged in 8 weeks later:

Logged in between February 1, 2014 - July 31, 2014

Logged in		Logged in again by Weeks													
Time	People	1	2	3	4	5	6	7	8	9	10	11	12	> 12	
Week of Feb 1, 2014	2,958	56.5%	7.5%	2.5%	1.9%	1.5%	0.9%	0.4%	0.3%					1.7%	
Week of Feb 8, 2014	1,492	35.5%	5.9%	3%	2%	2.1%	1.7%	0.6%	0.7%					2.8%	
Week of Feb 15, 2014	1,589	30.1%	4.4%	2%	1.6%	1.1%	1%	0.8%	0.5%					2.5%	
Week of Feb 22, 2014	1,100	30.7%	4.2%	2.3%	1.7%	2.3%	0.8%	0.9%	0.4%	0.3%	0.2%	0.6%	0.3%	2.1%	
Week of Mar 1, 2014	1,059	29.8%	4.6%	2.5%	1.9%	1%	0.6%	0.7%	0.4%	0.5%	0.2%	0.2%	-	2.3%	
Week of Mar 8, 2014	1,107	31.3%	3.7%	2.7%	1.3%	0.8%	0.8%	0.7%	0.6%	0.5%	0.4%	0.4%	0.2%	1.4%	
Week of Mar 15, 2014	1,045	30.7%	4.6%	1.4%	1.1%	0.7%	0.9%	0.6%	0.3%	0.6%	0.3%	0.3%	< 0.1%	2.1%	
Week of Mar 22, 2014	1,084	27.7%	4.6%	2.4%	0.9%	0.7%	0.7%	0.6%	0.2%	0.6%	0.3%	0.2%	0.2%	1.3%	
Week of Mar 29, 2014	1,125	26.5%	5.2%	1.2%	0.5%	0.4%	0.5%	0.7%	0.3%	0.4%	0.6%	-	0.3%	1.1%	
Week of Apr 5, 2014	1,091	28.8%	2.7%	1.8%	0.8%	1.2%	0.6%	0.3%	0.6%	0.6%	0.6%	0.5%	< 0.1%	1.5%	
Week of Apr 12, 2014	965	28.1%	4.5%	0.9%	0.7%	0.6%	0.2%	0.5%	0.4%	0.3%	0.4%	0.3%	0.4%	1.1%	
Week of Apr 19, 2014	992	30.3%	3.2%	1.7%	1%	0.7%	0.5%	0.6%	0.1%	0.5%	0.1%	0.2%	0.2%	0.4%	
Week of Apr 26, 2014	891	33.1%	3.9%	1.5%	1.1%	1%	0.3%	0.3%	0.2%	0.4%	0.4%	0.7%	0.2%	0.3%	
Week of May 3, 2014	883	30.5%	2.7%	2%	1.5%	0.1%	0.8%	0.6%	0.7%	-	0.3%	0.1%	0.1%	0.2%	
Week of May 10, 2014	959	31.9%	3.3%	1.4%	1.6%	0.9%	0.5%	0.4%	0.3%	0.4%	0.4%	0.3%	0.2%	0.1%	

Week of Feb 1, 2014: 8 people (0.3% of 2,958 people) did Logged in between 7-8 weeks of doing Logged in

[View the 8 people](#)

[Export Data](#) Display: **Percentage of people** Showing: **15** 1 - 15 of 26

If we click on “View the 8 people,” we’ll get a list of those users who logged in:

The screenshot shows a web interface titled "List People from Cohort Report". At the top, there is a section "Add more data to your search results:" containing a search bar with a "Person" filter and a green "+ Add another column" button. Below this is a blue "Search" button. The main content area is a table with a header "Person" and a dropdown arrow. The table lists 8 email addresses: larry@google.com, sean@apple.com, george@oreillyautoparts.com, sara@twitter.com, steve@tubebox.fm, jessica@southwest.com, andrew@groupon.com, and barbara@getpocket.com. At the bottom left of the table is an "Export Data" button with a download icon. At the bottom right is a pagination control showing "Showing: 20" (with a dropdown arrow), "1 - 8 of 8", and left/right navigation arrows.

For the week we viewed, they didn’t appear to be our most engaged users. We also can click on each user to learn more about them and how often they use our product.

The advantages of getting this much detail with people-based analytics is that we can email the people for feedback or test a hypothesis based on their behavior. If we were just looking at aggregate data, we

wouldn't be able to draw any *intelligent* conclusions or have a good reason to test a hypothesis about our product.

With Kissmetrics, all your data is tied to people. It's one of the key qualities that separates it from Google Analytics. And when you understand individual people, you'll understand how to improve your business.

The Foundation of Kissmetrics: People, Events, and Properties

The best way to get started with Kissmetrics is to understand people, events, and properties. People are the actual people (not pageviews) who visit your site, events are any important actions they take, and properties are any additional information about those people.

In this section, we'll break down these three types of data. We'll start by explaining how Kissmetrics tracks actual people. Then, we'll move on to explaining what events and properties are and how to use them to gather insight-rich data. Throughout the entire section, you'll see how people, events, and properties all tie in to one another.

Let's start by discussing People.

PEOPLE

The cornerstone of Kissmetrics is that it's a people-tracking platform. Every person who comes to your website gets recorded as a person, not a pageview. Throughout the entire Kissmetrics product, you can view a report and see exactly who took which actions. All the events an individual performs (and all the properties tied to the individual) get connected to a person. It doesn't matter if the person connects

via a desktop or a mobile device. And, with any report you run, you'll be able to drill down and see each person in the report.

Our Person Details Report shows all the events a person has done on your website. Here's how it looks:

▼ **Saturday**
June 14, 2014

Did events **View Home page, Product Search, Viewed Widget A** and **5 more...** — [Hide details](#)

- Did events: **Search engine hit, View Home Page site** 03:00:52 PM
 - **Referrer:** https://www.google.com
 - **Search engine:** Google
 - **Search terms:** not provided
 - **Viewed url:** https://www.example.com/
- Did an event: **Product Search** 03:01:10 PM
 - **Query:** Hammer
 - **Viewed url:** https://www.example.com/productsearch
- Did an event: **Viewed Widget A** 03:01:50 PM
 - **Viewed url:** https://www.example.com/hardware/generichammer
 - **Product Categories:** Home Improvement
- Did events: **Product Search, Viewed Widget B** 03:11:51 PM
 - **Viewed url:** https://www.example.com/productsearch
 - **Query:** Dewalt Hammer
 - **Viewed url:** https://www.example.com/hardware/dewalthammer
 - **Product Categories:** Home Goods
- Did event: **Placed Item in Cart** 03:32:42 PM
 - **Viewed url:** https://www.example.com/cart/
 - **Quantity:** 1
- Did event: **Placed Order** 03:33:06 PM
 - **Viewed url:** http://www.example.com/checkout
 - **Account phone number:** 555-555-5555
 - **Address:** 1600 Pennsylvania Avenue
 - **Order Amount:** 143
 - **Shipping Carrier:** USPS
 - **Product Categories:** Home Goods

Here we are looking at the activity this person has done in one day. It starts at the top, where we see they came to us from Google. As we move on down, we see the exact steps this person has taken to our website. Every time they come to our website, their session activity gets recorded, and we can see all the events they've done.

Why is it important to get this granular with your data?

Because in order to grow your business, you need to understand people. Throughout the customer lifecycle, understanding how each person interacts with your business is crucial to learning how to improve it.

Let's go through pre- and post-purchase customer activities to see how having a deep understanding of people can provide insights to grow your business.

Pre-Purchase

A customer acquisition funnel tracks the number of people who come to your site and end up purchasing. The best way to go about improving this funnel is to understand the people who purchased as well as those who did not purchase.

Why do we need to learn about the people who purchased from us? What do we need to learn about them?

We need to learn about our customers and the path they took pre-purchase. By understanding pre-purchase behavior, we learn about what they're interested in, what goes in to their buying decision, and what areas of our website convert visitors to customers.

Where did these customers come from?

What areas of our website did they visit before deciding to purchase? Why did they visit those areas?

What were the pages that led to the conversion?

What made them decide to buy from us?

What common characteristics do our customers share?

When we have answers to these questions, we'll know more about our customers. We'll know what areas of our website are the strongest in leading to conversions. We'll know what to focus on to get more customers.

Why do we need to learn about the customers who did not purchase from us? What do we need to learn about them?

Understanding why customers did not purchase from us is just as important as understanding why customers did purchase.

What were their barriers to purchasing?

What made them choose to not purchase?

What was the path they took through our website?

What was the last page they visited before dropping off?

Where did these visitors come from?

What are the differences between those who purchased and those who did not?

By understanding why people don't purchase from us, we'll know what our key barriers to customer acquisition are. We'll also have some ideas about how to fix them.

Post-Purchase

Once we have customers, we need to understand how to keep them and how to acquire more. With Kissmetrics, we can understand how our customers use our products and services.

Want to know which features customers first discover? Use the Kissmetrics People Search Report.

Want to know which features are used the most? Use the Kissmetrics People Search Report.

Want to know which features your best (most loyal) customers use? Use the Kissmetrics Person Details Report.

Want to know where your customers are coming from? Use the Revenue Report and segment by Channel.

People are the lifeblood of your business. If you don't have an understanding of how they use your products or which products they buy, then you're left in the dark. You won't know how to grow your business because you don't know your customers.

Throughout this section, you'll see examples of how all your data is tied to people. In each section, we'll run through reports and show how everything gets connected back to actual people.

Let's move on to events and see how they tie back to people.

EVENTS

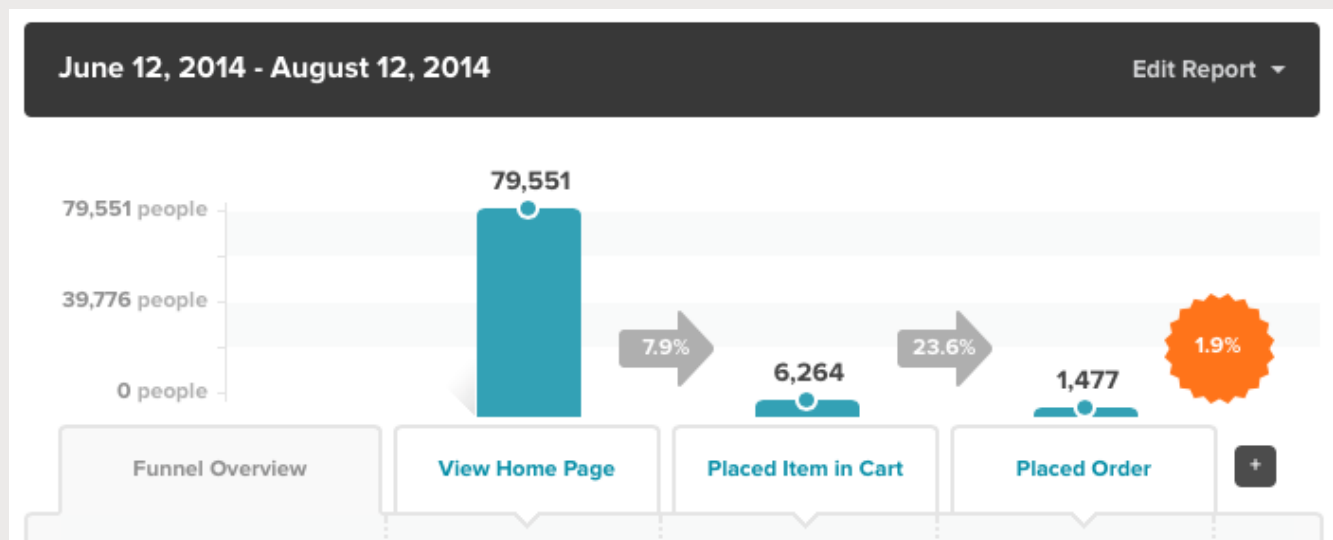
If you run a website, there likely are some important actions you have for visitors. These actions may be visiting a specific URL, signing up for an email newsletter, submitting a form, or placing an order. In Kissmetrics, these important actions are called events. Nearly everything you'll do in Kissmetrics will be centered around events.



You track events and then string these events together to gather insights. Let's run through four examples.

1. Funnel Reports

A common use of events is to put together a funnel report. Below is an example funnel report for an ecommerce company. We're putting together three events – visited site, placed an item in cart, and placed an order.



In this funnel report, we're tracking the percentage of people who come to our site and end up buying a product. It doesn't matter if people visit multiple times, they are counted only once.

So, if one person viewed your homepage 10 times, they are counted as only one person in this funnel report. This allows you to get the actual conversion rate of people who visited the home page, placed an item in their cart, and placed an order.

We can see there's a big bottleneck in getting people to actually put items in the cart. With this knowledge, we can run experiments aimed at getting people who are interested in the products to put a product in the cart.

These funnel reports can be used for anything you want to track. Some common funnel reports:

- Visited Site > Signed up for Newsletter
- Visited Site > Placed Order (ecommerce or SaaS)
- Visited Site > Signed up (SaaS)
- Opened App > Used Feature (Mobile or SaaS)
- Visited Site > Filled out Lead Form

The list is endless. Whatever goals you have for your site, you can set up a funnel report to see how many people actually convert to taking that important action.

Let's move on to discussing another useful Kissmetrics report.

2. Cohort Reports

A cohort is a group of people who share a common characteristic or experience within a defined period.

For a SaaS app (or anything that requires a login) you can track login retention over time using the Kissmetrics Cohort Report. Here's how that would look:

Signed up between **March 31, 2013 - June 1, 2013**

Signed up		Logged in by Weeks												
Time	People	1	2	3	4	5	6	7	8	9	10	11	12	> 12
Week of Mar 31, 2013	440	98.4%	19.3%	10.7%	8.4%	5.5%	5%	5.2%	3.4%	4.5%	5%	5%	3.9%	11.4%
Week of Apr 7, 2013	410	99%	16.1%	11.5%	7.3%	4.9%	5.1%	4.4%	4.9%	5.4%	4.1%	3.9%	3.7%	9.3%
Week of Apr 14, 2013	493	98.6%	15%	9.1%	5.9%	5.3%	4.1%	4.1%	3.7%	3.9%	3.7%	2.6%	2.4%	9.7%
Week of Apr 21, 2013	441	98.6%	16.1%	9.8%	6.8%	3.9%	4.5%	4.3%	4.5%	3.4%	3.2%	3.2%	3.2%	10.2%
Week of Apr 28, 2013	352	98.9%	13.9%	10.5%	6.8%	5.1%	4.3%	2.3%	2%	2.3%	2.8%	2.6%	2.6%	6.8%
Week of May 5, 2013	418	98.8%	15.3%	9.8%	6%	4.3%	3.6%	3.1%	3.1%	2.2%	2.4%	2.4%	1.9%	8.6%
Week of May 12, 2013	371	97.8%	13.2%	11.6%	6.7%	5.7%	4.3%	4.3%	3.8%	5.1%	4.6%	4.3%	2.4%	8.9%
Week of May 19, 2013	376	99.5%	13.6%	6.9%	4.5%	3.7%	3.2%	3.5%	3.7%	2.1%	3.2%	0.8%	1.1%	7.7%
Week of May 26, 2013	341	99.1%	14.1%	12%	5.3%	3.5%	1.5%	1.2%	1.5%	2.3%	1.2%	1.8%	2.1%	7.9%

Export Data Display: Percentage of people Showing: 15 1 - 9 of 9

The Cohort Report puts people into “buckets.” Each bucket represents a group of people who signed up during the same week and logged in during the same week.

In this report, we’re tracking two events: Signed up and Logged in. We’re tracking people who signed up between March 31, 2013 – June 1, 2013. Then, we’re tracking their engagement with a product during the specified signup weeks (on the left). For the people in the respective weeks, we’re tracking how many logged in again, from 1 week after up to 12 weeks after.

The biggest benefit for this report is to see how good your app is. It gives you solid engagement and tells you whether or not you really have product/market fit. If logins continue to drop (like they do in this report), people don’t really get much value out of your product.

They'll always drop a bit in the first few weeks, but you should see them stabilize.

Cohorts are useful for other reports as well. Here are a few ideas:

- Track how often people open a mobile or SaaS app. This can be tracked by hour, day, week, etc.
- Track your conversion rates over time. You can group people by the hours, days, weeks, months that they signed up, or any properties.
- Track how quickly users discover new features in a product. You can set this up by having one event as "Signed Up" and then a corresponding event that triggers when a user tries the new feature.

And with any report you run, you'll be able to see exactly who fell into which bucket. Just click on a bucket and select that you want to view the people:



Click on “View the 433 people” and you’ll see a list of the actual people in that bucket:

List People from Cohort Report

Add more data to your search results:

Person + Add another column

Search

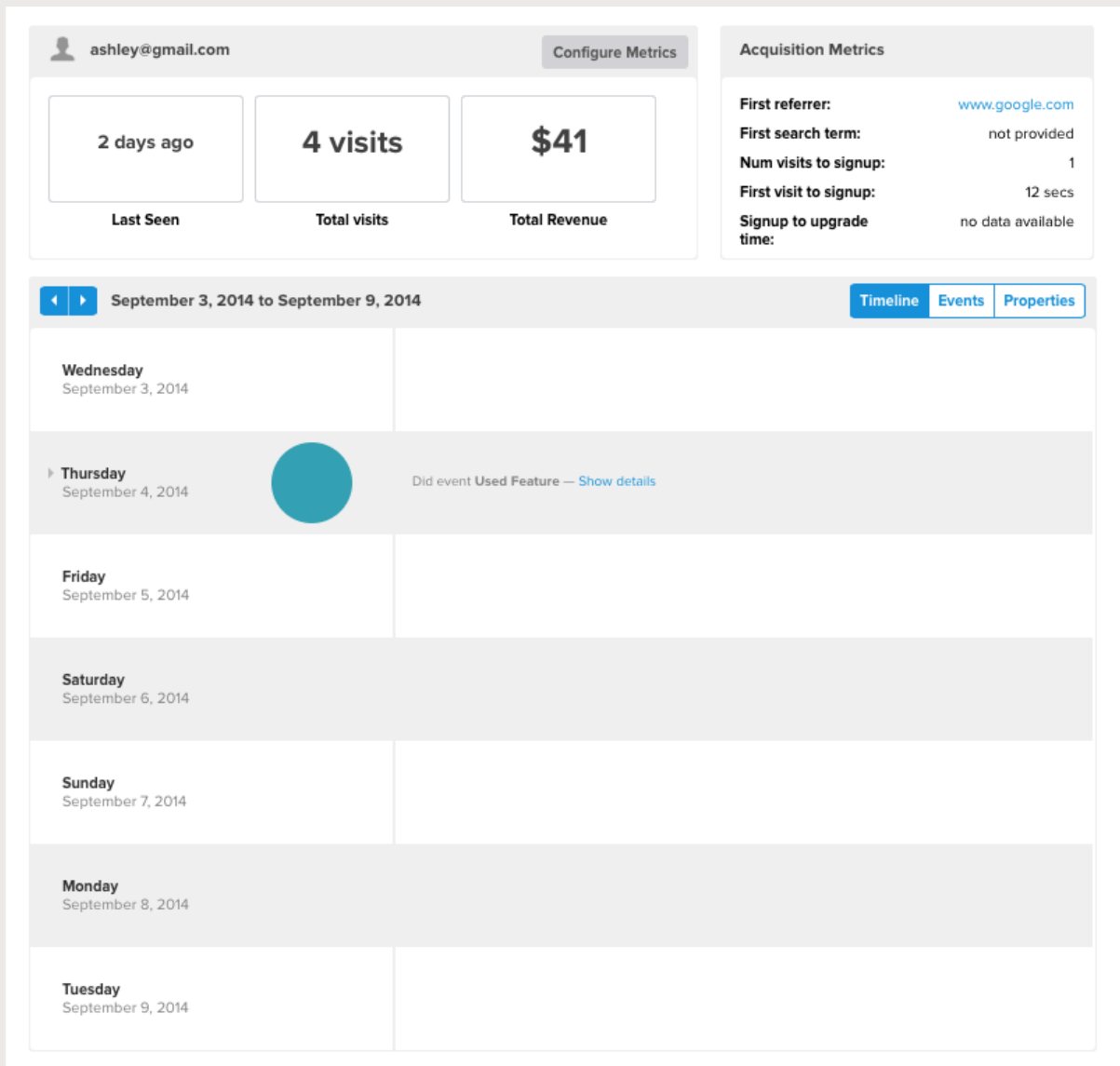
Person ▾

- abraham@lincoln.com
- ashley@google.com
- badger@wisconsin.gov
- chris@wholefoods.com
- daniel@facebook.com
- duke@toyota.com
- earl@whitehouse.gov
- eric@americanexpress.com
- erica@capitalone.com
- ernie@stonyfield.com

Export Data

Showing: 10 1 - 10 of 171

You can click on any email address to see details about the activity that person has done on your site. Let’s choose ashley@google.com as an example. We click on that email address and are presented with this:



This is our Person Report. Anything they've done on your site will be shown here. And you can get this data on any person.

Let's move on to discussing our People Reports.

3. People Reports

Let's say you run a SaaS app and you want to find out how many people used a particular feature this month. With Kissmetrics, you set up an event and call it "Used Feature," or whatever else you want to name it.

After it is set up, you run a People Search to look at the people who have used your app this month:

The screenshot displays the Kissmetrics People Search interface. At the top, there are two tabs: "Search by Group" (selected) and "Search by Identity". Below the tabs is a search filter box containing the text "Have done event **Used Feature** at least 1 time(s)". A blue button with a plus sign and the text "Add a condition" is located below the filter box. Underneath, there is a "Date range:" dropdown menu set to "This Month". Below that is a section titled "Add more data to your search results:" with a row of buttons: "Person", "Used Feature" (with edit and delete icons), and "+ Add another column". At the bottom of the filter section are "Search" and "Save this search" buttons.

The results table below has two columns: "Person" and "Used Feature". The "Used Feature" column has a sub-header "Total Times for Date Range". The table lists 10 email addresses and their corresponding usage counts.

Person	Used Feature <small>Total Times for Date Range</small>
aaron@gmail.com	45
adam@tubebox.fm	2
ashley@twitter.com	1
brent@facebook.com	25
chelsea@boeing.com	4
cory@apple.com	1
devin@kissmetrics.com	2
eric@capitalone.com	3
frank@amazon.com	3
haley@kissmetrics.com	6

At the bottom left of the table is an "Export Data" button. At the bottom right, it says "Showing: 10 1 - 10 of 187".

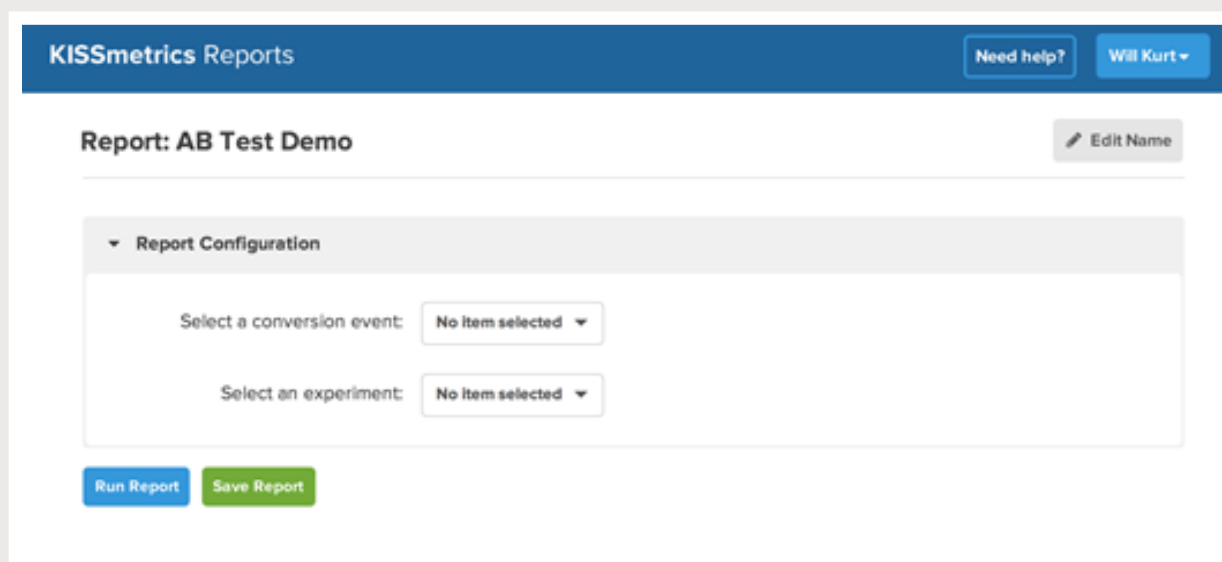
We get a list of people who have done that event (and the number of times they've done it) in the past month.

You can run this report for any event, whether it's using a feature, visiting a site, paying you, placing an order, submitting a form, etc. Any event you can think of, you can track with Kissmetrics.

4. A/B Test Report

Using the Kissmetrics A/B Test Report, you can set up your tests to run in a 3rd party tool like Optimizely or Visual Website Optimizer, and you can track the tests in Kissmetrics.

To set up a test, just create a new A/B Test Report.



The screenshot shows the Kissmetrics Reports interface. At the top, there is a blue header with the text "KISSmetrics Reports" on the left, and two buttons on the right: "Need help?" and "Will Kurt". Below the header, the main content area has a title "Report: AB Test Demo" on the left and an "Edit Name" button on the right. Underneath the title is a section titled "Report Configuration" with a dropdown arrow. This section contains two dropdown menus: "Select a conversion event:" and "Select an experiment:", both currently showing "No item selected". At the bottom of the configuration section, there are two buttons: "Run Report" (blue) and "Save Report" (green).

We first need to select our conversion event. We'll choose "Signed Up":

The screenshot shows a 'Report Configuration' section with two dropdown menus. The first dropdown, 'Select a conversion event:', is open, showing a list of events. The second dropdown, 'Select an experiment:', is currently empty. Below the dropdowns are two buttons: 'Run Report' (blue) and 'Save Report' (green).

▼ Report Configuration

Select a conversion event: **Signed up** ▲

Select an experiment:

- Sent no product e-mail
- Sent payment confirmation e-mail
- Sent people intro e-mail
- Sent trial ended e-mail
- Sent trial ending e-mail
- Sent welcome email
- Shared post
- Signed up**

Run Report **Save Report**

Then, we need to select our experiment. We run a search for the test we're running in Optimizely:

The screenshot shows the 'Report Configuration' section with both dropdown menus filled. The 'Select a conversion event:' dropdown is set to 'Signed up' and the 'Select an experiment:' dropdown is set to 'Optimizely homepage secondary cta to features'. Below the dropdowns are two buttons: 'Run Report' (blue) and 'Save Report' (green).

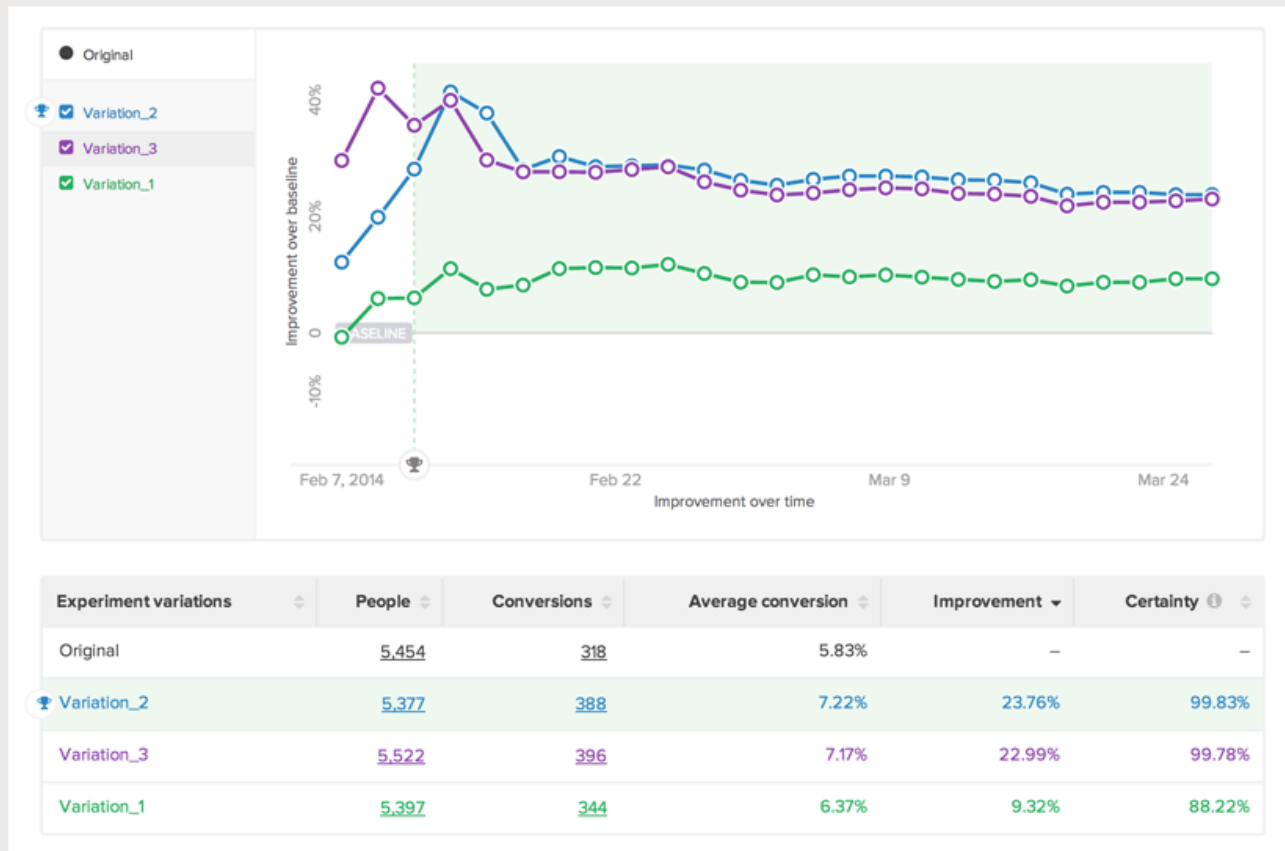
▼ Report Configuration

Select a conversion event: **Signed up** ▼

Select an experiment: **Optimizely homepage secondary cta to features** ▼

Run Report **Save Report**

And we run our report:



The great thing about our A/B Test Report is that you'll be able to see each person in the test. Just hover over one of the test bars and choose which people you'd like to see:

- **5.88% improvement**
- **148 people converted**
- **2390 people in variation**

Through February 11, 2014

You can do this with *any* event. If you're an ecommerce company, you can run the test with the event "Placed Order" to see how an A/B test actually affects your business. Or if you're a consultancy that wants people to fill out a lead generation form, create that event and track the results with Kissmetrics. No matter your website goals, just create an event, run a test, and see how it affects your business.

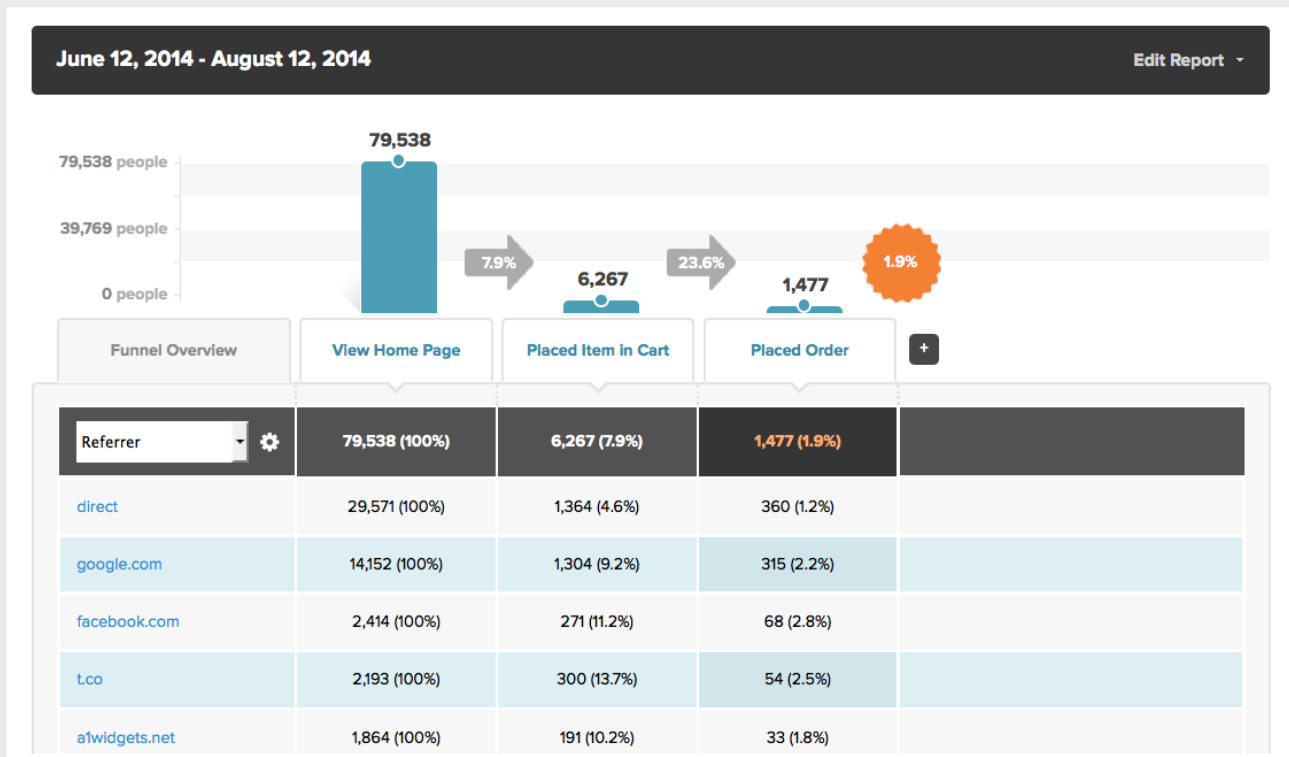
Now let's look at our final data point, properties, and see how each person is tagged with various properties.

PROPERTIES

Properties tell you various additional information about each person. They are primarily useful for segmenting people into groups.

Remember the ecommerce funnel report from earlier? We can view some of the properties in that report to tell us where our visitors came from.

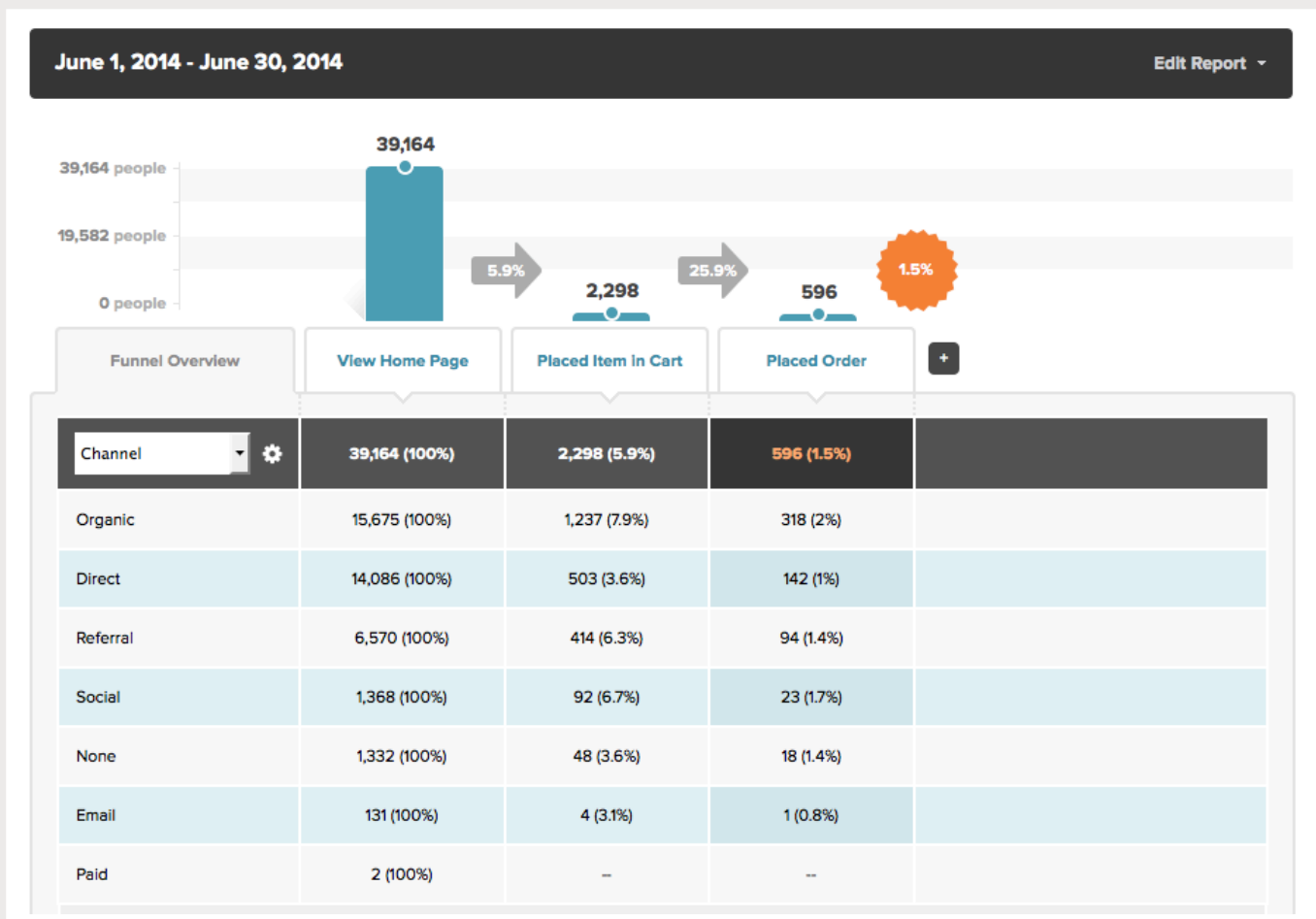
Here's that report, this time showing the referrer property:



This referrer property is showing us the sites that referred visitors to us. It's the first-ever referrer, meaning these sites drove users for their first visit. Any referrer after that is not included.

This report is showing us our top referrers. We can see how each referrer performs throughout the funnel. We see that we have a high conversion percentage from Facebook and t.co (Twitter), meaning that our social strategy is very targeted and getting good traction. We also see that our blog sends us a better-than-average conversion rate, so it may be worthwhile to continue with the blogging effort, or even ramp it up.

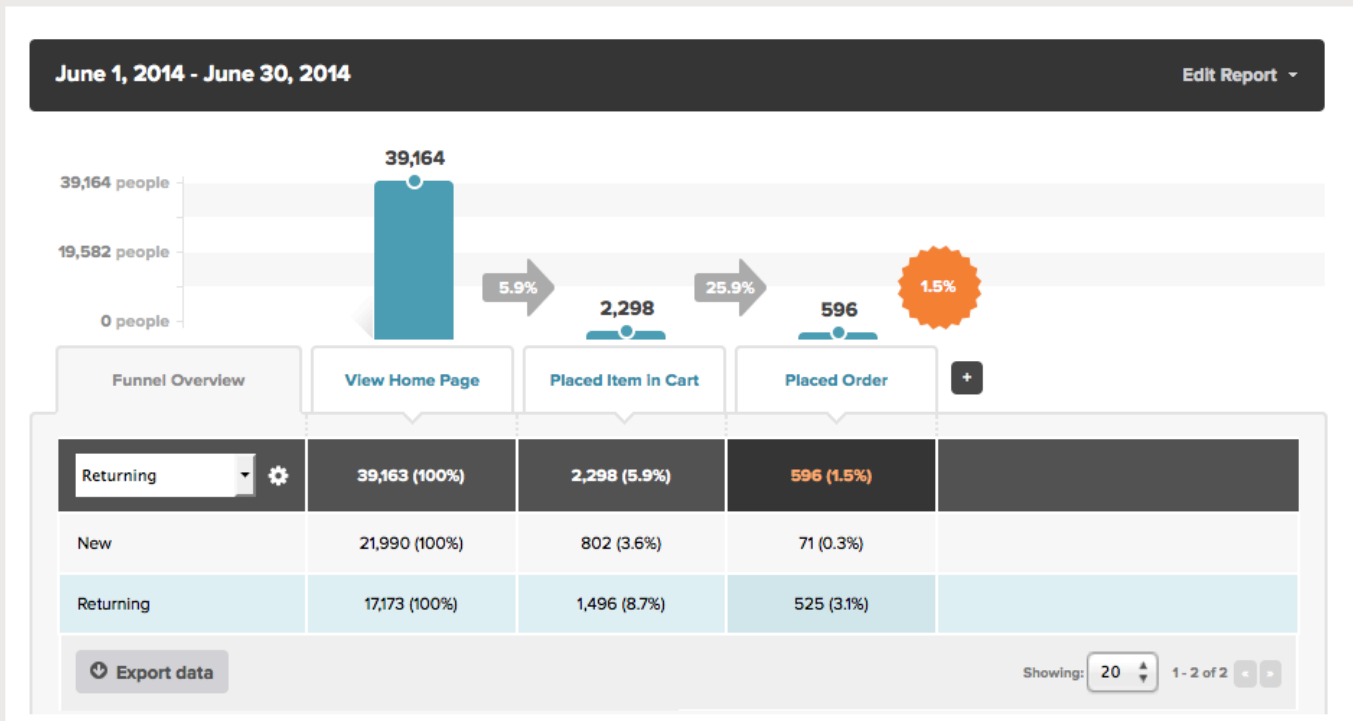
One common property is to segment people all together into Channels. This groups all traffic sources into categories. The funnel report below is for the month of June, and we're viewing the Channels property.



For a background on how we get this data, [check out our Channel Definitions page](#).

We can see that we get a good amount of traffic from organic and direct. Organic has a better-than-average conversion rate, while direct has less than average. We also get a good conversion rate from social. With this data in mind, we know that people who come to us from a search engine generally convert well, so adding more content on our website would possibly add more traffic, and thus more customers (if conversions remain the same). We also got 23 orders from social, so it makes sense for us to continue our social strategy.

We also can view how many of these people are new or returning:



We see that many of our customers are returning, and we also got a new batch of customers.

Viewing Each Person Throughout the Funnel

Throughout each step of the funnel, we can see who converted as well as who didn't convert.

We just hover over one of the steps.

We want to know where our customers came from. To do this, we'll first need to look at the people who placed an order (customers). So, we hover over the "Placed Order" step and click on the people who completed it:

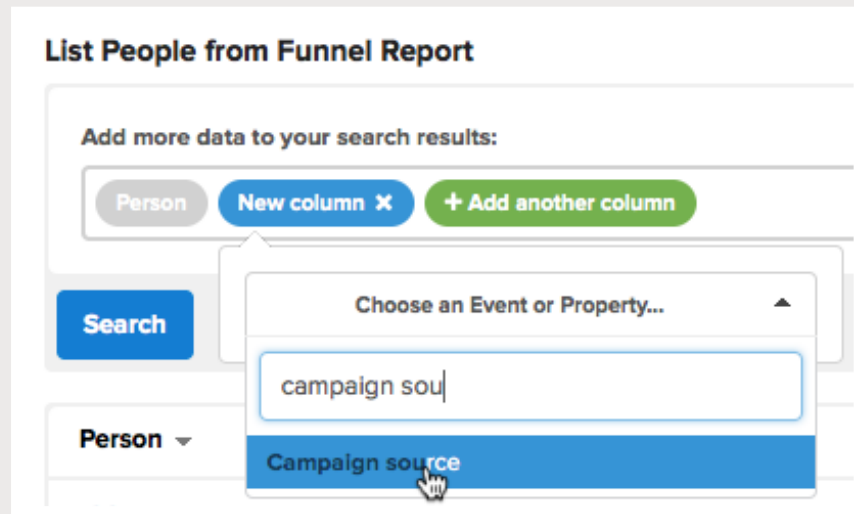


We get a list of people who have placed orders (customers):

The screenshot shows a web interface titled "List People from Funnel Report". At the top, there is a section for adding data to search results, with a "Person" filter and a "+ Add another column" button. Below this is a "Search" button. The main area displays a list of email addresses under the "Person" filter. At the bottom, there is an "Export Data" button and a pagination control showing "Showing: 10 1 - 10 of 596".

Person
fjoey@gmail.com
245billy@yahoo.com
andy@hotmail.com
brad@aol.com
chris@runbox.com
courtney@gmail.com
cullen@gmail.com
danielle@aol.com
derek@gmail.com
duke@apple.com

We want to know which campaign these customers came from. To do this, we'll need to add a column and add the property "Campaign source."



We select it and press Search:

List People from Funnel Report

Add more data to your search results:

Person Campaign source x + Add another column

Search

Person v	Campaign source v <i>Last-touch Attribution Ever</i>
1joey@gmail.com	blog
245billy@yahoo.com	newsletter-10-off-offer
andy@hotmail.com	come-back-remarket
brad@aol.com	weekly-update-newsletter
chris@runbox.com	mailchump
courtney@gmail.com	adwords
cullen@gmail.com	twitter.com
danielle@aol.com	social
derek@gmail.com	blog-footer-link
duke@gmail.com	feedburner

Export Data

Showing: 10 1 - 10 of 596

Clicking on Export Data leads to a CSV file that is emailed to us. (Note that these email addresses and details are made up and not intended to identify any real people.)

We have customer email addresses, and we can click on a person to view how they've interacted with our website.

Let's start by viewing courtney@gmail.com. All we do is click on her email:

The screenshot displays a user profile for **courtney@gmail.com**. At the top, there is a "Configure Metrics" button. Below this, three key metrics are shown in boxes: "48 days ago" (Last Seen), "2 visits" (Total visits), and "\$143" (Total Revenue). To the right, an "Acquisition Metrics" section lists: First referrer: www.google.com; First search term: not provided; Num visits to signup: 2; First visit to signup: 32 mins; Signup to upgrade time: no data available.

The timeline section covers the period from June 11, 2014, to June 17, 2014. It includes tabs for "Timeline", "Events", and "Properties". The events are as follows:

- Tuesday, June 17, 2014**: No events listed.
- Monday, June 16, 2014**: One event: "Did event Visited Site, Viewed Deal of the Day — Show details".
- Sunday, June 15, 2014**: No events listed.
- Saturday, June 14, 2014**: Multiple events: "Did events View Home page, Product Search, Viewed Widget A and 5 more... — Show details".
- Friday, June 13, 2014**: No events listed.
- Thursday, June 12, 2014**: No events listed.
- Wednesday, June 11, 2014**: No events listed.

We get a ton of data on our new customer. We can see how much revenue we've received from them, how many times they've visited our website, and what events they did on each of their visits.

We can get a breakdown of events and properties by each day. Let's see what they did on Saturday, June 14. To see this, we click on the "Show details" link. Here's what it shows us:

▼ **Saturday**
June 14, 2014


Did events **View Home page, Product Search, Viewed Widget A** and 5 more... — [Hide details](#)

- Did events: **Search engine hit, View Home Page site** 03:00:52 PM
 - **Referrer:** https://www.google.com
 - **Search engine:** Google
 - **Search terms:** not provided
 - **Viewed url:** https://www.example.com/
- Did an event: **Product Search** 03:01:10 PM
 - **Query:** Hammer
 - **Viewed url:** https://www.example.com/productsearch
- Did an event: **Viewed Widget A** 03:01:50 PM
 - **Viewed url:** https://www.example.com/hardware/generichammer
 - **Product Categories:** Home Improvement
- Did events: **Product Search, Viewed Widget B** 03:11:51 PM
 - **Viewed url:** https://www.example.com/productsearch
 - **Query:** Dewalt Hammer
 - **Viewed url:** https://www.example.com/hardware/dewalthammer
 - **Product Categories:** Home Goods

This Person Details Report shows us everything a person did, broken down by day. It starts at the top, where we see that Courtney came to us via a Google search. From there we can see how she moved around through our site.

By viewing the Timeline, we can see which products she searched for, which products she viewed, which products she added to the cart, and which products she decided to buy.

We can also view just the Events or just the Properties. Let's check out Events to see what important actions Courtney took on our website:

 courtney@gmail.com
Configure Metrics

48 days ago

Last Seen

2 visits

Total visits

\$143

Total Revenue

Acquisition Metrics

First referrer: www.google.com

First search term: not provided

Num visits to signup: 2

First visit to signup: 32 mins

Signup to upgrade time: no data available

Timeline
Events
Properties

Event ▾	# of times ▾	First time ▾	Last time ▾	Avg time between events ▾
Placed Order	1	Jun 14, 2014	Jun 14, 2014	
Entered Order Information	1	Jun 14, 2014	Jun 14, 2014	
Placed Item in Cart	1	Jun 14, 2014	Jun 14, 2014	
Viewed Widget C	1	Jun 14, 2014	Jun 14, 2014	
Placed Item in Cart	1	Jun 14, 2014	Jun 14, 2014	
Viewed Widget B	1	Jun 14, 2014	Jun 14, 2014	
Viewed Widget A	1	Jun 14, 2014	Jun 14, 2014	
Product Search	2	Jun 14, 2014	Jun 14, 2014	58 secs
View Home Page	1	Jun 14, 2014	Jun 14, 2014	

Now, when we click on Properties, we see various information about this person:

The screenshot displays a user profile for 'courtney@gmail.com'. It features three summary cards: 'Last Seen' (48 days ago), 'Total visits' (2 visits), and 'Total Revenue' (\$143). To the right, 'Acquisition Metrics' are listed: First referrer (www.google.com), First search term (not provided), Num visits to signup (2), First visit to signup (32 mins), and Signup to upgrade time (no data available).

Below these is a table with tabs for 'Timeline', 'Events', and 'Properties'. The 'Properties' tab is active, showing a table with columns for Property, Current value, and History.

Property	Current value	History
Account Phone Number	555-555-5555	555-555-5555 x1
Address	1600 Pennsylvania Avenue	1600 Pennsylvania Avenue x1
Order Amount	143	143 x1
Product Categories	Home Goods	Home Goods x2 Home Improvement x1
Referrer	https://twitter.com	https://twitter.com x1 https://google.com x1
Returning	1	1 x1
Search engine	Google	Google x1
Search terms	not provided	not provided x1
Shipping Carrier	USPS	USPS x1

We can see this is their second visit, as the Returning property has a 1 value, with an x1 next to it, meaning they've returned once, for a total of 2 visits. We know this is the first purchase they made (since we've been tracking) as there is only one value in the Order Amount row. If we hover over the x1, we can see when they placed the order:



We can send Courtney an email thanking her for her purchase and offering a 10% off coupon for the next time she purchases. And because we use Kissmetrics, we can set up an event for any time a person uses that coupon code. So, we'll be able to see when/if Courtney uses the coupon. If we can make her a loyal customer, her Events tab may look like this after a year:

courtney@gmail.com
Configure Metrics

4 Days Ago

Last Seen

201 visits

Total visits

\$931

Total Revenue

Acquisition Metrics

First referrer:	www.google.com
First search term:	not provided
Num visits to signup:	2
First visit to signup:	32 mins
Signup to upgrade time:	no data available

Timeline
Events
Properties

Event ▾	# of times ▾	First time ▾	Last time ▾	Avg time between events ▾
Entered Coupon Code 10off	1	December 22, 2014	December 22, 2014	
Placed Order	11	June 14, 2014	July 7, 2015	18 days
Entered Order Information	2	June 14, 2014	February 12, 2015	243 days
Viewed Widget T	7	August 14, 2014	Aug 13, 2014	77 days
Product Search	184	June 14, 2014	July 7, 2015	3 days
View Home Page	108	June 14, 2014	July 7, 2015	5 days
Placed Item in Cart	11	June 14, 2014	July 7, 2015	5 days
Viewed Widget F	13	August 14, 2014	April 19, 2015	26 days

We can get this data for every person. Yes, you can look at every person who has visited your website and see exactly what they've done as well as the properties for that person.

Automatically Tracked Events and Properties

There are some events and properties that are automatically tracked when you set up Kissmetrics using the JavaScript code snippet. Here's a list of those events and associated properties:

Visited Site event

- Referrer property indicates the URL the referrer came from
- URL property indicates the URL of the page they started browsing the site
- Returning property triggers when a person comes back and visits the site

Pageviews

- This event is not turned on by default; users can turn it on by visiting their Kissmetrics account settings

Ad Campaign Hit (Google Ad Campaign)

Works with UTM parameters; for example, the URL `http://Kissmetrics.com/?utm_source=semintrotopayperclicksearchmarketing&utm_medium=PDF&utm_term=PPC&utm_content=semintrotopayperclicksearchmarketing&utm_campaign=guides` has the following properties:

- Campaign medium = PDF
- Campaign name = guides
- Campaign source = semintrotopayperclicksearchmarketing
- Campaign content = semintrotopayperclicksearchmarketing
- Campaign term = ppc
- These all trigger as properties in Kissmetrics

Search engine hit

- Search Engine property indicates which search engine was used



- Search Terms indicate which search terms were used; since Google encrypts search data, many search terms will return as “Not Provided”

You’ll want to set some events and properties yourself. A few ideas for ecommerce sites:

- Product search terms property indicates what search terms were used by the visitor (in the product search bar)
- Viewed product event triggers when a visitor visits a product
- Add to cart event triggers when a product is placed in the shopping cart; associated properties can be product added (to indicate the name of the property), variation (to indicate what color, size, or model of the product), and quantity (to indicate how many of that product they placed in their cart)
- Promo code triggers when a customer enters a coupon/promo code during checkout
- Order total indicates the total monetary amount that was spent on an order
- Returned product name triggers when a customer returns a product

You can check out many more events and properties to set up with our [eCommerce essentials](#).

For a SaaS business, you’ll want to consider setting up these events and properties:

- Signed Up event triggers when a visitor signs up for a free trial (if applicable) or begins paying
- Plan name indicates the plan the visitor signed up for
- Subscription upgraded indicates when the customer upgrades their plan
- Subscription billing amount indicates the new amount the customer is paying
- Subscription billing length indicates how frequently in months they are billed
- Subscription plan level indicates the new plan the customer is on
- Trial description indicates the trial description such as 14-day trial, 30-day trial, etc.

For more events and properties to set up, view our [SaaS essentials](#).



EVENTS, PROPERTIES, AND PEOPLE ARE THE FOUNDATION OF KISSMETRICS

As you can see, all the insights Kissmetrics delivers come from this trifecta of events, properties, and people. After you get these set up, you'll be able to build reports that will help you understand the people who interact with your website. And, once you understand these people, you'll know how to grow your business.

What is the Difference Between Google Analytics and Kissmetrics?

One of the most common questions we get from people is how Kissmetrics is different from Google Analytics. We understand the curiosity. Both services are in the analytics space, so it's easy to think they're the same tools.

However, there are a number of differences between the two services; for example, how they handle tracking, what use cases are best, and what you can and can't do with each tool. We'll get into all that in this section.

As a matter of clarification, we'll be discussing the differences between Google's Universal Analytics and Kissmetrics. Universal Analytics is the next version of Google Analytics and will soon be what every Google Analytics account uses by default.

HOW GOOGLE ANALYTICS AND KISSMETRICS TRACK PEOPLE

At its core, Kissmetrics analytics is focused on people. As you'll soon see, every visit to your website gets tied to a person. Google Analytics added people tracking as a feature. It is not at the core of the product. Most people use Kissmetrics to track individual people, while most people who use Google Analytics will never touch that feature.

When tracking people, you need two things to verify their identity:

- **User Identification** — Your analytics tool must be able to identify users when they tell you who they are.
- **Signing In** — Users must be able to sign in and identify themselves on each of their devices.

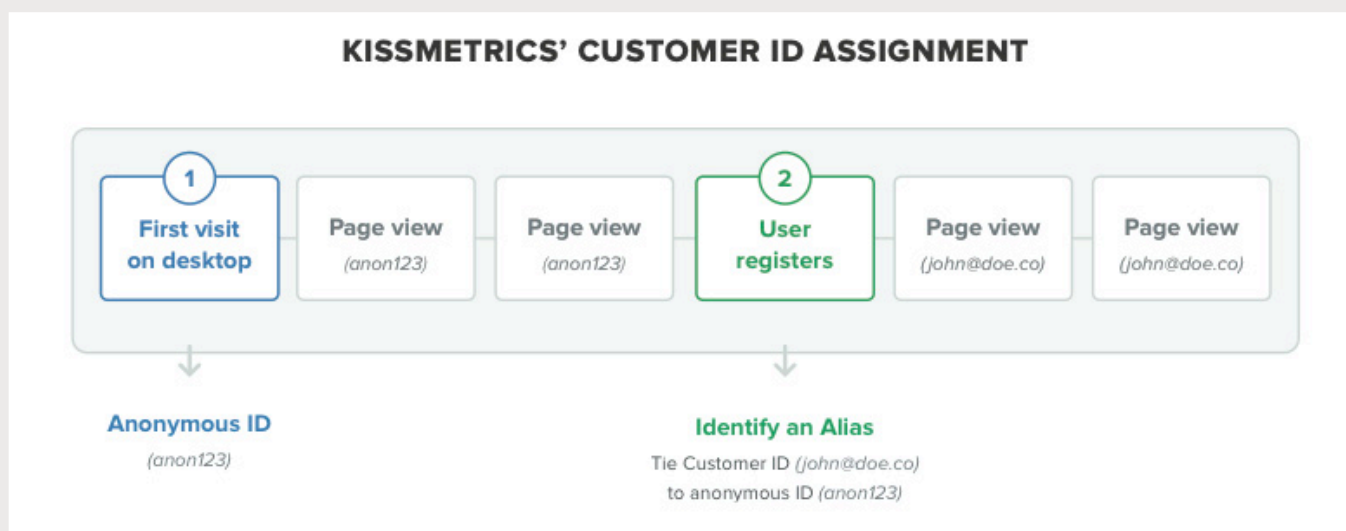
But, even if an analytics tool helps you identify users as they log in, they all handle it a little differently.

Let's go through how Kissmetrics and Google Analytics handle people tracking.

1. What Happens to Session Activity Prior to Registration or Logging In?

When a person visits your website for the first time, both Kissmetrics and Google Analytics assign an anonymous ID to that person.

For Google Analytics, the visit and registration must take place in the same visit session. If a person visits your website, leaves, and then comes back 10 days later and registers, only the last session is tied to the user ID. The first session is lost. Google Analytics connects data from only the session in which the user was identified. The only way around this is to find a way to identify people during as many sessions as possible.



With Kissmetrics, all data from a person's previous sessions is assigned to an alias. That's the core tracking summary of the two. But, they can differ depending on the situation.

2. What Happens to Data from Sessions after Someone is Identified?

Joey visits your site, registers, logs out, and closes the browser. He comes back a week later and doesn't register or log back in. What happens to the data from the second visit?

With Kissmetrics, all this data still gets tied to Joey because his device was cookied.

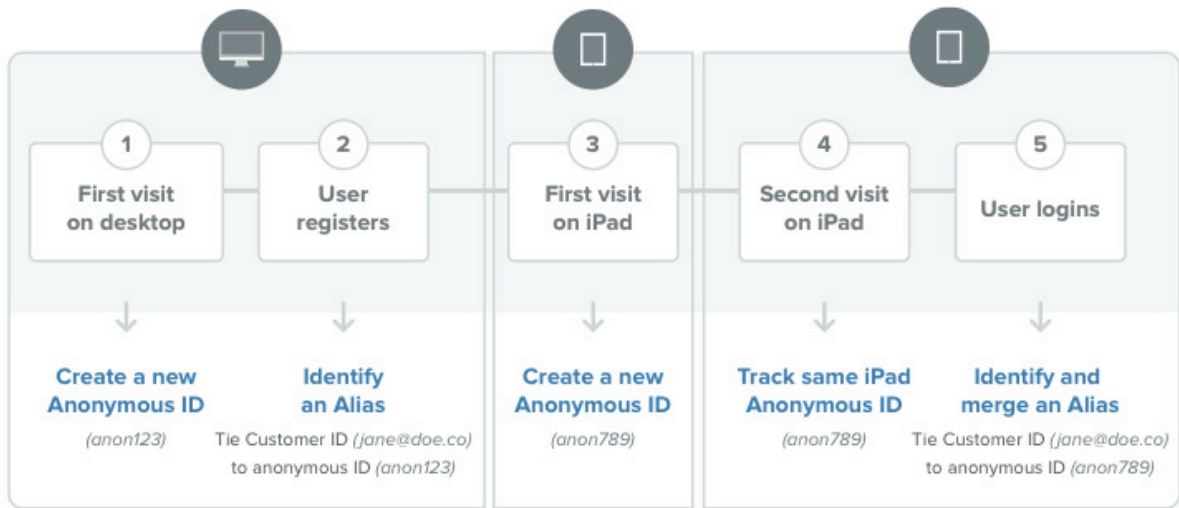
Google Analytics isn't as simple. You'll need to send the user ID every time there's a Google Analytics hit. So every piece of Google Analytics data needs a user ID attached to it. There is session unification that will stitch together any other hits that happen in the same session. But, every session needs a user ID defined in order to connect that session to a person. In Joey's case, Google Analytics would assume that his second visit was a different person.

3. What Happens to Session Activity from Several Devices?

1. Anna registers on your site from her desktop.
2. A week later, she visits your site on her iPad but doesn't log in.
3. Later that day, she visits your site again, this time logging in with her iPad.

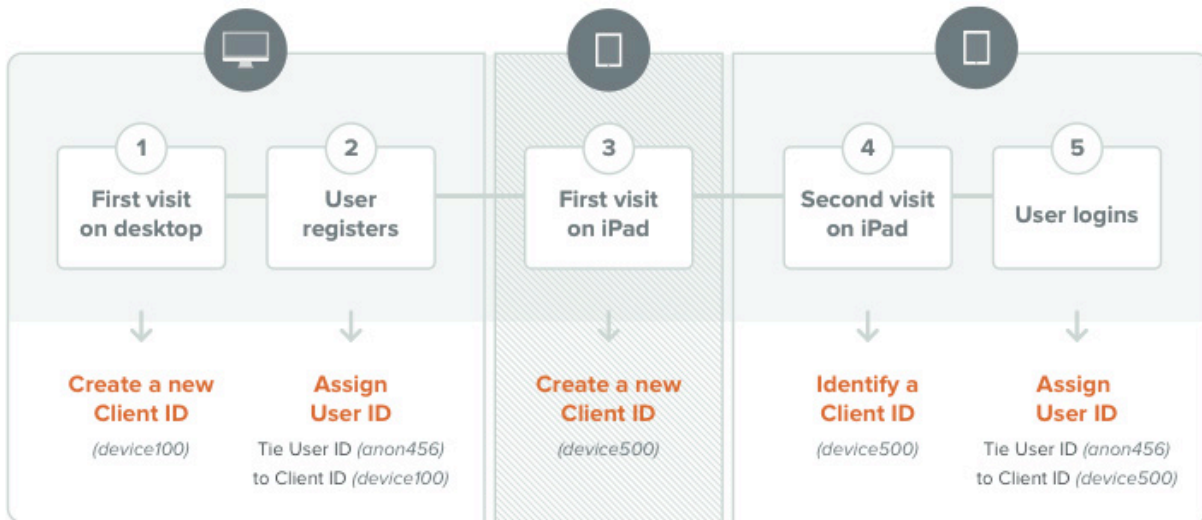
With Kissmetrics, all the data from her desktop gets assigned to her alias once she registers. When she visits on her iPad, Kissmetrics assigns her a new anonymous ID. Kissmetrics doesn't know this visitor is Anna until she logs in on her iPad. Once she logs in, all the sessions from her iPad are tied back to the ID she originally created when she registered on her desktop.

WITH KISSMETRICS



Everything gets tied to the user correctly

WITH GOOGLE ANALYTICS:



Correctly assigned to user

Not assigned to user

Correctly assigned to user

Anna registered on her first visit, so the activity from that session gets tied to her newly registered User ID. Since Anna's second visit was on a new device and she didn't log in, that data gets lost.

All her sessions going forward (on the same device) will be correctly assigned to her. The same goes for when she visits on another device. Once she logs in on a device, the data from that same session gets tied back to the User ID that was assigned when she registered on her desktop.

Remember that Google Analytics connects data only from the session in which the user was verified.

4. What Happens When Multiple People Use the Same Device?

Brenda is looking for tickets to a show tonight. She visits your site via a hotel PC, doesn't find any tickets that she likes, and leaves.

Steve also is looking for tickets. He visits your site using the hotel's PC, finds tickets that he likes, and registers and pays for them.

How do Kissmetrics and Google Analytics handle this?

With Kissmetrics, the data from Brenda gets assigned to Steve once he registers. So, all previous visits to your site from that same computer get tied to Steve. There is no technical way around this.

On the other hand, Google Analytics will report the correct data in this case. Since Brenda visited the site but didn't register, her session is lost. Since Steve registered on the same session as his visit, that data gets correctly tied to him.

5. What Happens When Multiple People Are Logging in on the Same Device?

Let's go back to the previous example with Brenda and Steve using the same device to access the same website.

This time, Brenda logs in, looks at a bunch of tickets, and then logs out. Steve comes by later that day and registers.

How does Kissmetrics handle this?

When Brenda visits the site and logs in, all the data gets correctly tied to her.

But, when Steve visits and registers, Kissmetrics still thinks it is Brenda visiting the website. Anything that Steve does before he registers gets tied back to Brenda's customer ID. Once Steve registers, Kissmetrics sees this as a new person and connects all future data to his customer ID.

With Kissmetrics, you can do a [clearIdentity call](#). This would clear Brenda's ID once she logs out and assign a new anonymous ID when the next person visits from that computer. Then, once Steve registers, all the data from Brenda's logout to Steve's registration gets tied to Steve's customer ID.

You will be able to do this only during logout events. You won't be able to reset all named ID's after each visit.

Google Analytics handles this correctly. When Brenda visits and logs in, all the data from her session gets tied to her ID. Then, when Steve visits and registers, all the data from his visit gets correctly assigned to him.

TRACKING SUMMARY

Analytics need to make one of two assumptions when tracking users:

- Each visit from the same device is coming from the same person.
- Each visit should be treated as a new person until they identify themselves.

Kissmetrics assumes that activity on one device is coming from the same person. If one of your users visits your site on their desktop, tablet, and phone, Kissmetrics will recognize them once they sign in and tie them back to their customer ID.

Google Analytics assumes that each visit is from a new person. The only way around this is to identify people in each session in order to see everything that person does.

Some of the content from this section was inspired by the [Managing User Identities](#) post written by Shay Sharon.

USE CASES

Kissmetrics is not a replica of Google Analytics. Yes, they both are analytics tools, but they each have their own use cases. Let's run through some common use cases and which tool is a better fit.

Tracking Visitors and Visits

If this is what you want to track, go with Google Analytics. While Kissmetrics can track visitors, it doesn't make sense to use it if that's all you want to do.

Tracking Bounce Rate, Time on Page, and Exits

Use Google Analytics for these metrics. You cannot currently track these in Kissmetrics.

Funnels

You can set up funnels in Google Analytics, but there are a few disadvantages:

- When you set up funnels, you can view data going forward only. You will not be able to view data that happened before the funnel was set up.
- You can track consecutive steps that people go through only if they are on the same visit. So, the data is gone if people complete a process over multiple visits or drop out of the defined path. If you want to track only sign-up flows or ecommerce checkout (you won't be able to track the number of people who put an item in the cart), you can go with Google Analytics. You won't be able to build your entire customer acquisition.

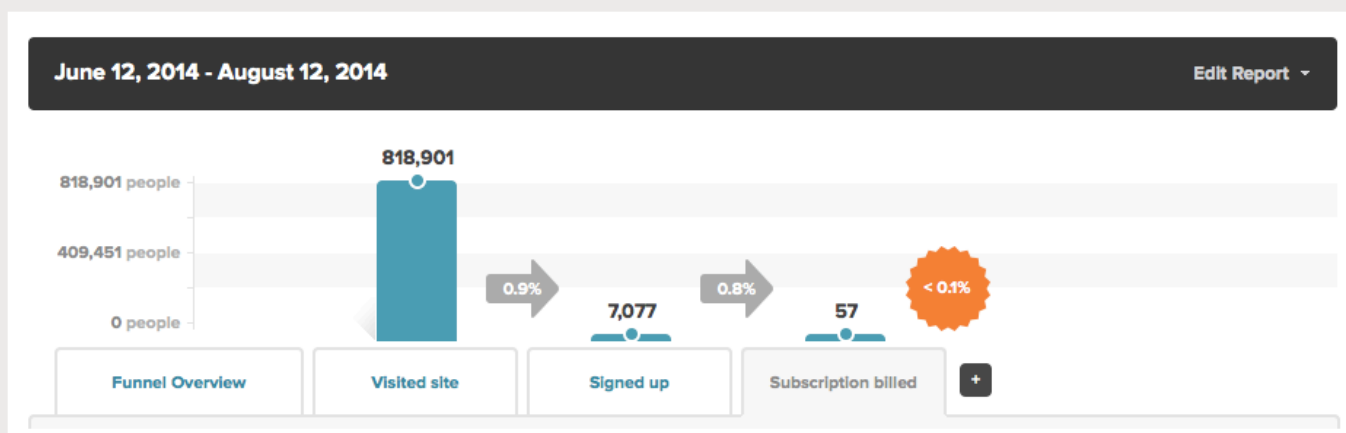
By contrast, the Kissmetrics funnels are able to retrieve historical data. So, you can set up your sign-up funnel and view how it has been performing over the months that you've been tracking. And, it doesn't matter if someone visits your website today but doesn't complete the funnel until six months later. Kissmetrics retains all their data.

Conversion Tracking

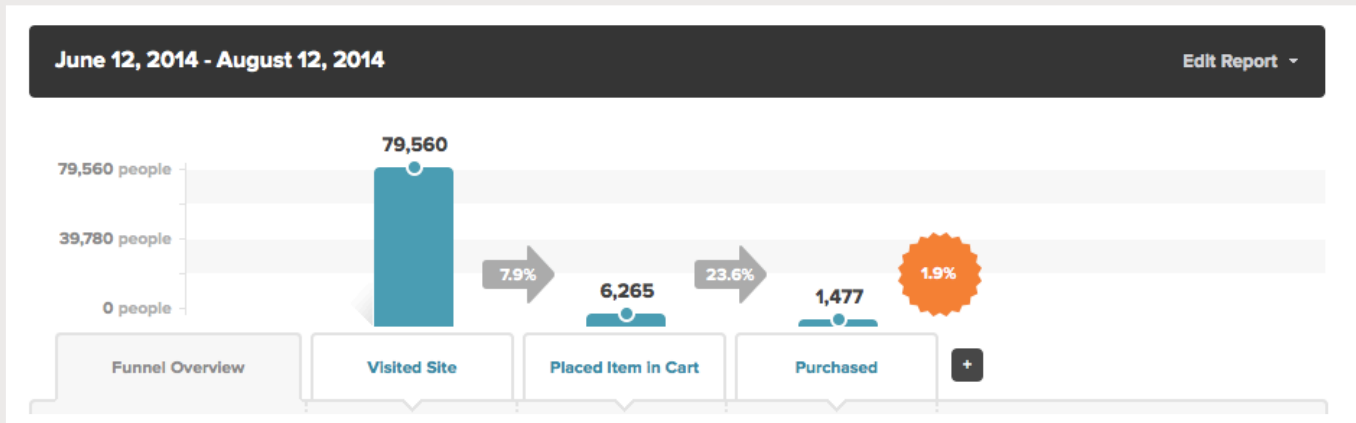
Some people may want to get a little more advanced with their analytics and begin tracking conversions. By tracking conversions, you're looking at the percentage of people who have done some important action on your site, such as signing up for your newsletter, downloading a white paper, or placing an order.

With Google Analytics, you'll have to set up goals. Also, there is a 90-day limit with conversions. By default, conversions have to happen on the same visit. This is useful if you're testing and want a conversion to happen right away, such as signing up for a trial. But, if you want to go deeper, it'll get a little more challenging. The only way around this is to [use multi-channel funnels](#). You'll have to use a specific report and be careful about which conversion data you're looking at.

In Kissmetrics, you'll need to set up a funnel report to track conversions. A common funnel report is tracking the number of people who have signed up or placed an order. Here's how it might look for a SaaS company:



Here, we are looking at people who have visited the site, signed up for a trial, and then converted to paying for a subscription. For an ecommerce company, a sales funnel might look like this:



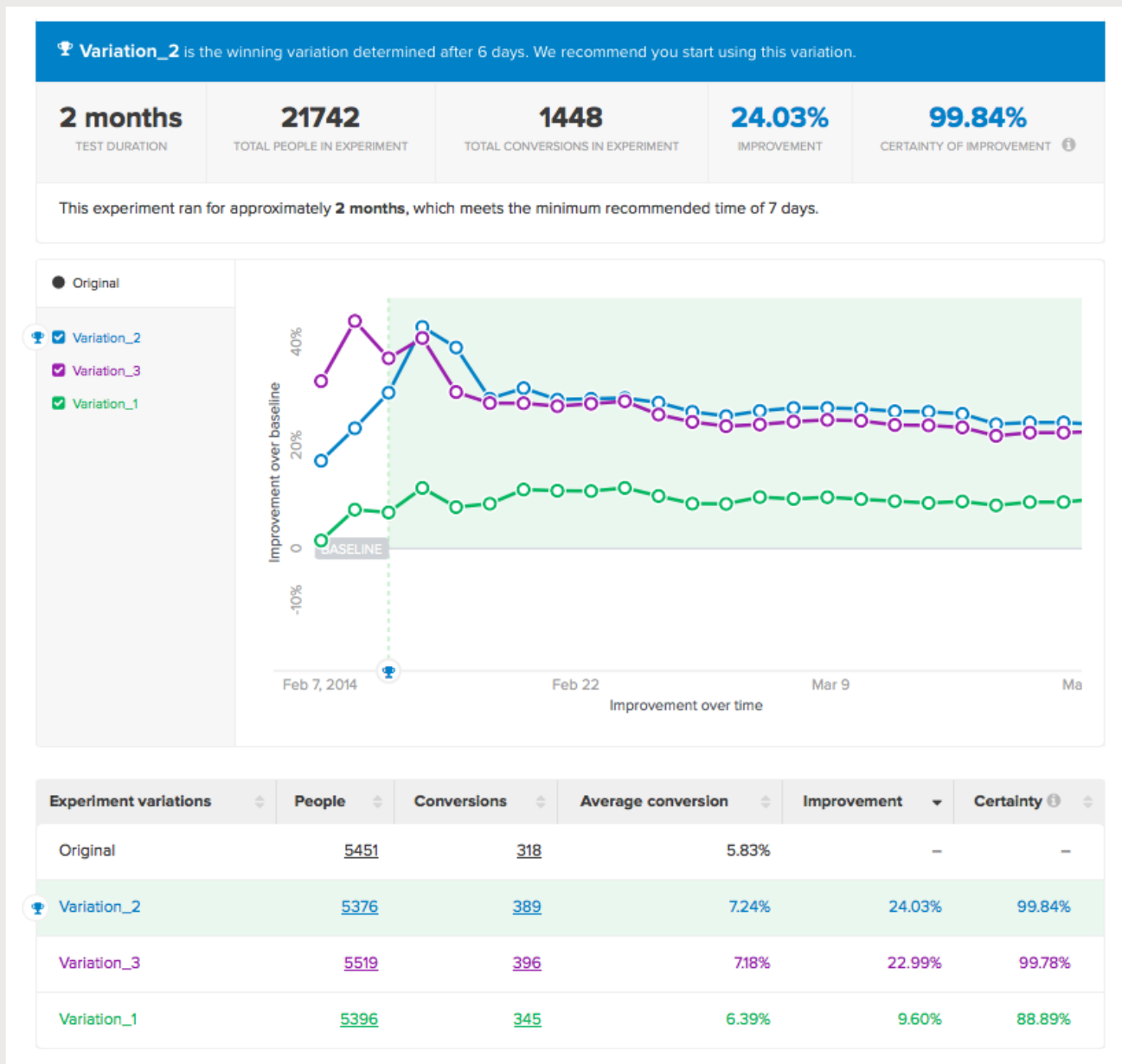
In this funnel, we're tracking the number of people who visited the site, placed a product in their cart, and then proceeded to purchase.

A/B Testing

In Google Analytics, you can set up content experiments to act as your A/B testing tool. To run the test, you'll have to build out two separate URLs (i.e., www.example.com/control and www.example.com/variant1). This can be challenging if you're testing your home page, as there may be hundreds of backlinks to one URL. You'll be able to get around this if you have developers on your team. But, it'll be more difficult if you're left to your own devices.

Another downside is the conversions must happen on the same visit. If people leave your site between steps, they won't get counted.

With Kissmetrics, you can integrate with an A/B testing tool like Optimizely and connect that data to the A/B test report. All your data gets connected back to actual people. Here's what the report looks like:



You can view people by clicking on a number under the People column, which shows you all the people in the variation. Or, you can view only the people who converted by clicking on a number under the Conversions column.

Cohort Reports

People can be divided into groups, or cohorts, based on actions they took. A prime example of this would be tracking login retention over time. With a cohort report, you would track people who logged in during a specified time range (typically a day or week), and then you would see how often those people log back in (by day or by week) after that specified time range. Here's what a report like that would look like in Kissmetrics:

Logged in		Logged in again by Weeks													
Time	People	1	2	3	4	5	6	7	8	9	10	11	12	> 12	
Week of Feb 1, 2014	2,958	56.5%	7.5%	2.5%	1.9%	1.5%	0.9%	0.4%	0.3%	0.4%	0.4%	0.3%	0.3%	1.8%	
Week of Feb 8, 2014	1,492	35.5%	5.9%	3%	2%	2.1%	1.7%	0.6%	0.7%	0.6%	0.4%	0.4%	0.7%	2.9%	
Week of Feb 15, 2014	1,589	30.1%	4.4%	2%	1.6%	1.1%	1%	0.8%	0.5%	0.2%	0.7%	0.2%	0.6%	2.7%	
Week of Feb 22, 2014	1,100	30.7%	4.2%	2.3%	1.7%	2.3%	0.8%	0.9%	0.4%	0.3%	0.2%	0.6%	0.3%	2.5%	
Week of Mar 1, 2014	1,059	29.8%	4.6%	2.5%	1.9%	1%	0.6%	0.7%	0.4%	0.5%	0.2%	0.2%	-	2.4%	
Week of Mar 8, 2014	1,107	31.3%	3.7%	2.7%	1.3%	0.8%	0.8%	0.7%	0.6%	0.5%	0.4%	0.4%	0.2%	1.9%	
Week of Mar 15, 2014	1,045	30.7%	4.6%	1.4%	1.1%	0.7%	0.9%	0.6%	0.3%	0.6%	0.3%	0.3%	< 0.1%	2.3%	
Week of Mar 22, 2014	1,084	27.7%	4.6%	2.4%	0.9%	0.7%	0.7%	0.6%	0.2%	0.6%	0.3%	0.2%	0.2%	1.7%	
Week of Mar 29, 2014	1,125	26.5%	5.2%	1.2%	0.5%	0.4%	0.5%	0.7%	0.3%	0.4%	0.6%	-	0.3%	1.4%	
Week of Apr 5, 2014	1,091	28.8%	2.7%	1.8%	0.8%	1.2%	0.6%	0.3%	0.6%	0.6%	0.6%	0.5%	< 0.1%	1.6%	
Week of Apr 12, 2014	965	28.1%	4.5%	0.9%	0.7%	0.6%	0.2%	0.5%	0.4%	0.3%	0.4%	0.3%	0.4%	1.3%	
Week of Apr 19, 2014	992	30.3%	3.2%	1.7%	1%	0.7%	0.5%	0.6%	0.1%	0.5%	0.1%	0.2%	0.2%	0.9%	
Week of Apr 26, 2014	891	33.1%	3.9%	1.5%	1.1%	1%	0.3%	0.3%	0.2%	0.4%	0.4%	0.7%	0.2%	0.4%	
Week of May 3, 2014	883	30.5%	2.7%	2%	1.5%	0.1%	0.8%	0.6%	0.7%	-	0.3%	0.1%	0.1%	0.6%	
Week of May 10, 2014	959	31.9%	3.3%	1.4%	1.6%	0.9%	0.5%	0.4%	0.3%	0.4%	0.4%	0.3%	0.2%	0.6%	

Export Data
Display: **Percentage of people**
Showing: **15**
1 - 15 of 26

You can't get anywhere close to this with Google Analytics.

USING GOOGLE ANALYTICS IN CONJUNCTION WITH KISSMETRICS

Google Analytics can provide a world of insight into how visitors interact with your website. Nearly every website you visit uses it, including the blog you're on now. We also use it on our main Kissmetrics.com page.

Many of our customers use Google Analytics alongside Kissmetrics. We use Google Analytics to get session data, view a general engagement on a page (time on page and site), and check referral data. We use our own product for our web app to get insights into how our customers are using our product, discover our customer acquisition channels, track our acquisition funnel, document our A/B tests, and gather data that can help us make better decisions.

Kissmetrics Gives You the Insights You Need to Optimize Your Marketing

Kissmetrics is the science behind your marketing. It shows you where your bottlenecks are, how to optimize your conversions, and where to find more customers for your business. Instead of spending tons of time analyzing and digging through your data, Kissmetrics gives you the insights you need to keep growing your business.

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