

**Email Engagement Cliff (Version3) Process**

**Functional Requirements Document (FRD)**

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Document History

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| **Date** | **Version** | **Author** | **Comments** |
| 8/30/19 | 1.0 | Deanna Xuan Nguyen | Initial draft |
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Related Documents

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| **Name** |
| [Email Engagement Cliff.docx](https://caesars365.sharepoint.com/:w:/s/CDPAnalyticsOptimization/EXtXnhGurU9DqO_QgueDrPYB55-K43-1hmTA2R2cc6hopw?e=TW8h3D) |
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Document Approvals

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# Introduction

## Document Purpose

The purpose of this document is to detail changed in functional requirements for setting email engagement code at the guest email address level. According the business, the existing logic does not provide a stabilized email engagement result due to the fluctuation in the guest email data.

This process uses the vendor Exact Target (will be replaced by Salesforce Marketing Cloud (SFMC) in the very near future) data to determine how engaged each guest is based on the number of emails sent and subsequently opened and clicked during a given time period. (Note: SFMC is the new term to replace ExactTarget or ET. They are the same system.)

It was observed that the engagement cliff indicator (i.e. email engagement code) for a guest was extremely volatile

Below is the new business requirement to modify existing logic for this “Email Engagement Code” update process.

Email Marketing has a new requirement to modify the existing logic, which sets the email engagement code attribute (values of L and H) in gst\_email table. Value “M” will be removed from this process.

Valid Values for c\_email\_engagment\_cd in table gst\_email:

* H (High or Green)
* M (Medium or Yellow) This value will be removed from the process.
* L (Low or Red)

**High:** Total: 3,159,466 – Target Open Rate > 7.7%

• Any guest with an account creation date in the past 90 days

o OR

• For non-offer emails that were sent in the past 30 days, the open rate is <= 0.1% AND for non-offer emails in the past 90 days the open rate is <= 0.2% AND for offer emails sent in the past 60 days the open rate is > 0.2%

o OR

• For non-offer emails that were sent in the past 30 days, the open rate is <= 0.1% AND for non-offer emails in the past 90 days the open rate is > 0.2%

o OR

• For non-offer emails that were sent in the past 30 days, the open rate is > 0.1%

**Medium:** To be removed from this new process.

**Low:** Total: 2,789,580 – Target Open Rate < 7.7%

• For non-offer emails that were sent in the past 30 days, the open rate is <= 0.1% AND for non-offer emails that were sent in the past 90 days the open rate is <= 0.2% AND for offer emails sent in the past 60 days the open rate <= 0.2%

## Key Terms and Acronyms

A number of terms and acronyms need to be specifically defined to ensure that everyone within the organization is using the same definition when these terms are used.

| **Term or Acronym** | **Definition** |
| --- | --- |
| SFMC | Salesforce Marketing Cloud (used for building audience segment for Maestro to use associate with offer definition) |
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# Scope

## In Scope

The following is deemed to be in scope:

1. Review the existing codes which set value for table gst\_email and column c\_email\_engagement\_cd. See the existing logic and design detail information in the document listed in the Related Documents table.
2. Modify existing design and logic to accommodate new business requirement submitted to EDW via Request # REQ0339132.

## Out of Scope

The following is deemed to be out of scope:

## Areas of Impact

The following areas of the business will be impacted by this project:

The following business functions will be impacted by this project:

| **Business Function** | **Impact** |
| --- | --- |
| Email Marketing | Use as one of the criteria for targeting customers during the campaign building process |
| Marketing Users | Guest data related to gst\_email table and email c\_email\_engagement\_cd |
|  |  |

# Functional Assumptions, Dependencies & Constraints

## Assumptions

The following assumptions were included in the original program development and still apply to this new version 2 of the engagement cliff indicator.

* The indicator will be populated using an EDW process. There will be NO manual updates or overrides to the engagement indicator.
* There will be one field created in the database for the engagement indicator.
* There are 3 possible values to identify a member’s engagement with emails.
  + Low Engagement Level (red)
  + Medium Engagement Level (yellow) – which will be removed from this update process.
  + High Engagement Level or “all other” (green)
* There may be numerous clicks and opens for a single email send; however, that will be counted as one click/open for this process. (For example, a guest was sent an email for TR Newsletter. The guest opened this email 3 times. The guest clicked on a link within the email 2 times. This is considered one send event with one associated open/click event.)
* The engagement code will be associated with the guest email record. If a guest deletes the email record, there will be no indicator for that guest.
* Salesforce Marketing Cloud (SFMC) will send data in the same format as the current vendor Exact Target. Need to confirm with Salesforce Product Model team.

## Dependencies

* Data from vendor Exact Target is being sent to EDW for processing and updating the email engagement code. All attributes required for calculating the new email engagement code will be available for EDW to retrieve during this process.
* Data from Salesforce Marketing Cloud, which will replace the Exact Target (ET), is being sent to EDW for calculating new email engagement code would be readily available in EDW for processing.

## Constraints

* None

# Functional Requirements

## Requirements Overview

Requirements have been prioritized according to the following categories:

* Mandatory – requirement that must be met to deliver a workable solution to the business and or have **compliance / regulatory** implications
* Highly desirable – meeting these requirements would provide significant benefit to the business, but they are not essential to a workable solution.
* Desirable – meeting these requirements would enhance the solution, but are not essential

## Functional Requirements

Existing logic for setting email engagement code for an email record in gst\_email table can be found in document “Email Engagement Cliff.docx” that is listed under the Related Documents section.

### New Logic to be applied to existing codes.

1. Calculate the Target Open Rate: # of opens / # of email sent.
2. The below logic will now have only Low and High (L/H). This means Medium (M) is no longer part of the calculation.

In the new logic listed below, offer email is defined as any email send even with the c\_offer\_id field populated. A blank value in c\_offer\_id means that it is a non-offer email.

**High:** Total: 3,159,466 – Target Open Rate > 7.7%

• Any guest with an account creation date in the past 90 days

o OR

• For non-offer emails that were sent in the past 30 days, the open rate is <= 0.1% AND for non-offer emails in the past 90 days the open rate is <= 0.2% AND for offer emails sent in the past 60 days the open rate is > 0.2%

o OR

• For non-offer emails that were sent in the past 30 days, the open rate is <= 0.1% AND for non-offer emails in the past 90 days the open rate is > 0.2%

o OR

• For non-offer emails that were sent in the past 30 days, the open rate is > 0.1%

**Low:** Total: 2,789,580 – Target Open Rate < 7.7%

• For non-offer emails that were sent in the past 30 days, the open rate is <= 0.1% AND for non-offer emails that were sent in the past 90 days the open rate is <= 0.2% AND for offer emails sent in the past 60 days the open rate <= 0.2%

# Non-Functional Requirements

## Overview

The non-functional requirements for this project have been broken down into categories such as:

* SLAs – no changes to be expected
* Scalability – no changes to be expected
* Performance – no changes to be expected
* Availability – no changes to be expected
* Etc.

## Non-Functional Requirements

# Appendix A -

Email Engagement Cliff (Version 1) logic is listed below.

* The logic for the Low, Medium, and High engagement was:
  + Low Engagement: Members who have been sent at least ***24 emails*** in the past ***12 weeks*** and have **0** associated open or click events.
  + Medium Engagement: Members who have received at least ***16 emails*** in the past ***8 weeks*** and have **0** associated open or click events.
  + High Engagement: Everyone who is not in the Low or Medium Engagement categories. (Example: They may have not opened or clicked in the past 12 weeks but they only received 8 emails. They should not be flagged as Low or Medium.)

In addition, the following sub processes were built into the original Email Engagement Cliff implementation.

* Daily Statistic table (email\_engagement\_stats): This table was created for use by Analytics to determine month over month trends.
  + Total records by run for each engagement value
  + Example:
    - 9/18/2015 LOW 555,000
    - 9/18/2015 MEDIUM 145,989
    - 9/18/2015 HIGH 1,522,801
  + In the current process, this table stores a summary by day since the program runs every day.
* Engagement Indicator Changes table (gst\_email\_engagement\_hist): This table tracks changes to the engagement indicator for each guest.
  + Example: A person went from Low Engagement to Medium Engagement on 9/18/2015.
  + Track the following information:
    - DMID
    - Before Indicator
    - After Indicator
    - Date of Change

Refer to document “Email Engagement Cliff.docx“ listed under the Related Document section for the logic from existing email engagement code (version 2).