Segmentation Quality Assurance Exercise

The questions below are designed to evaluate your logic and data segmentation skills. Please do

your best to solve these problems using the minimal context provided. Try not to leave anything blank and show your work for any incomplete answers.

1. Create a query that only targets donors within our full mailing list who have opened an email within the last 6 months. If they joined the list in the last 6 months, they should be included regardless of whether or not they have opened in the last 6 months.

Use:

* “ALS – Full List”
* “Donor = yes” / “Donor = no”
* “Opened in the last 6 months”
* “Joined in the last 6 months”

Circle one of the following in each instance:

= union (all members of both subsets)

= intersection (only members who are in both subsets)

Query =

(Donor = yes Opened in the last 6 months) (Joined in the last 6 months Donor = yes)

1. Consider an email is set to go out at the same time to a client’s full list in four segments. Each segment will receive the same content and are sent separately for tracking purposes only.

Please review each of the four segments below and provide an explanation of who will receive that individual segment and, additionally, identify what (if anything) is wrong with the overall segmentation of this email when sent to all four segments at once. Be sure to walk us through how you came to your conclusion.

SEGMENT 1: ALS – Ad Donors

* INCLUDE: “ALS – Full List” “ALS – Ad names”
* EXCLUDE: “Donor = no” “20180111 – 90 day non-opener suppression”

Ad donors within the full mailing list who have opened at least an email in any 90 day window since 20180111.

Include the intersection of the full mailing list and ad names: this gives us ad clients within the mailing list.

Exclude non-donors and clients who have a 90 day non-opener suppression since 20180111.

ad clients within the mailing list – non donors – 90 day suppression records =

Ad donors within the full mailing list who have opened at least an email in any 90 day window since 20180111.

SEGMENT 2: ALS – Ad Non-Donors

* INCLUDE: “ALS – Full List” “ALS – Ad names” “Donor = no”
* EXCLUDE: “20180111 – 90 day non-opener suppression”

Ad non-donors within the full mailing list who have opened at least an email in any 90 day window since 20180111.

Include the intersection of the full mailing list, ad names and the non-donors: this gives us ad non-donors clients within the mailing list.

Exclude clients who have a 90 day non-opener suppression since 20180111.

ad non-donors clients within the mailing list – 90 day suppression records =

Ad non-donors within the full mailing list who have opened at least an email in any 90 day window since 20180111.

SEGMENT 3: ALS – Non-ad Donors

* INCLUDE: “ALS – Full List” “Donor = yes”
* EXCLUDE: “ALS – Ad names” “20180111 – 90 day non-opener suppression”

Non-ad donors within the full mailing list who have opened at least an email in any 90 day window since 20180111.

Include the intersection of the full mailing list and donors: this gives us donors within the mailing list.

Exclude ad clients and clients who have a 90 day non-opener suppression since 20180111.

donors within the mailing list – ad clients - 90 day suppression records =

Non-ad donors within the full mailing list who have opened at least an email in any 90 day window since 20180111.

SEGMENT 4: ALS – Non-ad Non-Donors

* INCLUDE: “ALS – Full List”
* EXCLUDE: “Donor = yes” “20180111 – 90 day non-opener suppression”

Non-donors within the full mailing list who have opened at least an email in any 90 day window since 20180111.

Include all clients in the mailing list.

Exclude donors and clients who have a 90 day non-opener suppression since 20180111.

All clients in the mailing list – donors –90 day non-opener suppression records =

Non-donors within the fulling mailing list who have opened at least an email in any 90 day window since 20180111

Potential Problem:

Ad non-donors within the full mailing list who have opened at least an email in any 90 day window since 20180111 will receive both segment 2 and segment 4 because they are also non-donors within the full mailing list who have opened at least an email in any 90 day window since 20180111.

1. There are three groups of constituents, labeled Group A, Group B, and Group C. There is overlap in each pair of groups and some people are in all three groups. There is a strict hierarchy of importance as follows (high to low): Group B, Group A, Group C.

Group B (VIPs and board members) should never be sent the same version of an email that members of Group C (general public) receive. Group A (Annual Donors) often receive versioned messages that can be distinct from both Group B and Group C. Group A can also receive the same version of messages as either Group B or Group C.

No one constituent should receive more than one version of an email.

Of the emails below, which will violate the above constraints?

Day 1:

Version I: INCLUDE: Group A Group B

Version II: INCLUDE: Group C Group A

EXCLUDE: Group A Group B

Version II violates the constraints. Version II include constituents who are in both Group B and Group C but not in Group A. It violates that Group B and Group C members never receive the same version.

Day 2:

Version I: INCLUDE: Group A Group C

EXCLUDE: Group B

Version II: INCLUDE: Group B

EXCLUDE: Group A Group C

Day 3:

Version I: INCLUDE: Group B Group A

Version II: INCLUDE: Group C

Constituents who are in both Group B and Group C will receive both Version I and Version II. It violates the constraint that no one constituent should receive more than one version of an email.