



**Data Introduction for New Campaign Managers and Campaign Executives**

Table of Contents

1. **Data Uploads**
2. **Data Queries**
3. **Data Downloads**
4. **Basic Metrics**
5. **Heat Maps /Click Overlays**
6. **Activity Reports**
7. **Subscriber Behaviour Reports**
8. **Litmus Analytics**
9. **White Papers**
10. **Guide to Writing Better Briefs**

**Reporting and Analysis**

**“**At Alchemy Worx we believe open and click rates are just snapshots of your campaigns. Our focus on subscriber behaviour helps build an informed picture of your customers. By analysing frequency and reach, we can help you see what really works and refine your email strategy to deliver tangible business results.

Of course, we provide industry-standard reports like open and click rates for individual campaigns too. But our advanced reporting and analysis techniques go much further, enabling you to:

* identify inactive subscribers who have never interacted with your mails (often as many as 40% of recipients)
* spot the early warning signs that a customer is becoming inactive
* gain a long-term picture of individual customer behaviour - over years, rather than months
* check the effectiveness of your reactivation strategy
* reactivate inactive subscribers with targeted, focused content campaigns**”**

1. Data Uploads

**Data Cleansing**

* Ensuring data is uniform (in the correct column, correct format, etc.)
* Removal of weird/incorrect information (i.e. made up names, special characters and invalid email addresses).
* Selection/elimination of certain records based on field values
* Appending two or more different data sources in to a single file for upload based on a mutual key in the files.
* Salutation Cleansing usually follows a few generic rules –
* Initials are removed as they are considered to be invalid Firstnames (i.e. you don’t want an email to say “Dear A” for example)
* Company Names are removed
* Entries that contain more than one individual’s name is removed
* Special Characters are removed (commas, ampersands etc.)
* If the mailing requires ANY of these rules to be ignored (e.g. if a comma needs to included at the end of a salutation field and it cannot be implemented by the HTML)

**Data Uploading**

* Obviously, this is dependent on the specific ESP being used and a complete guide for how to brief an upload for the individual platforms can be found here:
* Generally, a good brief will include:
* Which (if not all) of the fields are to be uploaded?
* If the list should be given a specific name?
* Does it need a Campaign ID attached?
* Should it be uploaded to a specific location?

**Data Upload Reports**

* After each upload report you will be sent an ‘Upload Report’ like the example shown here:



* The format changes slightly based on the specific ESPs but the fundamental information it provides is always the same.
* It tells you:
* How many new people were added to your database or mailing list (‘***Total Added’***)
* How many people were already in the list and have had their information updated (‘***Total Updated***’)
* How many people in the original data provided by the client were not upload because they were duplicated or because of the quality of the data provided (‘***Total Invalid***’, ‘***Total Disallowed***’, ‘***Total Duplicate***’and ‘***Total Bad Data***’)
* If requested in the brief we can provide a complete list (with reason) for all these upload errors.

**Keys to a Good Data Brief:**

1. **Naming Conventions** – Unless the Campaign Manager specifically provides a name for a list or database it will follow the given a name in keeping with the following naming convention:

YYYYMMDD\_\*client\*\_\*projectno\*\_\*projectdescriptor\*

(e.g. 20120106\_cpw\_p4644\_acq\_tmob\_ucs\_wk40)

1. **Personalisation** – Does the data have any Personalisation (Title, First Name, Surname) or will any of the other fields be pulled as text values direct from the data in to the email. (Examples might include a date, store name or price. If this the case the brief must make this very clear so we can ensure that the field in question is in the correct format AND will not cause an rendering issues for the HTML department due to length etc.)
2. **Dynamic Rules** – Dynamic rules add another level of complication to any data (or reporting) work. Please ensure that you know the logic and rules behind any Dynamic deployment before briefing in the data work. Where possible please provide the team with an **exact** list of the values to be used.

Also, if you require any form of reporting on the dynamic content of a mailing it is important to discuss it with the data AND deployment teams at this stage. It might require extra care being taken or more sophisticated tracking to be attached to the mailing before deployment. If you fail to do this **there is nothing we can do POST deployment**.

1. **Segmenting** – Segmenting is the splitting or data based on a particular attribute or random sampling. When possible the team will always try to do this online because it is not only faster but invalid will have been removed before the segmentation and this means a more accurate split.

Each platform has some limitations in regard to segmentation. EMV can only do one percentage split for any given list, and SilverPop allows a maximum of 12 segmentations fields which can be restrictive when working with a Master Database. In the cases when online segmentation is not possible it is always possible to do so offline. However, as stated earlier this is a much slower and less accurate process as invalid emails will have to be removed manually prior to upload,

2. Data Queries

3. Data Downloads

When briefing in requests for any downloaded data please be sure to include a list of all the Profile Fields you wish included from the data, as well as any additional fields to be added. It is also a big help to us if you include a list of all the mailing names and the location on the platform.

**Sent Data –** All valid contacts to which a particular mailing was sent. It ***includes*** all bounced records but ***excludes*** all suppressed records. When briefing in requests for any Sent data please be sure to include a list of all the Profile Fields you wish included from the data, as well as any additional fields to be added.

**Received –** All valid contacts who received a specific mailing. This **e*xcludes*** all suppressed, soft bounced or hard bounced records.

**Not Received –** The two previous reports can be combined to produce the **Not Received** file. This includes the ***suppressed*** and ***all bounces***. If requested we can also match back the received data to the original data file to include the ‘***Not Uploaded***’ contacts in to the **Not Received** report.

**Opens –** This is a list of all unique openers with a count of the total number of times they opened the email in each format (HTML/Text etc.)

**Clicks –** This is a list of all unique click events (one unique person clicking on one unique link) with a count of the total number of times this occurred in each format (HTML/Text etc.)

**Metrics over Time (SilverPop/DreamMail) –** The Basic Metrics for any mailing can be measure over time. The intervals are fixed (SilverPop 15 mins and DreamMail 1 hour)

**How are these reports used? –**

* The Sent, Received and Not Received files are generally used by the clients to monitor and improve the health of their internal databases. There is no point in them paying us to clean and deploy data than we know will only be blocked by the platform.
* The Openers and Clickers are used to target or suppress people who have responded to a mailing. You may wish to send a specific offer to a group of people who were ‘engaged’ by a similar mailing in the past, or you may wish to only send a second email to those people who did not open the first.
* In cases where the Reporting for a mailing needs to be broken down by Segment Groups.

**Keys to a Good Data Brief**

1. **File Pathing –** For every type of data/reporting work it is very important to provide a very clear file location. This maybe be in the form of a text string for files on an ftp, a file URL on the network or a web URL direct to a platform (It’s is also helpful if we are provided with the folder string).

It is also important to note that on most platforms there are different URLs for the Sending and Reporting of an individual mailing – so while we appreciated the effort, there is no point providing the team with the ‘Sent Mailing’ report when you are briefing in a reporting job.

1. **Dynamic Rules** – If you require any form of reporting on the dynamic content of a mailing it is important to discuss it with the data AND deployment teams prior to deployment. When briefing in data downloads to analyse dynamic content please include a **description of the dynamic rules** used in the mailing. Often the only way for us to report on the dynamic rules is to recreate the logic offline.

4. Snapshot Reports

**Basic Snapshot Report**

Snapshot reports are the most common form of reporting we provide for an individual mailing. Each client has a slightly different template, and certain mailings have specialised templates designed for them. However, they all contain the same key features: Basic Metrics, an Interaction Summary and Click Overlays (or HeatMaps).

**Basic Metrics**

Due to the rapid international growth of email marketing, the associated naming conventions can vary from place-to-place and from company-to-company.

For example:

Metrics for “**Delivered**” may also be referred to as “**Received**” – i.e. the number of messages received by an inbox compared with the total sent.

**Subscribers –** These are the recipients of your campaign. They may be customers, prospective purchasers, or just a group of people who have opted-in (subscribed) to your mailing list.

**Suppressed records** – These are records where the email address is also included in a suppression list; either one created automatically by the Email Platform (ESP) – such as in the case of a ‘hard/ soft bounce’, or where the customer has requested that their email address is unsubscribed from the mailing, i.e. they no longer wish to receive email content from you.

**Delivery Rate**

This metric gives an overview of the amount of messages successfully delivered to your subscriber base. We calculate this by taking the number of emails that were delivered and dividing it by the total number of sent. This figure is presented as a percentage.

**Hard Bounce Rate**

A hard bounce is caused by an invalid or expired email account. This metric will show you the integrity of your data. A high hard bounce rate indicates a necessity to investigate your data collection processes. A consistently high or incremental bounce rate over time could potentially be due to poor data processing, with email addresses that have bounced are not being removed from future mailings in a timely manner. This should always be monitored as it may cause your IP address to be blacklisted, adversely affecting future delivery of all your campaigns.

**Soft Bounce Rate**

A soft bounce might occur because the recipient's inbox is full, so a future message may be delivered or may be forwarded manually by the network administrator in charge of redirecting mail on the recipient's domain. Soft bounces also need to be monitored but the threshold for removing addresses should be more lenient than for hard bounces as it may only be a temporary issue.

**Open Rate**

This, along with the Click Rate, is one of the most important insights into your mailing’s success. Simply, the number of emails opened divided by the number of delivered emails. This figure is presented as a percentage. Therefore, the more times your email is opened, the higher this percentage will be.

**Click Rate**

The Click Rate of an email is a quick overview of the performance of your mailing. The volume of clicks (how many of the URL links were clicked by a customer and how many times) is divided by the volume of customers who received the email (i.e. the number of delivered emails) and presented as a percentage. So if an email has 100 clickthroughs, and is only delivered to 10 people, the Click Rate is 10%.

**Click to Open Rate**

The click to open rate is an easily calculated metric that can add value to your analysis. It is a better indicator of the relevance of your content than clicks or opens alone as it uses the number of opens as a base rather than the number of delivered emails. It measures how effective your email content was in motivating recipients who opened it, to click a link. A low click to open rate may be an indication that your content is not relevant to the subscriber. Since these metric measures clicks as a proportion of opens, it also gives you information on your subject line effectiveness. A vague subject line may produce high opens, but the click to open rate will be low as the opens are not from qualified subscribers and you have wasted their time and damaged their brand by teasing them into opening an email that was not relevant to them.

**Click Quotient**

The click quotient is a measurement of the value of your content as it measures how many times the average clicker clicked on links within a message (clicks per clicker). A click quotient of 2 means that each subscriber who clicked on a message, clicked on an average of twice per message. This provides an indicator of the usefulness of your content and the value you are gathering from your campaigns. A low click quotient suggests that your subscribers are not interacting with your messages, either because they are not interested (the content provided is not relevant or interesting) or because you have not provided sufficient opportunities to interact. Email communications that contains only one links will have a maximum possible click quotient of 1.

The more links you have in an email, the more information you can gather about your subscriber base in order to provide additional customer based information which you use to segment and target your list. The use of landing pages and navigation bars can provide you with valuable information and provide your subscribers with an opportunity to react both functionally and emotionally to your messages.

**Conversion Rate**

Your conversion rate is a measure of the effectiveness of your campaign. Conversion is a generic term referring to the objective of your campaign so can be adapted accordingly. This may be any desired action - purchases, transaction, appointments etc. You may need to integrate other information (such as your website stats or sales data) with your emails to ensure you have the most reliable figures possible. Inevitably, some aspects will not be easily or reliably tracked, such as visits to a store, however coupons or campaign specific phone numbers can be used if it is particularly important for you to measure this metric accurately in an offline environment.

Using clicks as the basis for this metric will provide additional information on your products and services as well as the purchasing process. A high metric indicates that you have communicated your offer well in your email’s contents and the relevant landing page or web page and your purchasing process has been effective in turning these warm leads into sales. A low metric here suggests that your subscribers have shown an interest and interacted with your brand but not actually purchased anything and highlights an opportunity to optimise your subject lines, email content, landing page content and purchasing process.

**Unsubscribe rate**

The unsubscribe rate is the proportion of subscribers that received your email and requested to be removed from your database. Ensuring that best practices are adhered to in respect to data collection and maintenance, and providing relevant, value added content should maintain a low unsubscribe rate. A high unsubscribe rate suggests that you need to focus more time and resources on these factors.

Certain industries may have inherently high unsubscribe rates based on the lifecycle of the product/service E.g. a subscriber who signed up to receive daily rental properties from a real estate agency will be likely to unsubscribe when they have found a property. In this type of situation, particular attention should be made to making the unsubscription process fast and easy and overall trends should be monitored, rather than actual values.

A low unsubscribe rate combined with a deliverability problem or high level of SPAM complaints indicates that your unsubscribe link is not sufficiently prominent (subscribers will generally look for the link at the bottom of the email) or does not function effectively. You should make it easy for subscribers to let you know when your messages are no longer relevant to them, in order to reduce the use of the “this is spam” button to unsubscribe.

**What is the difference between unique click/open rates, and total open/click rates?**

A “unique” rate and a “total” can often be similar, and in a minority of situations can even be the same. However, while these two sets of metrics are often confused, they are very different.

A **unique open rate** is calculated by identifying a unique number of customers who have opened the mailing. Only a subscriber’s first interaction is taken into consideration when presenting this metric.

A **unique click rate** is calculated by identifying a unique number of customers who have clicked a link in the mailing. Only a subscriber’s first interaction is taken into consideration when presenting this metric.

**Further Information**

The passages that follow constitute relevant advice regarding metrics.

Firstly, this from SilverPop:

*“By measuring response to your engagement marketing program, you can:*

*• Improve your understanding of customers and prospects. When you understand the reasons behind marketing response, you can send more timely and relevant messages, cultivating powerful relationships and increasing ROI.*

*• Defend your budget and your worth. Accountability has become a marketing watchword. Metrics help you to make the case for your initiatives by proving the ROI of your efforts. They also help you hone your efforts, enabling you to deliver maximum effect at minimal cost.”*

While we base our reporting on these main sets of metrics, it is important to consider that these are not ‘hard and fast’ figures for analysing the success of your campaigns.

See this passage from an interview with our Head of Campaign Management, Claire Rollinson:

*“Open and click rates… can lead you astray. We prefer to focus on hard numbers. So for example you have a list of 100,000 subscribers who you send one email a month to and your average open rate is 20% and click rate 7% (20,000 opens and 7000 clicks). You decide to send 2 emails a month to your list. Your open rate and click rates will almost certainly fall to say 17% and 5% respectively. So you could conclude that your tactic has failed because sending more email has resulted in a drop of around 15% in your open and click rates. Or you could conclude that increasing your mailing frequency to 2 a month is a huge success because you are getting 34,000 opens and 10,000 clicks.”*

**Interaction Summary**

Put simply, any way that the email recipient connects with the content of the email is an “interaction”. If your subscriber does not open the email or click any of the URL links, they have had no interaction with the mailing. Any interaction the customer has will contribute towards the various metrics explained in this guide.

The Interaction Summary breaks down all the subscribers that were sent a mailing in to 4 categories.

Subscribers who:

* Did **Not Receive** the mailing
* Received but did **Not Open** the mailing
* **Opened** but did **Not Click**
* **Clicked** any URL in the mailing

**Click Overlays/Heatmaps**

Click Overlays or Heatmaps display the clicks and percentage of the total clicks for each individually tracked link on the HTML template. The difference between the Click Overlay and the Heatmap is simple – Heatmaps always use a red (hot) to blue (cold) colour system, but the overlays use green (good) to red (bad). Alchemy Worx’s internal system always produces Click Overlays but it’s important to be aware of the difference because some of the platforms produce Heatmaps that the client has access to.

5. Activity Reports

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