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\_\_ALS—Full List\_) (\_Opened\_ \_Joined\_)

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”

Segment 1 includes the intersection of the ad names and the full list and excludes the non-donors who haven’t opened an email in 90 days. So, those who are donors to ads and have opened something recently

SEGMENT 2: ALS – Ad Non-Donors

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

Segment 2 includes the intersection between the full list, ad names, and non-donors. It excludes anyone who hasn’t opened something recently. So we will get ads who have not donated but have opened an email in the past 3 months. I feel like the triple intersection might be wrong because it doesn’t follow the pattern of 1 and 3, but I’m not sure.

SEGMENT 3: ALS – Non-ad Donors

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

Segment 3 includes the intersection of full list and the donors while excluding the ad names and those who haven’t opened an email in 90 days. So we will get donors who aren’t ad names or those donors who haven’t answered an email in 90 days

SEGMENT 4: ALS – Non-ad Non-Donors

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

Segment 4 includes the full list, but excludes the donors and anyone who hasn’t opened an email in 90 days. This one is wrong because there is nothing about the ad names in the query. I would add a union of the ad names to the exclusion list.

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.

B > A > C

B != C

B == A or A == 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

Some of those in B will not receive the email because version 1 only sends to those that are VIP and donors.

Day 2:

Version I: INCLUDE: Group A Group C

EXCLUDE: Group B

Version II: INCLUDE: Group B

EXCLUDE: Group A Group C

This one seems straightforward. The donors receive the same email as the public.

Day 3:

Version I: INCLUDE: Group B Group A

Version II: INCLUDE: Group C

This one is bad because it doesn’t have any exclusions. There are some people in all three groups so those people will receive perhaps 3 emails if the way the list is formulated includes copies. Someone who is VIP or a donor and in the general public will definitely receive both versions of this email.