**Mail Chimp Automation Solution Overview**

**Change Log**

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date | Description | Author |
| 0.1 | 21/02/2013 | Initial version | Stas |
| 0.2 | 25/02/2013 | Added analytics and templates ID’s to each campaign | Stas |
| 0.3 | 28/02/2013 | Added Subjects to each campaign, added change log | Stas |
| 0.4 | 03/03/2013 | Updated to use v1.3 of MailChimp API, only one list, multiple groups added |  |

**Background**

There are customers who didn’t complete the registration process or after receiving a loan offer didn’t take it. Those customers receive an email that offers them to finish the registration and take the loan. The process today is performed manually by retrieving the new customers that didn’t finish the process from the DB, adding them to mail list in Mail Chimp online web form and sending a Campaign (predefined email) by customers type (by step of registration he/she stopped) on daily basis.

**Goal**

Develop a tool to manage the customers` lists automatically by using Mail Chimp API class library.

**Approach**

• The tool will retrieve 3 lists of customers on daily basis from the DB and add them to Mail Chimp List Ezbob\_Customers to 3 Groups accordingly:

Group 1: OnlyRegisteredEmail– customers who finished only the first step of the registration (entered their email).

Group 2: OnlyRegisteredStore– customers who finished the second step of the registration (entered a valid store).

Group 3: DidntTakeLoan– customers who finished the whole registration process and got a loan offer by didn’t take it 24-48 hours after an offer.

• The tool will send appropriate 9 Campaign (predefined email) for each Segmented List by Group and Date on daily basis by three segmentation rules:

• Day After

• Three Days After

• Week After

**Specifications & Requirements**

• Rules:

• Customer finished the first step - entered only the email - will receive email the next day after registration, 3 days after registration and a week after registration.

• Customer finished the second step – entered a store – will receive email the next day after registration, 3 days after registration and a week after registration with approximate loan offer regarding his/her store value.

• Customer finished the registration and received a loan offer and didn’t take one will receive email 2 days, 4days and 8 days after a loan offer, reminding him to take it.

• Db:

3 Stored Procedures to retrieve the customers by type by day specified (receive

between from and to date parameters:

• **GetFirstStepCustomers @FromDate @ToDate** – Customers without Name and

without Stores. Retrieve: Email.

• **GetSecondStepCustomers** **@FromDate @ToDate** – retrieve all customers with

registered stores, without Name, positive annual store income more than 8000 £ and

propose an approximate

loan of 6% of the annual income rounded to hundreds. Retrieve: Email, approximate

loan offer.

• **GetLastStepCustomers** **@FromDate @ToDate** – retrieve customers who got loan offer and didn’t take a loan in 24-48 hours after an offer (max approved not null , sum of loans null) . Retrieve: Email, first name, last name, loan offer.

• Gui:

Currently only Console Automatic Application will be developed without user configuration options.

TBD

• Logic:

• Each day at 15:15 UK time will retrieve from DB 9 lists of customers (one for each day parameter and each type)

• For each such list that is not empty will subscribe the customers to according List with according List Fields values. Will create segmented campaign with according filtering condition and will send the campaign.

• MailChimp Api:

**Lists**:

|  |  |
| --- | --- |
| ID | Name |
| 0371913807 | Ezbob\_Customers |

**Groups**: Name: SignUpProcess Id: 8209

|  |
| --- |
| Name |
| OnlyRegisteredEmail |
| OnlyRegisteredStore |
| DidntTakeLoan |

**Templates**:

|  |  |
| --- | --- |
| ID | Name |
| 39861 | EZBOB Didnt Take Offer Day After |
| 39861 | EZBOB Didnt Take Offer Three Days |
| 39861 | EZBOB Didnt Take Offer Week |
| 44149 | EZBOB Email Regitered Day After |
| 39813 | EZBOB Email Regitered Three Days |
| 44165 | EZBOB Email Regitered Week |
| 39833 | EZBOB Regitered Store Day After |
| 44237 | EZBOB Regitered Store Three Days |
| 44245 | EZBOB Regitered Store Week |

**Subjects**:

|  |  |
| --- | --- |
| Promo | Subject |
| Registered Email Only - 1 Day | Fund your business with EZBOB |
| Registered Email Only - 3 Days | You are less than 10 minutes away from cash |
| Registered Email Only - 7 Days | Get your business financed today |
| Registered Store Only - 1 Day | EZBOB has a £\*|LOANOFFER|\* loan to offer you |
| Registered Store Only - 3 Days | You're pre-qualified for approximately £\*|LOANOFFER|\* |
| Registered Store Only - 7 Days | Your business is eligible for a £\*|LOANOFFER|\* loan |
| Didn’t Take Loan - 1 Day | You were recently approved for a £\*|LOANOFFER|\* loan! |
| Didn’t Take Loan - 3 Days | EZBOB has £\*|LOANOFFER|\* available for you today |
| Didn’t Take Loan - 7 Days | EZBOB helps your business to grow with a £\*|LOANOFFER|\* loan |

**Campaigns**:

Each day creating 3 new campaigns for 3 templates using the following Parameters:

**from\_email**: customercare@ezbob.com

**from\_name**: EZBOB

**subject**: [*Subject*]

**template\_id**: [*TemplateID*]

**list\_id**: [*ListID*]

**title**:

• FirstStepCustomers: EZBOB Registered Email + [*Condition*] + [*Date*]

• SecondStepCustomers: EZBOB Registered Store + [*Condition*] + [*Date*]

• LastStepCustomers: EZBOB Didnt Take Offer + [*Condition*] + [*Date*]

**analytics**: google

**Segments and List Fields:**

|  |  |  |
| --- | --- | --- |
| Field | Type | Is Mandatory |
| EMAIL | Email | Yes |
| FNAME | Text | Only in Ezbob\_Didnt\_Take\_Loan |
| LNAME | Text | Only in Ezbob\_Didnt\_Take\_Loan |
| LOANOFFER | Number | Only in Ezbob\_Didnt\_Take\_Loan and Ezbob\_Store\_Owner |
| DAYAFTER | Date | No |
| THREEDAYS | Date | No |
| WEEK | Date | No |
| Grouping | Group | Yes |

• Classes and public methods:

• Constants – contains constant definitions for DB and Mail Chimp API such as connection string, stored procedures names, lists IDs, templates IDs, etc.

• DBCommands – static class with functions to retrieve data from DB.

• getSubscriberList – retrieve list of subscribers by type

• MailChimpApiControler – static class to perform Mail Chimp operations

• listBatchSubscribe – adds subscribers list to specific list

• CreateSegmentedCampaign – creates campaign for specific list filtered by specific condition for specific template. Function returns campaigns id.

• SendCampaign – sends the campaign.

• Subscriber – class with subscriber properties: email, group, first name, last name, loan offer, DayAfter, ThreeDays, Week.

• Day – class with properties: TemplateID, Condition, Subject.

• Campaign – class with campaign properties: ListID, List of Day, CampaignType, Title.

• Campaigns – class with list of Campaign .

• InitCampaignsList – inits the campaign list with 3 for each list and template.