E-Mail Campaign Manager 1.3.2 for Sitecore CMS 6.5

Marketer's Guide

User guide for marketing analysts and business users

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Chapter 1

Introduction

This document is designed for end users, and provides detailed information on how to create and edit a message, carry out an e-mail campaign and analyze its Sitecore Engagement Analytics reports. For more detailed technical information about the module, read the *ECM Administrator's and Developer's Guide*.

The E-mail Campaign Manager lets you carry out large e-mail campaigns and analyze their results so you can continuously optimize your campaign results. With this module you can:

- Create and manage e-mail messages with native Sitecore authoring tools.
- Find the best e-mail subject messaging and design using Sitecore A/B testing tools.
- Get detailed Sitecore Analytics reports with user behavior tracking across e-mails and the Web site.
- Utilize e-mail subscriber lists from CRM and other enterprise applications.
- Manage self-service subscription forms on your Web site.

This document contains the following chapters:

- **Chapter 1 – Introduction**
- **Chapter 2 – E-Mail Campaign Quick Walkthrough**
- **Chapter 3 – E-Mail Campaign Manager Tutorials**
- **Chapter 4 – Using E-Mail Campaign Reports**
- **Chapter 5 – Reports Reference**

1.1 Fundamental Concepts

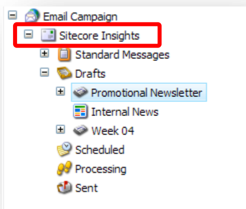
This section contains a list of definitions for important terms and concepts used throughout the E-Mail Campaign Manager documentation.

Message

A message is an e-mail that is sent to a set of recipients.

Target Audience

A target audience is an item that lets Sitecore users create and dispatch messages related to a specific topic. For instance, in the following screenshot, *Sitecore Insights* is the target audience:



Each target audience is associated with one list of subscribers. When a visitor uses a form on a Web site to subscribe for messages about the associated topic, they are added to the list of subscribers for the target audience.

Each target audience item contains a set of subfolders that are used to store message drafts, messages being processed, and messages that have already been sent. Before you start working with messages, you must choose a target audience.

Target audiences are stored as children under a manager root.

Manager Root

A manager root item stores one or more target audiences. A Web site generally has one associated manager root.

Subscriber

A subscriber is an individual with an associated e-mail address that receives messages from one or more target audiences.

Personalization

Personalization is the process of including recipient specific information in the message sent to each subscriber.

For instance, you can insert this line in the beginning of the message:

```
Hello $name$!
```

When the message is sent, the `$name$` token is replaced with the subscriber's name.

Message Subject Test

A good message subject catches your eye and you tend to read that message first even if you have a long list of unread messages.

The Message Subject A/B Test lets you find the subject that entices the most recipients to open the e-mail, thereby increasing the return on investment (ROI) of the message.

In a message subject test, you send several versions of a message, each containing a different subject, to a limited set of subscribers. After the message has been sent and the subscribers have had time to review and respond to the message, you can compare the conversion rates associated with each variation of the message. You can then identify the most effective subject and send it to the remainder of the list of subscribers.

Conversions and Goals

A conversion occurs when a visitor to a Web site performs a desired action, such as, purchasing a product or signing up for a conference. Marketing departments often design e-mail campaigns to entice the recipients to visit a Web site and complete some specific actions. Messages with a higher number of conversions have a better (ROI).

In Sitecore Analytics, goals represent the desired actions which, when taken, correspond to conversions.

Message Engagement Plan

Engagement plans allow you to control some of the specific ways in which your website interacts and communicates with the visitors to your website.

The ECM uses the message engagement plan to to manage the sending process and track the behavior of the recipients of the message.

For more information about Engagement Plan, see *Engagement Automation Cookbook*.

Engagement Value

The level of commitment exhibited by your customer is the secret ingredient of quality called the Engagement Value. Each visit produces an engagement value calculated from all the resources a visitor consumes during one or multiple visits. Resources consumed can include goals, campaigns or forms submitted.

For more information about the Engagement Value, see *Executive Dashboard Cookbook*.

Relevance (Value per Visit)

Relevance measures the value per visit of your website visitors. If your website has more relevance to your customers then your marketing effectiveness increases.

Formula:

```
Relevance = Value/Visits
```

Chapter 2

E-Mail Campaign Quick Walkthrough

This chapter walks through the activities involved in a typical e-mail campaign from the perspective of Maria, a marketing analyst. The chapter describes the most common tasks she must perform, such as, creating new messages, sending messages, and reviewing reports.

In some cases, Maria checks the effectiveness of different message subjects on a small set of subscribers before choosing the best subject to send to the majority of the subscribers on the list.

This chapter contains the following sections:

- Considering the Goals of a Message
- Creating a New Message
- Sending a Message
- Monitoring the Dispatch Process and Visitor Behavior
- Analyzing the Value of the Message
- Performing a Message Subject Test

2.1 Considering the Goals of a Message

Let me introduce Maria.

Maria is a marketing analyst. From time to time, her department launches various new services on their company's Web site. Maria's job is to attract customers to these new services, monitor their behavior and analyze the value that the services bring. She uses the E-mail Campaign Manager to send messages to the lists of subscribers and spread the news about the new services.

Whenever Maria sends a message, she has the following things set up:

- A set of goals that she's hoping the message will help her achieve.
- Engagement value points set for each goal.

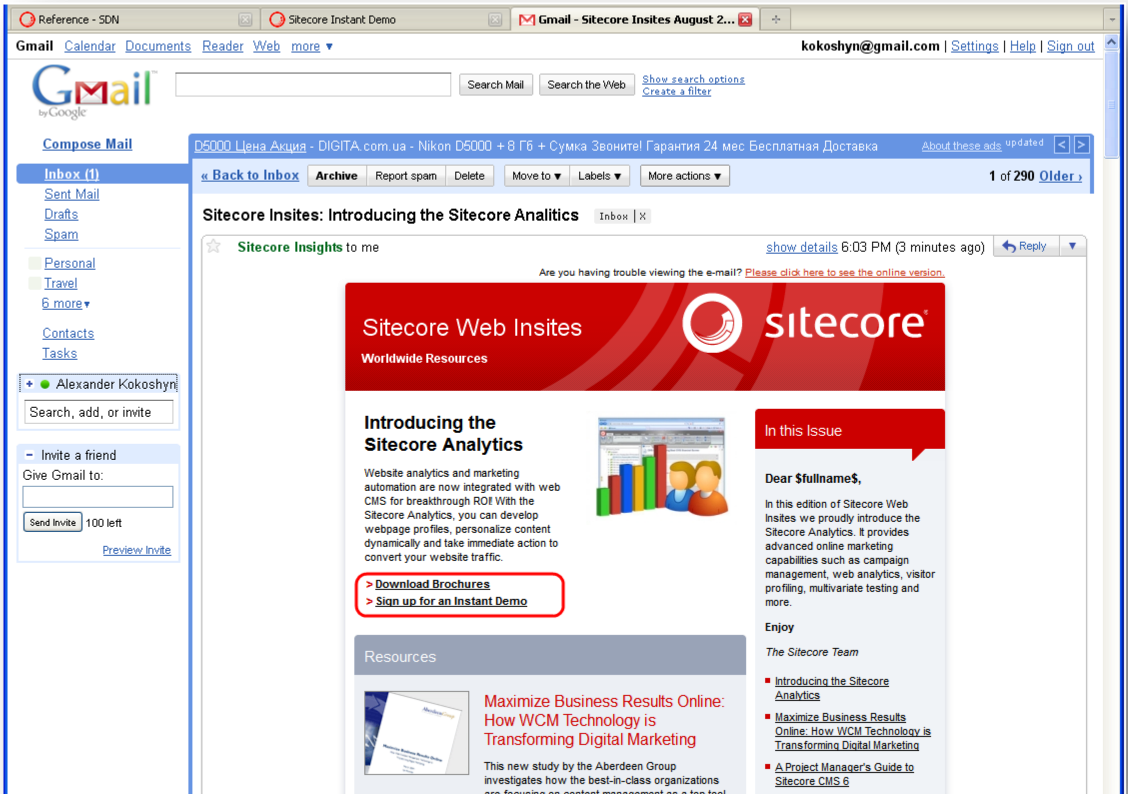
For example, in general, Maria would like people to sign up for an instant demo, which people can do by visiting the Web site and submitting some information on a form. This has value for her organization because a high percentage of people who attend instant demos eventually make a purchase.

Maria would also like website visitors to download some brochures. When a visitor downloads a brochure they gain some engagement value points. However, downloading a brochure generates fewer engagement value points than signing up for a demo.

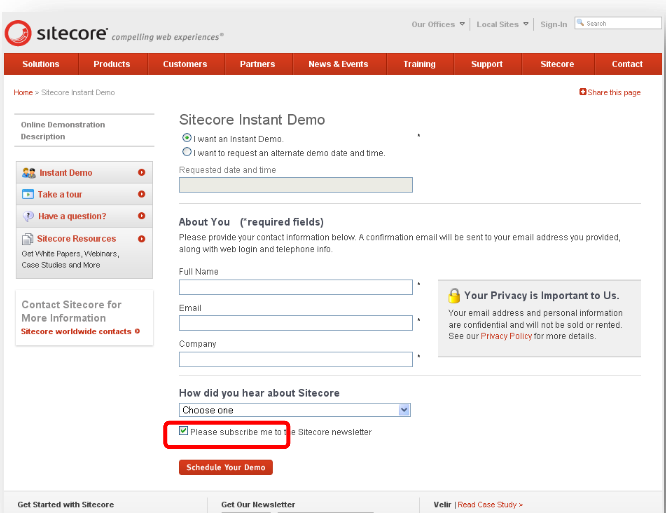
Maria hopes that the message she sends will increase the number of people who sign up for an instant demo. The more people who sign up for an instant demo, the higher is the value of the campaign and, consequently, the return on investment (ROI) of the message.

Therefore, when Maria creates the message, she includes links back to appropriate pages on the Web site that will help encourage recipients to sign up for an instant demo and complete her goals.

For example, here is a message which includes a link to the instant demo form on the Web site.



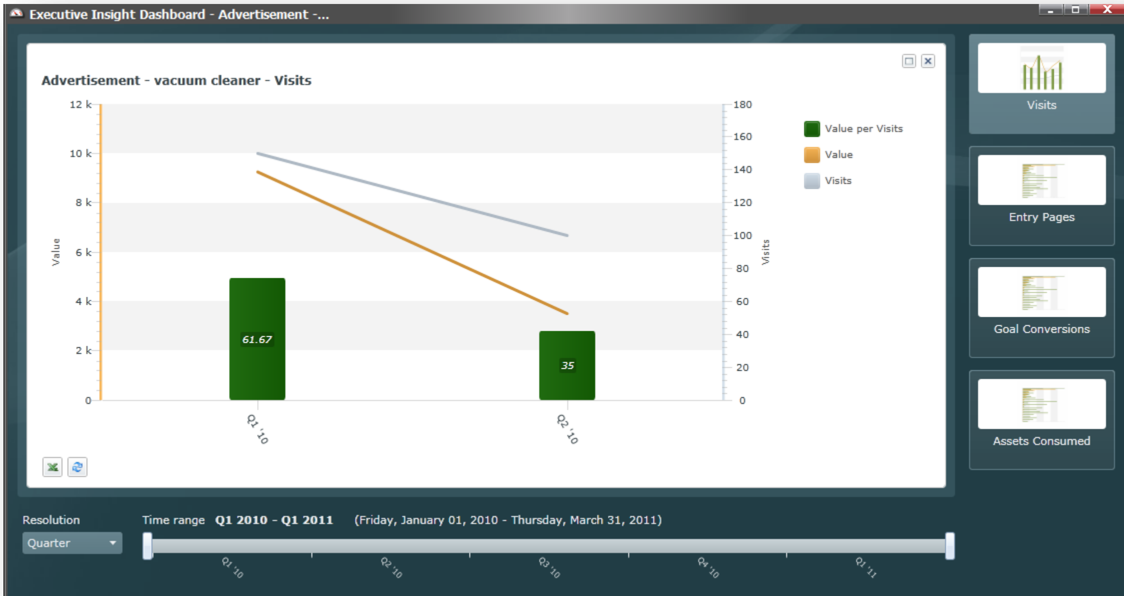
When a recipient clicks on the *Sign up for an instant demo* link, they see a page like this:



When the recipient successfully completes the form and clicks the **Schedule your Demo** button, Sitecore registers this as a conversion and the current visit accumulates a certain value.

When Maria considers that enough time has passed for subscribers to react to the message, she opens the Dashboard reports to analyze the value of her campaign.

For instance, in the Visits report she sees the volume of traffic and the value points that were accumulated.



2.2 Creating a New Message

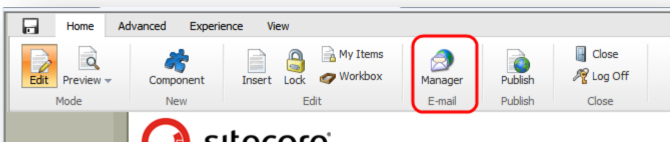
Before creating a new message, Maria decides who should receive the message and selects an appropriate target audience. Later, Sitecore sends the message to all of the subscribers who belong to this target audience. In this case, Maria selects the *Sitecore Insights* target audience.

2.2.1 Selecting an Appropriate Target Audience

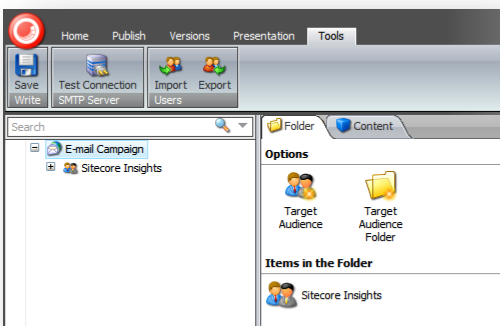
Before Maria can create a message, she needs to select a target audience.

To select the appropriate target audience:

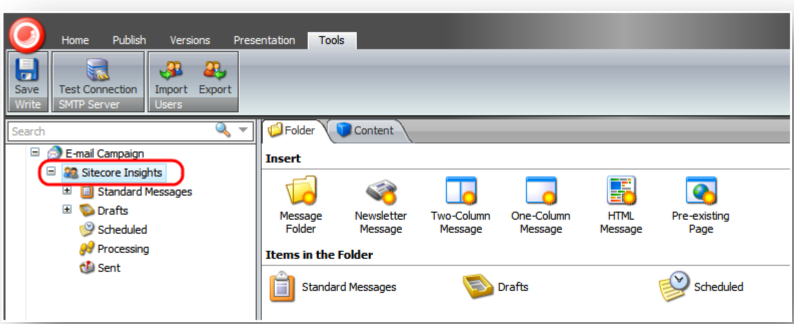
1. Maria opens the **Page Editor**.
2. On the ribbon, on the **Home** tab, in the **E-mail** group, she clicks **Manager**.



Sitecore starts the **E-Mail Campaign Manager**.



3. In the content tree, she selects the *Sitecore Insights* target audience.

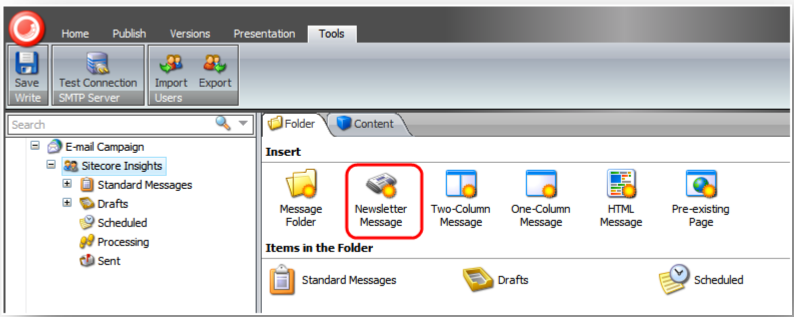


2.2.2 Creating the Message

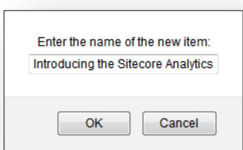
Now that Maria has selected a target audience, she can start to create the actual message that she wants to send.

To create the message:

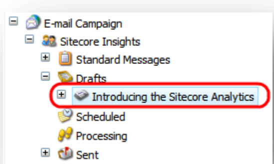
1. Maria selects the *Sitecore Insights* target audience and in the right-hand pane, on the **Folder** tab, she clicks **Newsletter Message**. Maria might use any other message type but **Newsletter Message** contains pre-defined design that meets her requirements.



2. In the dialog box, she enters the name of the new message, for example *Introducing the Sitecore Analytics* and clicks **OK**.



   Sitecore then creates the new message in the *Drafts* folder.

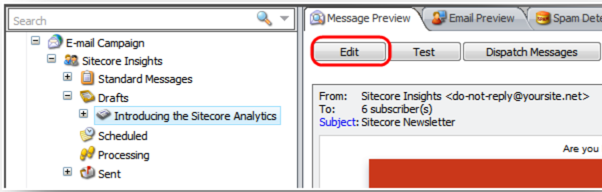


Now that Maria has created the message item, she can edit the text in the message.

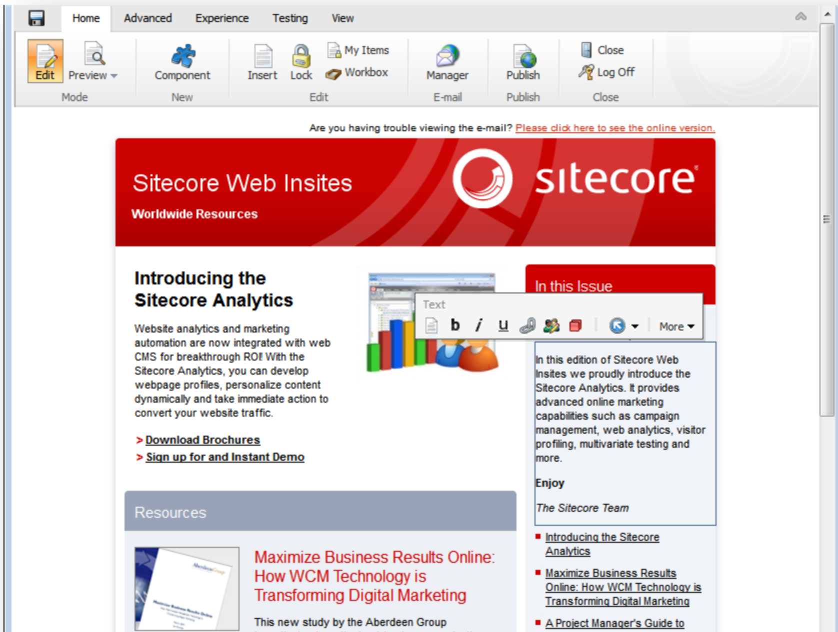
To edit the message:

1. Maria selects the message in the *Drafts* folder.

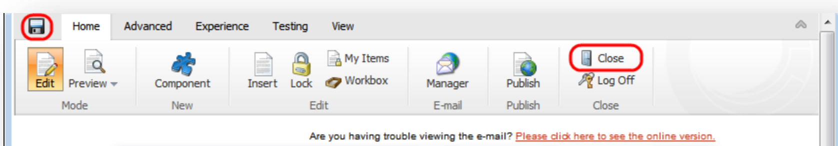
2. On the **Message Preview** tab she clicks **Edit** to open the message in the **Page Editor**.



3. She edits the message so that it looks like this:



4. She clicks the **Save** button and then clicks **Close** at the top of the page.



5. As her message contains links to images she has just created and they must be published before recipients can see them, Maria publishes the site using the *Incremental Publish* option.

The message is now ready to be sent.

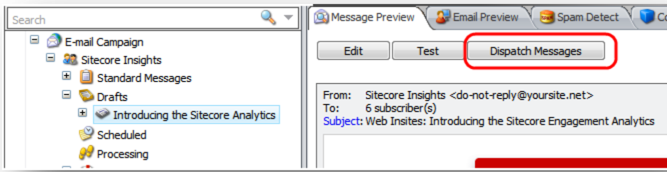
Note
When Maria clicks **Edit**, the editor opens in a new window. When she clicks **Close** in this window, Sitecore does not close the window automatically, so Maria closes it manually as she would close any other browser window. To see the changes that she has made to the message, she clicks the message in the content tree to refresh the **Preview** tab.

2.3 Sending a Message

Now that Maria has created a message, she can send it to subscribers.

To send the message:

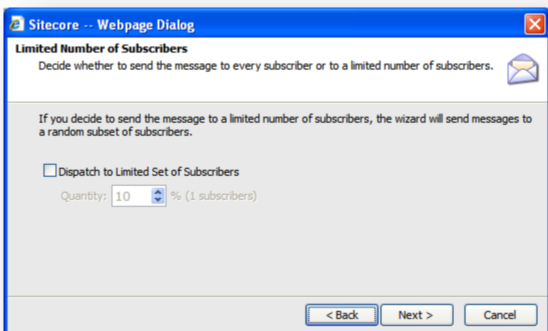
1. Maria selects the message.
2. On the **Message Preview** tab, she clicks **Dispatch Messages**.



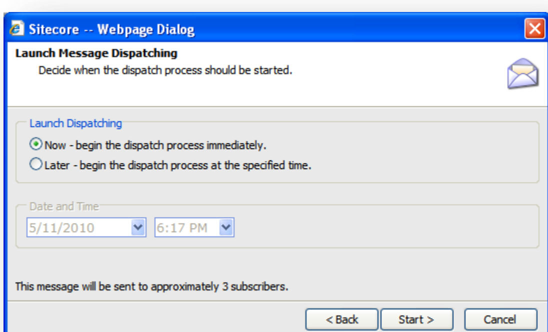
Sitecore starts the **Dispatch Message** wizard.

Maria follows the **Dispatch Message** wizard.

3. Maria decides to skip the **Limited Number of Subscribers** dialog box and send the message to all subscribers from the list right away. She clicks **Next**.



4. In the **Launch Message Dispatching** dialog box, Maria selects the **Now** option and clicks **Start**.



The message sending process starts to run in a background. The message being processed is placed in the *Processing* folder. When the dispatch is completed, the message is moved to the *Sent* folder.

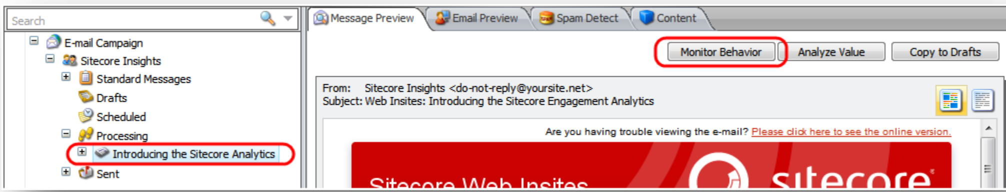
2.4 Monitoring the Dispatch Process and Visitor Behavior

The ECM uses the message engagement plan to manage the sending process and track the behavior of the recipients of the message.

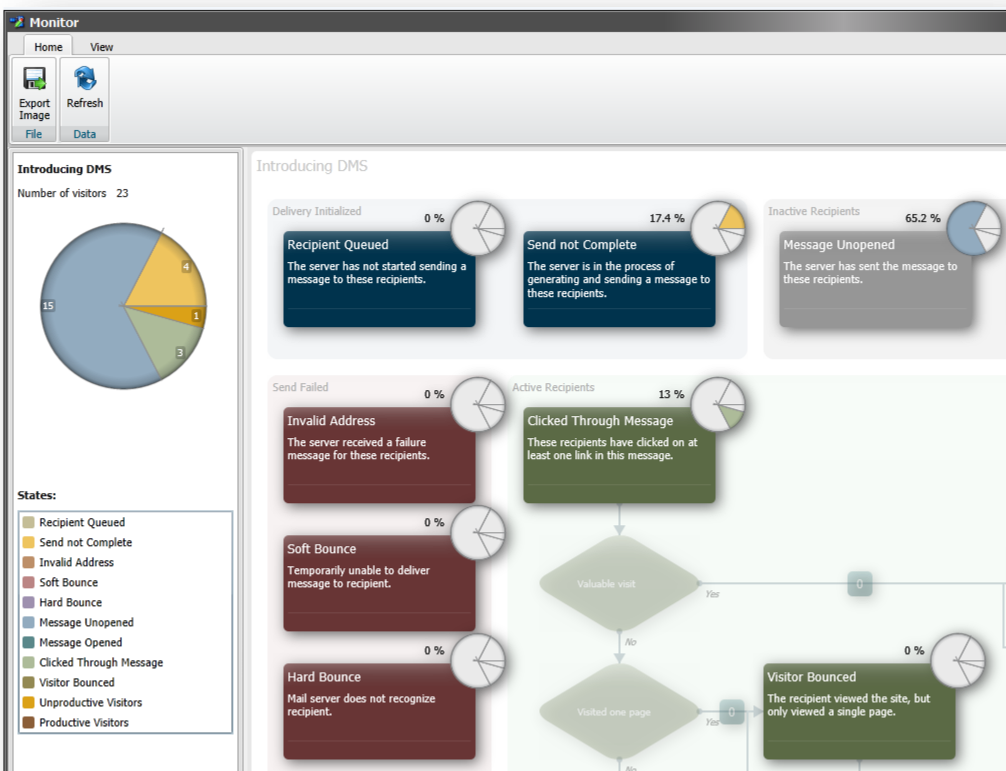
To monitor how the dispatch process is going and how visitors behave, Maria opens the Engagement Plan Monitor.

To open the Engagement Plan Monitor:

1. Maria selects a target audience.
2. In the *Processing* or the *Sent* folder, she selects a message.
3. She clicks **Monitor Behavior** to monitor the subscriber behavior.

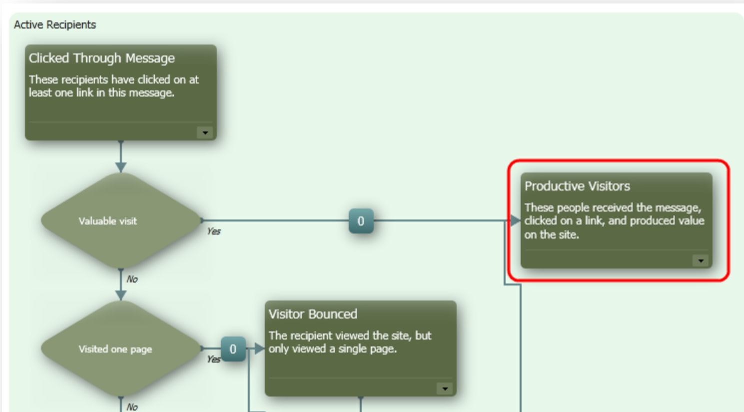


The module opens the engagement plan monitor.



For instance, Maria wants to know how many subscribers have already clicked links in the message. To find this out, she looks at the **Clicked Through Message** state. If the visitor clicks a link in the message, the module puts the visitor in this state.

Maria gives subscribers some time to see the message and react to it. As time passes, recipients perform valuable actions on the website, for example by converting a specific goal, like *Downloading a Brochure* and the engagement plan moves them to the **Productive Visitors** state.



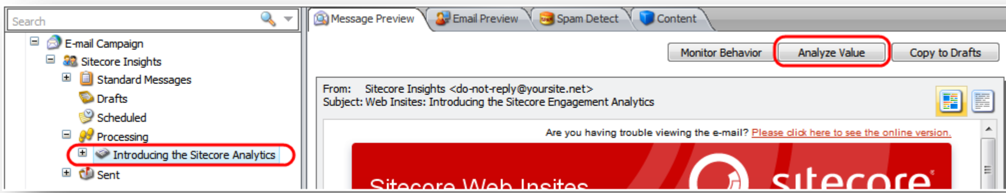
Maria uses the **Engagement Plan Monitor** to see when the majority of visitors have reacted to the message. She looks at the **Inactive Recipients** and **Active Recipients** groups. She wants to investigate how effective the Email Campaign Message has been and analyzes the value of the message using the **Engagement Analytics** reports.

2.5 Analyzing the Value of the Message

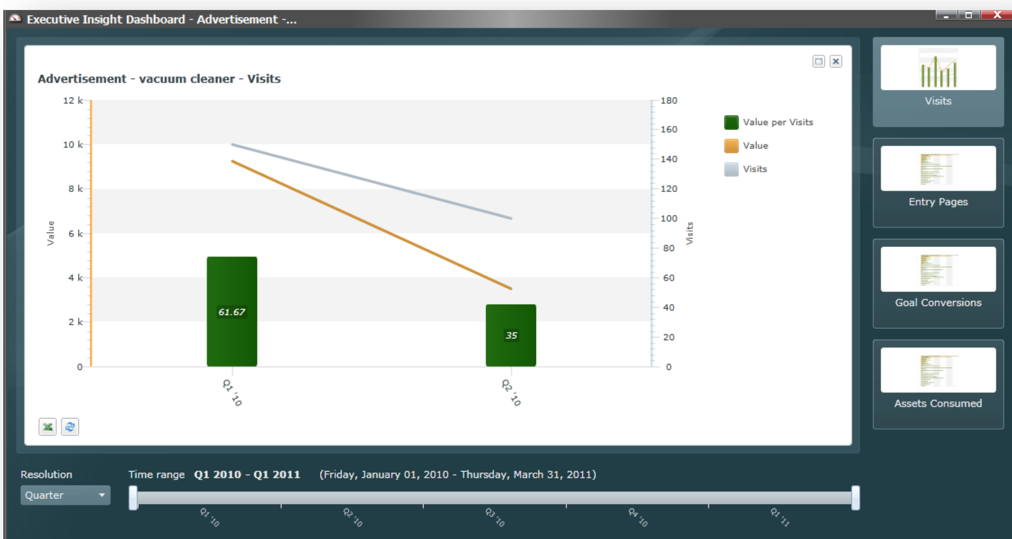
When Maria has verified that a significant amount of subscribers have reacted to the message, she analyzes the value of the message using the **Engagement Analytics** reports.

To view the reports:

1. Maria selects a target audience.
2. In the *Processing* or the *Sent* folder, she selects a message.
3. She clicks **Analyze Value** to view the engagement analytics reports related to the message.



The module opens the Executive Insight Dashboard with the reports.



The Executive Insight Dashboard application provides Maria with marketing reports of an email campaign's effectiveness.

For instance, in the **Visits** report she sees the volume of traffic the campaign generated and the engagement value points that were accumulated in the current campaign.

2.6 Performing a Message Subject Test

A message subject A/B test helps Maria identify the subject that entices the most recipients to open the e-mail, thereby increasing the effectiveness and ROI of a given message.

With the message subject test, Maria can send a message with multiple variations of the message subject to a limited set of subscribers. After it has been sent and the subscribers have had time to read and respond to the message, Maria can compare the relevance associated with each variation. She can then choose the best subject to send to the remainder of the list of subscribers.

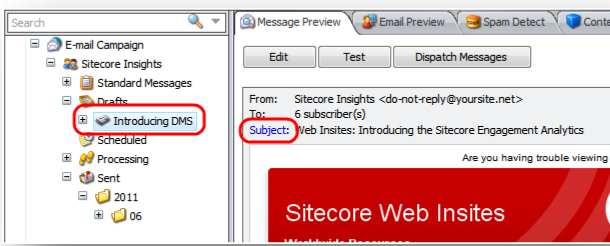
In this section, Maria carries out a message subject test, reviews the Subject Test report, and then completes the dispatch operation using the subject that performs best.

2.6.1 Configuring Multiple Subjects

Maria composes three different subjects to test. Now she needs to configure the module to use these subjects.

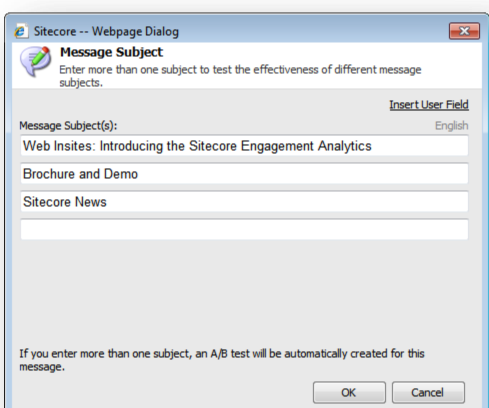
To configure multiple subjects:

1. Maria selects the message in the *Drafts* folder.
2. On the **Message Preview** tab, she clicks **Subject**.

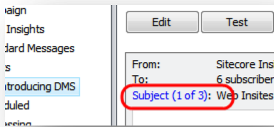


   Sitecore starts the **Message Subject** dialog box.

3. In the **Message Subject** dialog box, in the **Message Subject(s)** fields, Maria enters the subjects she wants to test and clicks **OK**.



Now the subject A/B test is configured for this message. The **Subject** link changes to **Subject (1 of 3)** on the **Message Preview** tab.



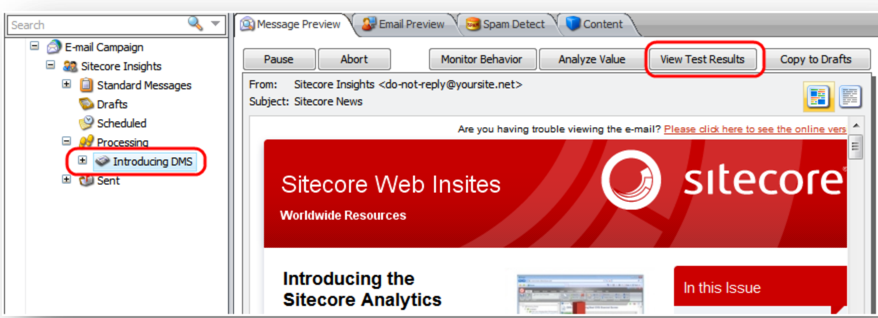
4. On the **Message Preview** tab, Maria clicks **Dispatch Messages**. Sitecore starts the **Dispatch Message** wizard.

5. In the **Limited Number of Subscribers** dialog box, she selects the **Dispatch to Limited Set of Subscribers** check box and in the **Quantity** field specifies the percentage of subscribers that she wants to use in the test. Maria clicks **Next** to continue.

The subscribers for this subset are chosen randomly. The actual number of subscribers in the subset is shown in brackets.

6. In the **Launch Message Dispatching** dialog box, Maria selects the **Now** option and clicks **Start**. Sitecore sends messages to the subset of subscribers.

   Sitecore moves the message to the *Processing* folder.



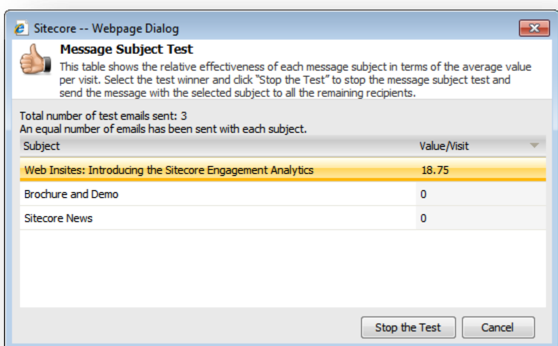
2.6.2 Reviewing the Message Subject Test Report

Maria gives the subscribers some time to read the message and react to it. After that she views the Message Subject Test report.

To view the Message Subject Test report:

1. Maria selects the message in the *Processing* folder.
2. On the **Message Preview** tab, she clicks **View Test Results** to view related reports.

Sitecore opens the **Message Subject Test** dialog box.

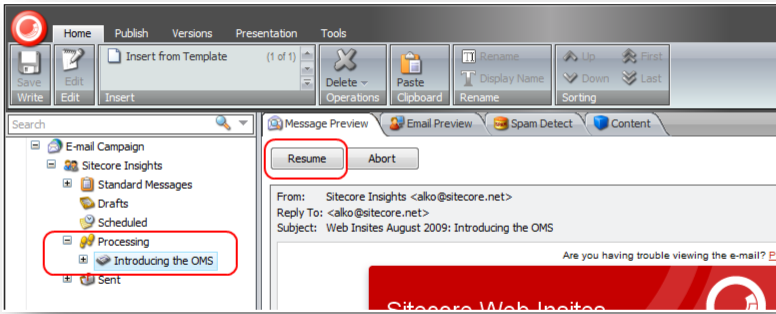


In this report, Maria selects the test winner and clicks **Stop the Test** to stop the message subject test. Then she clicks **Resume** to send the message with the selected winning subject to all the remaining recipients.

2.6.3 Complete the Dispatch Process with One Subject

When Maria has selected the subject that best suits her goals, she can send the e-mail with this subject to the rest of the subscribers.

On the **Message Preview** tab, Maria clicks **Resume** to continue the sending process.



Chapter 3

E-Mail Campaign Manager Tutorials

This chapter contains tutorials which describe how to perform various actions using the features of the ECM module.

This chapter contains the following sections:

- Using the E-Mail Campaign Manager

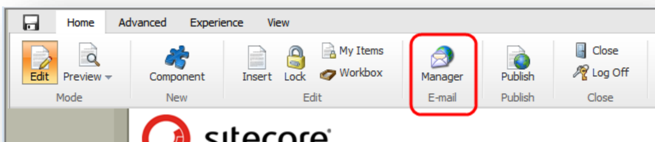
3.1 Using the E-Mail Campaign Manager

This section describes how to perform a number of the most common tasks in the E-Mail Campaign Manager.

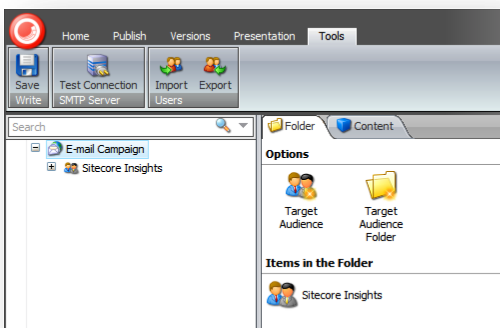
3.1.1 How to Access the E-Mail Campaign Manager

To access the **E-Mail Campaign Manager** from the **Page Editor**:

1. Open the **Page Editor**.
2. In the ribbon, on the **Home** tab, in the **E-Mail** group, click **Manager**.



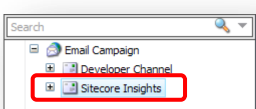
Sitecore starts the **E-Mail Campaign Manager**.



To open the **E-Mail Campaign Manager** from the **Sitecore Desktop**, click **Sitecore**, **All Applications**, **E-Mail Campaign**, **E-Mail Campaign Manager**.

How to Select a Target Audience

In the **E-Mail Campaign Manager**, you can see the target audiences under the manager root:

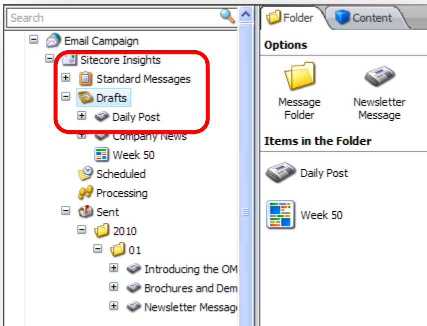


3.1.2 How to Find a Message

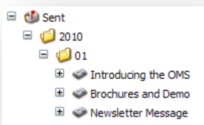
The messages are stored in folders under the target audience items.

To find a message:

1. In the **E-Mail Campaign Manager**, select a target audience item.
2. In the *Drafts* folder, look for your message.



You may also want to find a message that you have sent previously. Sent messages are stored in the *Sent* folder and they are organized in subfolders by date:



Messages that are being processed are stored in the *Processing* folder. Messages that are used in a message subject test are stored in this folder as well.

Messages that are scheduled for dispatching at a later time are stored in the *Scheduled* folder.

3.1.3 How to Preview a Message in Different Clients

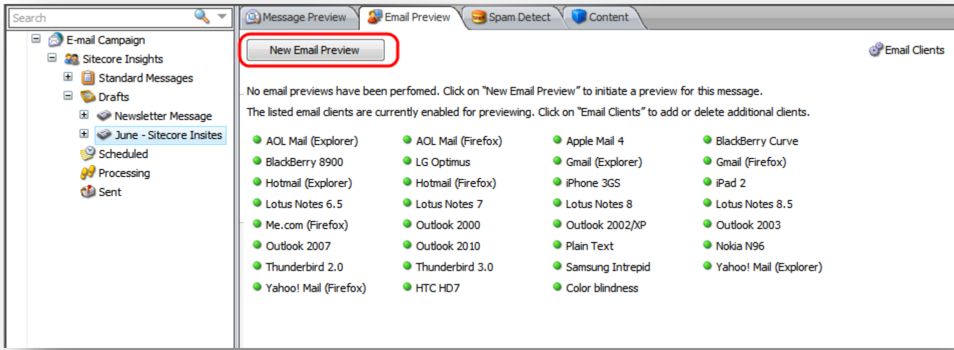
The ECM allows you to see how your email message looks in different email clients.

Note
To be able to use this functionality, you must sign up for the Email Preview service in the Sitecore App Center. For more information about this, see the document *Getting Started with Sitecore App Center*.

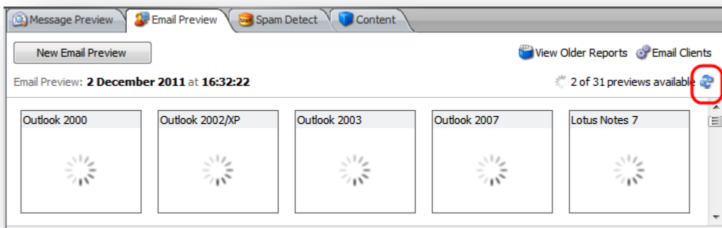
To preview how your email looks in different clients:

1. In the *Drafts* folder, select a message.

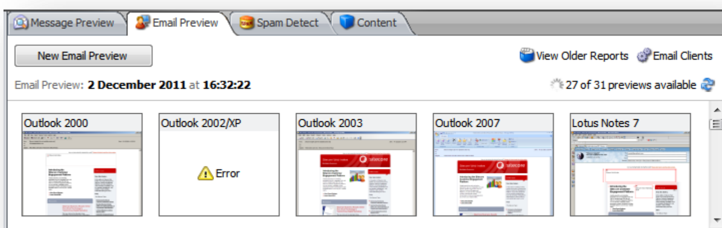
2. In the **Email Preview** tab, click **New Email Preview**.



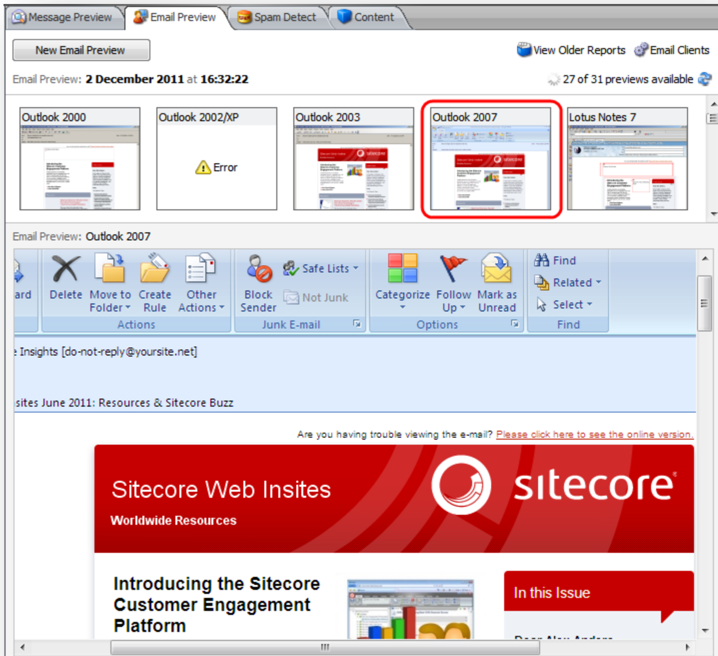
When you click **New Email Preview**, the module requests the preview images through the SAC. Generating preview images for all the selected clients can take some time. To view the images that are generated so far, click the **Refresh** button:



When you click it, the images that are generated so far appear:



3. Click an image to view it in full size:

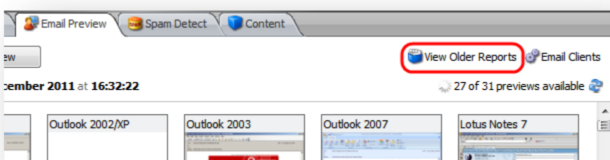


How to View Older Reports

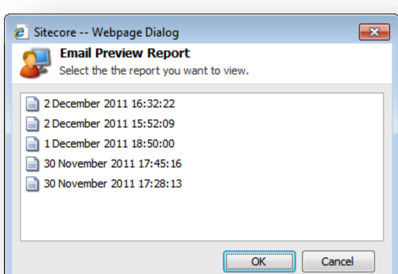
You can view email previews that were generated previously.

To view older reports:

1. On the **Email Preview** tab, click **View Older Reports**:



The module opens the dialog box where you can select an older report:



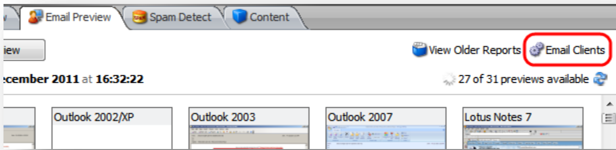
2. Select a report and click **OK**.

How to Select Email Clients

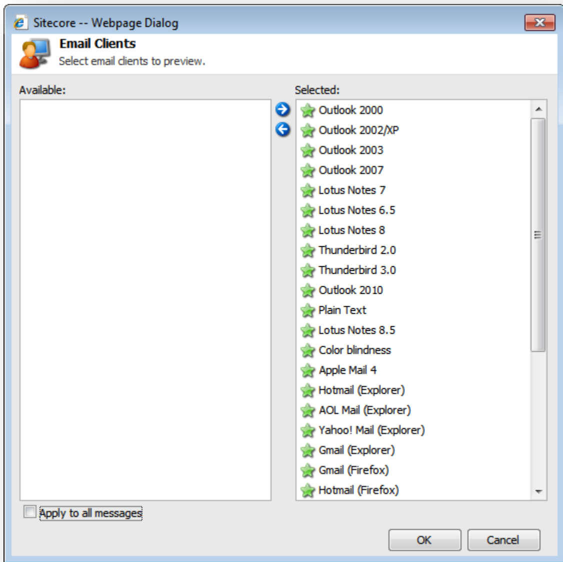
By default the system generates email previews for all available clients. You can select the email clients that you want the system to generate previews for.

To select email clients:

1. On the **Email Preview** tab, click **Email Clients**:



The module opens the dialog box where you can select email clients:



2. Select email clients and click **OK**.

3.1.4 How to Perform Spam Detection

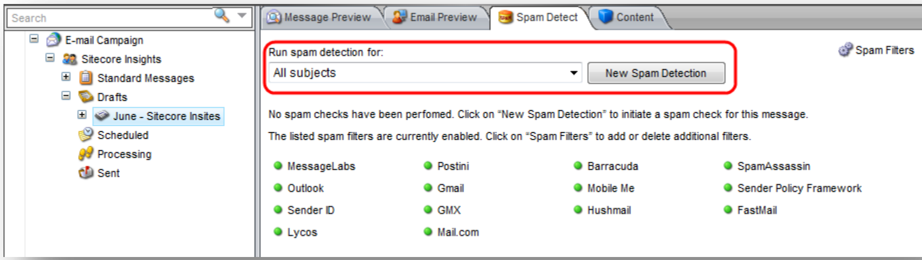
You can test your message to see how different spam filters will treat it.

Note
To be able to use this functionality, you must sign up for the Spam Check service in the Sitecore App Center. For more information about this, see the document *Getting Started with Sitecore App Center*.

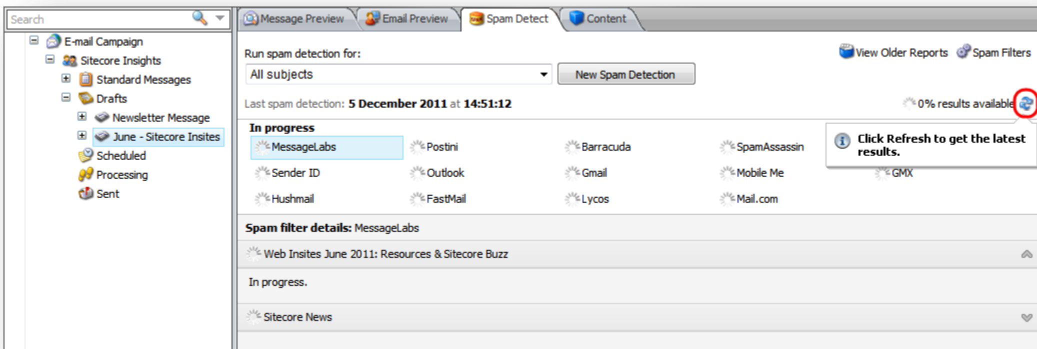
To perform spam detection:

1. In the *Drafts* folder, select a message.

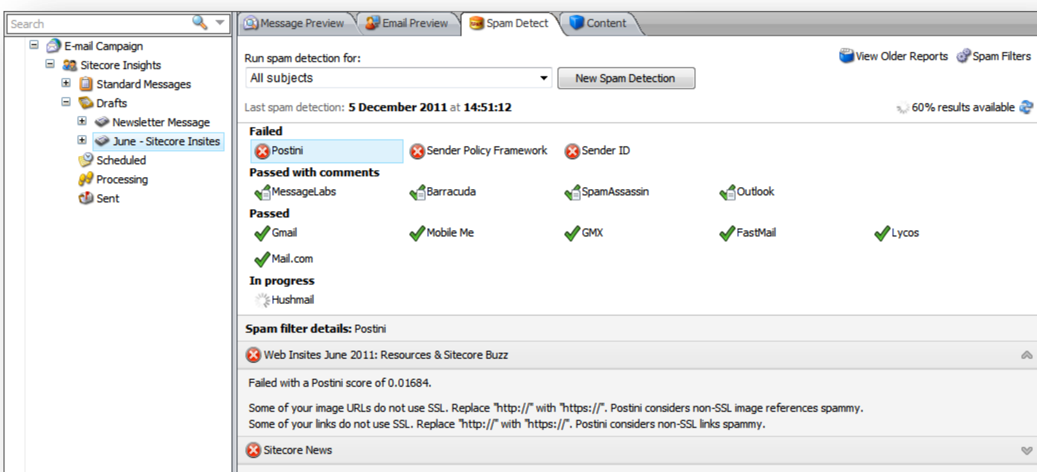
2. In the **Spam Detect** tab, click **New Spam Detection**.



When you click **New Spam Detection**, the module passes the message to the SAC, which handles the spam detection process. Sending the message and checking how different spam filters react may take some time. To view the results collected so far, click the **Refresh** button:



3. When you click the Refresh button, the tab displays the results that are ready so far:



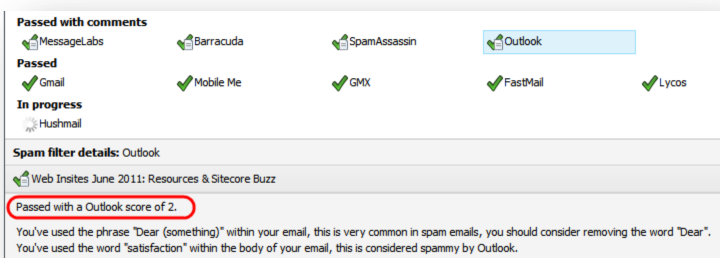
Spam filters can return different types of results:

- **Failed.**

Your message will probably not pass this spam filter. In the **Spam filter details** section, you see suggestions of what you can do to avoid your message failing for this spam filter. Also, you can see the score of your message with this filter. Scores are a method used by spam filters to rate the likelihood of the message being caught in the spam filter. Not all spam filters use scores, and the scale used for the scores may differ between different spam filters.

- ○ **Passed with comments**.

  Your message will probably pass this spam filter. In the **Spam filter details** section, but the spam filter has provided suggestions for actions you can take to improve the likelihood of successfully delivering your mails to your recipient's inbox. Also, you can see the score of your message with this filter. If you message is in the **Passed with comments** state, this means that the score of your message is higher that the default threshold for this filter, but the comments will help you to considerably increase you score and make your message more trustworthy for this particular filter.



  Note: spam filter providers may occasionally change their score thresholds.

- ○ **Passed**.

  Your message will pass this filter.

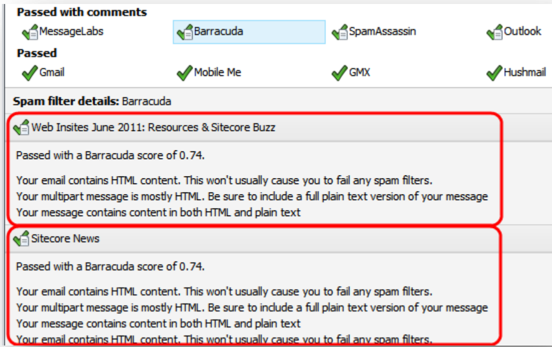
- ○ **In progress**.

  Your message is being tested against this spam filter. Click **Refresh** to get the latest results.

- ○ **Error**.

  An error occurred while processing your request. Performing a new spam detection later may yield a successful result.

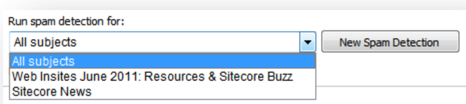
If you run the spam detection for all message subjects that are available for the current message, you see the results for each subject in the **Spam filter details** section:



If you run the spam detection for one subject, you only see the results for that subject.

How to Run the Spam Detection for a Particular Subject

Note: you can run the spam detection for a particular subject using the **Run spam detection for** field in the **Spam Detect** tab:

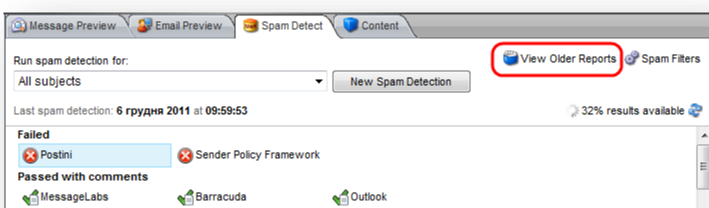


How to View Older Reports

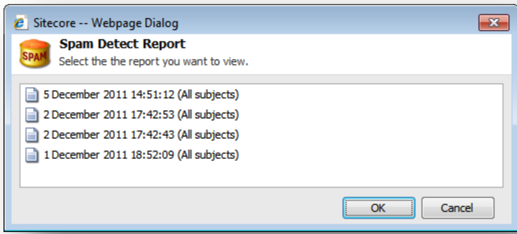
You can view older reports that the module generated previously.

To view older reports:

1. On the **Email Preview** tab, click **View Older Reports**:



The module opens the dialog box where you can select an older report:



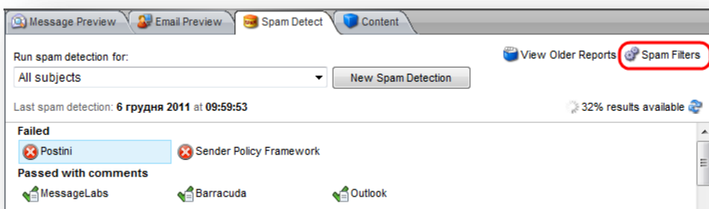
2. Select a report and click **OK**.

How to Select Spam Filters

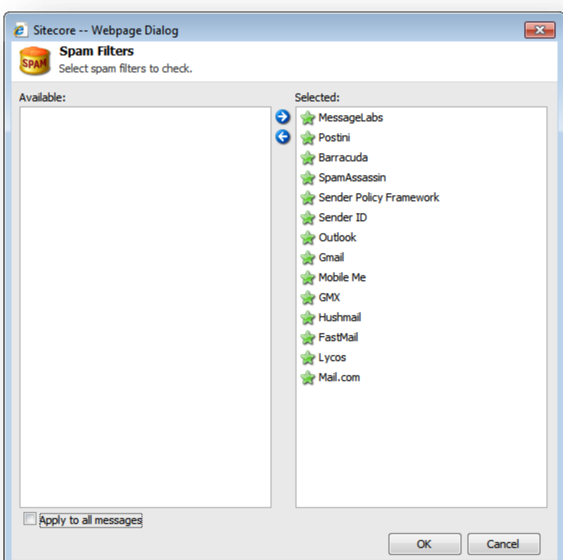
You can select the email clients that you want the module to generate previews for.

To select email clients:

1. On the **Email Preview** tab, click **Spam Filters**:



The module opens the dialog box where you can select spam filters:

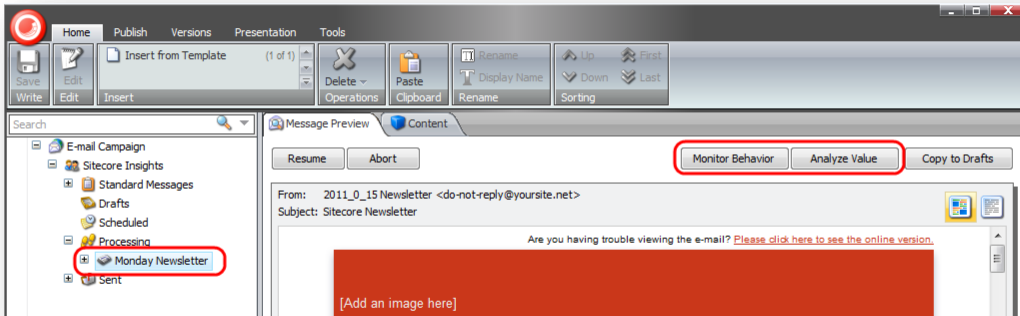


Select email clients and click **OK**.

3.1.5 How to Monitor Behavior and View Analytics Reports

To monitor the subscriber behavior or view the reports related to a message:

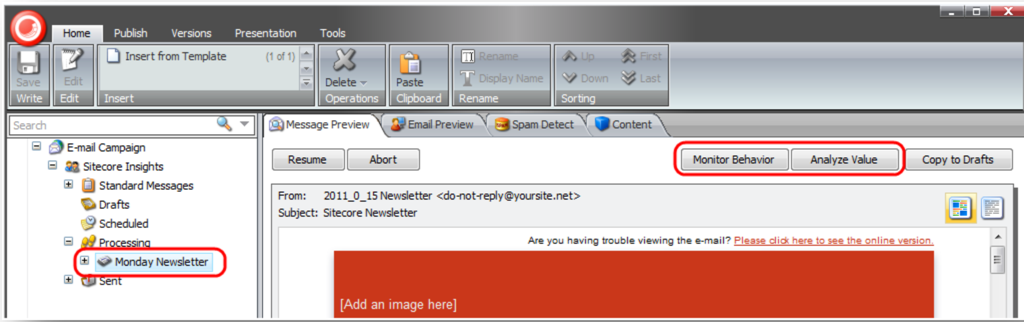
1. Select a target audience.
2. In the *Processing* or the *Sent* folder, select a message.
3. Click **Monitor Behavior** to monitor the state of the dispatch process and behavior of the subscribers who have received the mail.



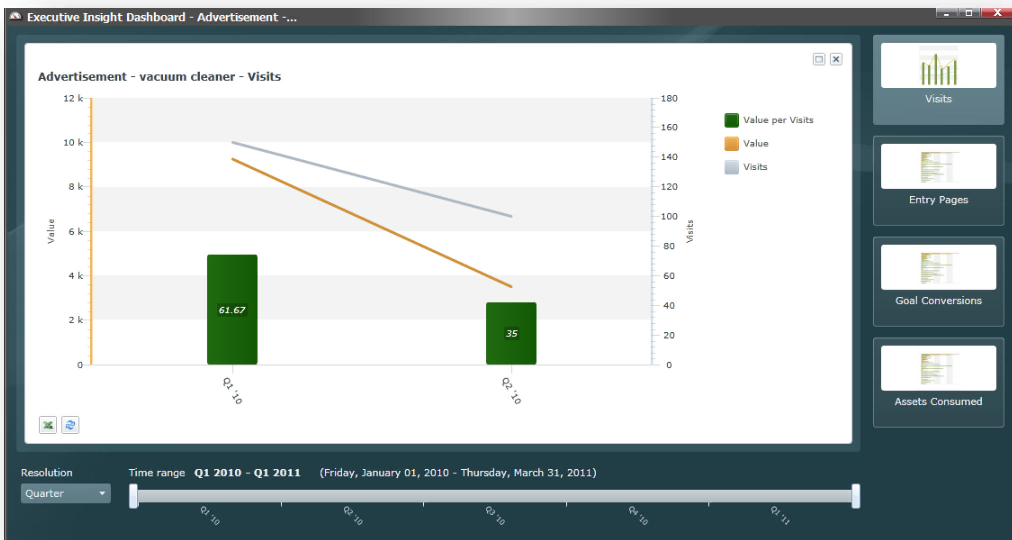
The module opens the engagement plan monitor.

Note
When using Plain Text Message, the **Visit Reports** will mark all messages as unopened even if they have been opened.

4. Click **Analyze Value** to view the analytics reports related to the message.



The module opens the Executive Insight Dashboard with the reports.



3.1.6 How to Use ECM Actions

The Email Campaign Manager contains actions that can be used in an engagement plan and applied to visitors who meet the conditions specified for the previous state of the plan:

- **Edit Email Audience**

  The Edit Email Audience action subscribes a visitor to (or unsubscribe a visitor from) one or more Target Audiences.

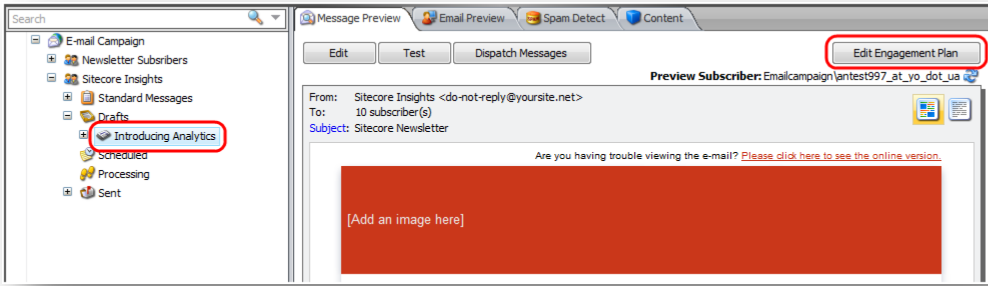
- **Send Email Campaign Message**

  The Send Email Campaign Message action sends a standard email campaign message to a website visitor.

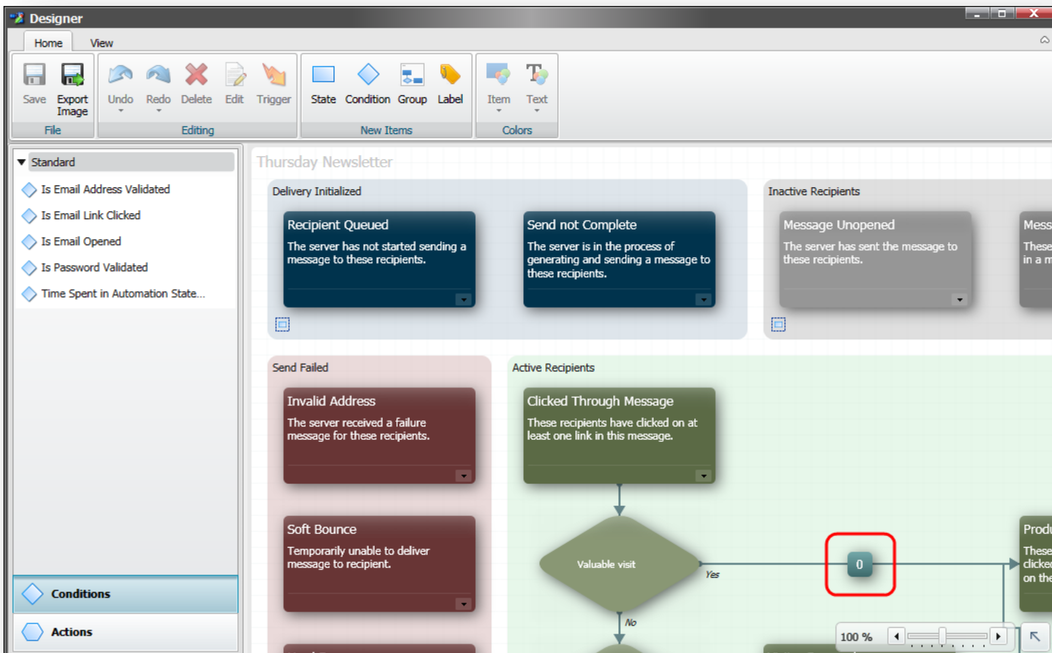
To set the **Edit Email Audience** action:

2. Select a target audience.

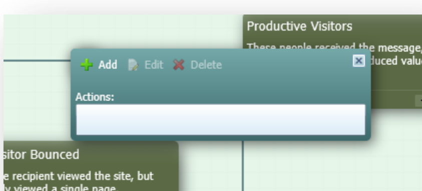
3. In the *Drafts* folder, select an existing message or create a new newsletter message:



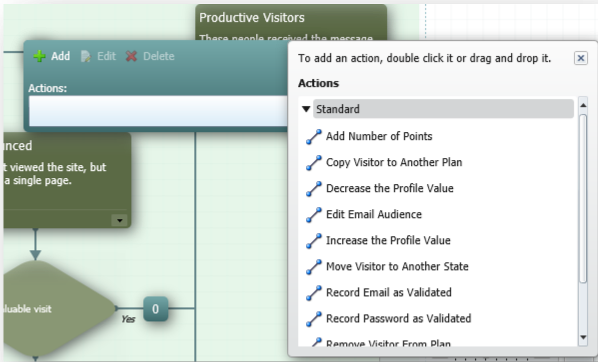
4. In the **Message Preview** tab, click **Edit Engagement Plan**. Sitecore opens the **Designer** window.



5. Click the square box and the **Actions** dialog box appears.

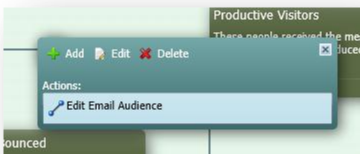


6. Click **Add** and a dialog box appears.

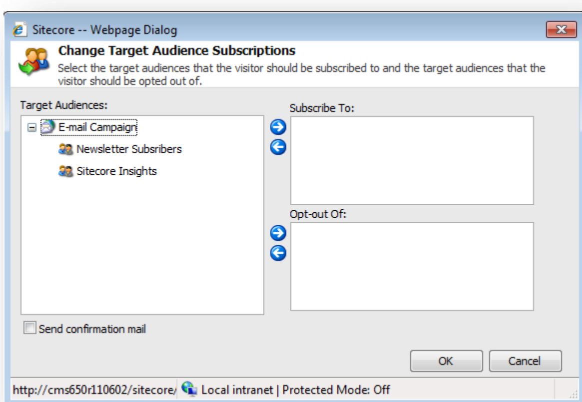


This dialog box lists all of the actions that are available.

7. In this dialog box, double click the *Edit Email Audience* action to add it to the **Actions** field.



8. In the **Actions** dialog box, click **Edit** to configure the action.



9. In the **Change Target Audience Subscriptions** dialog box, you can change target audiences to which the visitor is subscribed.

   To subscribe a website visitor to a target audience:

   a. In the **Target Audiences** field, select a target audience.

   b. Click right arrow icon next to **Subscribe To** field. Selected target audience is displayed in the **Subscribe To** field.

To unsubscribe a website visitor from a target audience:

a. In the **Target Audiences** field, select a target audience.

b. Click right arrow icon next to **Opt-out Of** field. Selected target audience is displayed in the **Opt-out Of** field.

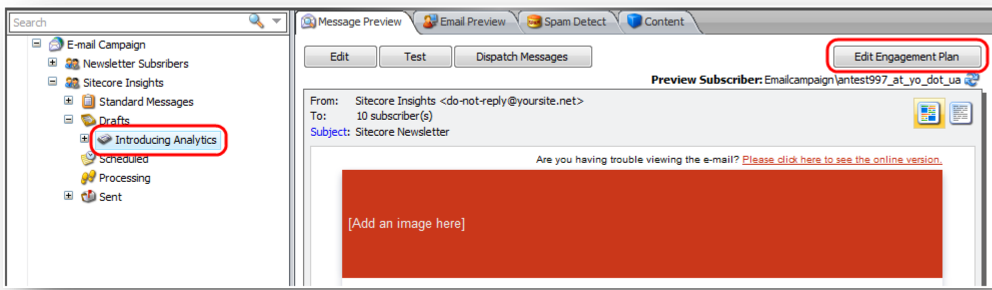
10. Click **Ok** to close the **Change Target Audience Subscriptions** dialog box.

11. In the **Designer**, click **Save.**

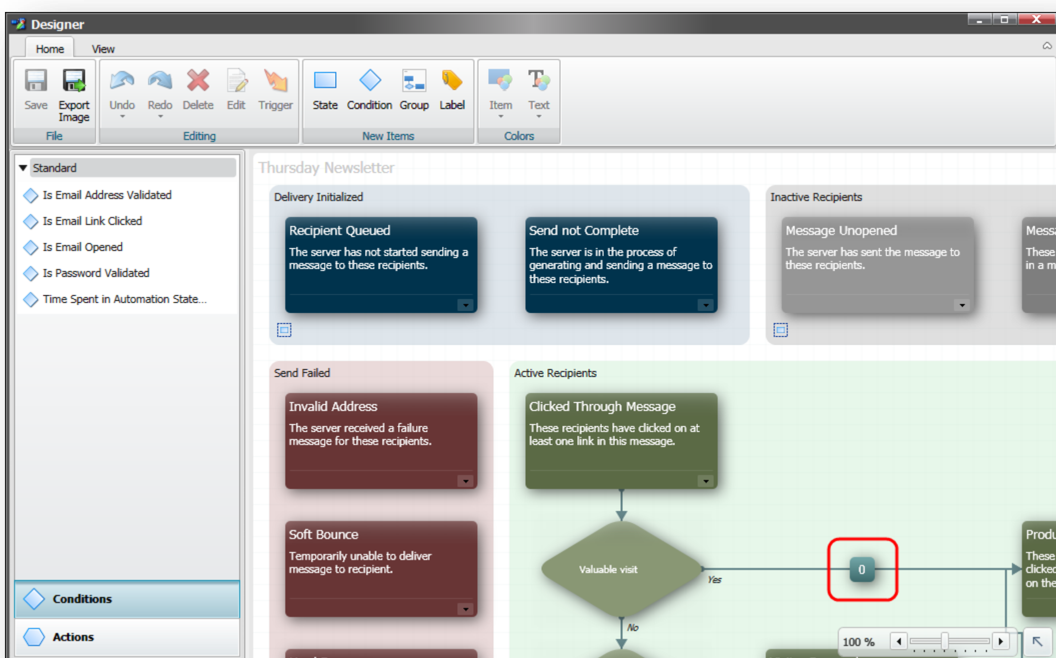
To set the **Send Email Campaign Message** action:

1. Select a target audience.

2. In the *Drafts* folder, select an existing message or create a new newsletter message:

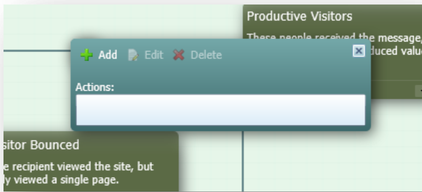


3. In the **Message Preview** tab, click **Edit Engagement Plan**. Sitecore opens the **Designer** window.

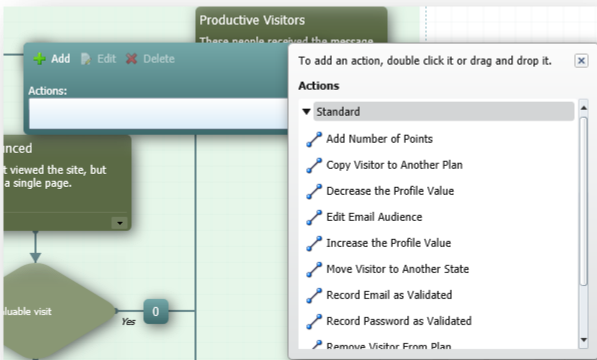


Standard messages are used to send a message to a single recipient at a time. You can extend the message plan to send a “Thank you for visiting our site” message to all visitors who produced value on the site (in the Productive Visitors state). The message could contain addresses of local stores and encourage them to visit the store to take advantage of an exclusive discount deal.

4. Click the square box and the **Actions** dialog box appears.

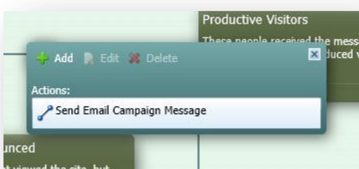


5. Click **Add** and a dialog box appears.

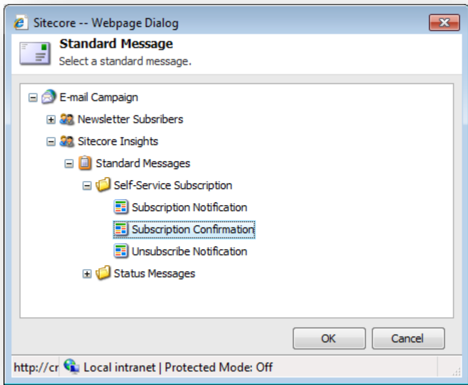


This dialog box lists all of the actions that are available.

6. In this dialog box, double click the *Send Email Campaign Message* action to add it to the **Actions** field.



7. In the **Actions** dialog box, click **Edit** to configure the action.



8. In the **Standard Message** dialog box, select a standard message.
9. Click **Ok** to close the **Standard Message** dialog box.

   In the **Designer**, click **Save.**

3.1.7 How to Copy a Message Sent Previously

There are three places where your message can be stored after you click **Dispatch Messages**, depending on the options you choose.

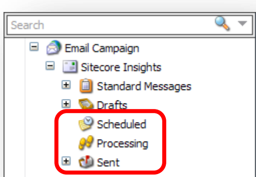
The messages can be stored in the:

- *Scheduled* folder.

  This folder contains the messages which are scheduled to be sent at a later time.
- *Processing* folder.

  This folder contains the messages which are being sent at the moment or those which have been paused.
- *Sent* folder.

  This folder contains the messages which have been already sent.

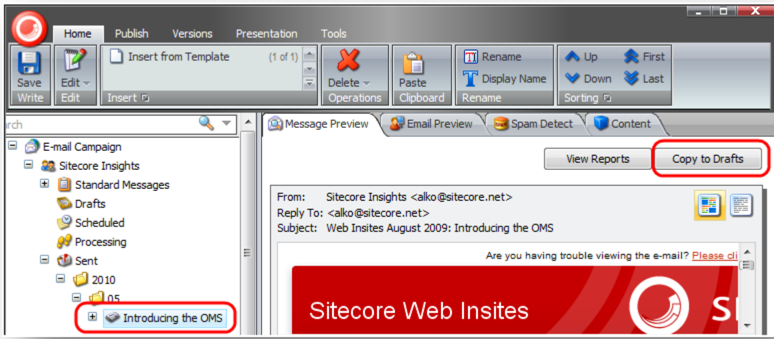


You can copy a message from one of these folders and send it again or edit it.

To copy a message:

1. Select the message in a folder (*Drafts*, *Processing,* or *Sent* folder).

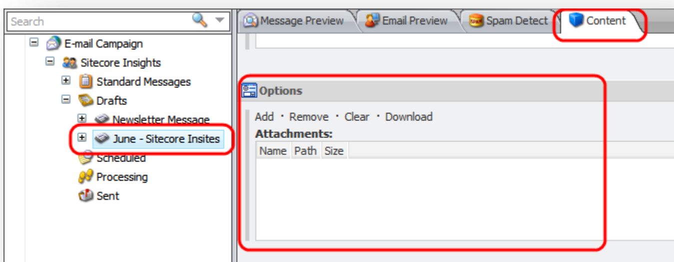
2. On the **Message Preview** tab, click **Copy to Drafts**.



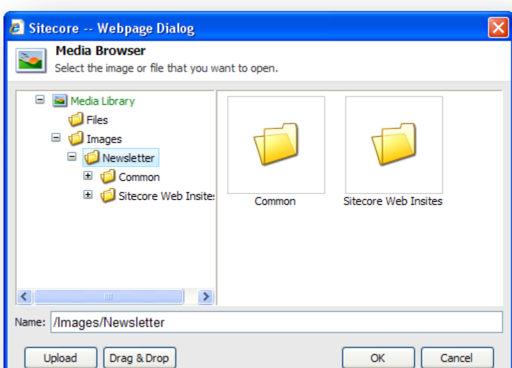
3.1.8 How to Attach a File to a Message

To attach a file to a message:

1. Select the message in the *Drafts* folder.
2. On the **Content** tab, in the **Options** section, in the **Attachments** field, click **Add**.



3. In the **Media Browser** dialog, select the file to attach.



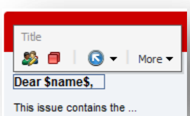
To upload a new file to the media library, click **Upload**.

3.1.9 How to Add a $token$ to the Message Text

The ECM module supports tokens that you can use to personalize your messages. For instance, in the beginning of the message you can insert the line “Dear $name$!” and when the message is sent, this token is substituted with the actual name of the subscriber. You can use tokens in both the message subject and the message body.

By default, the following tokens are available: `$email$, $fullname$, $name$, $phone$`. The module replaces a token with the appropriate value from the user profile and put it in the email.

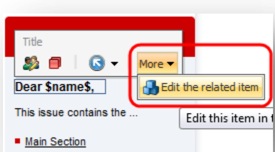
You can either insert the tokens by typing them in the message:



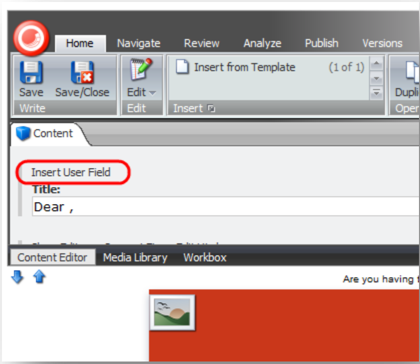
Or you can use the **Insert Field** button which is available when you edit the related item.

To insert a token using the **Insert Field** button:

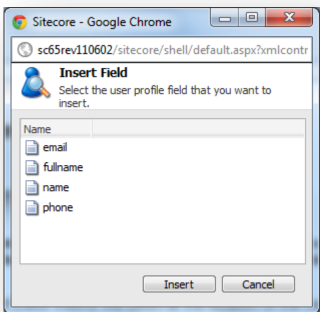
1. Start editing a message.
2. Place the cursor in the field in which you want to insert a token. Sitecore displays the context menu. In the menu, select **More, Edit the related item**.



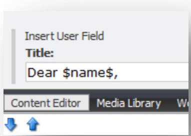
Sitecore opens the related item using the ribbon.



3. In the **Content** tab beneath the ribbon, place the cursor where you want to insert a token and click **Insert User Field**. Select the token from the list of available tokens.



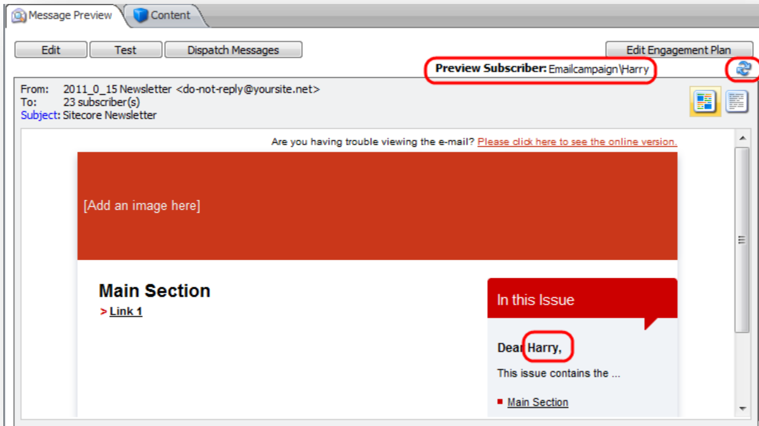
The Rich Text Editor inserts the token at the location of the cursor.



4. On the ribbon, click **Save/Close**. Sitecore saves the item and closes the ribbon.

Alternatively, you can type the token directly into the message.

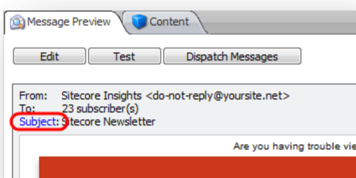
To preview the personalized message for different subscribers, on the **Message Preview** tab, click the **Refresh** button ( ) to the right of the **Preview Subscriber** field.



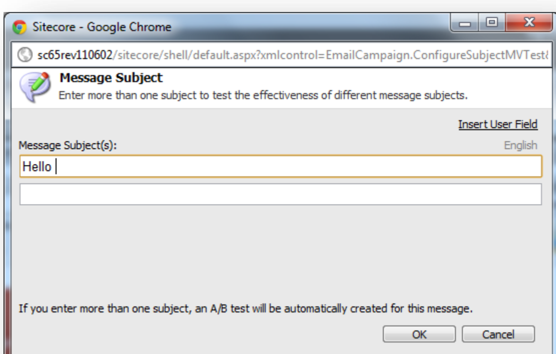
3.1.10 How to Add a $token$ to a Message Subject

To add a token to a message subject:

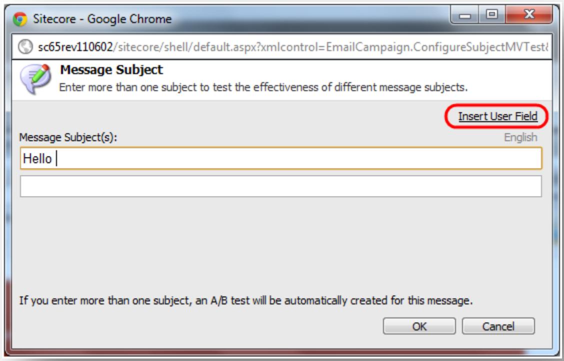
1. Select a message.
2. On the **Message Preview** tab, click **Subject**.



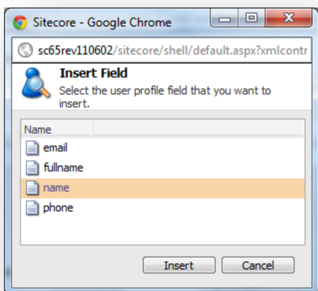
Sitecore starts the **Message Subject** dialog box.



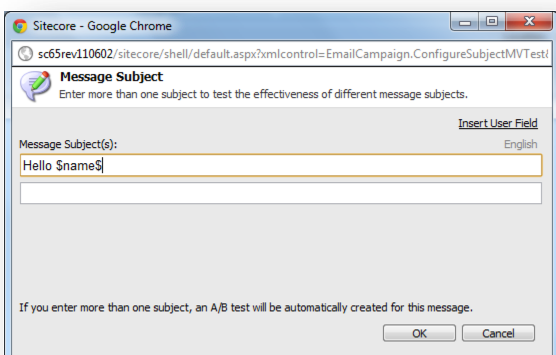
3. In the **Message Subject** dialog box, enter the subject text, ensure that the cursor is in the place where you want to insert a token and then click **Insert User Field**.



4. Select the user profile field that you want to insert. Click **Insert**.



The user field token is in the message subject now:



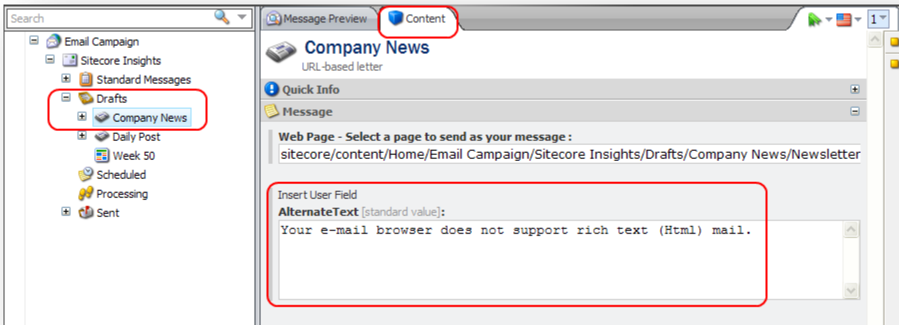
5. Click **OK**.

3.1.11 How to Set "alternate text" for a Message (Shown in non-HTML E-mail Clients)

Alternate text is a plain text version of the message. This text is used when the program that the subscriber uses to read the message cannot read the HTML version of the message.

To set the alternate text:

1. In the *Drafts* folder, select the message.
2. In the right-hand pane, on the **Content** tab, select the **Alternate Text** field.



3. Edit the text.
4. Save the message.

3.1.12 How to See an Estimate of How Long It Takes to Send a Message

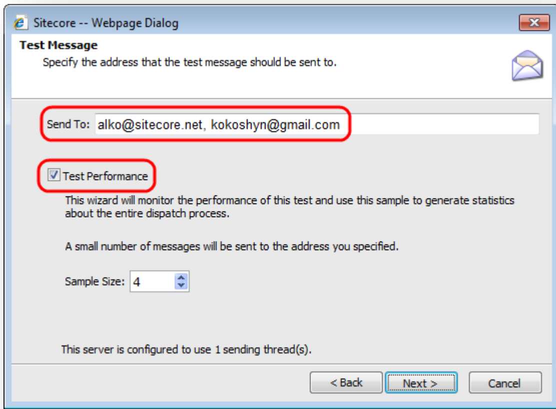
It may take a long time to send all the messages depending on the number of subscribers. You use the *Test Message* dialog to know the estimate of how long the dispatch process will take.

To get the estimate, the module sends a small number of messages to a recipient (or several recipients). While the messages are being sent, the module gathers statistics, estimates how long it will take to send all the messages, and shows the *Dispatch Statistics* report afterwards.

To perform the test and see the dispatch statistics:

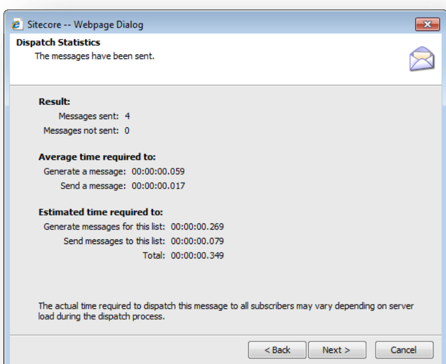
1. Select a message.

2. On the **Message Preview** tab, click **Test**. Sitecore opens the *Test Message* dialog.



3. Select the **Test Performance** check box.
4. In the **Send To** field, enter the e-mail addresses that you would like to use for testing. If you enter more than one e-mail address, place them in a comma separated list.
5. In the **Sample Size** field, specify the number of messages that should be sent to each e-mail address.
6. Click **Next** and the test messages are sent to the specified address(es).

   After the test messages have been sent, you will see the **Dispatch Statistics** dialog box.



   This page contains the following information:

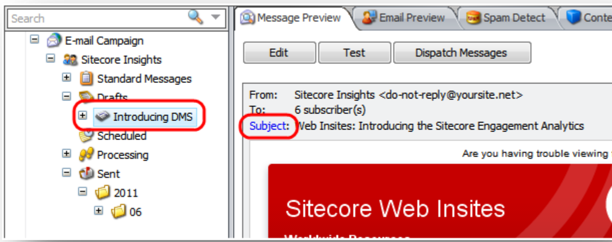
   - The number of messages that were sent and were not sent.
   - The average time required to generate a single message and send it.
   - The estimated time required to generate the messages for the whole subscriber list, send the messages to this list, as well as the total time required to generate and dispatch the messages to the whole list of subscribers.

7. Click **Next** to finish the test.

3.1.13 How to Send a Message to a Limited Set of Subscribers and Perform a Subject Test

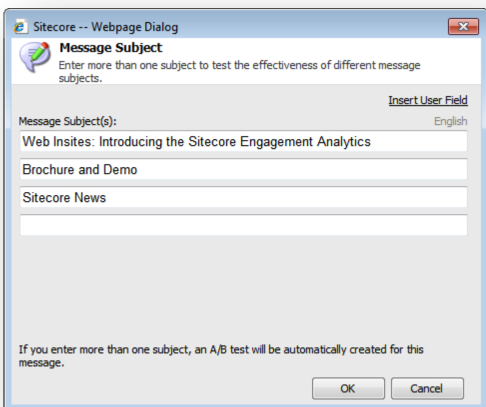
To send a message to a limited set of subscribers and perform a subject A/B test:

1. Select the message.
2. On the **Message Preview** tab, click **Subject**.

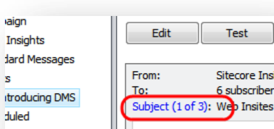


   Sitecore starts the **Message Subject** dialog box.

3. In the **Message Subject** dialog box, in the **Message Subject(s)** fields, enter the subjects you want to test and click **OK**.



   Now the subject A/B test is configured for this message. The **Subject** link changes to **Subject (1 of 3)** on the **Message Preview** tab.



4. On the **Message Preview** tab, click **Dispatch Messages**. Sitecore starts the **Dispatch Message** wizard.
5. In the **Limited Number of Subscribers** dialog box, select the **Dispatch to Limited Set of Subscribers** check box and in the **Quantity** field specify the percentage of subscribers that you

want to use in the test. Click **Next** to continue.

The subscribers for this subset are chosen randomly. The actual number of subscribers in the subset is shown in brackets.

6. In the **Launch Message Dispatching** dialog box, select the **Now** option and click **Start**. Sitecore sends messages to the subset of subscribers.

   Sitecore moves the message to the *Processing* folder.

When Sitecore finishes sending messages to the subset of subscribers, this message remains in the *Processing* folder until you resume the dispatch process or abort it.

Give subscribers some time to read the message and react to it. When you think that enough time has passed for the subscribers to react to the message, view the test results.

To view the test results, click the **View Test Results** button.

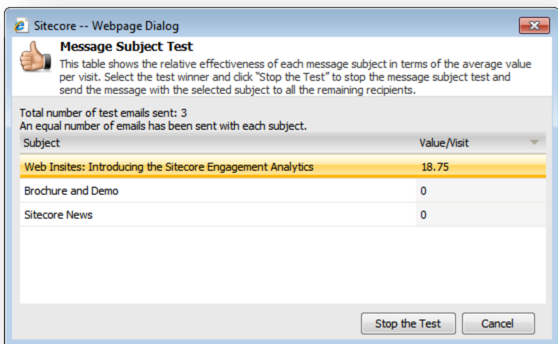
3.1.14 How to View the Message Subject Test Results

To view the message subject test results:

1. Select a target audience.

2. In the *Processing* or the *Sent* folder, select a message.

3. In the **Message Preview** tab, click **View Test Results**. Sitecore opens the **Message Subject Test** dialog box.



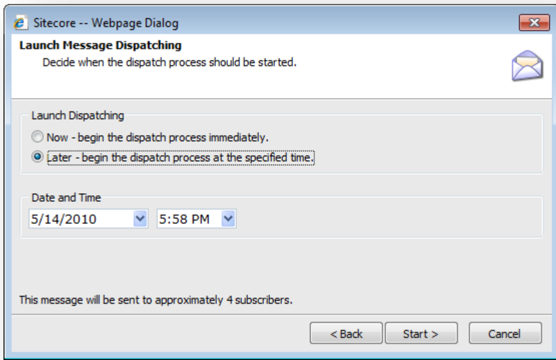
4. Select the test winner and click **Stop the Test** to stop the message subject test. Click **Resume** to send the message with the selected subject to all the remaining recipients.

3.1.15 How to Schedule a Message to be Sent at a Specific Time

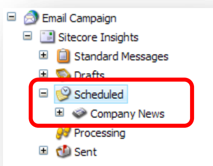
To specify that a message should be sent at a specific time:

1. In the **Dispatch Message** wizard, in the **Launch Message Dispatching** dialog box, select the **Later** option. After you select it, you will be given access to the **Delivery Date and Time** field,

where you can set the time for the dispatching.



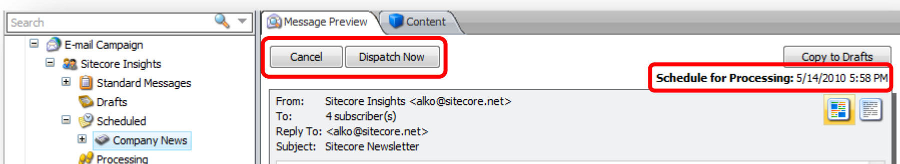
2. In the **Delivery Date and Time** field, set the time for the dispatching.
3. Click **Start**, and the message is placed in the *Scheduled* folder. It stays there until the scheduled time, and then it is dispatched.



When the message is in the *Scheduled* folder, you can dispatch the message immediately, cancel the message, or change the time of the scheduled dispatch.

To change the schedule of a message:

1. In the *Scheduled* folder, select the message.



2. To dispatch the message immediately, on the **Message Preview** tab, click **Dispatch Now**.
3. To cancel the dispatch of the message, on the **Message Preview** tab, click **Cancel**. Sitecore moves the message to the *Drafts* folder.
4. To change the time of the scheduled dispatch, click **Schedule for Processing**.

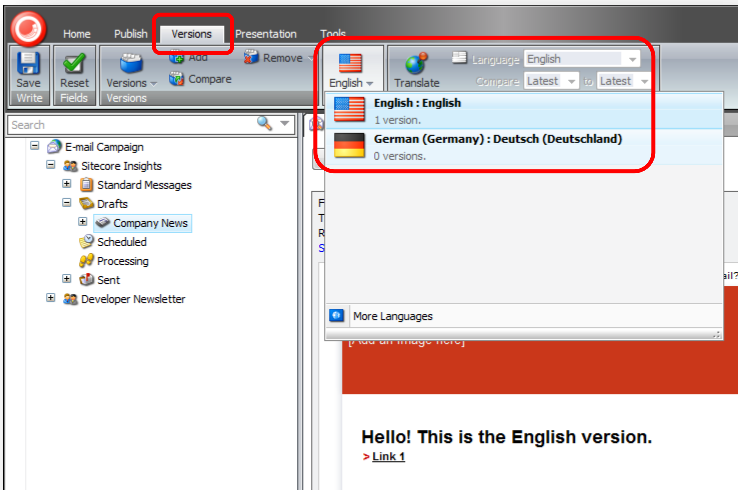
3.1.16 How to Translate a Message into a Different Language

This section describes how to translate a message into a different language.

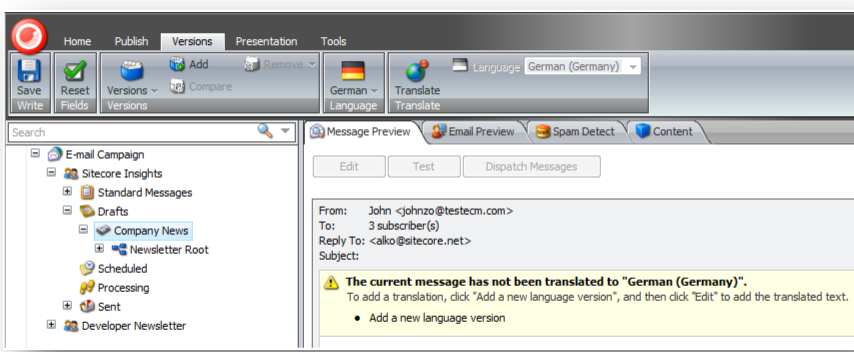
Note
In this example we assume that there are two languages configured in your Sitecore installation – English and German. Your system administrator can configure an additional language for you.

To translate a message into a different language:

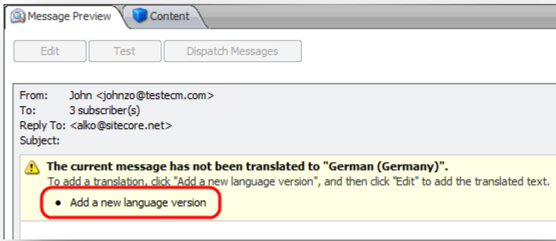
1. Select the message.
2. On the **Versions** tab, in the **Language** group, select the language that you want to translate the message to. In this example, we are translating to German:



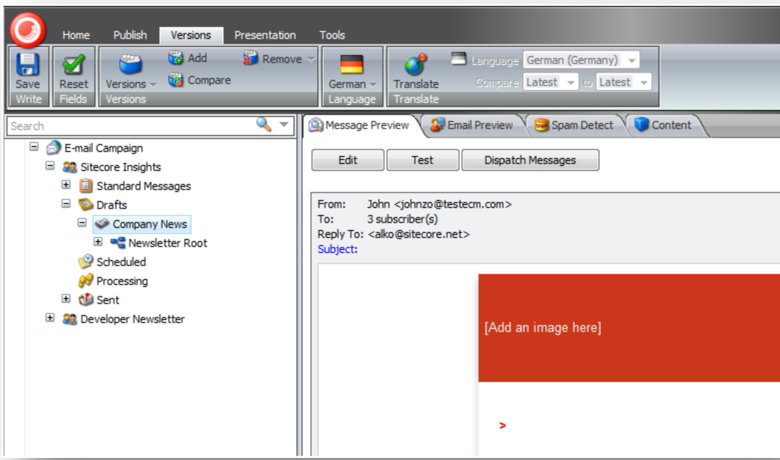
If you have not created any versions of the message in the German language yet, you get the message: *The current message has not been translated to German (Germany)*.



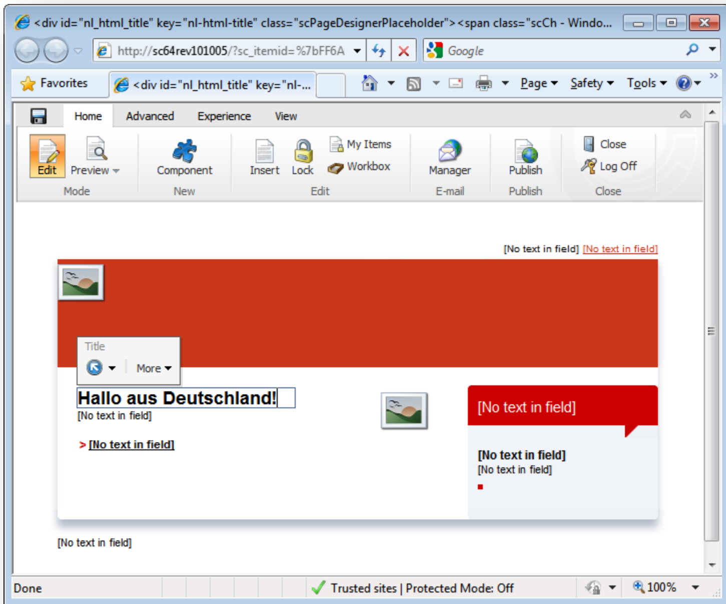
3. On the **Message Preview** tab, click *Add a new language version*.



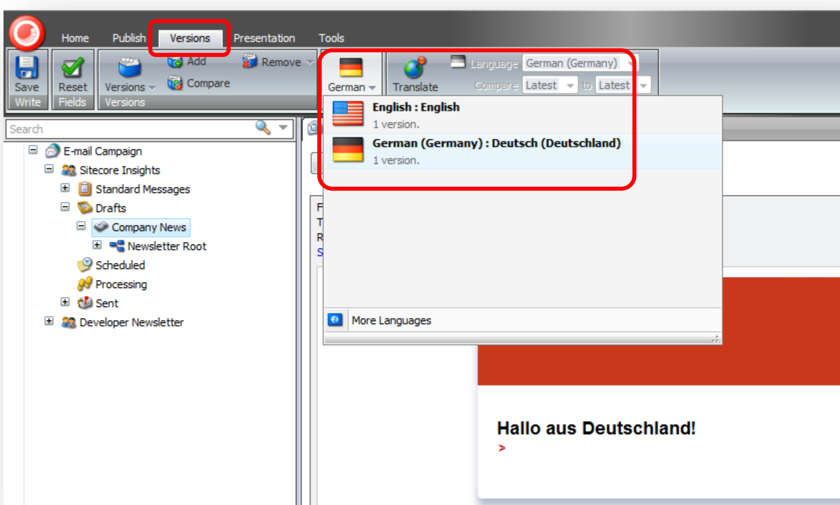
Sitecore creates the version of the message in German language and opens it in the **Message Preview** tab:



4. On the **Message Preview** tab, click **Edit**. Edit the message in German and then click the **Save** button and then click **Close**.



Now you have the versions the message in two languages. You can switch between the languages using the **Language** group of the **Versions** tab.



Chapter 4

Using E-Mail Campaign Reports

This chapter describes how to use the E-Mail Campaign Reports.

This chapter contains the following sections:

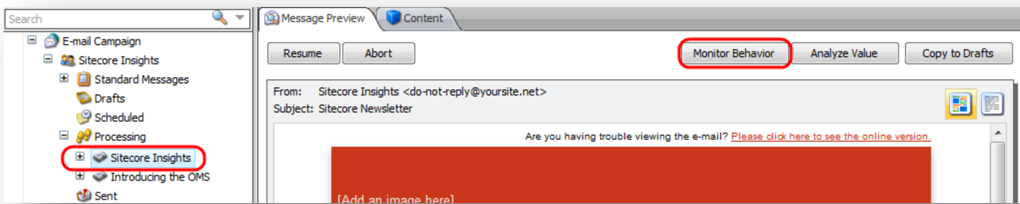
- Accessing the Reports
- Frequently Asked Questions

4.1 Accessing the Reports

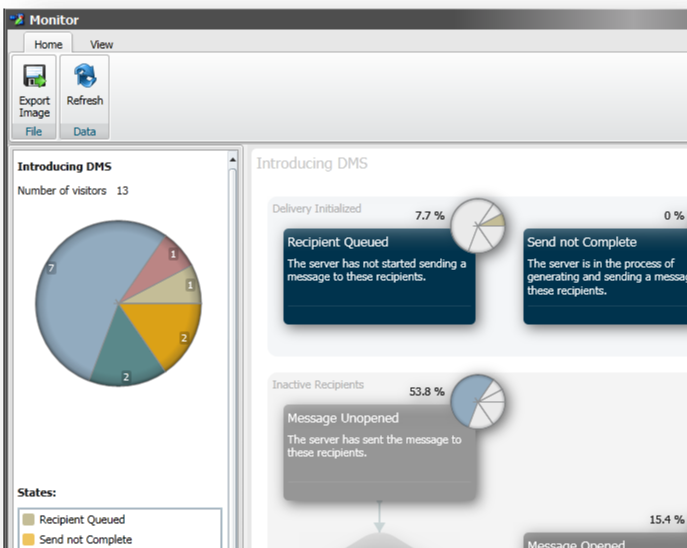
The E-Mail Campaign Manager contains a number of marketing reports.

To access the reports related to a message:

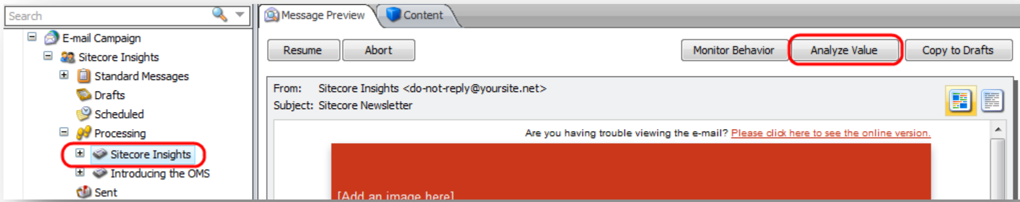
1. Select a target audience.
2. In the *Processing* or the *Sent* folder, select a message.



3. In the **Message Preview** tab, click **Monitor Behavior** to open the engagement plan monitor and monitor the subscriber behavior:



4. In the **Message Preview** tab, click **Analyze Value** to view the analytics reports related to the message:



Sitecore opens the **Executive Insight Dashboard** containing various analytics reports such as *Visits*, *Entry Pages*, *Goal Conversions* and so on.

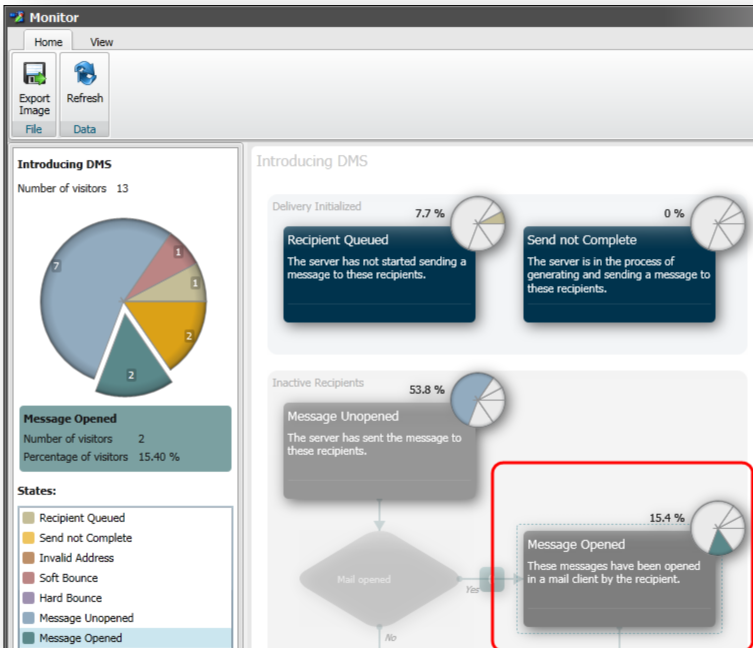
4.2 Frequently Asked Questions

This section contains some common marketing questions and explains how to use the ECM reports to answer them.

4.2.1 How Many Subscribers Have Opened a Message?

Answer: Use the **Engagement Plan Monitor**, the **Message Opened** state.

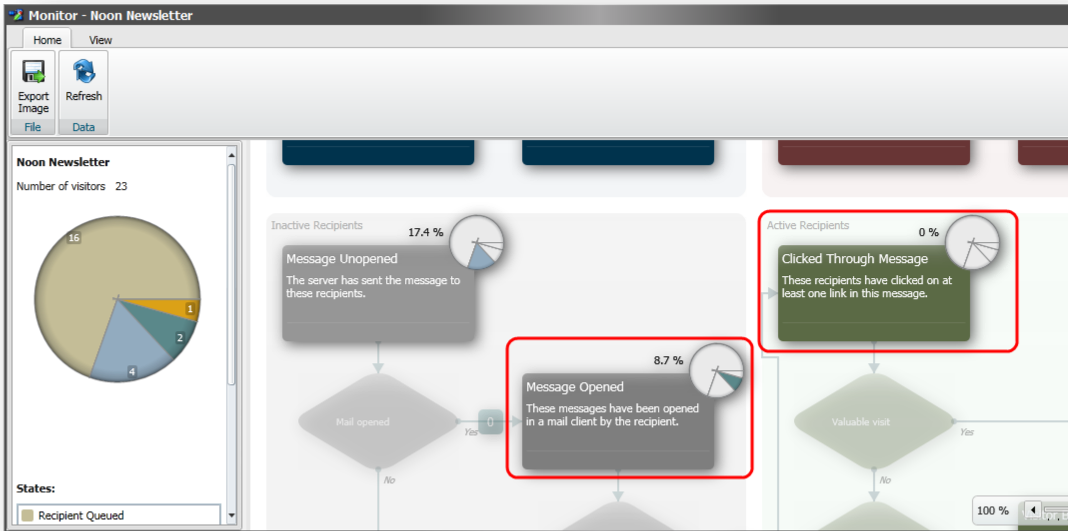
The **Message Opened** state shows the number of subscribers who have opened the message.



In this example, two subscribers opened the message that is 15.40% of the total number of subscribers.

4.2.2 Are the Links in the Message Effective?

Answer: Use the **Engagement Plan Monitor**, compare the number of subscribers who only opened the message with the number of subscribers who clicked through the message.



The states of interest are:

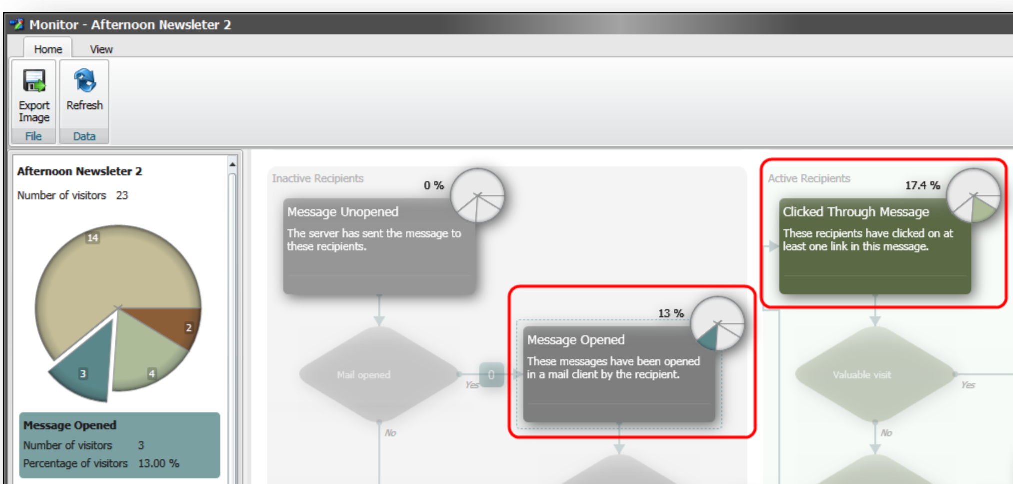
- **Message Opened**

  The module puts recipients who opened the message but did not click links in it in this state.

- **Clicked Through Message**

  If the visitor clicks a link in the message, this condition puts that visitor in the **Clicked Through Message** state.

In the following example, three subscribers only opened the message and four subscribers clicked links in it.

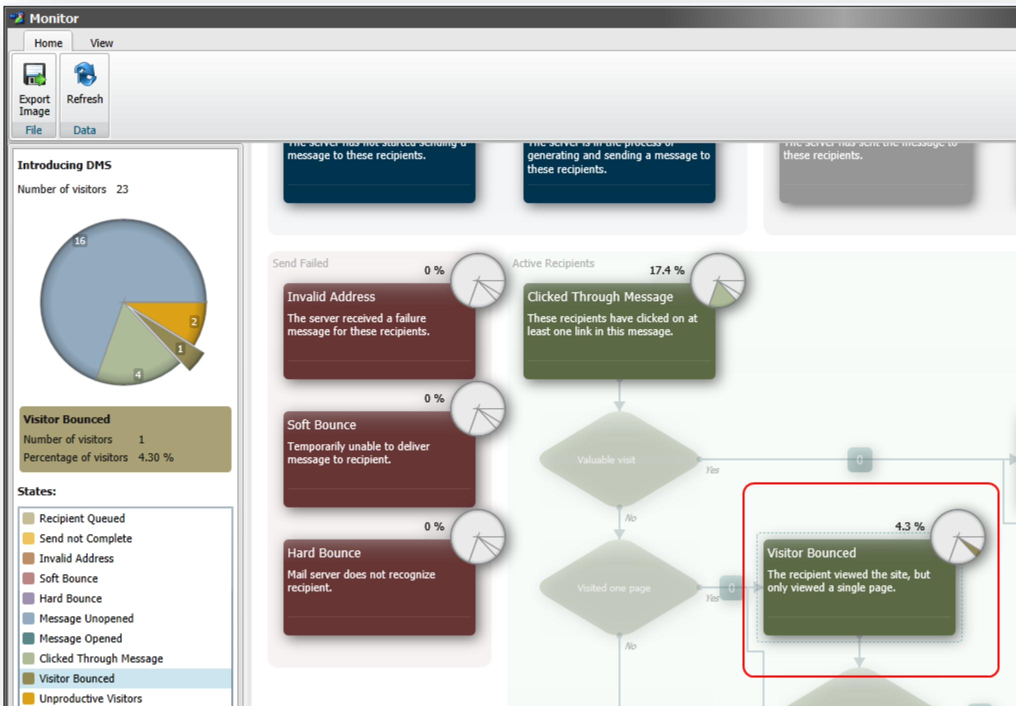


You can also use the **Entry Pages** report to analyze the effectiveness of the links in the message. For more information about the **Entry Pages** report, see the *Which Links in the Email Were* Most Effective? section.

4.2.3 Does Your Site Hold Subscriber Attention when They Visit the Site Through a Link?

Answer: Use the **Engagement Plan Monitor**, the **Visitor Bounced** state.

The **Visitor Bounced** state shows the number of subscribers who viewed only one page on the site and then left.



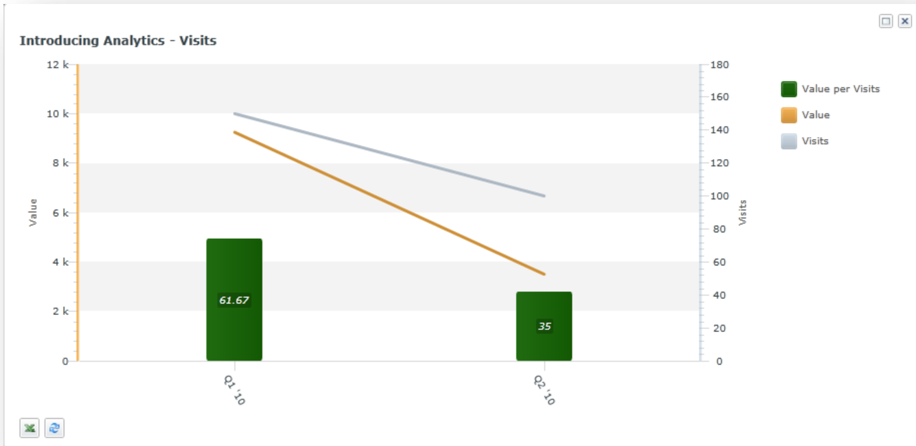
4.2.4 How Much Engagement Value did a Message Create?

Answer: Use the **Executive Insight Dashboard,** the **Visits** report.

For more information about how to access the ECM reports, see the *Accessing the Reports* section.

Executive Insight Dashboard allows you to see value that was generated on the website. For example, the Entry Pages report displays how much value was generated by visitors who clicked on specific links in the email message.

The **Visits** report shows the *Value* (points accumulated), *Visits* (volume of traffic) and *Value per Visits* (relevance) of visits to your website for the selected time period. The relevance measures the effectiveness of the campaign.



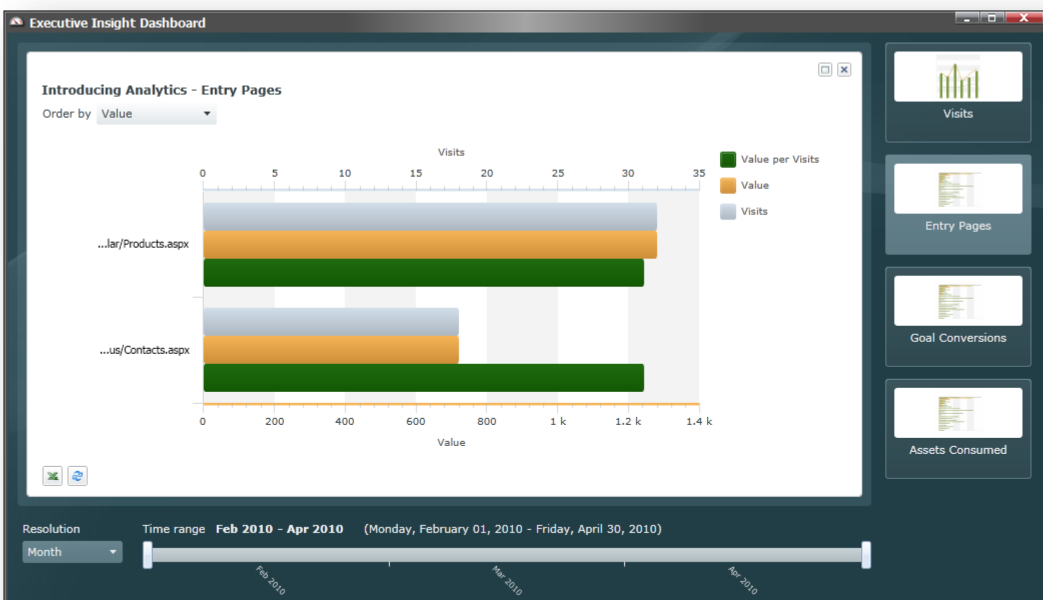
4.2.5 Which Links in the Email Were Most Effective?

Answer: Use the **Executive Insight Dashboard,** the **Entry Pages** report.

For more information about how to access the ECM reports, see the *Accessing the Reports* section.

The **Entry Pages** report shows the number of visits, the value, and the relevance that each link in the email created.

In the ECM, entry pages are the email links that recipients click to enter the website.

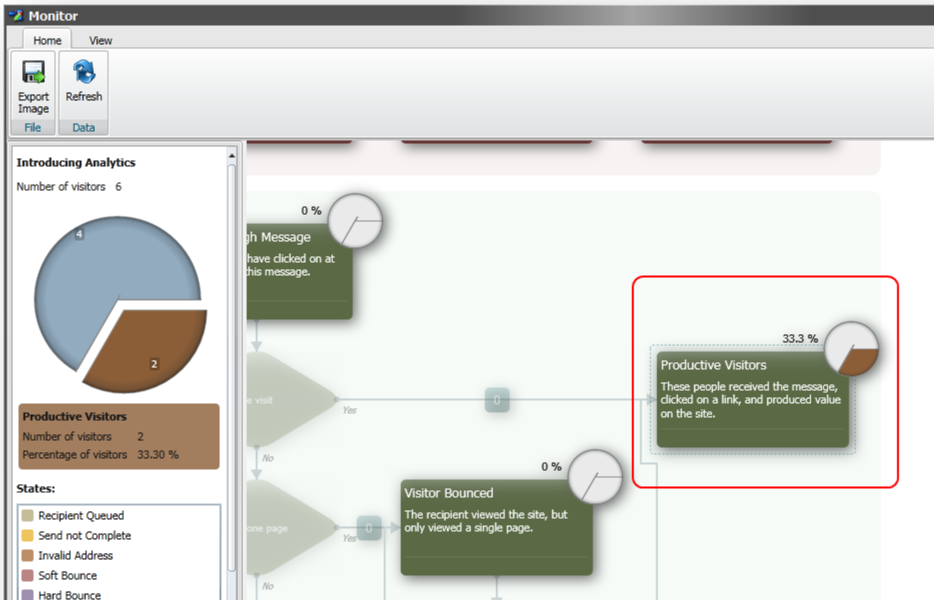


In this example, the home page produced more value than other pages. Click on the bars representing each entry page to see which websites referred the most traffic to those pages.

4.2.6 How Many Subscribers Produced Value?

Answer: Use the **Engagement Plan Monitor,** the **Productive Visitors** state.

The **Productive Visitors** state shows the number of subscribers who have received a message, clicked on a link in it, and produced value on the website.

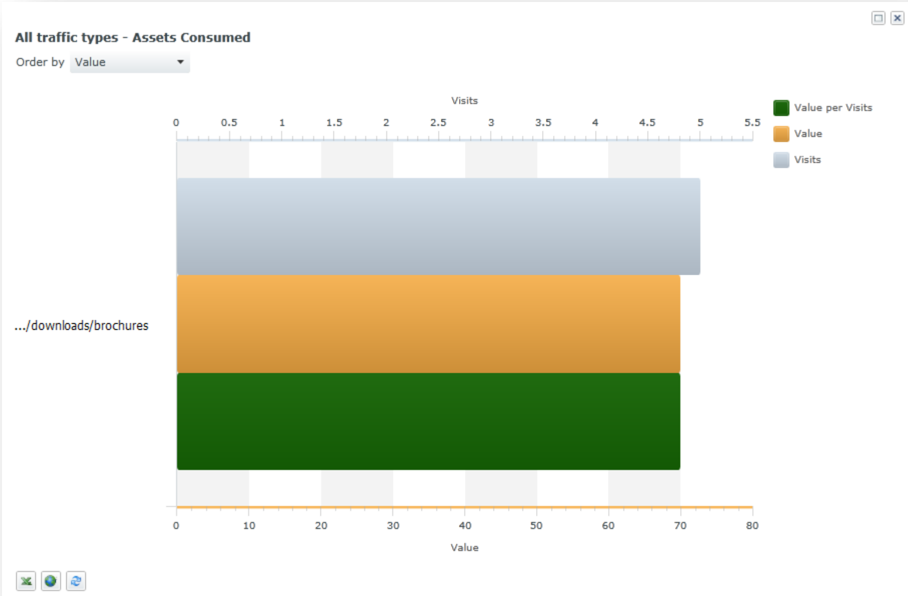


In this example, two of six recipients clicked on a link in the message and produced value on the website.

4.2.7 What Assets Did the Subscribers Consume?

Answer: Use the **Executive Insight Dashboard,** the **Assets Consumed** report.

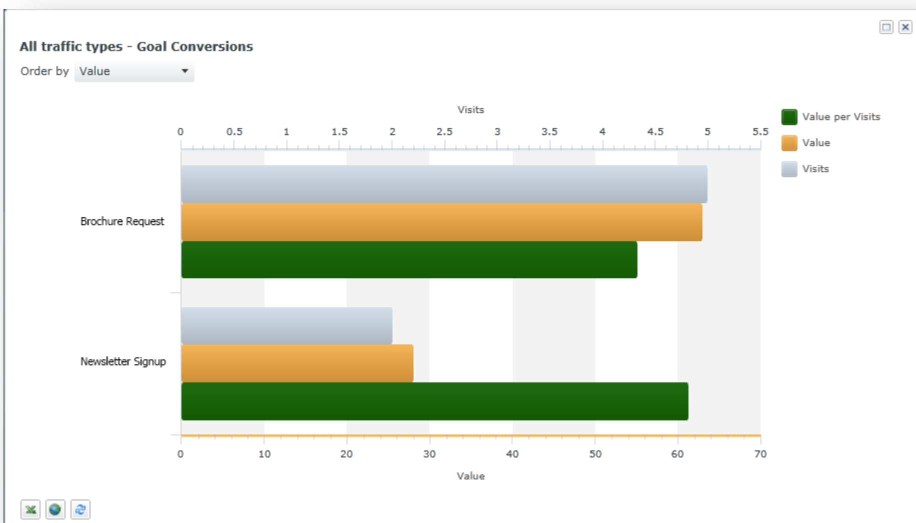
The **Assets Consumed** report shows how many assets the email campaign recipients consumed. For example, when a visitor downloads a brochure, the module registers an assets consumed event.



4.2.8 What Goals Did Message Recipients Convert?

Answer: Use the **Executive Insight Dashboard,** the **Goal Conversions** report.

The Goal Conversions report shows how much engagement value was created by visitors who entered the site from the email campaign and converted specific goals.



Chapter 5

Reports Reference

This chapter describes the E-mail Campaign Manager analytics reports.

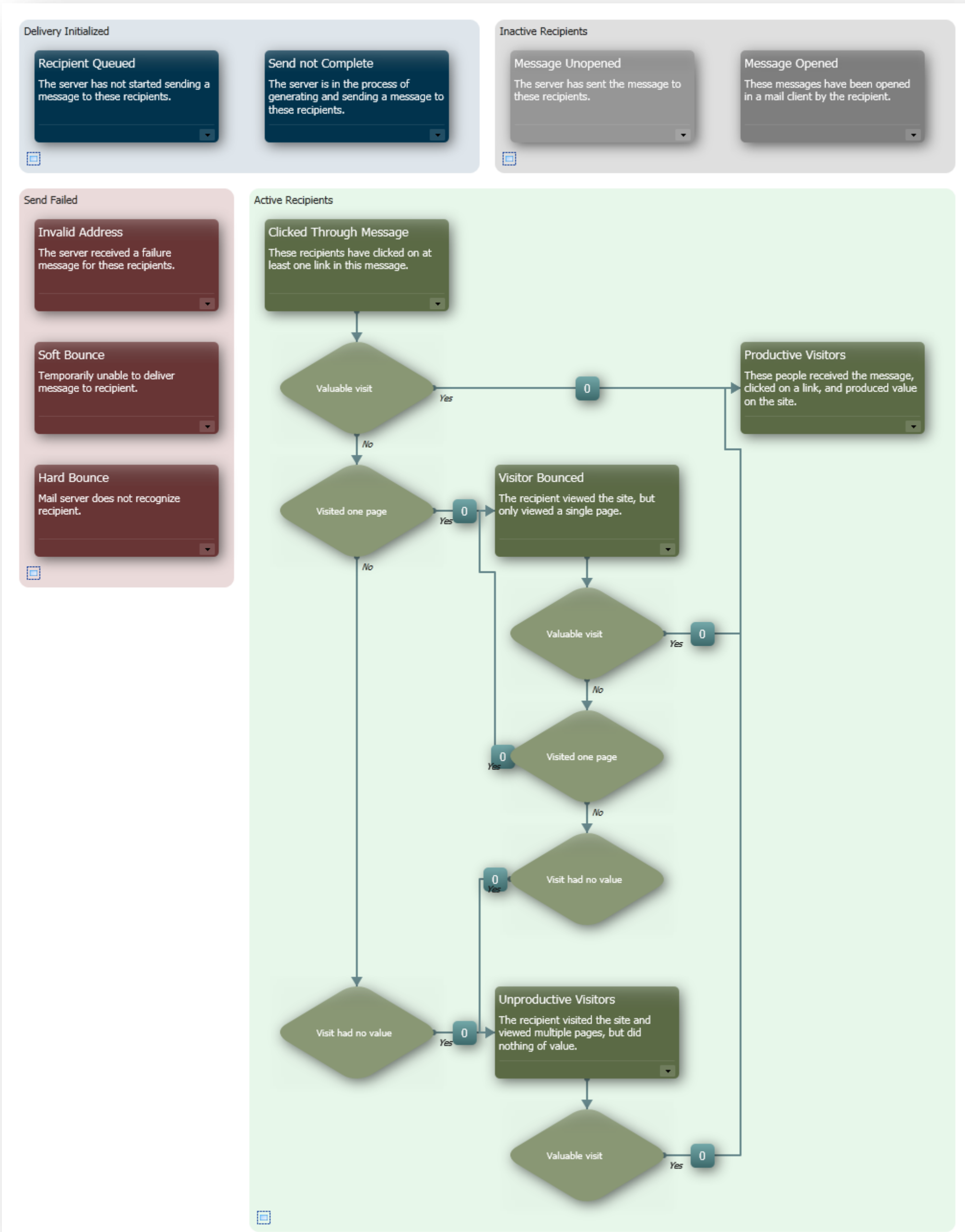
This chapter contains the following sections:

- The Message Engagement Plan
- The Executive Insight Dashboard Reports
- The Message Subject Test

5.1 The Message Engagement Plan

The ECM uses the message engagement plan to manage the sending process and track the behavior of the recipients of the message.

The following image shows the message engagement plan:



The following sections describe the groups, states and conditions that the plan contains.

5.1.1 Message Engagement Plan Groups

For the sake of convenience, the states of the engagement plan are sorted in groups.

The message plan contains the following groups:

- **Delivery Initialized**

  This group contains recipients that are queued for dispatch. If the dispatch process is complete and there are recipients in this group left, that means that the module failed to send messages to those recipients. For more information, see *section Delivery Initialized*.

- **Send Failed**

  This group contains recipients to whom the module could not deliver the message.

- **Inactive Recipients**

  This group contains recipients to whom the message was successfully delivered.

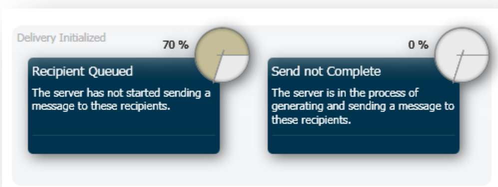
- **Active Recipients**

  This group contains recipients who opened the message and subsequently performed some related actions.

Let's take a closer look at each group.

Delivery Initialized

This group contains recipients that are queued for dispatch.



It includes the following states:

- **Recipient Queued**

  This state contains recipients that are queued for dispatch. When you click the **Dispatch Messages** button, the module puts the recipients from the Opt-in role in this state. Then the module starts generating and sending messages to them.

- **Send not Complete**

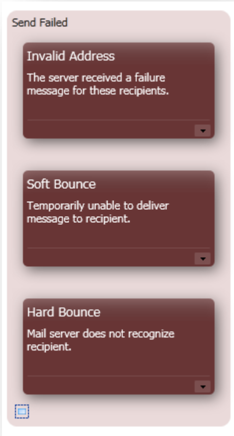
  When the ECM generates a message for a recipient, it puts that recipient in the *Send not Complete* state. When the ECM delivers the message successfully to the recipient's inbox, the module moves that recipient to the *Message Unopened* State. A recipient may stay in the *Send not Complete* state for as short period as one second. If the module fails to deliver the message to the recipient's inbox, then that recipient stays in the *Send not Complete* state.

  If the dispatch process is complete and there are recipients in the *Send not Complete* state, this means that the module failed to deliver the message to those recipients.

Note
The module handles the transitions between states in this group automatically; modifying states in this group could affect core functionality.

Send Failed

This group contains recipients to whom the module could not deliver the message.



It includes the following states.

- **Invalid Address**

  When the ECM queries the message, it checks whether the recipient's email is a valid email address. The module uses a formula (a regular expression) for this purpose. If the address does not match the regular expression, the module moves the recipient to the *Invalid Address* state.

- **Soft Bounce**

  A bounce email is a message that is returned to the sender because it cannot be delivered for some reason. A soft bounce is a temporary failure and there is a chance that the recipient will receive the message eventually. For more information, see the *ECM Administrator's Guide, section 5.6, Emails that Bounce and the Undelivered Max Setting*.

- **Hard Bounce**

  A **hard bounce** means that the email is permanently bounced back to the sender because the address is invalid. A hard bounce is a permanent failure. For more information, see the *ECM Administrator's Guide, section 5.6, Emails that Bounce and the Undelivered Max Setting*.

If a recipient appears in the **Hard Bounce** state, the module stops sending messages to this recipient from any target audience. If such recipient clicks a link in a message that has been sent to them eventually, then the module moves this recipient to the **Clicked Through Message** state.

For more information about messages that bounce, see the *ECM Administrator's Guide, section 5.6, Emails that Bounce and the Undelivered Max Setting*.

Inactive Recipients

This group contains recipients whom the module sent the message. Some of these recipients may have opened the message, but none of them performed any other actions (like clicking links) with the message yet.

If a recipient clicks links in the message, or just opens it, the module moves that recipient further in the engagement plan.

If the module gets an error response from the recipient's email server, it moves the recipient to a state in the Send Failed group.

The Inactive Recipients group contains two states: **Message Unopened** and **Message Opened**.

Message Unopened

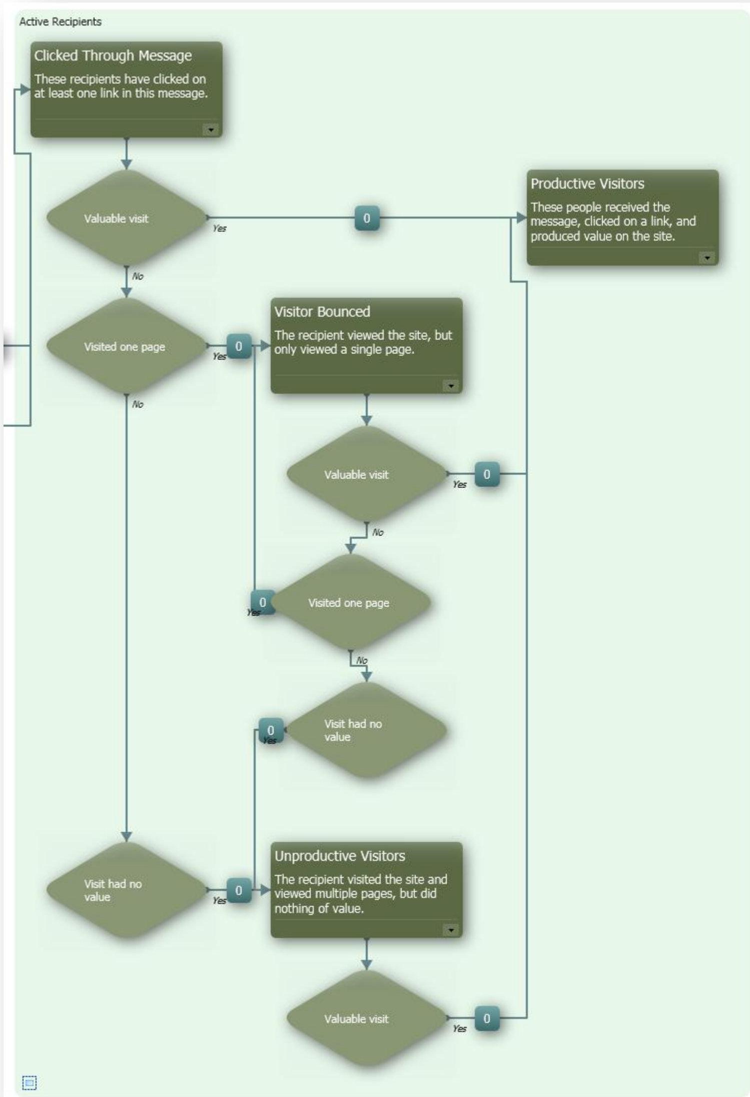
This state contains recipients to whom the module sent the message and who did not perform any actions with it yet.

Message Opened

The module puts recipients who opened the message but did not click links in it in this state.

Active Recipients

This group contains recipients who opened the message and subsequently performed some related actions.



The states in this group are triggered by the Session End page event.

Here is the description of the states in this group.

Clicked Through Message

If the visitor clicks a link in the message, the module puts that visitor in this state.

When a browser session of a visitor in this state ends, Sitecore evaluates the conditions associated with this state for that visitor.

The conditions associated with this state are:

- **Valuable Visit**

  If the visitor achieved any value points after clicking links in the message, this condition puts that visitor in the **Productive Visitors** state. Otherwise, the module checks the **Visited One Page** condition.

- **Visited One Page**

  If the visitor visited only one page, that visitor is moved to the **Visitor Bounced** state. Otherwise, the module checks the **Visit had no Value** condition.

- **Visit had no Value**

  If the visitor visited more than one page, but did not achieve any value points, that visitor is put in the **Unproductive Visitors** state.

Visitor Bounced

If the visitor visited only one page after clicking a link in the message, that visitor is moved to this state.

When a browser session of a visitor in this state ends, Sitecore evaluates the conditions associated with this state for that visitor.

The conditions associated with this state are:

- **Valuable Visit**

  If the visitor achieved any value points, this condition puts that visitor in the **Productive Visitors** state. Otherwise, the module checks the **Visited One Page** condition.

- **Visited One Page**

  If the visitor visited only one page after clicking a link in the message, that visitor is moved to the **Visitor Bounced** state. Otherwise, the module checks the **Visit had no Value** condition.

- **Visit had no Value**

  If the visitor visited more than one page, but did not achieve any value points, that visitor is put in the **Unproductive Visitors** state.

Unproductive Visitors

If the recipient visited the site and viewed multiple pages, but did nothing of value, Sitecore moves that recipient to this state.

When a browser session of a visitor in this state ends, Sitecore evaluates the conditions associated with this state for that visitor.

The conditions associated with this state are:

- Valuable Visit

  If the visitor achieved any engagement value points, this condition puts that visitor in the **Productive Visitors** state. Otherwise, the visitor remains in the **Unproductive Visitors** state.

Productive Visitors

If the recipient generated some engagement value on the site, the module puts that recipient in this state.

This is the final state.

5.2 The Executive Insight Dashboard Reports

The Executive Insight Dashboard application provides you with marketing reports of an email campaign's effectiveness.

The ECM marketing reports include the following reports:

- **Visits**

  This report shows the volume of traffic and the value points that were accumulated as the result of the current email campaign.

- **Entry Pages**

  This report shows the Value, Visits and Relevance of visits to your website for specific entry pages. Entry pages for an email campaign are links in the email.

- **Goal Conversions**

  This report shows the value that was generated by goal conversions in the current campaign.

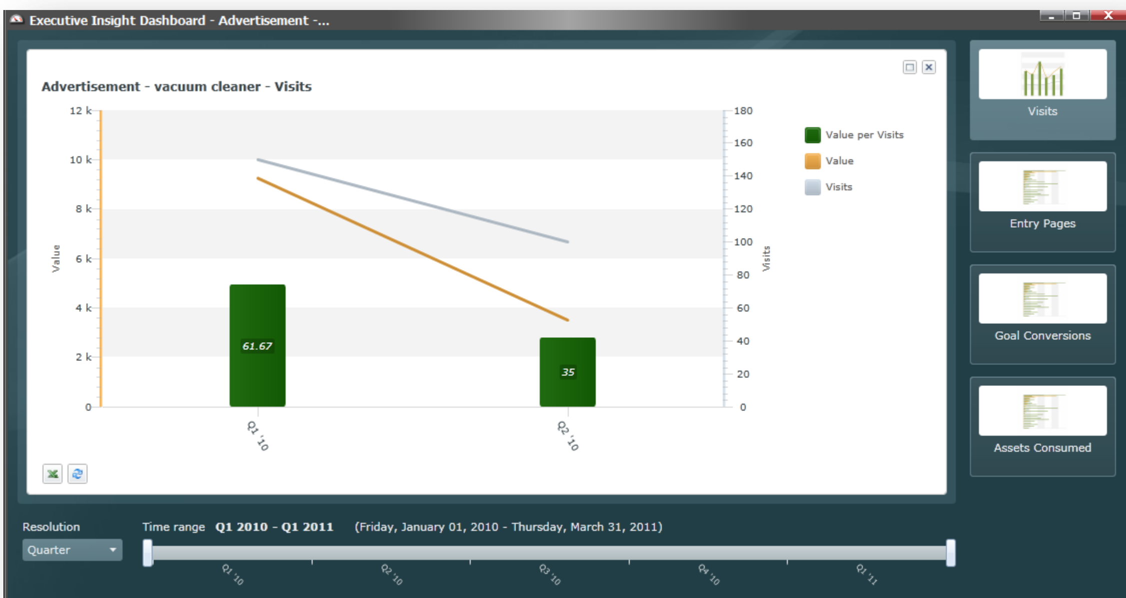
- **Assets Consumed**

  This report shows which assets were downloaded in the current email campaign and which led to the most valuable visits.

The following sections describe each report in detail.

5.2.1 Visits

This report shows the volume of traffic and the engagement value points that were accumulated as the result of the current email campaign.



The **Value** line shows the number of visits over time and the **Visits** line shows the number of visits.

The bars show the relevance (value per visit). This measures the effectiveness of the campaign.

Use this report to get an overview of visits. This report lets you know quickly, how much engagement value your campaign generated over time.

5.2.2 Entry Pages

This report shows the *Value* (points accumulated), *Visits* (volume of traffic) and *Relevance (*Value per Visits) of visits to your website for specific entry pages (email links).

In ECM, entry pages represent links in the email.

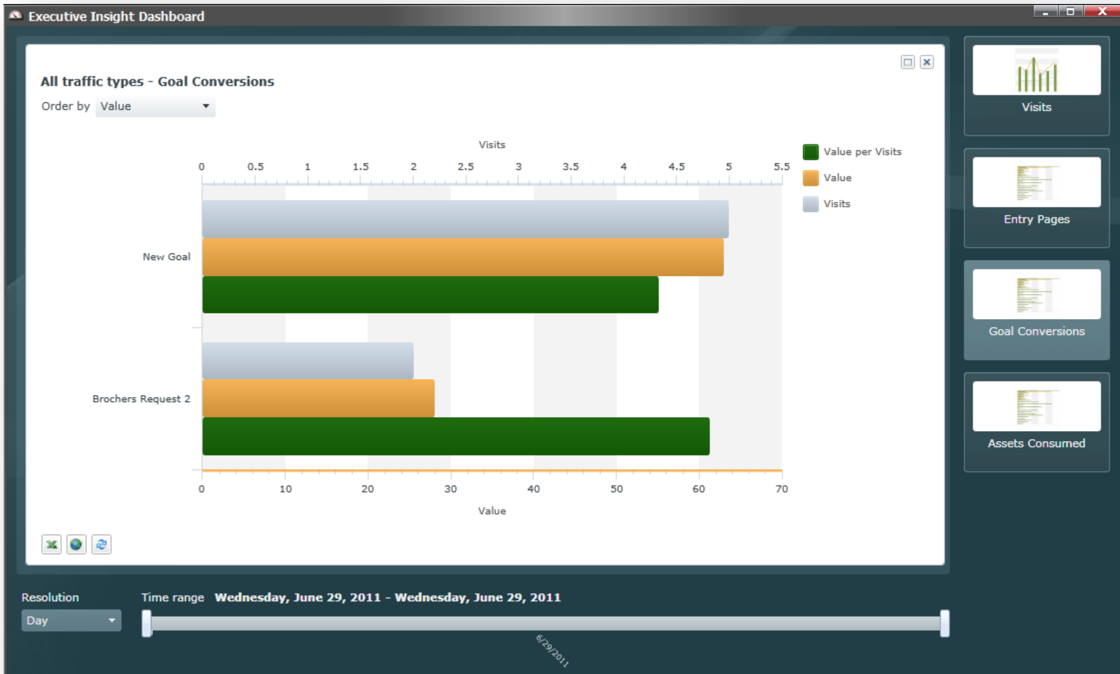
The default view shows entry pages sorted by relevance.

Use this report to help identify the following:

- The effectiveness of the links in the message.
- Landing pages that lead to the highest value.

5.2.3 Goal Conversions

This report shows the goals converted by visitors who entered the website by clicking on a link in an Email Campaign, and the engagement value in those visits.



The bars in this chart display the following information:

- Visits bar

  Shows how many visitors who were part of the email campaign converted this goal.

- Value bar

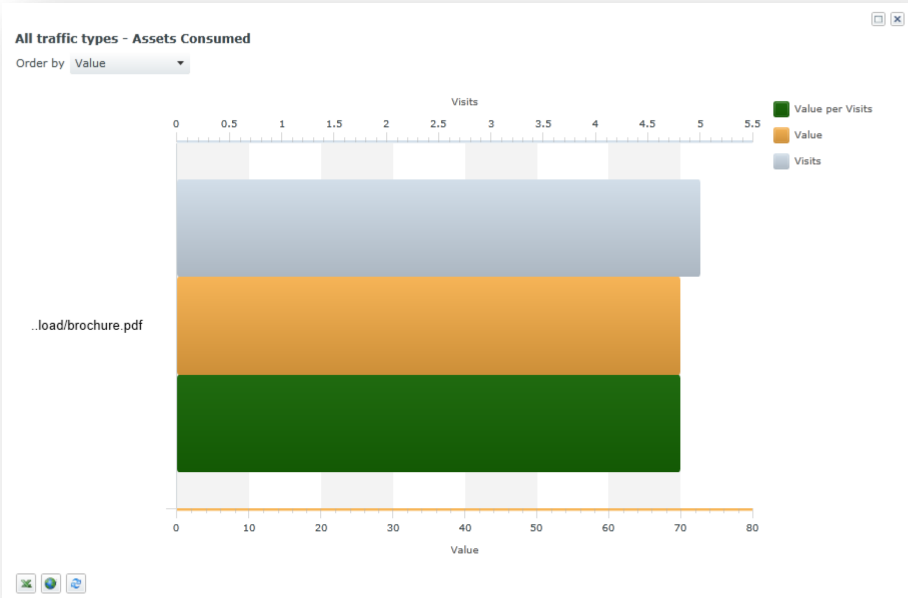
  Shows how much value visitors who were part of the email campaign and converted the goals generated during their visits.

- Value per Visit

  Shows the effectiveness of the goals for people who entered the website as part of this campaign.

5.2.4 Assets Consumed

This report shows which assets were downloaded in the current email campaign and which led to the highest value visits.



The term 'assets consumed' refers to visitors downloading brochures, white papers, video content, and other assets from the website during a visit. When a visitor downloads a brochure it shows a higher level of commitment on the website than just viewing pages.

The default view shows which assets visitors consumed the most during all value visits ranked by value.

The bars in this chart display the following information:

- Visits bar

  Shows how many visitors who were part of the email campaign download this asset.

- Value bar

  Shows how much value this asset generated.

- Value per Visit

  Shows the value per asset consumed.

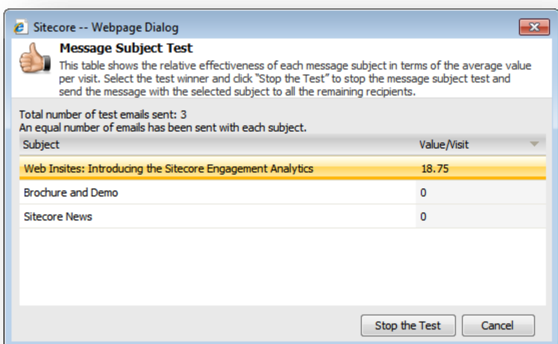
5.3 The Message Subject Test

When you perform a message subject test, Sitecore moves the message to the *Processing* folder.

When Sitecore finishes sending messages to the subset of subscribers, this message remains in the *Processing* folder until you resume the dispatch process or abort it.

To view the subject test results, click the **View Test Results** button in the **Message Preview** tab.

Sitecore opens the **Message Subject Test** dialog box.



The table in the dialog shows the relative effectiveness of each message subject in terms of the average value per visit.

You can use this to judge which subject was most effective and thereby select the winner. Usually the most effective subject in the test will also be the most effective subject or the rest of the emails. Select the test winner and click **Stop the Test** to stop the message subject test. Click **Resume** to send the message with the selected subject to all the remaining recipients.