

E-Mail Campaign Manager 1.3.3 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 email, thereby increasing the return on investment (ROI) of the message.

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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.

	Prodec Web meno	letherhum@nmeil.com I.Settings I.Hala I.Sina est
nail <u>Calendar</u> Documents	Reader Web more •	kokoshyn@gmail.com Settings Help Sign out
Gmail [®]	Search Mail Search the Web Show search options Create a filter	
<u>Compose Mail</u>	<u>D5000 Цена Акция</u> - DIGITA.com.ua - Nikon D5000 + 8 Гб + Сумка Звоните! Гарантия 24 мес I	Бесплатная Доставка <u>About these ads</u> updated < >
Inbox (1) Sent Mail	« Back to Inbox Archive Report spam Delete Move to ▼ Labels ▼ More actions ▼	1 of 290 <u>Older →</u>
<u>Drafts</u>	Sitecore Insites: Introducing the Sitecore Analitics Index X	
<u>Spam</u>	Sitecore Insights to me	show details 6:03 PM (3 minutes ago) 👆 Reply 🔹
Personal	Are you having trouble viewing the e-mail?	
Travel		
<u>6 more</u> ▼	Sitecore Web Insites	sitecore
<u>Contacts</u> Tasks		SILCCOIC
	Worldwide Resources	
 Alexander Kokoshyn 		
earch, add, or invite	Introducing the	
	Sitecore Analytics	In this Issue
Invite a friend ve Gmail to:	Website analytics and marketing	Deve de llerer d
ve Offiair to:	automation are now integrated with web CMS for breakthrough ROI With the	Dear \$fullname\$,
and Invite 100 left	Sitecore Analytics, you can develop	In this edition of Sitecore Web Insites we proudly introduce the
	webpage profiles, personalize content dynamically and take immediate action to	Sitecore Analytics. It provides advanced online marketing
Preview Invite	convert your website traffic.	capabilities such as campaign
	> Download Brochures	management, web analytics, visitor profiling, multivariate testing and
	> <u>Sign up for an Instant Demo</u>	more.
		Enjoy
	Resources	The Sitecore Team
		Introducing the Sitecore
	Maximize Business Results Online:	Analytics Maximize Business Results
	How WCM Technology is Transforming Digital Marketing	Online: How WCM Technology is
	This new study by the Aberdeen Group	Transforming Digital Marketing
	investigates how the best-in-class organizations	<u>A Project Manager's Guide to</u> <u>Sitecore CMS 6</u>

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

Solutions	Products	Customers	Partners	News & Events	Training	Support	Sitecore	Contact
ome > Sitecore Ins	stant Demo						Os	hare this page
Online Demons Description	tration	● I want a	re Instant I n Instant Demo. request an alterr	Demo nate demo date and time	.			
as Instant De	mo O	Requested	date and time					
📧 Take a tou	r O							
🕐 Have a que	estion? O	About Yo	u (*required	fields)				
Get White Papers Case Studies and	, Webinars,		ide your contact in veb login and tele	nformation below. A cont phone info.	irmation email w			
Contact Sitecore for More Information Sitecore worldwide contacts 9	Email				Your Privac Your email addres are confidential an	s and personal info d will not be sold o	ormation r rented.	
Sitecore world	while contacts o	Company				See our Privacy Po	licy for more detail:	5.
		How did y	/ou hear abou	It Sitecore				
		Choose o	ne		*			
		Please s	ubscribe me to t	e Sitecore newsletter				
		Schedule	Your Demo					
set Started with			Set Our Newslette			ir Read Case Study		

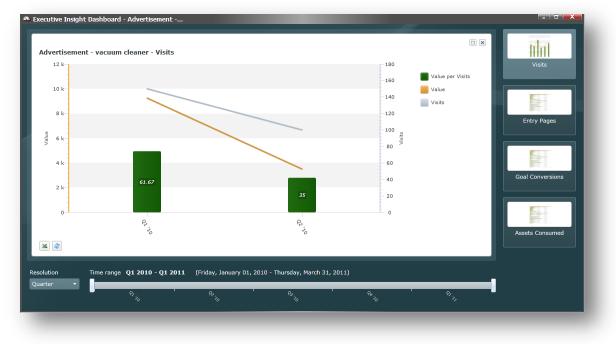
When the recipient successfully completes the form and clicks the **Schedule your Demo** button, Sitecore registers this as a conversion and the current visit accumulates a certain value.

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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

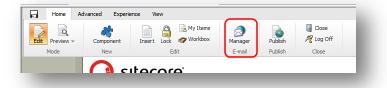
Before creating a new message, Maria decides who should receive the message and selects an appropriate target audience. Later, Sitecore sends the message to all of the subscribers who belong to this target audience. In this case, Maria selects the *Sitecore Insights* target audience.

2.2.1 Selecting an Appropriate Target Audience

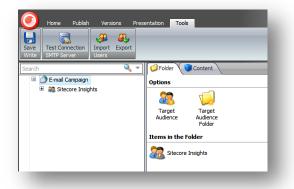
Before Maria can create a message, she needs to select a target audience.

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.

Test Connection Users			
earch 🔍 🔫	Folder Content		
Compaign Compaign Compaign Steccore Insights Standard Messages Softedued Processing Sent	Insert Message Folder Items in the Folder	Two-Column Message One-Column	HTML Pre-existing Message Page
Jen	Standard Messages	Drafts	Scheduled

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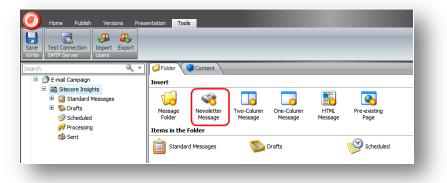


2.2.2 Creating the Message

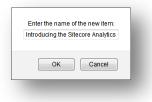
Now that Maria has selected a target audience, she can start to create the actual message that she wants to send.

To create the message:

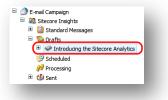
 Maria selects the Sitecore Insights target audience and in the right-hand pane, on the Folder tab, she clicks Newsletter Message. Maria might use any other message type but Newsletter Message contains pre-defined design that meets her requirements.



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.

lit Preview -	Component	Insert Lock 🛷 Workbox		Publish	Close	
Mode	New	Edit	E-mail	Publish	Close	

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.

Search 🔍 🔻	🔝 Message Preview 🔪 🔐 Email Preview 👌 😼 Spam Detect 👌 🧊 Co
😑 🎯 E-mail Campaign	
Sitecore Insights	Edit Test Dispatch Messages
🗉 间 Standard Messages	
😑 🥯 Drafts	From: Sitecore Insights <do-not-reply@yoursite.net></do-not-reply@yoursite.net>
Introducing the Sitecore Analytics	To: 6 subscriber(s) Subject: Web Insites: Introducing the Sitecore Engagement Analytics
I Scheduled	bubjeet, web instear introducing the steepic engagement analytics
🔗 Processing	

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**.

🛿 Sitecore Webpage Dialog
Limited Number of Subscribers Decide whether to send the message to every subscriber or to a limited number of subscribers.
If you decide to send the message to a limited number of subscribers, the wizard will send messages to a random subset of subscribers.
Dispatch to Limited Set of Subscribers
Quantity: 10 📚 % (1 subscribers)
Sack Next > Cancel

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.

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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.

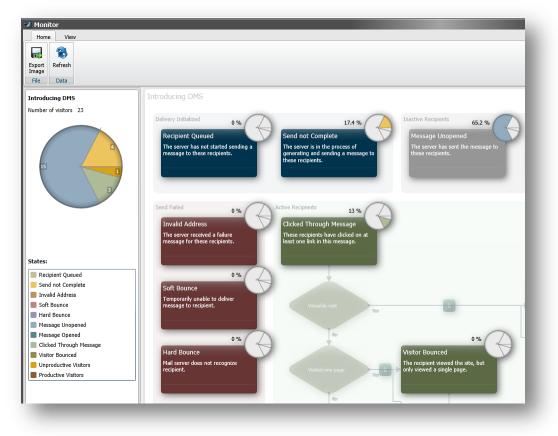
To monitor how the dispatch process is going and how visitors behave, Maria opens the Engagement Plan Monitor.

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.



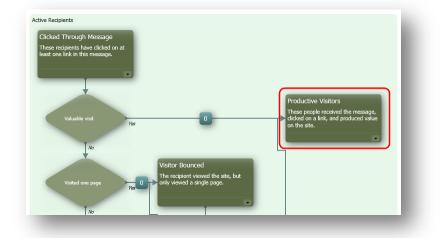
The module opens the engagement plan monitor.





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

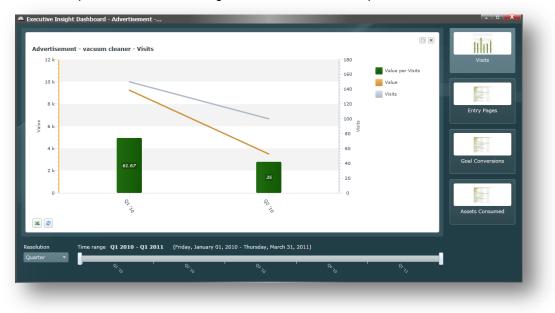
When Maria has verified that a significant amount of subscribers have reacted to the message, she analyzes the value of the message using the **Engagement Analytics** reports.

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.

iearch 🔍 🔻	🔯 Message Preview 🔪 🕹 Email Preview 👋 😼 Spam Detect 🔧 🔽 Content 🔪	
E-mail Campaign Sitecore Insights	Monitor Behavior Analyze Value Copy	to Drafts
 Image: Standard Messages Drafts Scheduled 	From: Sitecore Insights <do-not-reply@yoursite.net> Subject: Web Insites: Introducing the Sitecore Engagement Analytics</do-not-reply@yoursite.net>	E
Processing	Are you having trouble viewing the e-mail? Please dick here to see the online vers	on.
 		E

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 email, 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.

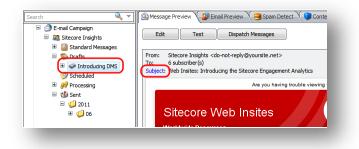
In this section, Maria carries out a message subject test, reviews the Subject Test report, and then completes the dispatch operation using the subject that performs best.

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**.

Message Subject Enter more than one subj subjects.	iect to test the effectiveness of different message
	Insert User Field
Message Subject(s):	English
Web Insites: Introducing the	e Sitecore Engagement Analytics
Brochure and Demo	
Sitecore News	
If you enter more than one subje message.	ct, an A/B test will be automatically created for this



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.

Insights	Edit	Test
lard Messages		
s	From:	Sitecore Ins
troducing DMS	To:	6 subscriber
uled	Subject (1 d	f 3): Web Insites
eeina		

- 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.

nited Number of Subscribers Decide whether to send the message to every su	oscriber or to a limited number of subscribers.
If you decide to send the message to a limited nu a random subset of subscribers.	mber of subscribers, the wizard will send messages to
Dispatch to Limited Set of Subscribers Quantity: 50 🔷 % (3 subscribers))
Subject MV Test is configured for this message.	
	< Back Next > Cancel

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.

Search 🔍 👻	Message Preview Brail Preview Span Detect Content Pause Abort Monitor Behavior Analyze Value View Test Results Copy to Drafts
 Image: Image and Image	From: Sitecore Insights <do-not-reply@yoursite.net> Subject: Sitecore News</do-not-reply@yoursite.net>
Scheduled	Are you having trouble viewing the e-mail? Please click here to see the online vers
Processing Processing Producing DMS Sent	Sitecore Web Insites Worldwide Resources
	Introducing the Sitecore Analytics

Sitecore moves the message to the *Processing* folder.

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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.

Message Subject Test This table shows the relative effectiveness of each message per visit. Select the test winner and click "Stop the Test" to s send the message with the selected subject to all the remain	top the message subject test a	
otal number of test emails sent: 3 An equal number of emails has been sent with each subject.		
Subject	Value/Visit	-
Web Insites: Introducing the Sitecore Engagement Analytics	18.75	_
Brochure and Demo	0	
Sitecore News	0	
	Stop the Test Car	ncel

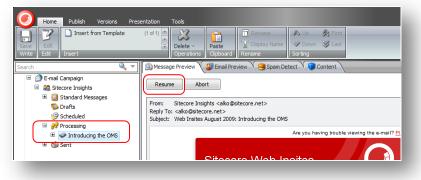
In this report, Maria selects the test winner and clicks **Stop the Test** to stop the message subject test. Then she clicks **Resume** to send the message with the selected winning subject to all the remaining recipients.

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.

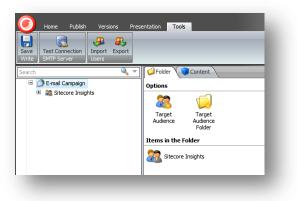
3.1.1 How to Access the E-Mail Campaign Manager

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

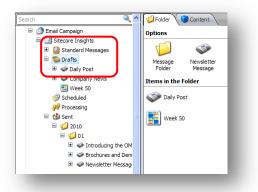
The messages are stored in folders under the target audience items.

To find a message:

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- 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:

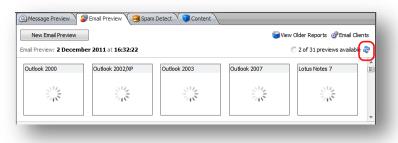
1. In the Drafts folder, select a message.



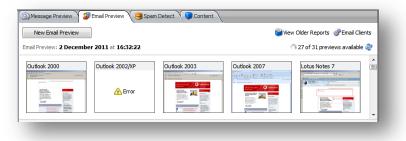
2. In the Email Preview tab, click New Email Preview.

 Bernail Campaign Sitecore Insights 	New Email Preview				Email Clients
 Image: Standard Messages Image: Standard Messages Image: Standard Messages 			ail Preview" to initiate a preview g. Click on "Email Clients" to add	-	
B	AOL Mail (Explorer) BlackBerry 8900 Hotmail (Explorer) Lotus Notes 6.5 Me.com (Firefox) Outlook 2007 Thunderbird 2.0 Yahoot Mail (Firefox)	AOL Mail (Firefox) LG Optimus Hotmail (Firefox) Lotus Notes 7 Outlook 2000 Outlook 2000 Outlook 2010 Thunderbird 3.0 HTC HD7	Apple Mail 4 Gmail (Explorer) iPhone 3GS Lotus Notes 8 Outlook 2002/NP Plain Text Samsung Intrepid Color blindness	 BlackBerry Curve Gmail (Firefox) iPad 2 Lotus Notes 8.5 Outbook 2003 Nokia N96 Yahoo! Mail (Explorer) 	

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:

New Email Previe	ew		(🖥 View Older Reports 🛭 💣 Email Clients
mail Preview: 2 Dec	cember 2011 at 16:32:22			🥋 27 of 31 previews available 🍣
Coutlook 2000	Outbook 2002/XP	Outlook 2003	Outlook 2007	Lotus Notes 7
nail Preview: Outlo	ok 2007			
nd Delete Move Fold	er Y Rule Actions Y Send Actions J		gorize Follow Mark as Up V Unread Options	À Find ∧ Related ∼ Ls Select ∼ Find
tes June 2011: Re:				
	Sitecore Web Norldwide Resources			e click here to see the online version.

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:

		(🕲 Vie	w Older Reports @Email @	Clients
nber 2011 at 16:32:22		_	💭 27 of 31 previews availa	ble 🎯
Outlook 2002/XP	Outlook 2003	Outlook 2007	Lotus Notes 7	Ê
	And the second sec	ACCURATE AND ADDRESS ADDRE	CARACTER AND COMMENTS OF A DECK	

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

Email Preview Report	
Select the the report you wa	ant to view.
2 December 2011 16:32:22	
2 December 2011 15:52:09	
1 December 2011 18:50:00	
30 November 2011 17:45:16	
30 November 2011 17:28:13	
	OK Cancel



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:

	1		📛 Vi	ew Older Reports 🞯 Email Clients
mbe	er 2011 at 16:32:22			💭 27 of 31 previews available 🍣
	Outlook 2002/XP	Outlook 2003	Outlook 2007	Lotus Notes 7

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

ailable:	Selected:	
	📀 👷 Outlook 2000	
	G 👷 Outlook 2002/XP	
	👷 Outlook 2003	
	👷 Outlook 2007	
	🚖 Lotus Notes 7	
	🚖 Lotus Notes 6.5	
	👷 Lotus Notes 8	=
	Thunderbird 2.0	
	Thunderbird 3.0	
	Outlook 2010	
	👷 Plain Text	
	👷 Lotus Notes 8.5	
	Color blindness	
	Apple Mail 4	
	😭 Hotmail (Explorer)	
	AOL Mail (Explorer)	
	😭 Yahoo! Mail (Explorer)	
	Gmail (Explorer)	
	😭 Gmail (Firefox)	
	👷 Hotmail (Firefox)	T

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

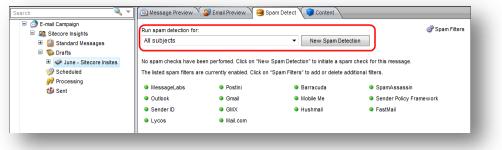
To be able to use this functionality, you must sign up for the Spam Check service in the Sitecore App Center. For more information about this, see the document *Getting Started with Sitecore App Center*.

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:

 E-mail Campaign Sitecore Insights Standard Messages 	Run spam detection for: All subjects		New Spam Detection		🍟 View Older Reports o 🎯 Spam Filters
 Source of the second sec	Last spam detection: 5 De	cember 2011 at 14:51:12			0% results available
June - Sitecore Insites	In progress				① Click Refresh to get the latest
😕 Scheduled	MessageLabs	Postini	💥 Barracuda	SpamAssassin	👻 results.
e Processing	Sender ID	Outlook	👋 Gmail	Mobile Me	STE GMX
🗐 Sent	Hushmail	FastMail	Lycos	Mail.com	
	Spam filter details: Mes	sageLabs			
	े ^{थे} Web Insites June 2011	Resources & Sitecore Buzz			6
	In progress.				
	Sitecore News				9

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

Search 🔍 🔻	🙉 Message Preview 🔪 🐉 Ema	ail Preview 🛛 😹 Spam Detect	Content			
 B E-mail Campaign Sitecore Insights Standard Messages 	Run spam detection for: All subjects	_	New Spam Detection]	🍟 View Older Reports 🛭 🍪 Spam Filter	rs
🗆 💿 Drafts	Last spam detection: 5 December 2011 at 14:51:12				🥋 60% results available 🤤	
Wewsletter Message Wewsletter Message	Failed					
 June - Sitecore Insites Scheduled Processing Sent 	3 Postini 3 Sender Policy Framew		k 🔞 Sender ID			
	Passed with comments	e darracuda	A SpamAssassin	⊲ ∰Outlook		
	Passed I Gmail	🖋 Mobile Me	SMX	🖋 FastMail	V Lycos	
	✔ Mail.com In progress ﷺHushmail					
	Spam filter details: Postini					
	😣 Web Insites June 2011: Res	ources & Sitecore Buzz			6	~
	Failed with a Postini score of 0.0 Some of your image URLs do no Some of your links do not use S	t use SSL. Replace "http://" with			s spammy.	
	😣 Sitecore News				6	V

Spam filters can return different types of results:

• Failed.

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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.

Bostini Passed with comments	Sender Policy Framework	😣 Sender ID		
MessageLabs	Barracuda	SpamAssassin	and Outlook	
Passed I Gmail	🖋 Mobile Me	MX GMX	🖋 Hushmail	🖌 FastMai
Spam filter details: Postir	ni			
😢 Web Insites June 2011:	Resources & Sitecore Buzz			
Failed with a Postini score o	f 0.01684.			
	o not use SSL. Replace "http://" with			pammy.
Some of your links do not us	se SSL. Replace "http://" with "https:	://". Postini considers non-!	SSL links spammy.	

• 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.

Passed with comment	s agarracuda	SpamAssassin	Outlook	
Passed				
🖋 Gmail	🖋 Mobile Me	SMX	🖌 FastMail	VLycos
In progress				
Spam filter details: Out	look			
📲 Web Insites June 2011	l: Resources & Sitecore Buzz			
Passed with a Outlook sco	re of 2.			
		mail, this is very common in spam our email, this is considered spamr		emoving the word "Dear".

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

o Passed.

Your message will pass this filter.

o In progress.

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

o Error.

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

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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:

MessageLabs	Barracuda	SpamAssassin	Outlook
Passed Gmail	Mobile Me	SMX	🖋 Hushmail
5pam filter details: Barrad	tuda		
Web Insites June 2011: F	Resources & Sitecore Buzz		
	ostly HTML. Be sure to includ	use you to fail any spam filters. de a full plain text version of your n :ext	nessage
Passed with a Barracuda sco		use you to fail any spam filters.	

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:

Run spam detection for:		
All subjects	-	New Spam Detection
All subjects		
Web Insites June 2011: Resources & Sitecore Buz	z	
Sitecore News		

How to View Older Reports

You can view older reports that the module generated previously.

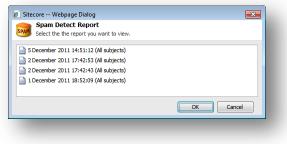
To view older reports:

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

un spam detection for:			ビ View Older Reports 🞯 Spam Filters
All subjects		New Spam Detection	
ast spam detection: 6 грудн	я 2011 at 09:59:53		🔅 32% results available 🍣
Failed			
🔞 Postini	🔞 Sender Policy Framev	vork	=
Passed with comments			=
MessageLabs	Barracuda	outlook 🖌	



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



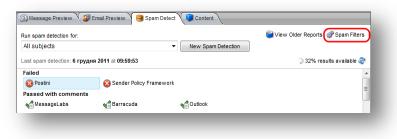
2. Select a report and click **OK**.

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:

Spam Filters Select spam filters to check. ilable:	
Apply to all messages	 ☆ FastMail ☆ Lycos ☆ Mail.com

Select email clients and click OK.

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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.

earch		Jo \bigotimes First Jown 🎯 Last ng	T Display Name Rename	Tools Delete ~ Paste Operations Clipboard	esentation (1 of 1)	Publish Versions Pre	Home
	Analyze Value Copy to Drafts	Monitor Behavior Analy		Abort 2011_0_15 Newsletter <c< th=""><th>Resul</th><th>Campaign ecore Insights Standard Messages Drafts</th><th>□ ② E-mail □ 33 Sit</th></c<>	Resul	Campaign ecore Insights Standard Messages Drafts	□ ② E-mail □ 33 Sit
🗃 😈 Sent [Add an image here]		ing trouble viewing the e-mail? <u>Please click here to se</u>				Processing Monday Newsletter	- 2

The module opens the engagement plan monitor.

📸 Monitor - Monday Newsletter		
Home View		
Export Image		
File Data		
Monday Newsletter Number of visitors 21	The server has not started sending a The server is in the process of The	alid 0.% Alid Address server received a failure age for these recipients.
6	28.6 %	Accipients

Note

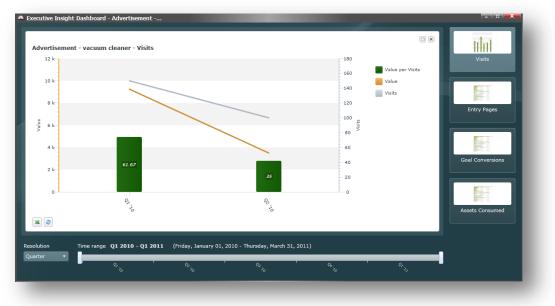
When using Plain Text Message, the **Visit Reports** will mark all messages as unopened even if they have been opened.



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

Ave Edit Insert from Template Edit Insert	(1 of 1) Delete
earch 🔍 🔻	🕅 🚳 Message Preview 🔨 🥵 Email Preview 🔨 😼 Spam Detect 🔨 🗊 Content 🔪
 B-mail Campaign Sitecore Insights Standard Messages 	Resume Abort Monitor Behavior Analyze Value Copy to Drafts From: 2011_0_15 Newsletter < do-not-reply@yoursite.net> Image: Copy to Drafts Image: Copy to
📡 Drafts 🕑 Scheduled	Subject: Sitecore Newsletter
Processing	Are you having trouble viewing the e-mail? Please click here to see the online version.
 Monday Newsletter Sent 	

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.

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

Search Sea	Image: Spannesse Preview Image: Spannesse Preview Image: Spannesse Preview Image: Spannesse Preview Edit Engagement Plan Edit Test Dispatch Messages Edit Engagement Plan Preview Subscriber: Emailcampaign antest997_at_vo_dot_ua 20
Gill Standard Messages Crafts Go Drafts Go Introducing Analytics Scheduled	From: Sitecore Insights <do-not-reply@yoursite.net> To: 10 subscriber(s) Subject: Sitecore Newsletter Are you having trouble viewing the s-mail? Please click here to see the online version.</do-not-reply@yoursite.net>
🥔 Processing 🗷 付 Sent	[Add an image here]

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

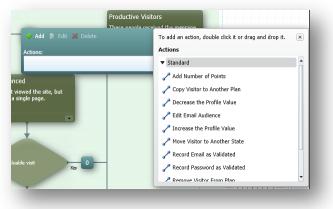
🧏 Designer		
Home View		۵
Save Export Image File Editing	· · · · · ·	Text fors
▼ Standard	Thursday Newsletter	
Is Email Address Validated	Delivery Initialized	Inactive Recipients
Is Email Link Clicked	Recipient Queued	Send not Complete Message Unopened Messa
S Email Opened	The server has not started sending a message to these recipients.	The server is in the process of these recipients. These in a million of the server has sent the message to these recipients.
 Is Password Validated Time Spent in Automation State 		these recipients.
Time spent in Automation State		
	Send Failed	Active Recipients
	Invalid Address The server received a failure	Clicked Through Message
	message for these recipients.	These recipients have clicked on at least one link in this message.
		↓ _
	Soft Bounce	Produ
	Temporarily unable to deliver message to recipient.	Valuable visit Ver 0 or the dicked dicked
Conditions		
Actions		
	Hard Bourses	Visitor Doursed

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

	🕂 Add 📡 Edit 💥	Delete	Iuced value
	Actions:		
tor Bounce	d		
recipient vie viewed a si			



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.

🕂 Add 🍃 Edit 💥 Delete	
Actions:	
PEdit Email Audience	

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

Change Target Audience Su	Ibscriptions e visitor should be subscribed to and the target audiences that the
visitor should be opted out of.	e visitor should be subscribed to and the target addiences that the
get Audiences:	Subscribe To:
E-mail Campaign	
🌆 Newsletter Subsribers	
Sitecore Insights	
	Opt-out Of:
Send confirmation mail	
Joena commutation main	
	OK Cancel
	l intranet Protected Mode: Off

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.

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To unsubscribe a website visitor from a target audience:

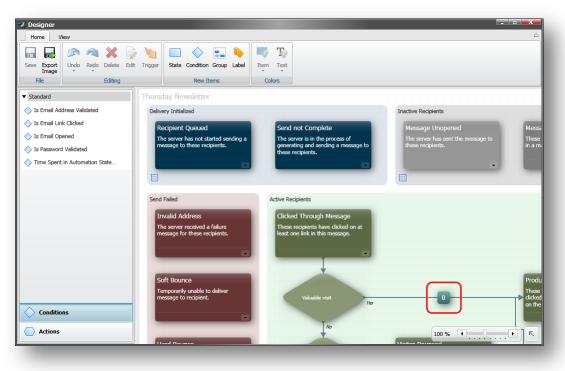
- a. In the **Target Audiences** field, select a target audience.
- b. Click right arrow icon next to **Opt-out Of** field. Selected target audience is displayed in the **Opt-out Of** field.
- 10. Click Ok to close the Change Target Audience Subscriptions dialog box.
- 11. In the **Designer**, click **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:

Search	🔪 Message Preview 🤇 🔐 En	nail Preview 🔪 🤕 Spam Detect 🔪 🗊 Content 🔪	<u>\</u>
Compaign	Edit Test	Dispatch Messages Preview	Edit Engagement Plan Subscriber: Emailcampaign\antest997_at_yo_dot_ua 🖑
Cantard Messages Standard Messages Sources The second s	From: Sitecore Insights <d To: 10 subscriber(s) Subject: Sitecore Newsletter</d 	To: 10 subscriber(s)	
Scheduled Processing Sent		Are you having trouble viewing th	e e-mail? <u>Please click here to see the online version.</u>
	[Add an image he	re]	

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.



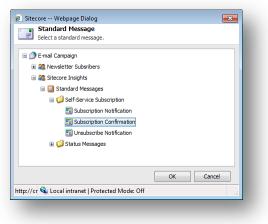
This dialog box lists all of the actions that are available.

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.

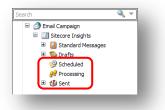
This folder contains the messages which are scheduled to be sent at a later time.

• 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.



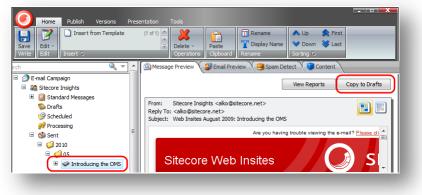
You can copy a message from one of these folders and send it again or edit it.

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.

Search Search Search Second Ensights Standard Messages Standard Messages Sources Inside the Message Second International Second International	Message Preview Benal Preview Span Detect Content Add · Remove · Clear · Download Attachments: Name Path Size
🕼 Sent	

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

Sitecore Webpage Dialog Media Browser Select the image or file that you want	to open.	
Media Library Gries Gordenation Gordenation Gordenation Gordenation Gordenation Gordenation Gordenation Gordenation Gordenation Gordenation	Common	Sitecore Web Insites
Name: /Images/Newsletter		
Upload Drag & Drop		OK Cancel

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

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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.

n this Issue	In this Issue
Dear \$name\$,	Dear Harry,
This issue contains the	This issue contains the
Main Section	Main Section

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**.





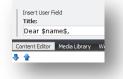
Sitecore opens the related item using the ribbon.

Home	Navigate	Review	Analyze	Publish	Versions
Save Save/Close	[] Edit →	🗋 Insert f	rom Template	(1 of	1)
Write	Edit	Insert %	_	_	Oper
Content					
	_				
Insert User Field	ر				
Title: Dear ,					
Dear,					
	dia Library	Workbox			
ን 😭				A	re you having t
	10				

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.



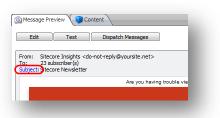
To preview the previous the preview tab, click the **Refresh** button (¹) to the right of the **Preview Subscriber** field.

Edit	Test Dispatch Messages	Preview Subscriber: Emailcampaign\Harry	an 2
o: 2	011_0_15 Newsletter <do-not-reply@yoursite.net> 3 subscriber(s) itecore Newsletter</do-not-reply@yoursite.net>		
	Are you having	g trouble viewing the e-mail? Please click here to see the online version.	
	[Add an image here]		
			E
	Main Section	In this Issue	ш
	Main Section ≻Link1		II
		In this Issue Dea (Harry, This issue contains the	III

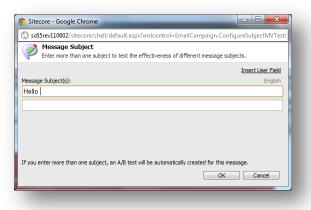
3.1.10 How to Add a \$token\$ to a Message Subject

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.

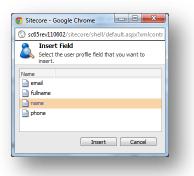




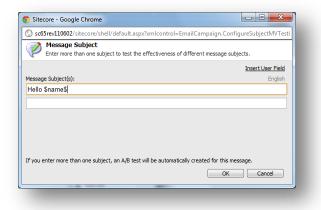
3. In the **Message Subject** dialog box, enter the subject text, ensure that the cursor is in the place where you want to insert a token and then click **Insert User Field**.

🧿 Site	core - Google Chrome
🔘 sce	5rev110602/sitecore/shell/default.aspx?xmlcontrol=EmailCampaign.ConfigureSubjectMVTest{
Ø	Message Subject Enter more than one subject to test the effectiveness of different message subjects.
	je Subject(s):
Hello	
If you	enter more than one subject, an A/B test will be automatically created for this message.
	OK Cancel

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 Email 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.

Search 🔍 👻	Image: Search of the searc	
Generation Generation	Quick Info Message	
 B	Web Page - Select a page to send as your message : sitecore/content/Home/Email Campaign/Sitecore Insights/Drafts/Company News/Newsletter Insert User Field AlternateText [standard value]:	
	Your e-mail browser does not support rich text (Html) mail.	

- 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.

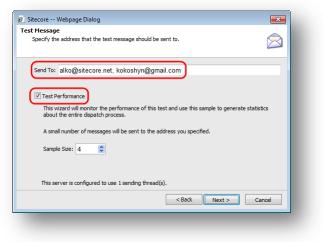
To get the estimate, the module sends a small number of messages to a recipient (or several recipients). While the messages are being sent, the module gathers statistics, estimates how long it will take to send all the messages, and shows the *Dispatch Statistics* report afterwards.

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.

ispatch Statistics		
The messages have been sent.		\geq
Result:		
Messages sent: 4		
Messages not sent: 0		
Average time required to:		
Generate a message: 00:00:00.059		
Send a message: 00:00:00.017		
Estimated time required to:		
Generate messages for this list: 00:00:00.269		
Send messages to this list: 00:00:00.079		
Total: 00:00:00.349		
The actual time required to dispatch this message load during the dispatch process.	to all subscribers may vary depending on s	erver
	< Back Next > 0	Cancel

This page contains the following information:

- o 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**.

💈 Sitecore Webpage Dialog	— ×
Message Subject Enter more than one subject to test the effectiveness of diffe subjects.	erent message
	Insert User Field
Message Subject(s):	English
Web Insites: Introducing the Sitecore Engagement Analyt	ics
Brochure and Demo	
Sitecore News	
If you enter more than one subject, an A/B test will be automatically on message.	reated for this

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.

aign Insights	Edit Test
ard Messages	
;	From: Sitecore Ins
roducing DMS	To: 6 subscriber
uled	Subject (1 of 3): We Insites
cina	

- 4. On the **Message Preview** tab, click **Dispatch Messages**. Sitecore starts the **Dispatch Message** wizard.
- 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

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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.

Search 🔍 🔻	🖾 Message Preview 🗸 😹 Email Preview 🗸 🥃 Spam Detect 🔪 🗊 Content
 Stecore Insights 	Pause Abort Monitor Behavior Analyze Value View Test Results Copy to Drafts
Standard Messages Standard Messages	From: Sitecore Insights <do-not-reply@yoursite.net> Subject: Sitecore News</do-not-reply@yoursite.net>
Scheduled	Are you having trouble viewing the e-mail? Please click here to see the online vers
Processing P	Sitecore Web Insites
	Introducing the Sitecore Analytics

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.

Search 🔍 🔻	Message Preview Breview Brevie
 B E-mail Campaign Sitecore Insights 	Pause Abort Monitor Behavior Analyze Value View Test Results Copy to Drafts
Gill Standard Messages	From: Sitecore Insights <do-not-reply@yoursite.net></do-not-reply@yoursite.net>
🔂 Drafts	Subject: Sitecore News
🧐 Scheduled	Are you having trouble viewing the e-mail? Please click here to see the online vers
AProcessing AProcessing AProcessing AProducing DMS APROVE Sent	Sitecore Web Insites
	Introducing the Sitecore Analytics

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

Message Subject Test This table shows the relative effectiveness of each message sub- per visit. Select the test winner and click "Stop the Test" to stop send the message with the selected subject to all the remaining	the message subject test a	
Total number of test emails sent: 3 An equal number of emails has been sent with each subject.		
Subject	Value/Visit	•
Web Insites: Introducing the Sitecore Engagement Analytics	18.75	
Brochure and Demo	0	
Sitecore News	0	
[Stop the Test Can	cel

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:

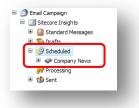
1. In the **Dispatch Message** wizard, in the **Launch Message Dispatching** dialog box, select the **Later** option. After you select it, you will be given access to the **Delivery Date and Time** field,



where you can set the time for the dispatching.

unch Message Dispatchi				
Decide when the dispatch	process snould be s	tarted.		\ge
Launch Dispatching				
Now - begin the dispatch	process immediately			
Later - begin the dispatch	process at the spec	tified time.		
Date and Time 5/14/2010 <u>5</u> 5	:58 PM 💌			
is message will be sent to ap	proximately 4 subscr	ibers.		
		< Back	Start >	Cancel

- 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.

arch 🔍	Message Preview Content	
🖃 🔿 E-mail Campaign		
🖃 🎎 Sitecore Insights	Cancel Dispatch Now	Copy to Drafts
Standard Messages		Schedule for Processing: 5/14/2010 5:58 PM
ዄ Drafts	From: Sitecore Insights <alko@sitecore.net></alko@sitecore.net>	
Scheduled	To: 4 subscriber(s)	
E Company News	Reply To: <alko@sitecore.net></alko@sitecore.net>	
🔗 Processing	Subject: Sitecore Newsletter	

- 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.

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Note

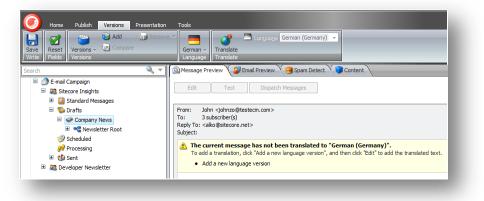
In this example we assume that there are two languages configured in your Sitecore installation – English and German. Your system administrator can configure an additional language for you.

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:

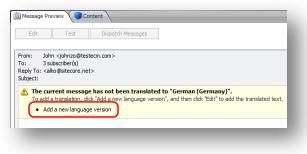
Home Publish Versions Presentation	Tools
Save Reset Versions V 🖓 Compare	English Translate Compare Latest to Latest
Write Fields Versions	English : English
Search Q ✓ □ ② E-mail Campaign □ Stecore Insights □ ③ □ Standard Messages □ © □ Partition □ @ ○ Orpany News	I version. German (Germany) : Deutsch (Deutschland) U versions. F
Scheduled	R S
 ● ● Sent ● ● Developer Newsletter 	More Languages
	provide mouge notes
	Hello! This is the English version. > <u>Link 1</u>

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)*.

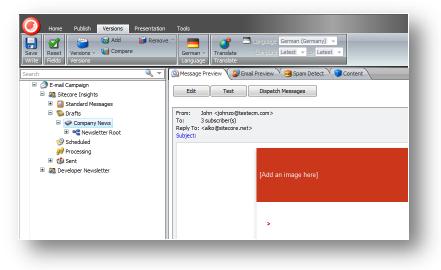




3. On the **Message Preview** tab, click Add a new language version.



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**.

	orites	🏉 < div						\		▼ ⊡	600	. 100	JC .	<u>S</u> afety ▼	10013		_
-	Home	Advan	iced I	Experien	te Vie	ew								_		~	-
D	Q		-					y Items		2		0		Clos			
Edit	Preview	*	Compone	ent	Insert	Lock	-	orkbox		Manage		Publis		R Log			
	Mode		New			E	dit			E-mail		Publis	h 👘	Close			
												[No tex	t in fiel	d] [No text	in field]		
1	\sim	_	_	_	_	_		_	_			_					
	Title		- 11														Ε
		- Mor															
	-					_					_				_		
		o aus t in field]	Deu	tschl	and!				2		[No	o text ir	n field	ŋ			
	[NO Tex	t in tieldj								ļ	-			- -			
	> <u>[No</u>	text in fi	eld]								٢No	text in	field1				
												text in fie					
															_		
n	No text in	field]															

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

Home Publish Versions Presentation Save Save Save Save Write Fields Save Save Search Save Save Save Stecore Insider Messages Stecore Save Stecore Save Save Save Stecore Save Save Save	Tools
Image: Scheduled Image: Processing Image: Scheduled Image: Processing Image: Scheduled Image: Scheduled Image: Processing Image: Scheduled Image: Scheurstere <td>More Languages</td>	More Languages

3.1.17 How to Insert External Links in Messages

When you insert links to external websites in ECM messages, it is important that you include the scheme prefix, for instance:

```
http://
https://
```

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For example, a link to the sitecore.net website should look like this: http://www.sitecore.net.

Sitecore Webpage Dialo	eg en	
🧈 🖻 🔗 😫 Ω - 🖏	🖒 - 🤁 - 🏦 Insert Field -	
₿ ℤ Ü ≣ ≣ ≣ I	■ 📰 듣 듣 譁 幸 abe ×: ×* A • ⊗ • 🚍 🛄	
	🗐 Hyperlink Manager	
	Hyperlink Anchor E-mail	
	URL http://www.sitecore.net	
	Link Text	5
	Target None	-

If you don't include the scheme prefix, ECM will treat this link as an internal link. For instance, if you insert a link sitecore.net, ECM will look for a page called sitecore.net on your website.

You can insert all types of scheme prefixes in your emails (for example, ftp://, mailto:) but ECM will only support Analytics tracking to the following prefixes:

http:// https://



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.

 E-mail Campaign Isights 	Resume Abort	Monitor Behavior Analyze Value Copy to Drafts
 Image: Standard Messages Drafts Scheduled 	From: Sitecore Insights <do-not-reply@yoursite.net> Subject: Sitecore Newsletter</do-not-reply@yoursite.net>	
E 🔗 Processing	Are you h	naving trouble viewing the e-mail? Please click here to see the online version.
 Sitecore Insights Sitecore Insights Sitecore Insights Sitecore Insights 		

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

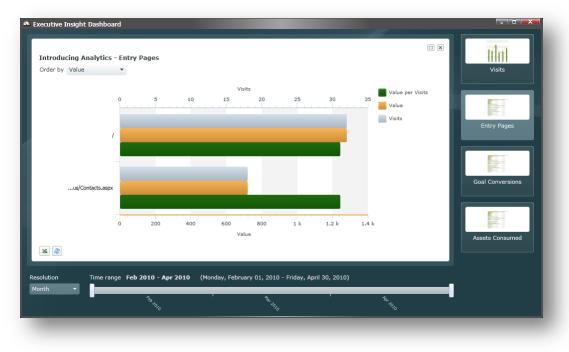
Monitor View		
Export File Data		
Introducing DMS	Introducing DMS	
Number of visitors 13	Delivery Initialized 7,7 % Recipient Queued The server has not started sending a message to these recipients.	0 % Send not Complete The server is in the process of generating and sending a messag these recipients.
2	Inactive Recipients 53.8 % Message Unopened The server has sent the message to these recipients.	
States:		
Recipient Queued Send not Complete	+	15.4 % Message Opened



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

Compaign Sitecore Insights	Resume Abort	Monitor Behavior Analyze Value Copy to Drafts
Standard Messages Orafts Scheduled	From: Sitecore Insights <do-not-reply@yoursite.net> Subject: Sitecore Newsletter</do-not-reply@yoursite.net>	
Processing	Are you having t	trouble viewing the e-mail? Please click here to see the online version.
 Sitecore Insights Introducing the OMS 		
🗐 Sent	[Add an image here]	

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.

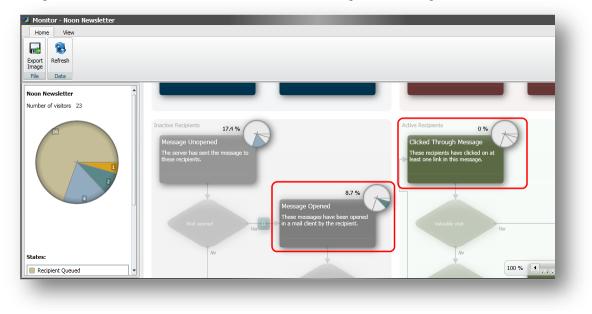
Home View Export Image File Data	
Introducing DMS	Introducing DMS
Number of visitors 13	Delivery Initialized
	Recipient Queued The server has not started sending a message to these recipients. Inactive Recipients 53.8 %
Message Opened	Message Unopened
Number of visitors 2	The server has sent the message to these recipients.
Percentage of visitors 15.40 %	
States:	
Recipient Queued	15.4 %
Send not Complete	Message Opened
Invalid Address	These messages have been opened
Soft Bounce	Mail opened
Hard Bounce	16
Message Unopened	
Message Opened	No

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.



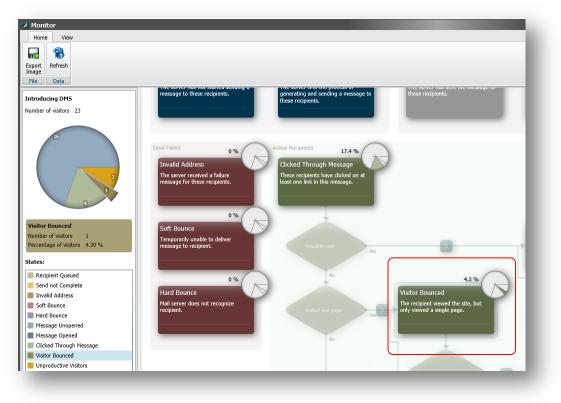


You can also use the **Entry Pages** report to analyze the effectiveness of the links in the message. For more information about the **Entry Pages** report, see the *Which Links in the Email Were* Most Effective? section.

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.

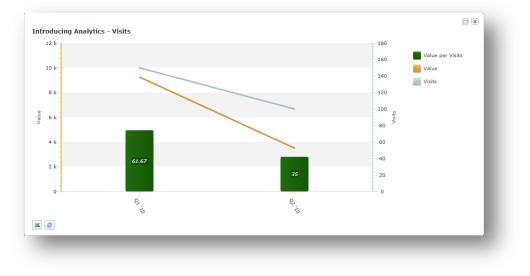
Executive Insight Dashboard allows you to see value that was generated on the website. For example, the Entry Pages report displays how much value was generated by visitors who clicked on specific links in the email message.

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

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effectiveness of the campaign.



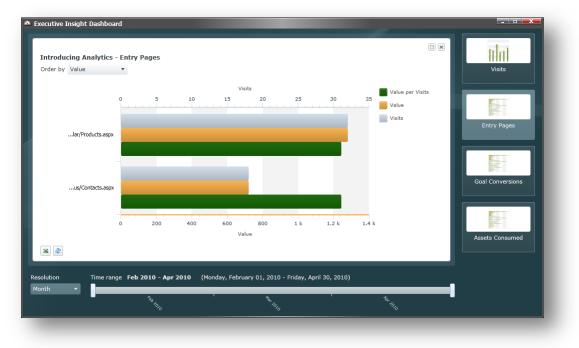
4.2.5 Which Links in the Email Were Most Effective?

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.

Monitor Home View Export Refresh Image File Data	
Introducing Analytics Number of visitors 6 4 4 4 4 4 4 4 4 4 4 4 4 4	1) Message have clicked on at this message. weth Normal State Sta

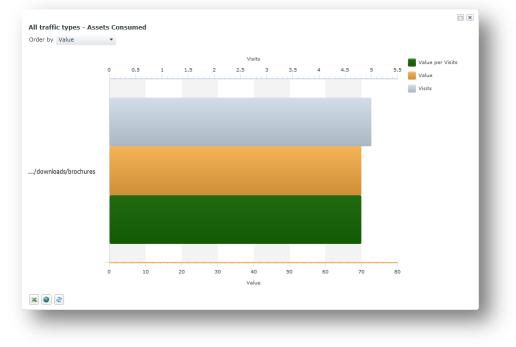
In this example, two of six recipients clicked on a link in the message and produced value on the website.

4.2.7 What Assets Did the Subscribers Consume?

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



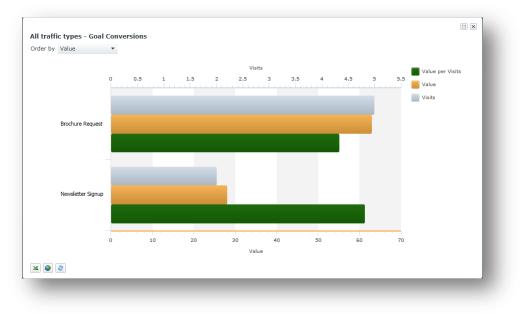
The **Assets Consumed** report shows how many assets the email campaign recipients consumed. For example, when a visitor downloads a brochure, the module registers an assets consumed event.



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:

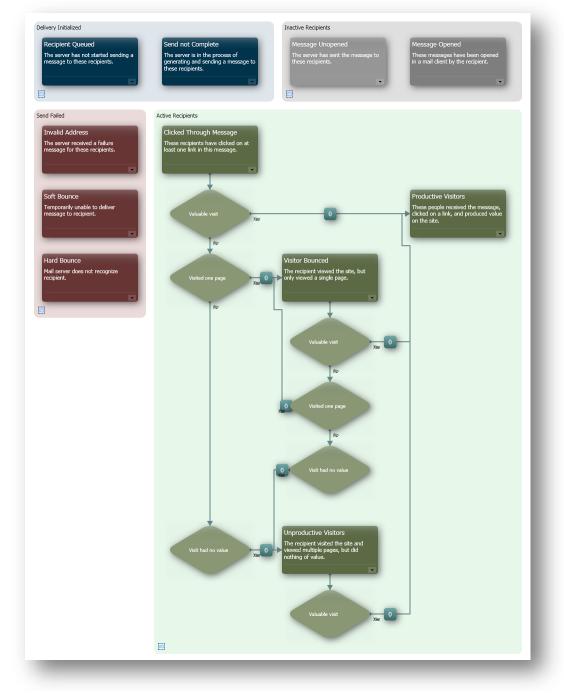
- The Message Engagement Plan ٠
- The Executive Insight Dashboard Reports
- The Message Subject Test •



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.

Recipient Queued	Send not Complete
The server has not started sending a message to these recipients.	The server is in the process of generating and sending a message to these recipients.

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.

Invalid Address The server received a failure	
nessage for these recipients.	_
	•
Soft Bounce	
Temporarily unable to deliver message to recipient.	
maxinge to recipient	_
	•
Hard Bounce	
Mail server does not recognize recipient.	
	_
1	•
]	

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.

Message Unopened	Message Opened
The server has sent the message to these recipients.	These messages have been opened in a mail client by the recipient.
•	•

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.

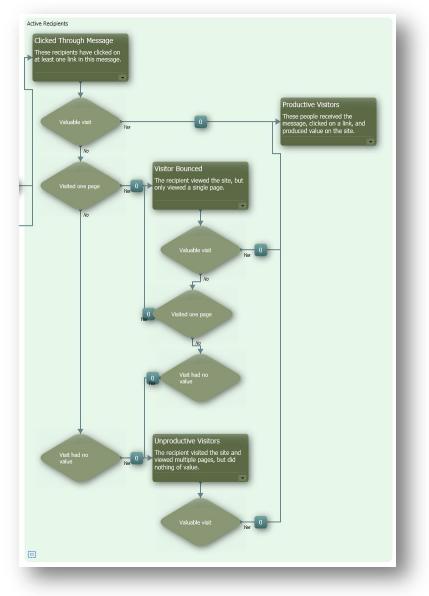
Message Opened

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.

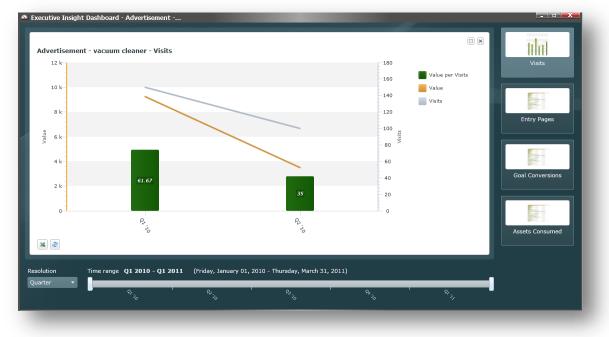
Assets Consumed

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.

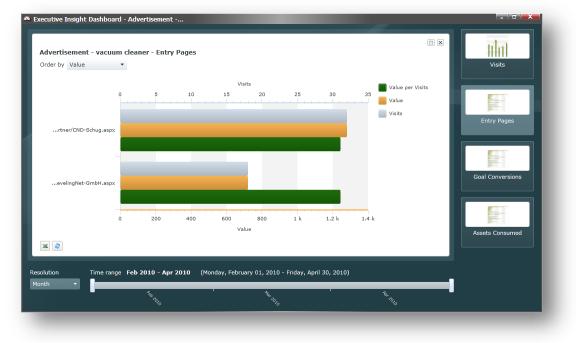


The bars show the relevance (value per visit). This measures the effectiveness of the campaign.

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.

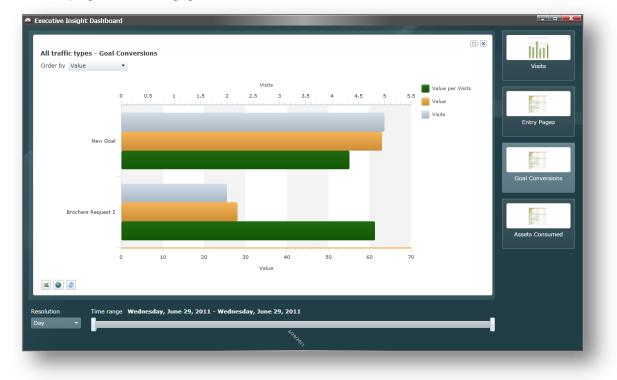
Use this report to help identify the following:

- 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.

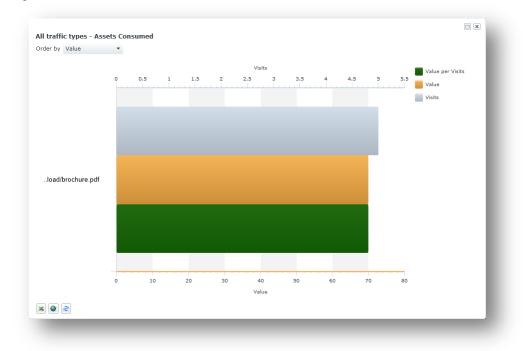
Value per Visit

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.

Message Subject Test This table shows the relative effectiveness of each message su		
per visit. Select the test winner and click "Stop the Test" to sto send the message with the selected subject to all the remainin		na
otal number of test emails sent: 3 n equal number of emails has been sent with each subject.		
Subject	Value/Visit	-
Neb Insites: Introducing the Sitecore Engagement Analytics	18.75	
Brochure and Demo	0	
Sitecore News	0	
		_
	Stop the Test Can	cel

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.