Salesforce Marketing Cloud Training #3: Reporting

February, 2016
SMC Training #2: Reporting

- Profile Page
- Welcome Emails
- Personalization
- Reports – Subscriber Tracking
- Reports - Send tracking
  - List of sends and pending sends
  - Send detail (opens, clicks, etc.)
  - Export files from a send detail
  - Email reports
  - A/B tests
- Q&A
Profile Pages

- Profile pages on hosted on the et.npr.org domain at http://pages.et.npr.org/cpc?bu=

- You need to find your Salesforce Marketing Cloud ID number to add to the end of the URL.

Look for the MID by hovering over your account name in the top-right:
Profile Pages

- Review logo/banner (640 px max if not yet uploaded)
- Review newsletters listed. Are all still valid?
- Let us know if changes needed

Going Live:

- You can link directly to your profile page from your website, or embed it on a page using an iframe.
- If using an iframe, add &iframe=true to the end of your profile page URL
Welcome Email

- Everyone who signs up via your profile page will automatically be sent a standard Welcome Email

- Go to EMAIL>>MY EMAILS>>NPR DS EMAIL TEMPLATES

- Click on the email named “DS Welcome Message Jan2016”

- Add your logo & edit text as needed.

- Keep welcome email in the NPR DS EMAIL TEMPLATES folder & do not change the internal name.
You can pull text into your email based on any information stored in your Data Extension.

Use the field header between four % symbols to instruct SMC to pull in personalized data:
- Ex. First Name info is stored in the PERS_FirstName_str field.
- Enter %PERS_FirstName_str% in the text of your email to pull data from that field.

Example email:

Dear %PERS_FirstName_str%

It's exciting to think all of the opportunities there are. I'm writing with a quick update about KSTS's spring fundraiser.

We got off to a great start last week thanks to listeners like you. We still have $732,476 to go in order to reach our goal of $1.2 million and be able to claim an additional $600,000 from Overseas Adventure Travel. KSTS has never received a challenge this big, and we are counting on your help. Click here to give online or call 800-999-8287.

This $600,000 will go a long way in supporting your favorite KSTS and NPR programs. So help us now.

Walter P. White
Director of Membership

P.S. Today is also your last chance to be entered for a chance to win your choice of an iPhone 6 or Apple...
Previewing Personalization

- From the edit view of your email, select “Send Preview”

- In the box on the right, navigate to your data extension, then choose a contact to use as a sample on the left:
Click “Generate Preview” at the top:

View a preview on screen. Click on “Test Send” to send yourself an email with that subscriber’s data in the content.
Standard email reporting on every send:
- Opens
- Clicks
- Delivers

Email >> Overview to see past/pending sends

Or

Reporting >> Tracking >> Sends to see more detail on last 100 sends
Email Send Tracking Detail Page

**Summary**
- **Job ID:** 1065383
- **Name:** Oct 27
- **Subject:** Blue Bag Special Offer for You
- **Date Sent:** 10/27/2015 5:29 PM
- **Total Sent:** 24,302
- **Data Extensions:** Fall 2015 Membership Drive Campaign (24302 sent) (Using All Subscribers/24302 sent) Excluded: Already Gave (1176 excluded)

**Inbox Activity**
- **Viewing:** Current Activity
- **Total:**
  - **Opens:** 3,019
  - **Clicks:** 319
  - **Forwards:** 0
  - **Surveys:** 0
  - **Unsubscribes:** 6

**Delivery Rate:** 99.642%
- **Total Bounces:** 87
  - **Hard Bounces:** 49
  - **Soft Bounces:** 22
  - **Block Bounces:** 16
  - **Delivered:** 24,215

**Open Rate:** 10.622%
- **Delivered:** 24,215
- **Total Opens:** 3,019
- **Unique Opens:** 2,572

**Forward to a Friend Activity**
- **Total:**
  - **Clicked ‘Forward’ link:** 0
  - **Forward Activity:** 0
  - **New Subscribers:** 0
Email Send Tracking Detail: Activity

- **Job ID**
  - Good to know for support

- **Data Extension**
  - Who did you send to

- **Click Activity**
  - Heatmap of links in email

- **Bounces** (read more)
Email Send Tracking Detail: Exports

View and export on each send detail:

• Did not click
• Did not open
• Delivered

Example…
Export out those who didn’t open and create one-time data extension to send an email asking if they still want to receive your newsletters (include link to your Profile Page)
List Hygiene

- It’s important to maintain strong list hygiene to help maintain a strong sender reputation.
- We recommend periodic purging of contacts who do not engage in emails:
  - Generate a filtered data extension based on subscribers who have not opened or clicked on links over several sends
  - Send email asking subscribers, do you still want to receive email? & link to your profile page to confirm.
  - For those who do not click on the link, add to your unsubscribed list.
Reporting: Email Delivery

Email reports to you or your team

Email >> Interactions >> Activities >> Report
Coming Soon – Subscribes & Unsubscribes

- SalesForce is working on creating two custom reports for us:
  - Subscribes from profile page
  - Unsubscribes from profile page

- Ignore the subscriber reports that are currently in the system as they only pull from the enterprise view of all accounts.

- For now, you can see all your active subscribers by exporting your master subscriber data extension.
A/B Testing: Setup

[Image of A/B Testing setup interface]
A/B Test: In Progress

Training test
Status: Canceled

Results
Condition A
Small Image Email

Condition B
Test subject

Remainder
Test Canceled

Total

Details
TEST TYPE
EMAIL A SUBJECT LINE
EMAIL B SUBJECT LINE
PREHEADER
PROM NAME
DETERMINE WINNER BY
WINNER
RECIPIENTS
TESTS SENT
NEXT SEND

Original Email Details
CREATED: Dec 12, 2014, 10:47 AM
MODIFIED: Dec 12, 2014, 10:55 AM
Your Migration Cycle

- Complete your field mapping spreadsheet
- Finish setting up emails & filtered data extensions
- Review your profile page
- Review & customize your Welcome email
- Start sending from SMC! **Goal: Start sending week of Feb. 22nd.**
SMC: Support & Questions

- Any Questions?
  
  Sara Terpeny – sterpeny@npr.org, (617)622-5413
  Janeen Williamson – jwilliamson@npr.org, (617)622-5443

Learning Resources from SMC:

  All Reports (some n/a)
  A/B Testing
  Deliverability and Bounces
  Conversion Tracking (advanced)
Filtered Data Extensions

Confirm field data is in Master Subscriber data extension
(Subscribers>>Data Extensions>>Master Subscriber Data>>Station Subscriber Master>>View Data

1. Go to Data Filters>>Create

2. Name your filter so you recognize it when sending

3. Choose Data Ext as your Data Source
   My Data Ext: Station_Subscribers_Master

4. This will populate your fields to select from

5. Choose the field of your segment and enter your value

6. Click Save