ListManager Advanced Training

Presented by Ana DeLeón

Logistics

Remember - Shared Audio:

- Share comments, questions, jokes…
- State your name when asking a question
- Mute out background noise and music ***6**

Introduction

Please share:

- Your name
- What topic(s) are of particular interest?
- What version of LM are you using?

What You'll Learn To Do

You will be able to:

- Track mailings and segment based on the tracking
- Use MailStream optimization for deliverability
- Prevent mailing fatigue
- Use surveys to engage and interact
- Design a Refer-A-Friend form to grow your list organically
- Customize your message with Conditional Content

Agenda

- Tracking & Segmentation
- MailStreaming
- Recipient Limits
- Surveys
- Refer-a-Friend
- Conditional Content
- Q&A

Tracking & Segmentation

- Tracking & Segmentation
- MailStreaming
- Recipient Limits
- Surveys
- Refer-a-Friend
- Conditional Content
- Q&A

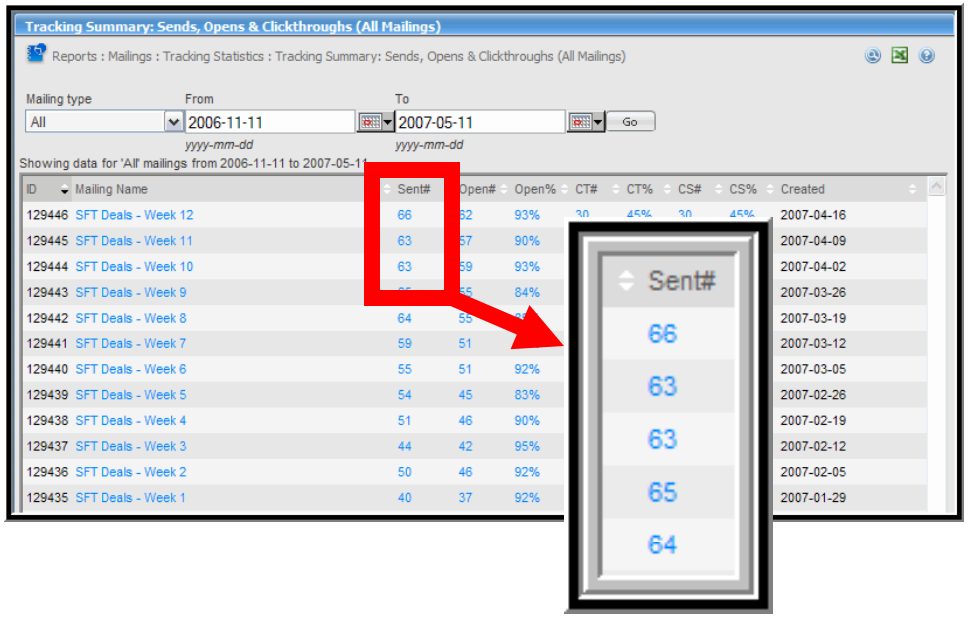
Four Types of Success Tracking

How successful are my mailings?

1. Delivery Tracking
2. Opens Tracking
3. Clickthrough Tracking
4. Actions Tracking

Delivery Tracking

Who got the message?



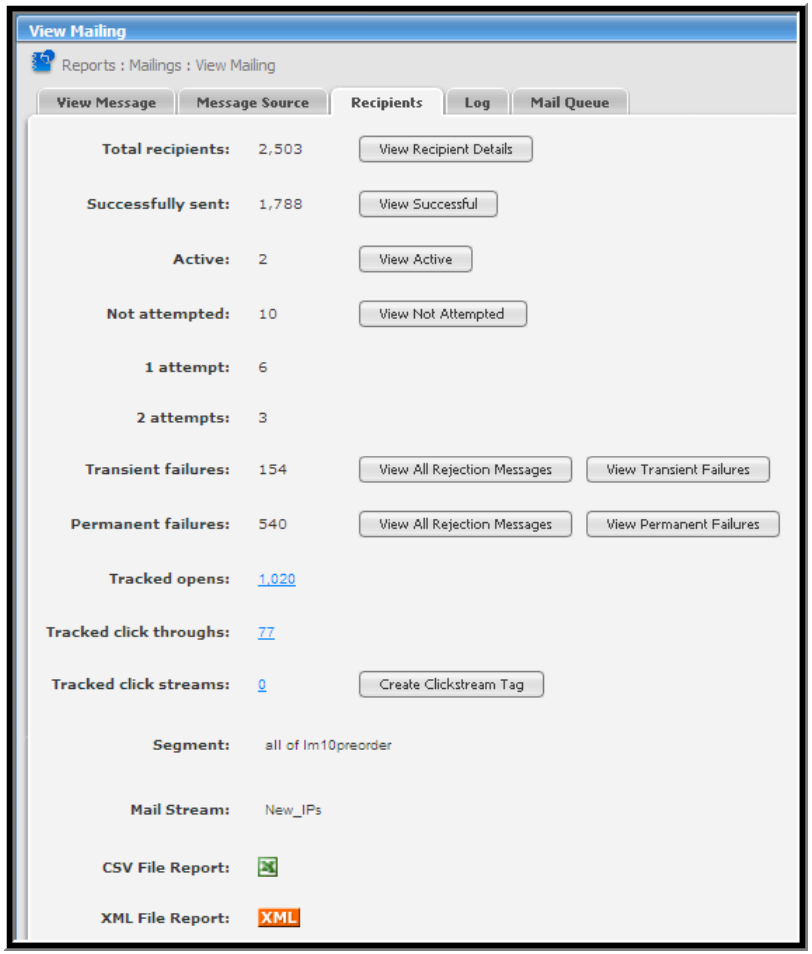
Engagement is done automatically every time the mailing is sent out, you'll know

- **Who received the mailing**
- **Who failed to receive it**

To view report:

Reports: Tracking Statistics

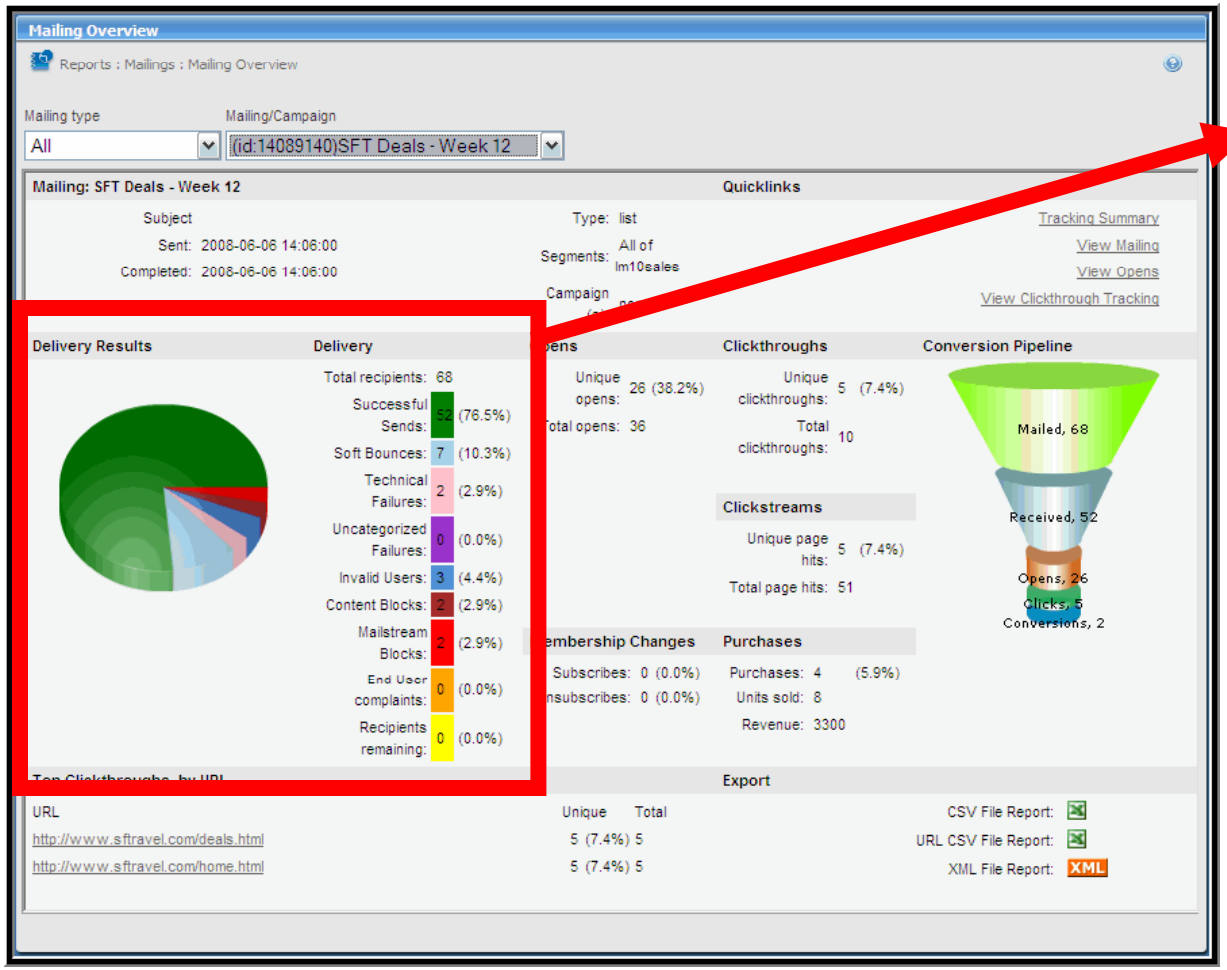
Delivery Tracking



Drill down to see "Recipient:"

- **Transient failures**
- **Permanent failures**
- **Other tracking info**

Delivery Tracking



View nine distinct categorizations' of bounces

Held Status

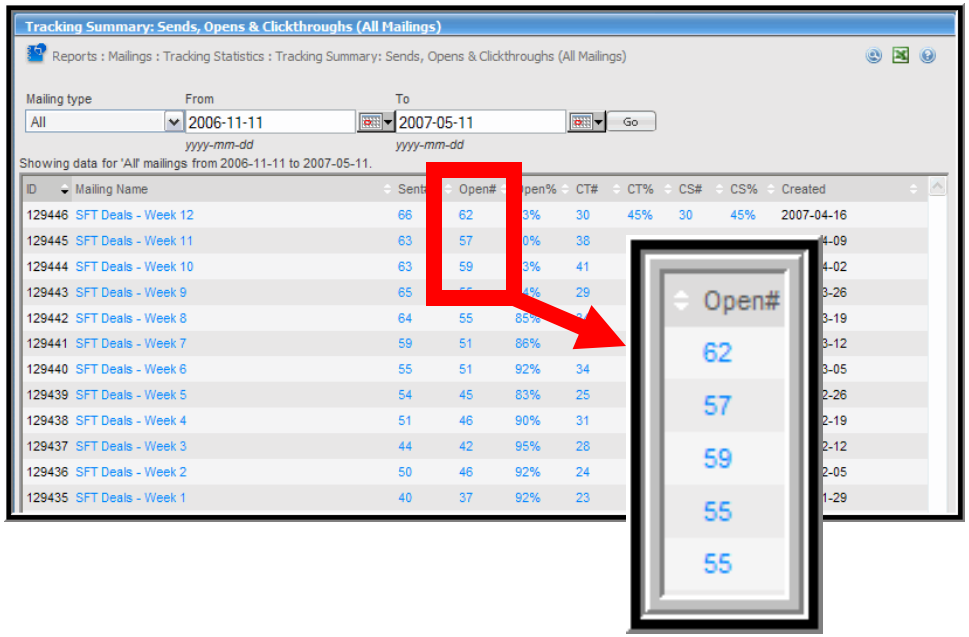
Members who are undeliverable over time are put into "held" status

Number of bounces determined by ***Utilities: List Settings: Automatic Maintenance: Error Mail: Bounce Limit***

- **Invalid users go on hold immediately server wide**
- **Held members may be removed automatically**
- **Content problems never go on hold**

Open Tracking

Who opened a particular mailing?

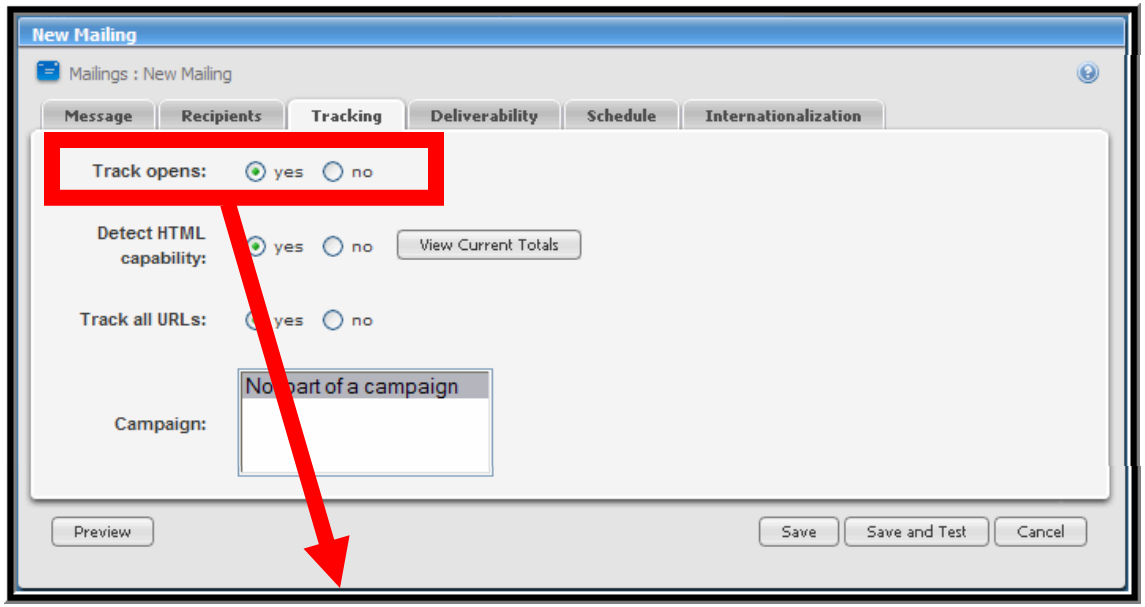


It's turned on by default

To view report:

Reports: Tracking Summary

Open Tracking (2)



Find this setting in the mailing area

- **Enabled when creating a mailing**
- **Automatically turns text message into multipart**
- **Enables forward tracking**

Open Tracking (3)

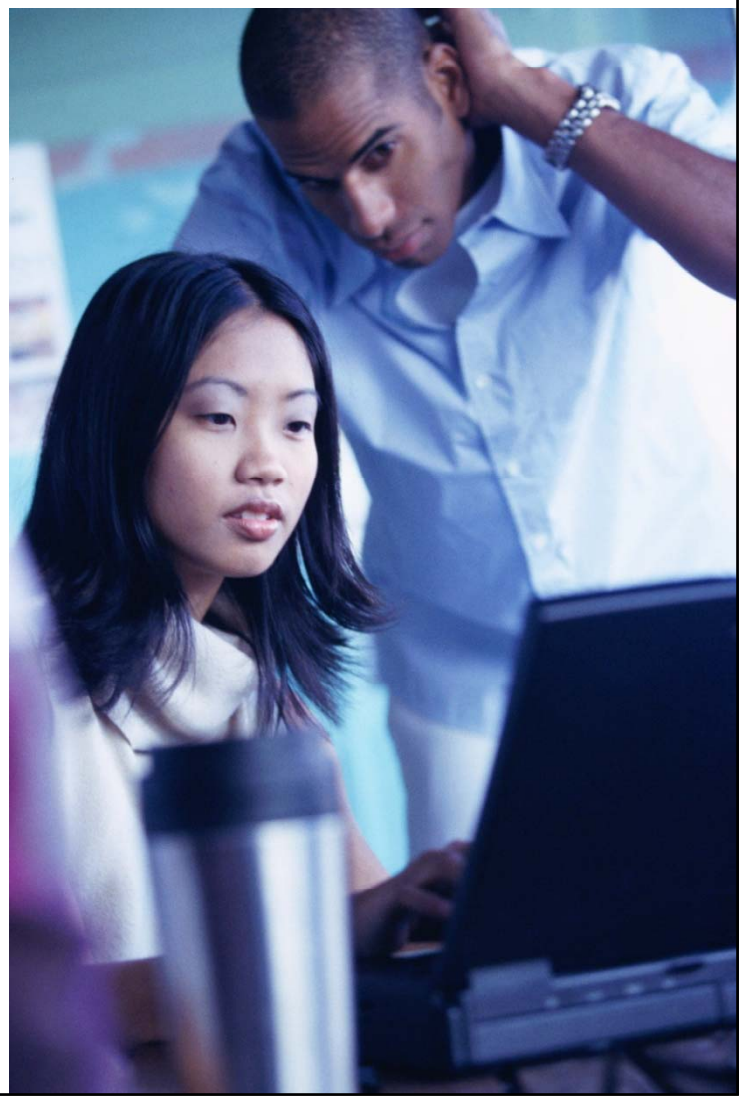
How does it works?

- Inserts tracking tab into mailing:

  %%detect_both%%

- ListManager inserts invisible gif with mailing, recipient info:

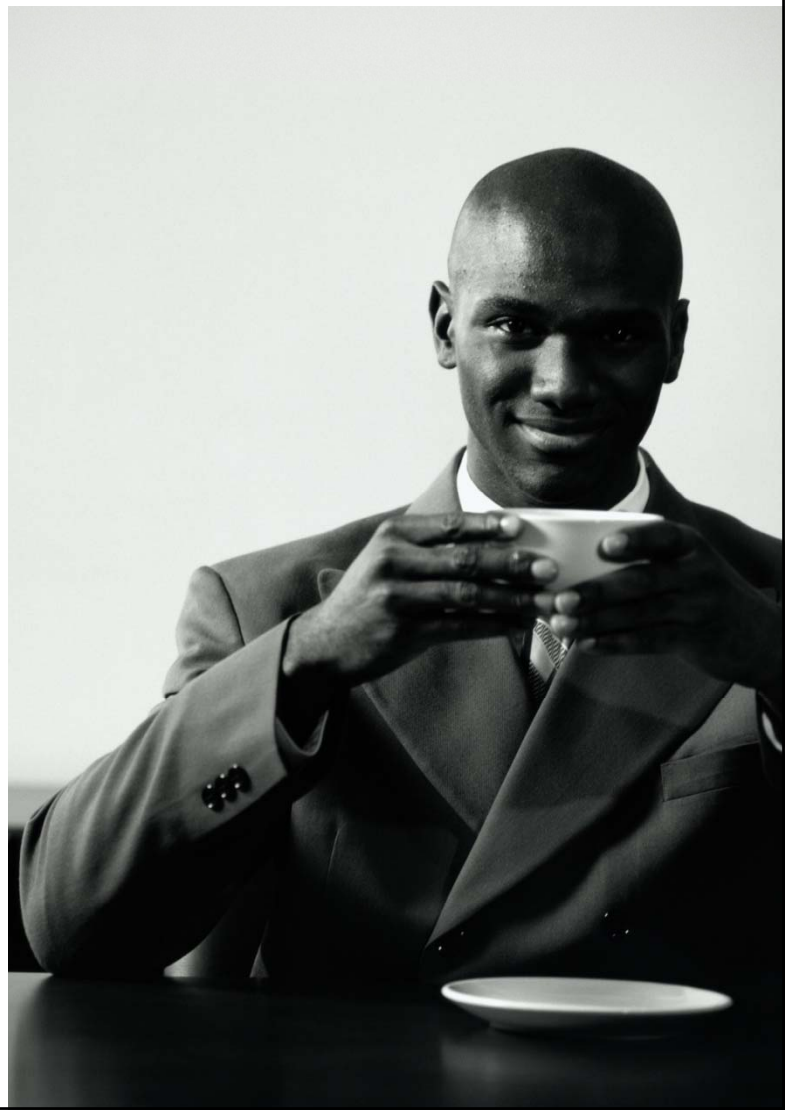
<IMG SRC="http://emails.example.com/1.gif" WIDTH=1 HEIGHT=1>



Open Tracking (4)

How they are recorded:

- When recipient opens message with HTML images enabled = open
- When a recipient clicks on a Clickthrough tracking link = open



Open Tracking (5)

How it's recorded:

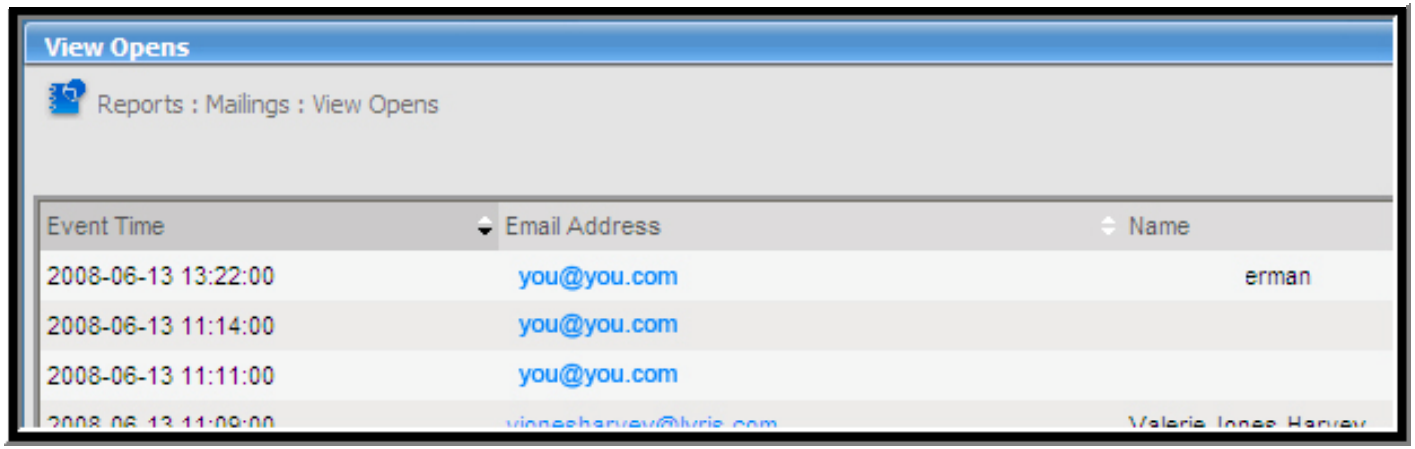
- If an open is detected with an invisible gif
  = HTML capable.
- If an open is detected for more than one computer
  = a forward

Open Tracking (6)

Opens are good for *trends*

- False + = preview pane
- False - = image suppression

Open Tracking Report



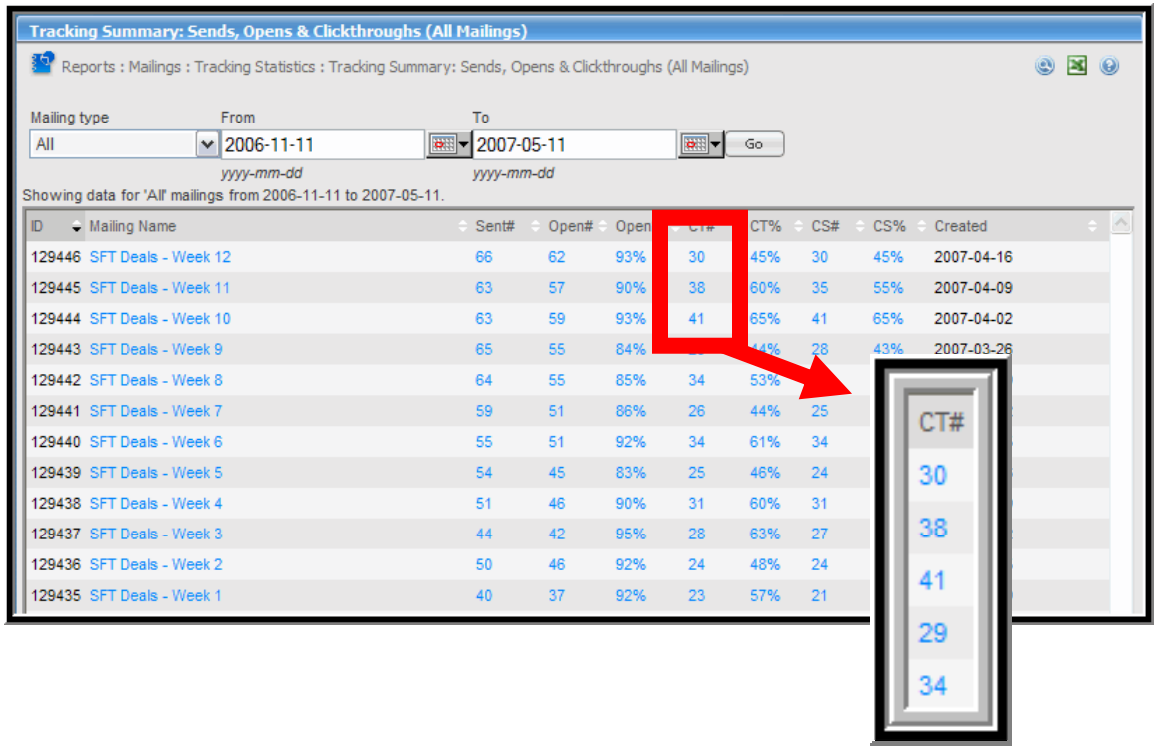
See details on who opened the message and segment out

Open Tracking Report

- Total opens = all opens registered
- Unique opens = one open registered per recipient
- Estimated opens = percentage of those who are known to have HTML capability who opened this message is applied to the entire list, regardless of HTML status

Clickthrough Tracking

Who clicked on URL in the message?



It's turned on by default

To view report:

Reports: Tracking Summary

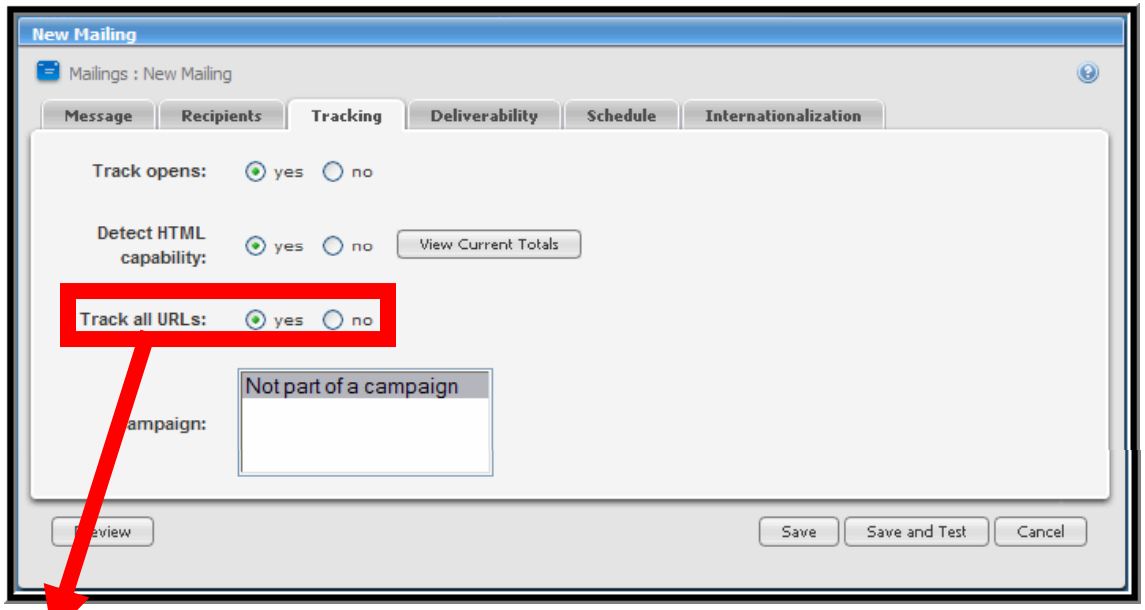
Clickthrough Tracking (2)

How Clickthrough Tracking works:

- Uses a redirect
- ListManager makes a unique clickthrough URL for each recipient:

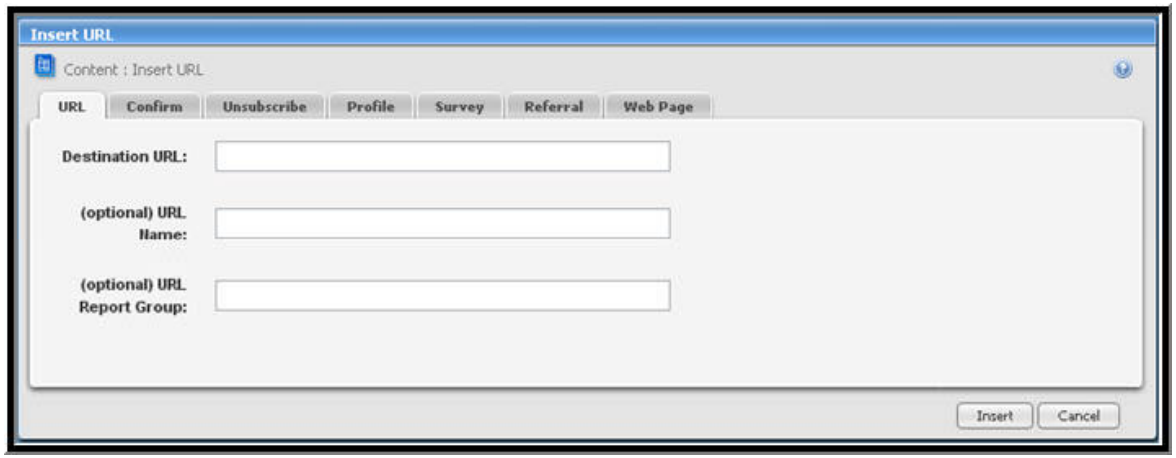
  http://emails.example.com/t/43/94/2/0/
- It's simple to make clicks on text or images in your message trackable.
  - All URL's
  - Clickable Text
  - Clickable Image
  - Undisguised URL

Clickthrough Tracking (3)



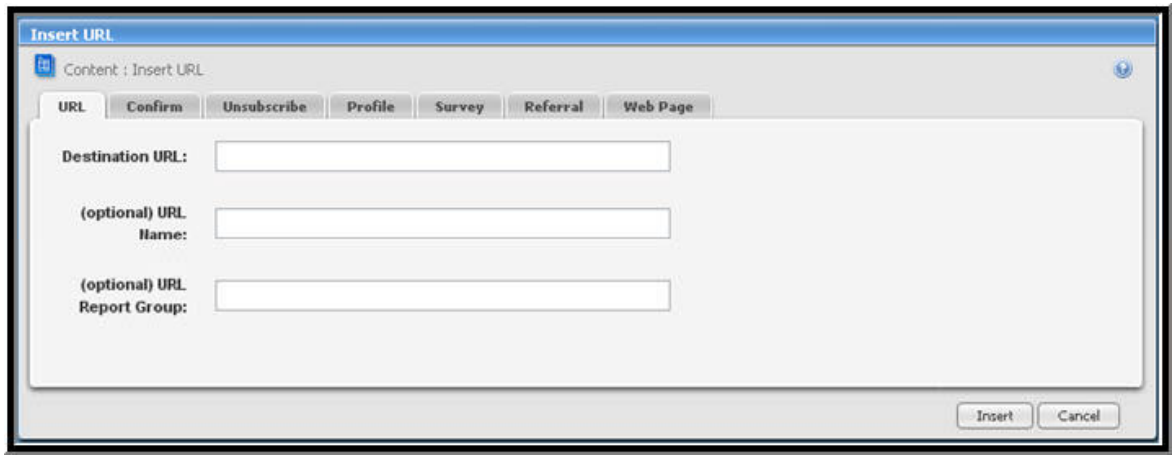
- Mailing enabled in the tracking tab
- List enabled at:
  Utilities: List Settings: Web Created Content
- Inserts a tracking merge:
  %%track [subst {http://example.com/}]%%

Clickthrough Tracking (4)



Track a single URL from the content area

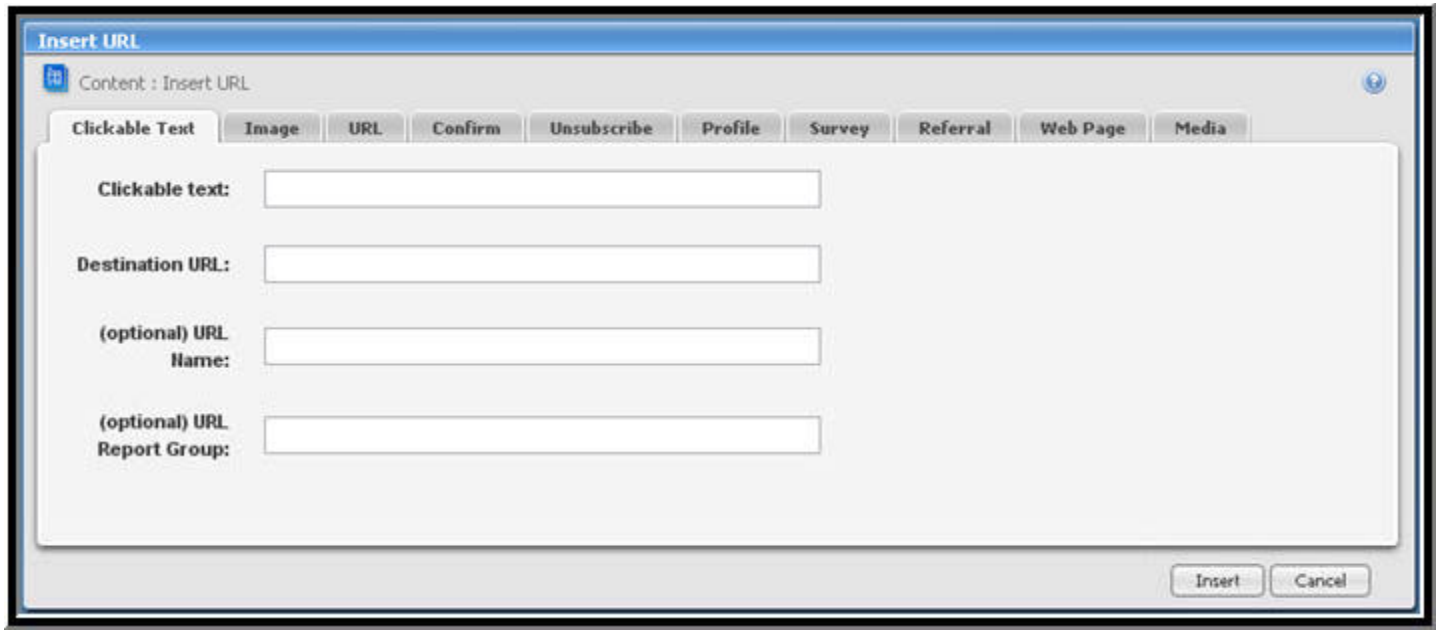
Clickthrough Tracking (5)



In text messages, clickthrough URLs will show your server's domain.

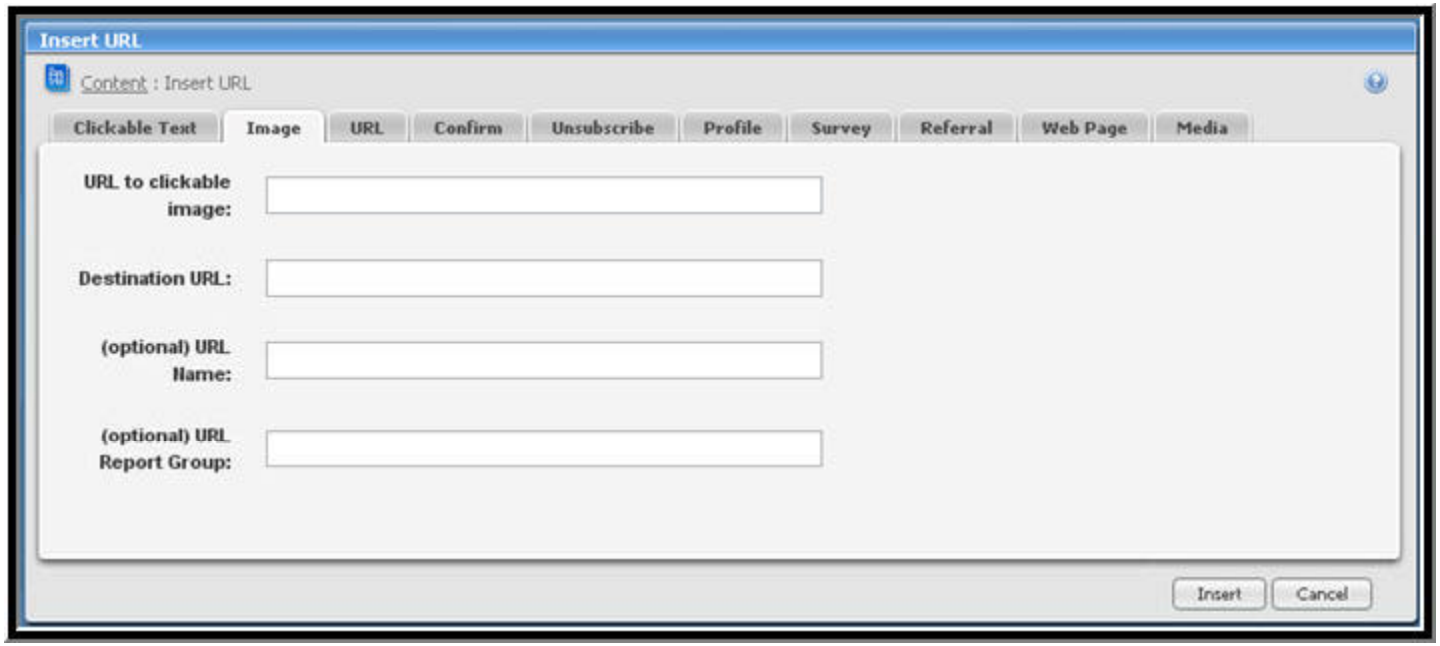
Example:
http://demo.example.com/t/153/18/2/0/
may actually go to:
http://www.lyris.com

Clickthrough Tracking (6)



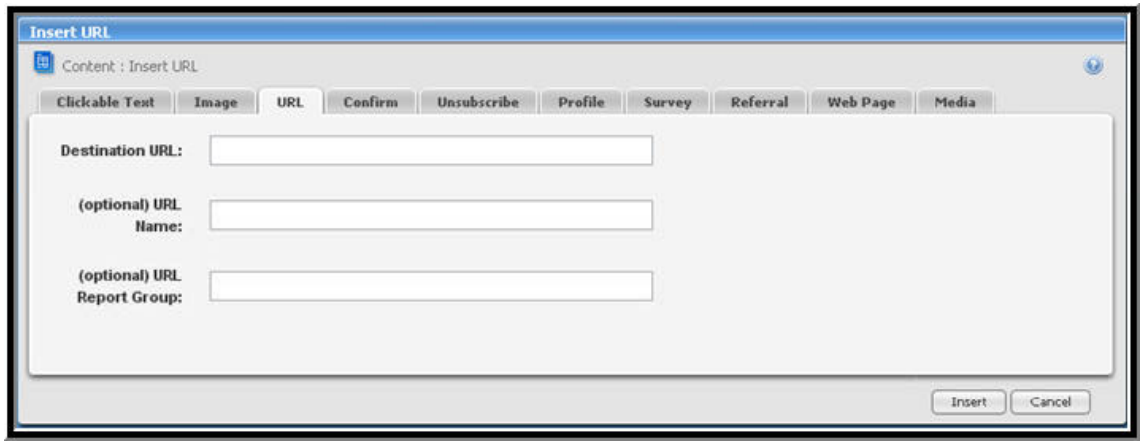
In HTML Messages, make an HTML clickthrough link by selecting *Clickable Text* tab ...

Clickthrough Tracking (7)



… Or make an image clickable in HTML by selecting *Clickable Image* tab

Clickthrough Tracking (8)



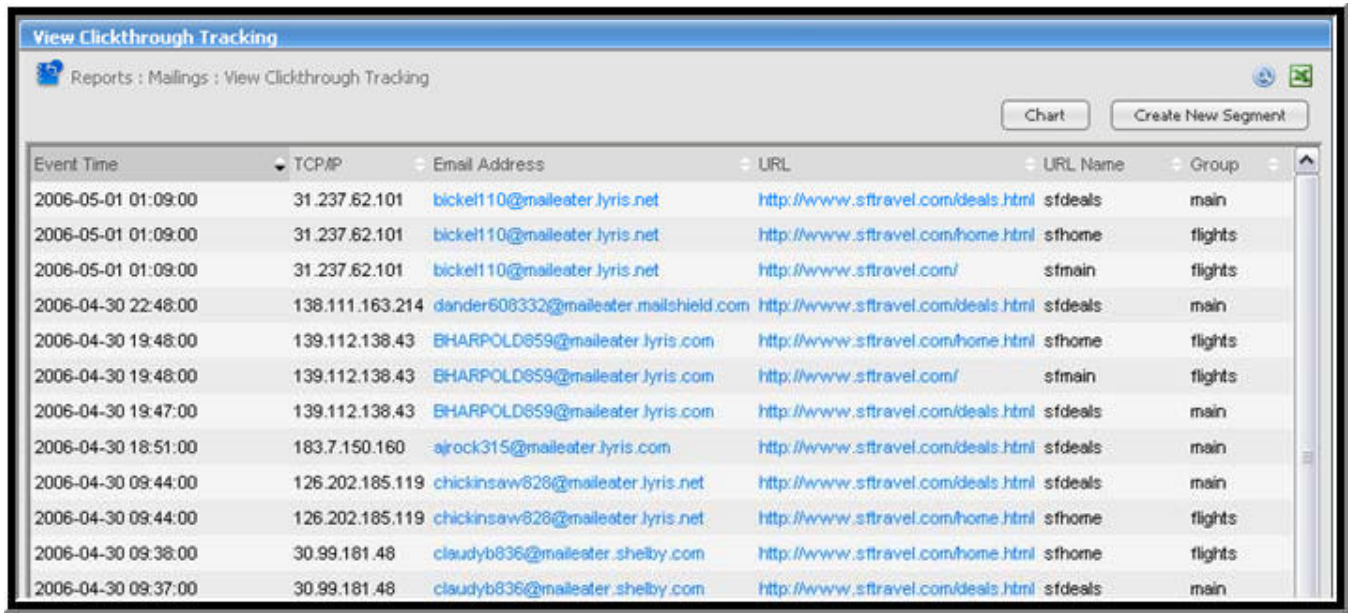
To identify a unique link in Reports, you can specify:

- *URL name*
- *URL report group*

Formatting without a wizard:

%%track http://www.example.com -name “home” –group “top”%%

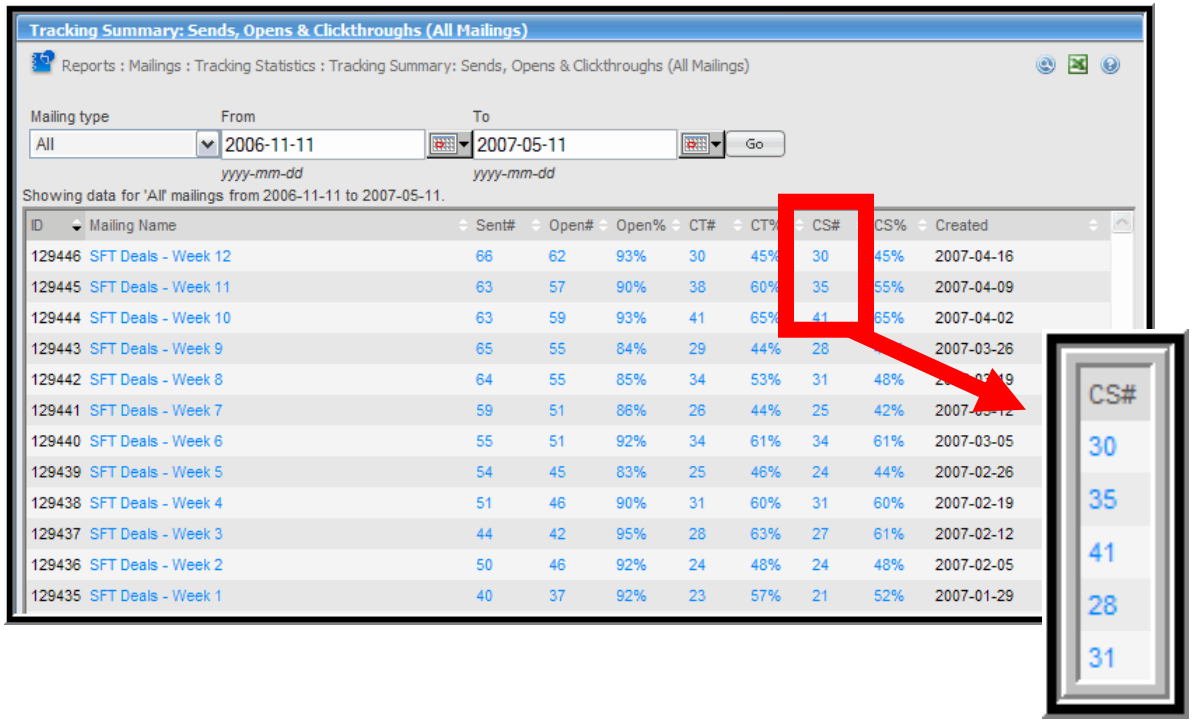
Clickthrough Tracking Report



Event Time	TCP/IP	Email Address	URL	URL Name	Group
2006-05-01 01:09:00	31.237.62.101	bickel110@maileater.lyris.net	http://www.sftravel.com/deals.html	sfdeals	main
2006-05-01 01:09:00	31.237.62.101	bickel110@maileater.lyris.net	http://www.sftravel.com/home.html	sfhome	flights
2006-05-01 01:09:00	31.237.62.101	bickel110@maileater.lyris.net	http://www.sftravel.com/	sfmain	flights
2006-04-30 22:48:00	138.111.163.214	dander608332@maileater.mailshield.com	http://www.sftravel.com/deals.html	sfdeals	main
2006-04-30 19:48:00	139.112.138.43	BHARPOLD859@maileater.lyris.com	http://www.sftravel.com/home.html	sfhome	flights
2006-04-30 19:48:00	139.112.138.43	BHARPOLD859@maileater.lyris.com	http://www.sftravel.com/	sfmain	flights
2006-04-30 19:47:00	139.112.138.43	BHARPOLD859@maileater.lyris.com	http://www.sftravel.com/deals.html	sfdeals	main
2006-04-30 18:51:00	183.7.150.160	ajrock315@maileater.lyris.com	http://www.sftravel.com/deals.html	sfdeals	main
2006-04-30 09:44:00	126.202.185.119	chickinsaw828@maileater.lyris.net	http://www.sftravel.com/deals.html	sfdeals	main
2006-04-30 09:44:00	126.202.185.119	chickinsaw828@maileater.lyris.net	http://www.sftravel.com/home.html	sfhome	flights
2006-04-30 09:38:00	30.99.181.48	claudyb836@maileater.shelby.com	http://www.sftravel.com/home.html	sfhome	flights
2006-04-30 09:37:00	30.99.181.48	claudyb836@maileater.shelby.com	http://www.sftravel.com/deals.html	sfdeals	main

See who clicked on a specific URL and segment out

Clickstream Tracking

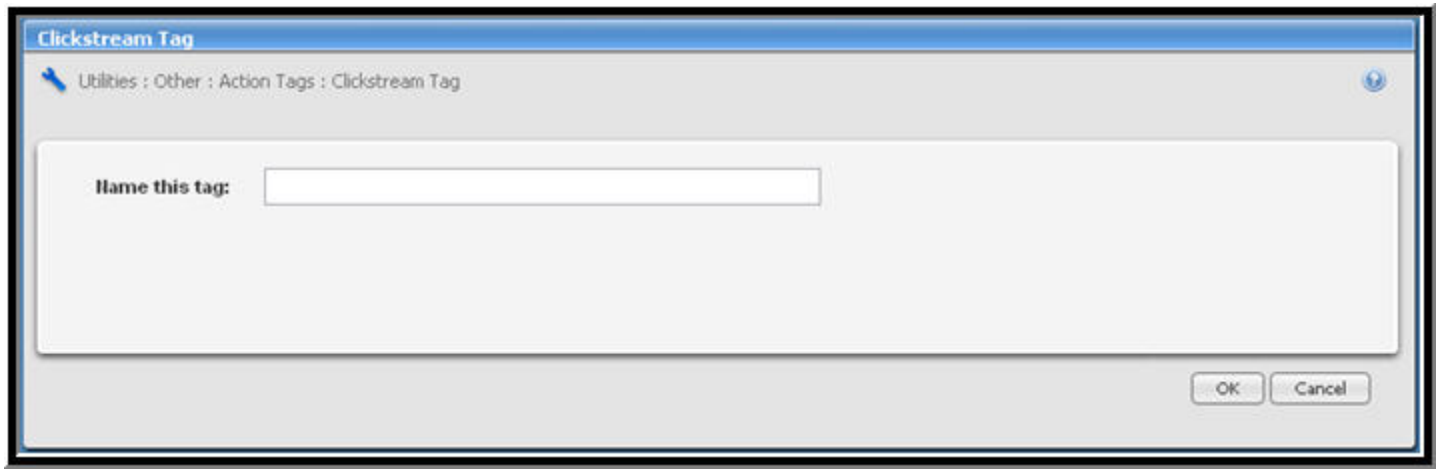


See how many and what *Web Site pages* members have visited

To view report:

Reports: Tracking Summary

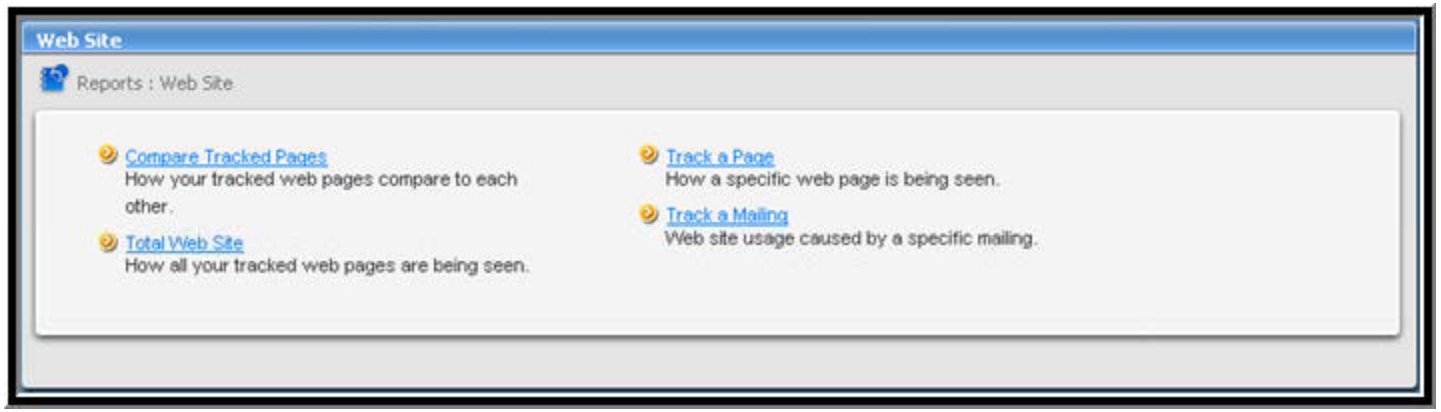
Clickstream Tracking (2)



Clickstream tracking monitors whether a page is viewed AFTER a clickthrough

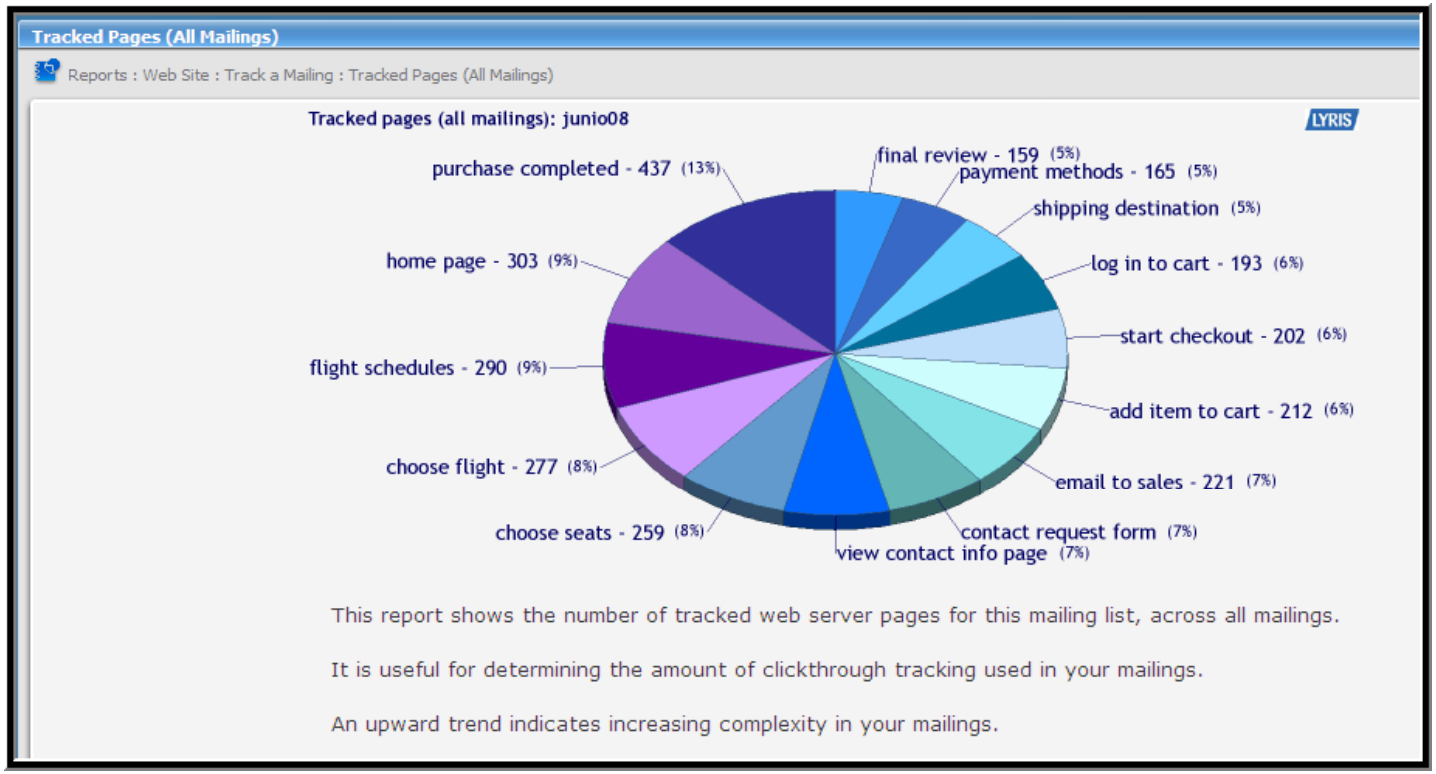
- Clickthrough passes a cookie to the clicker
- Uses clickstream tags (invisible gifs)
- Create tags in ***Utilities: Other: Action Tags: Clickstream Tag***
- Insert tags directly into HTML code of web pages you want to track

Clickstream Tracking Report



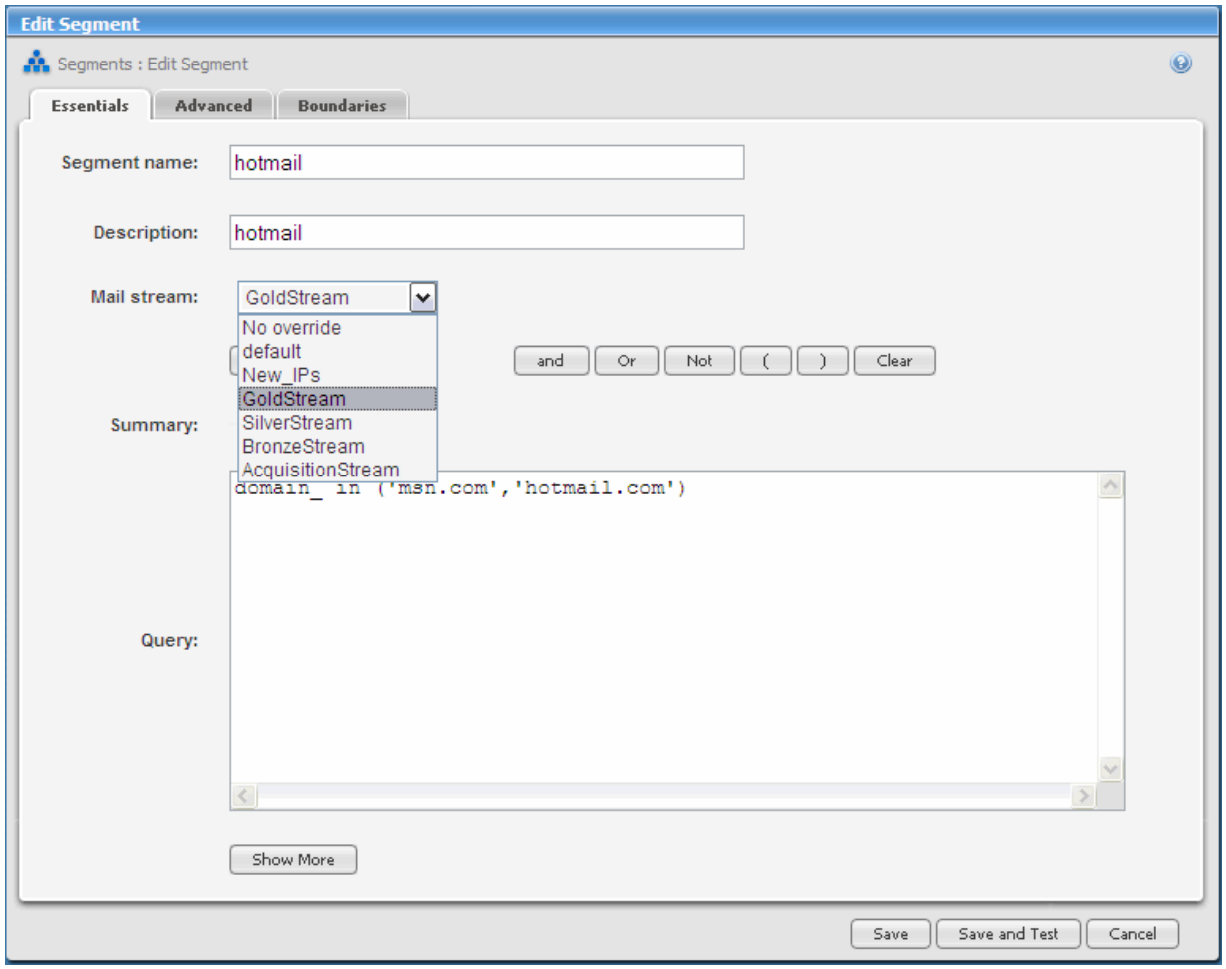
Clickstream reports available in *Reports: Website*

Clickstream Tracking Report



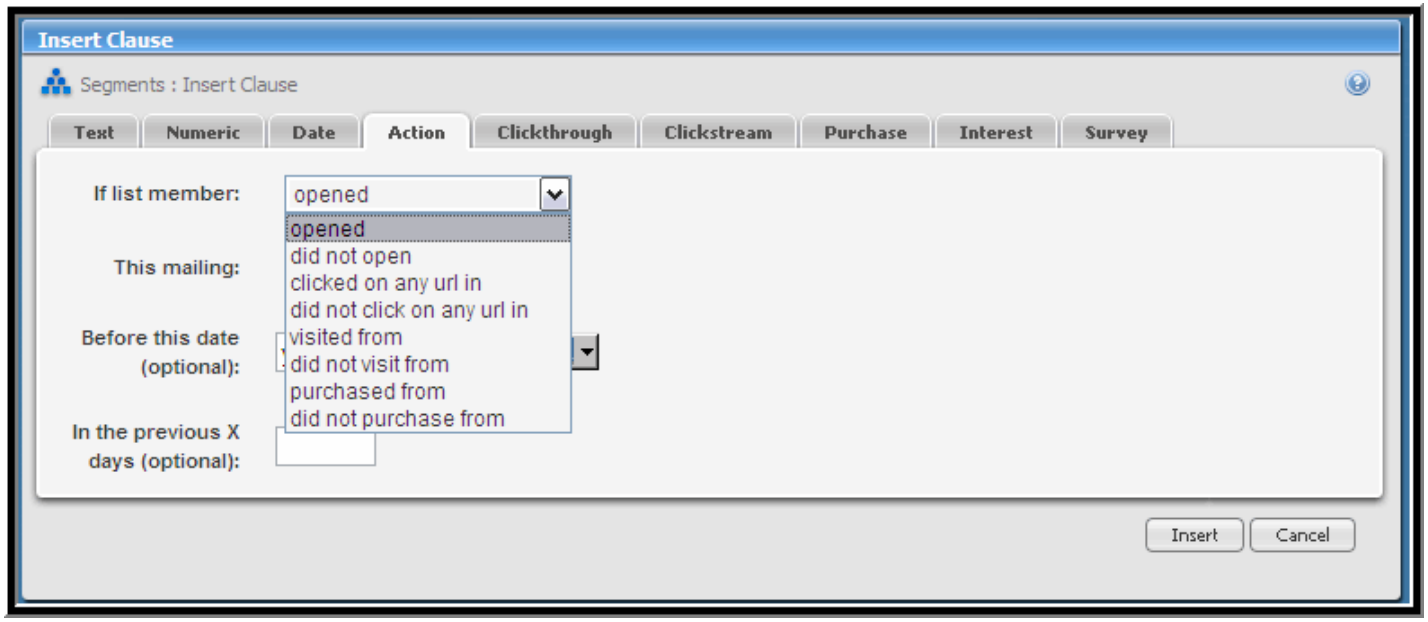
Easily analyze traffic to your website and segment out

Segments



Use segments to follow up with members that did or did not do an action

Segments



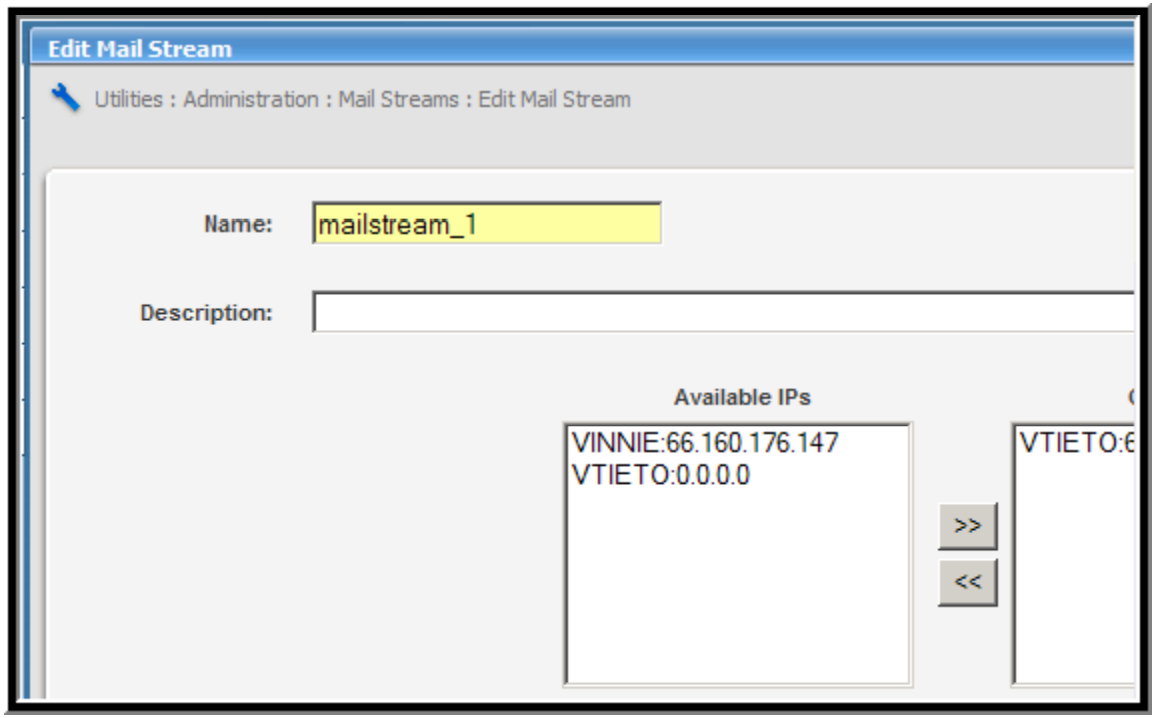
Target members that have or have not:

- **Opened a mailing**
- **Clicked on a link**
- **Visited a web page**

MailStreaming

- Tracking & Segmentation
- MailStreaming
- Recipient Limits
- Surveys
- Refer-a-Friend
- Conditional Content
- Q&A

MailStreams



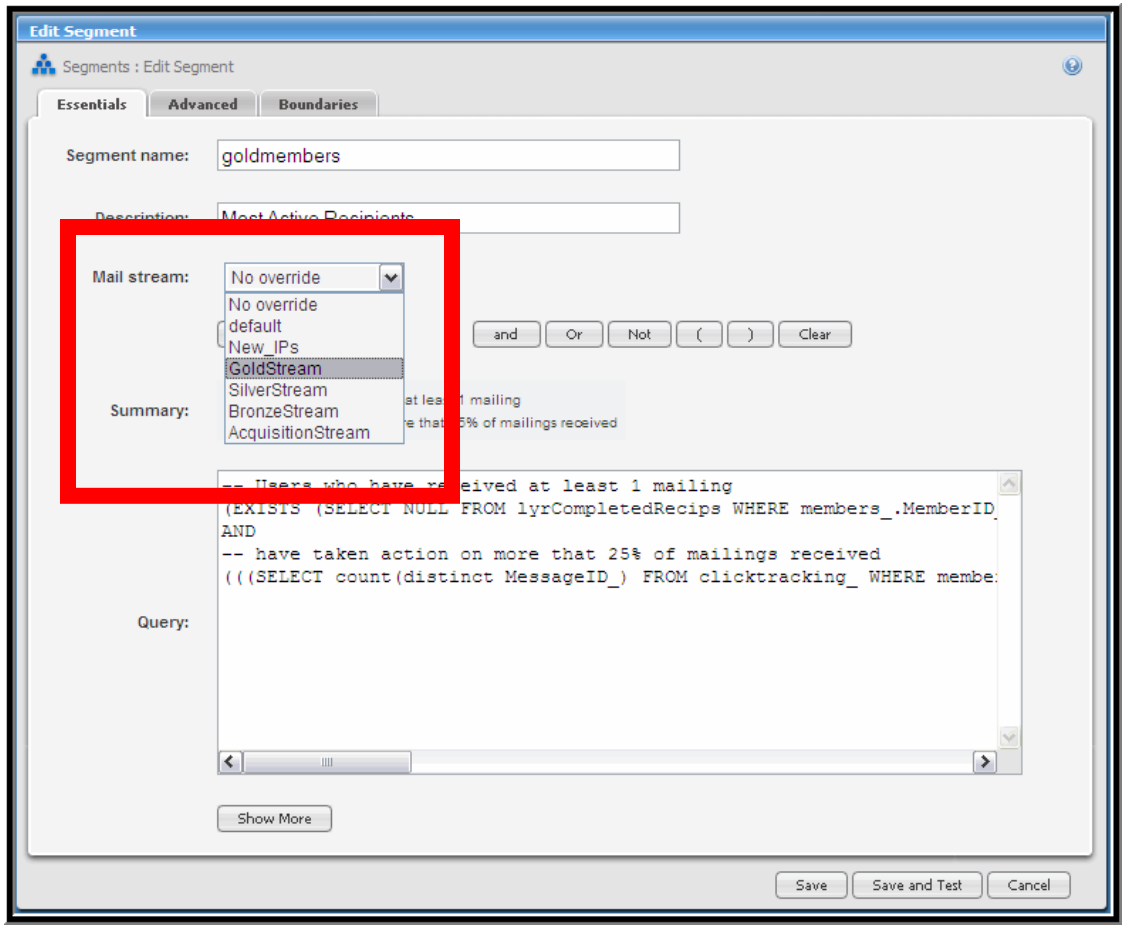
- Give your most important subscribers a delivery advantage
- Send mail faster
- Put control in the hands of the marketer

MailStream Theory

Name	Associated IPs	Description
AcquisitionStream	1	Stream for the first mailing attempt
BronzeStream	1	Least active users
default	1	Default mail stream.
GoldStream	1	Most active users
New_IPs	2	New IPs for clio
SilverStream	1	Moderately active users

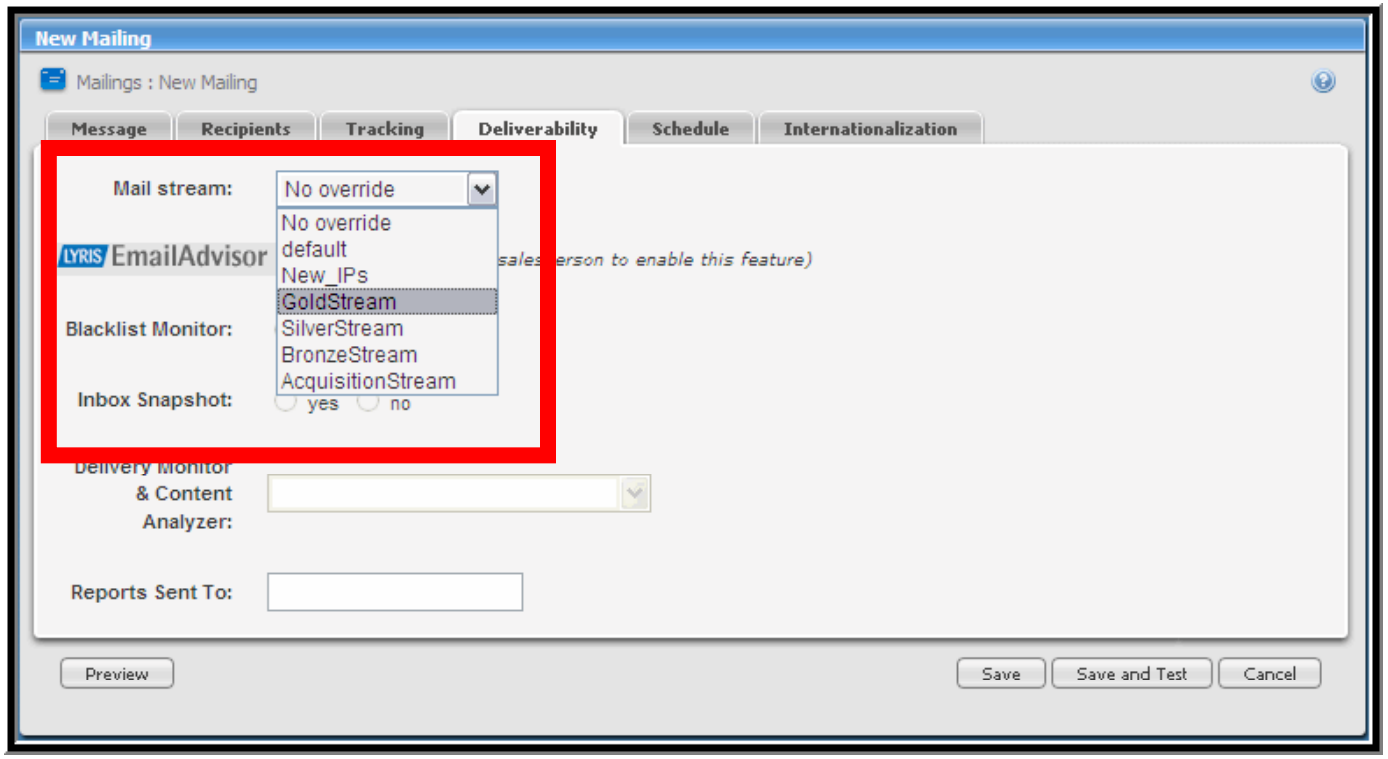
- **Target different audiences with the use of MailStreams.**
- **Different types of mailings should use different MailStreams**

MailStreams Segments



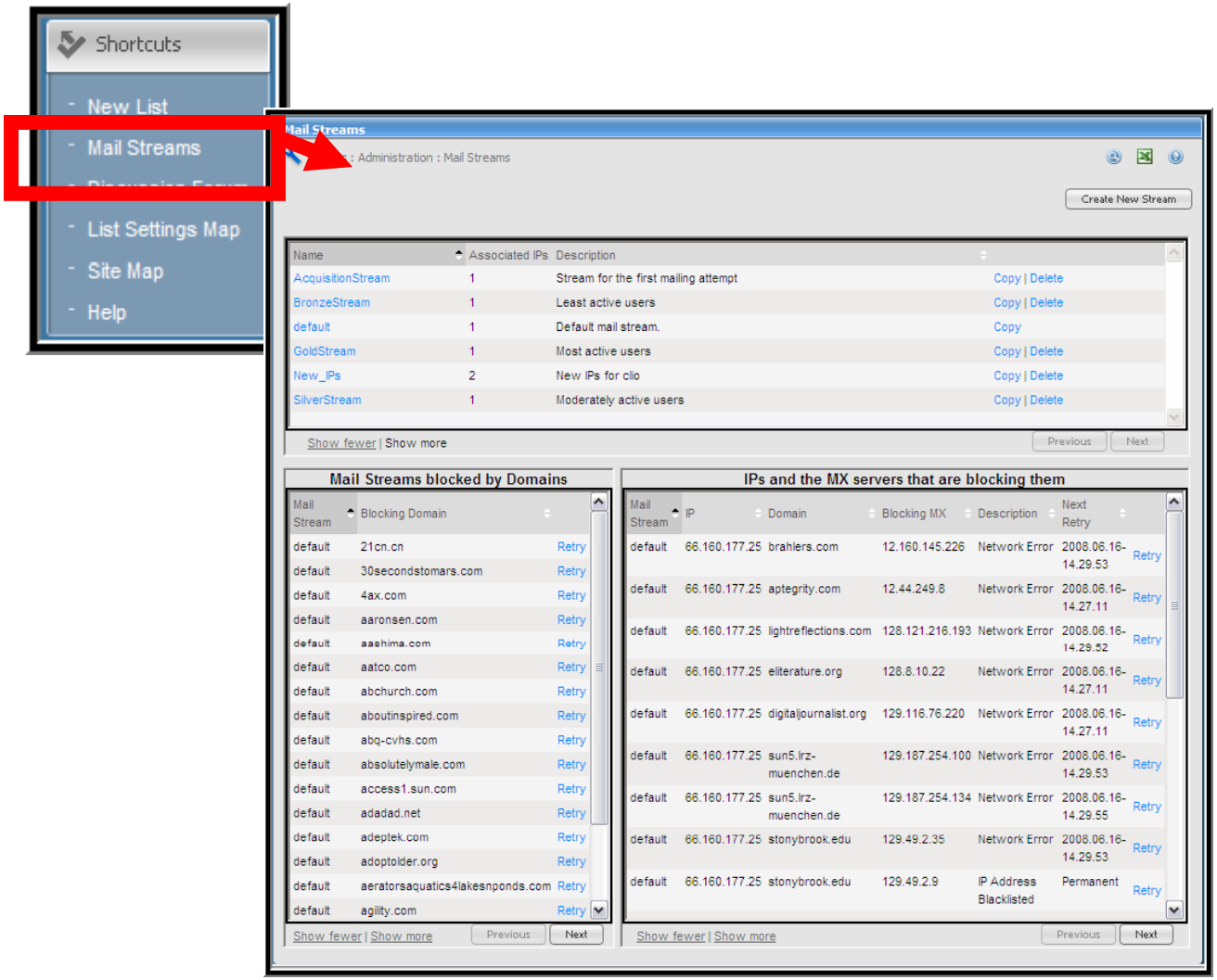
Segments can be automatically assigned to a MailStream for optimization.

MailStreams Mailings



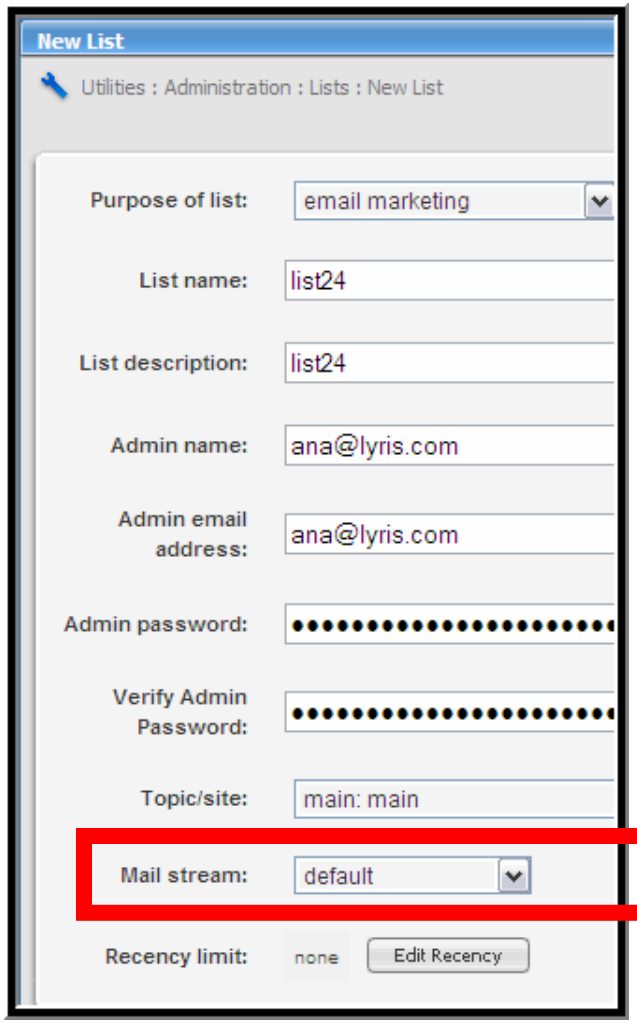
Set a MailStream at the mailing level in the “Deliverability” tab

MailStreams Mailings 2



- **Create a MailStream**
- **View blocks by domain**
- **View IP's and MX servers blocking them**

MailStreams List



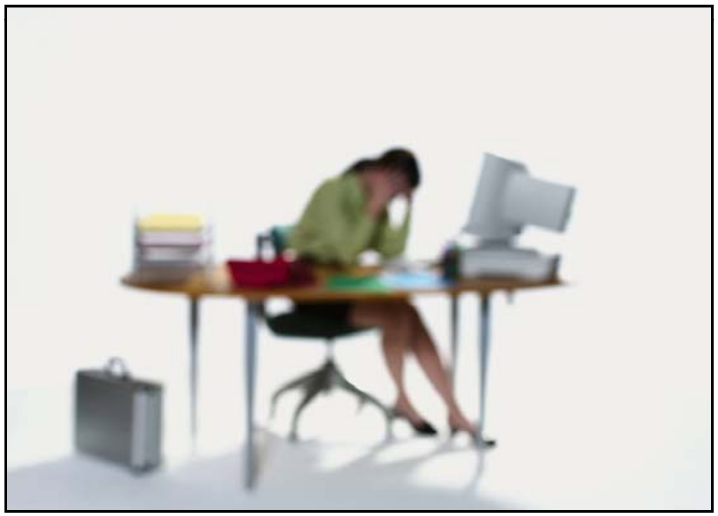
The list will be associated with a default mailstream

Recipient Limits

- Tracking & Segmentation
- MailStreaming
- Recipient Limits
- Surveys
- Refer-a-Friend
- Conditional Content
- Q&A

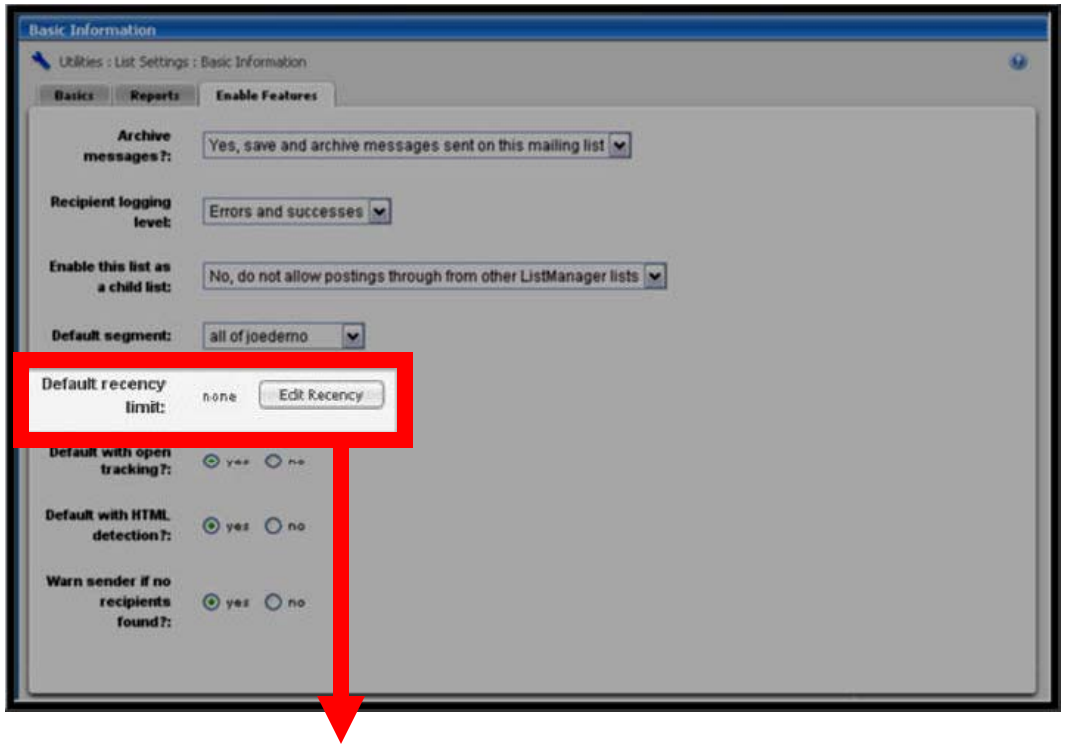
E-mailing to Segments

Emailing too often can be too much of a good thing…



- **By emailing to segments, you may be hitting the same people too often**
- **Too frequent emails leads to fatigue, and unsubscribes or spam complaints**

Recency Limits Overview

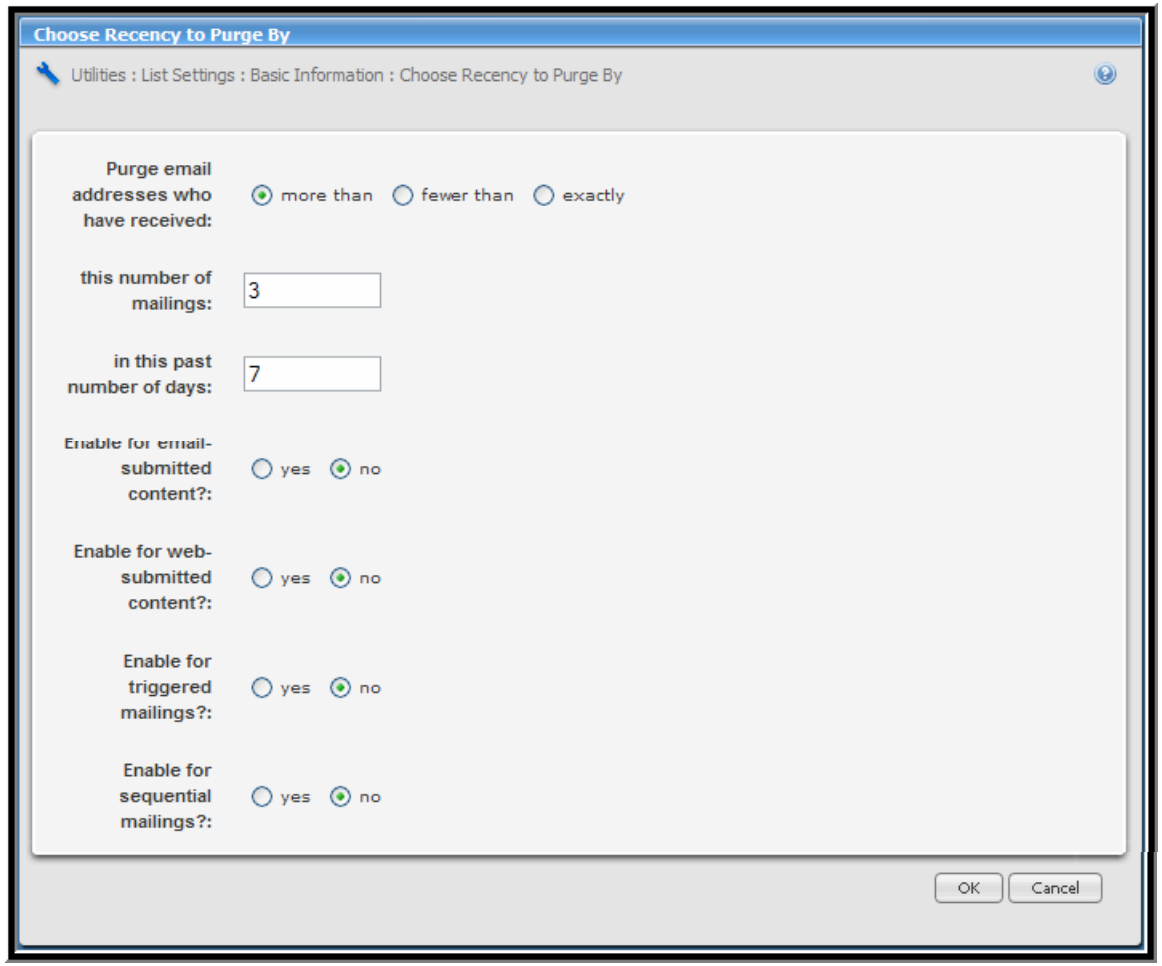


- Use *Default Recency Limit* to avoid sending too much mail
- Set default for:
  1. List level
  2. Individual mailings

Set Recency limits for list:

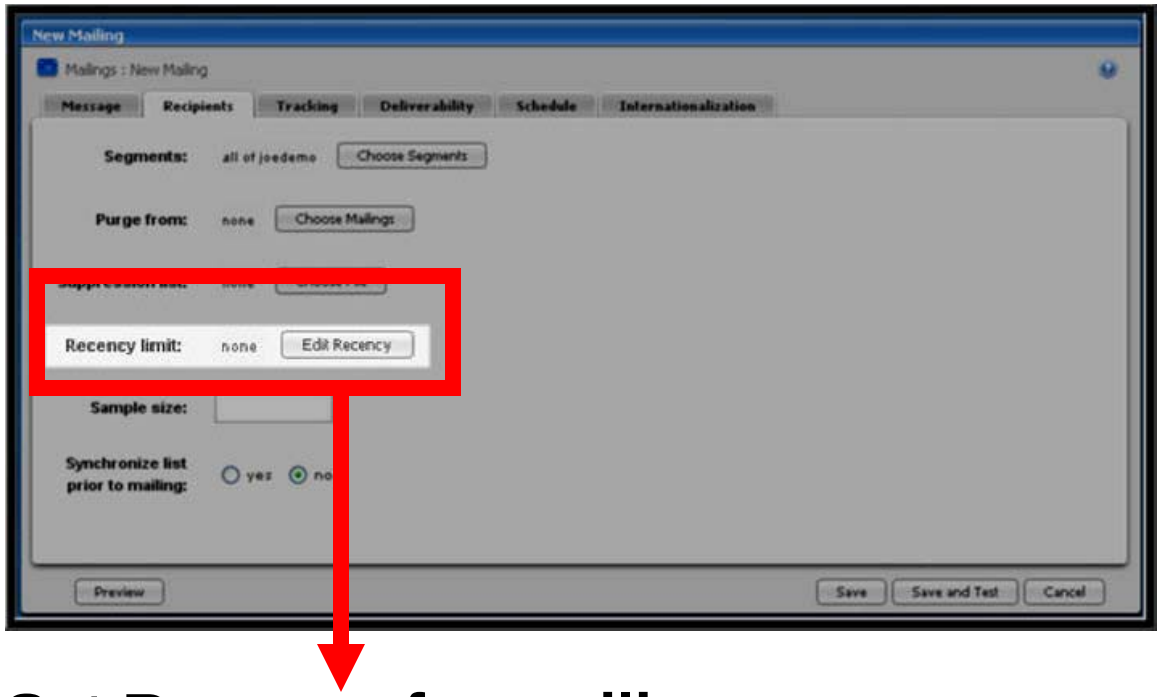
Utilities: List Settings: Basic Information: Enable Features

Recency Limits for the List



- **Specify recency threshold**
- **Specify what kinds of messages should have recency settings**

Recency Limits for the Mailing

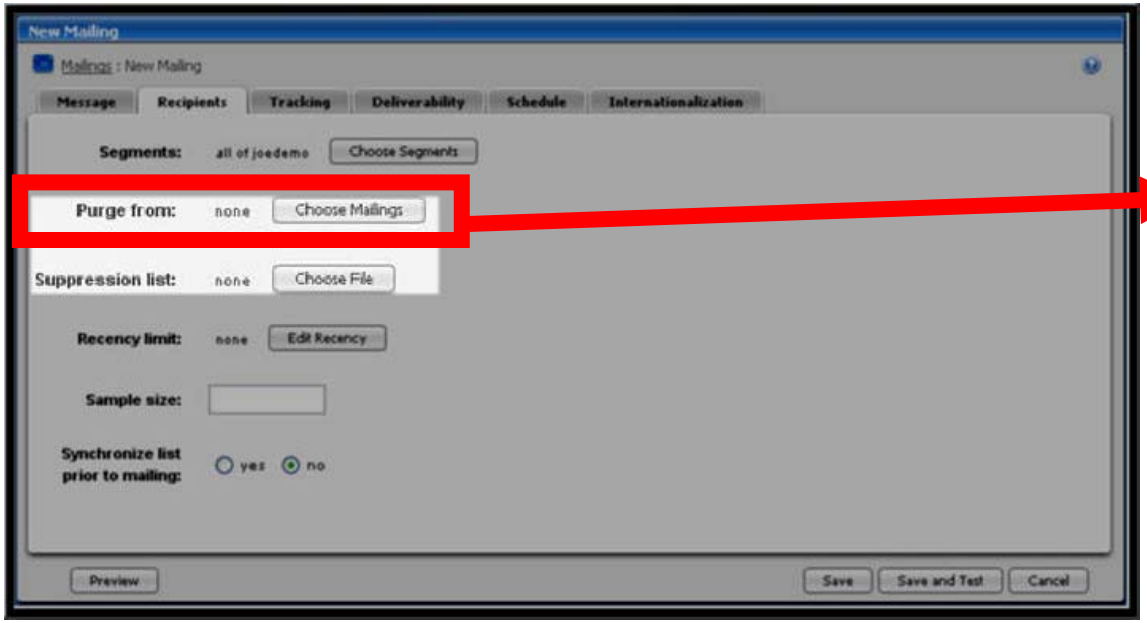


Override list recency limits when creating a mailing

Set Recency for mailing:

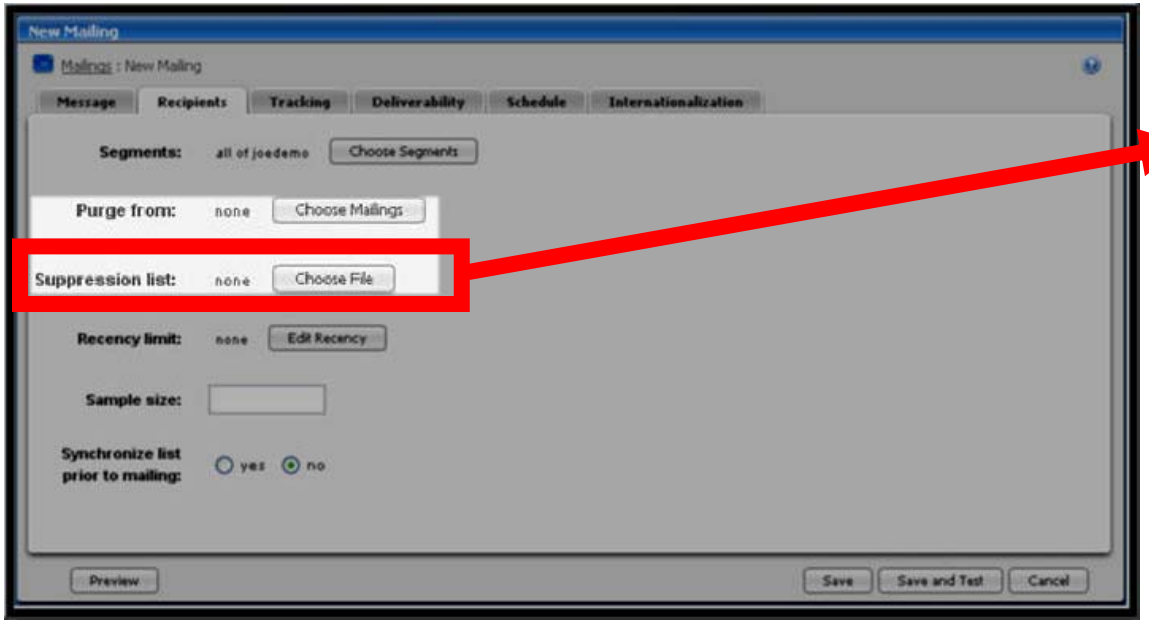
Mailing: New Mailing: Recipient

Purge From



Any member that received a past specified mailing will not receive the one being sent out

Suppression List



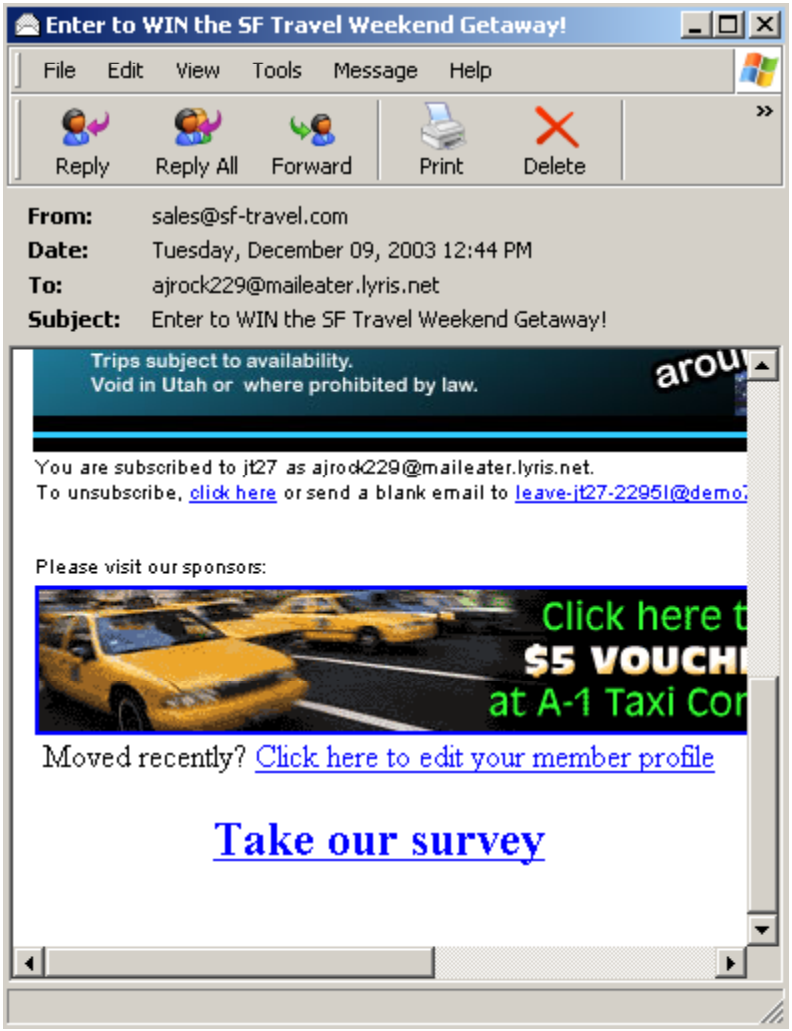
Upload a text file with emails of those members that should NOT receive this mailing

Surveys

- Tracking & Segmentation
- MailStreaming
- Recipient Limits
- Surveys
- Refer-a-Friend
- Conditional Content
- Q&A

Survey

Use surveys to engage and interact

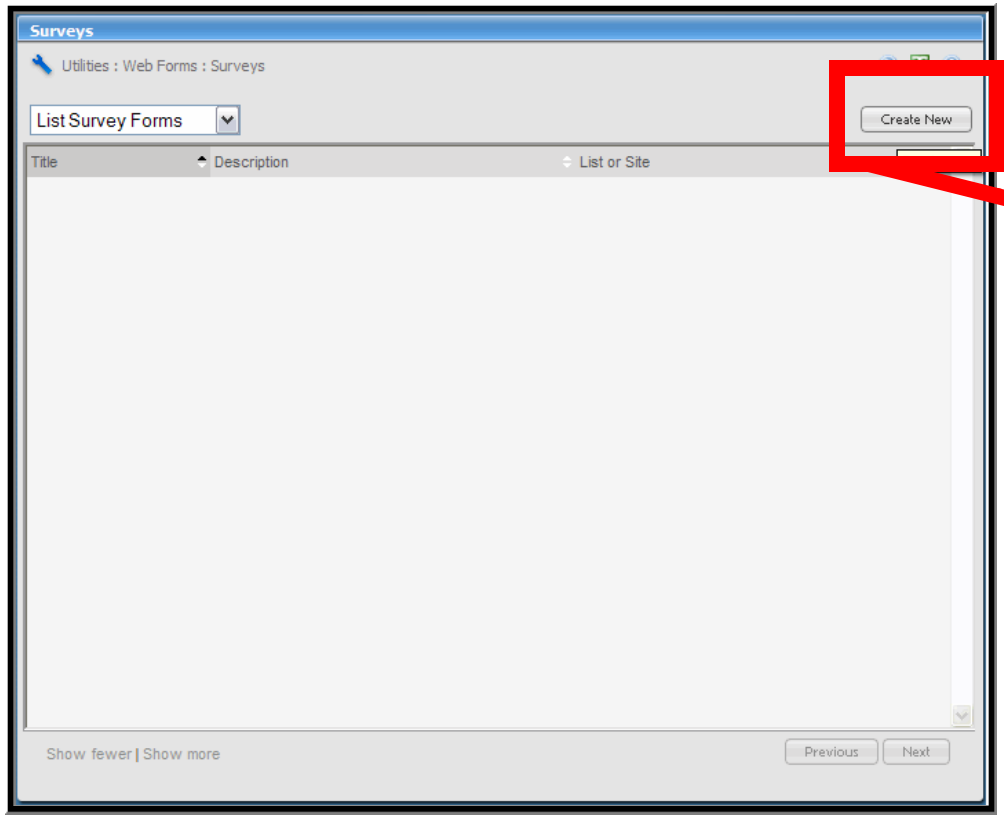


Survey Creation

Six Easy Steps:

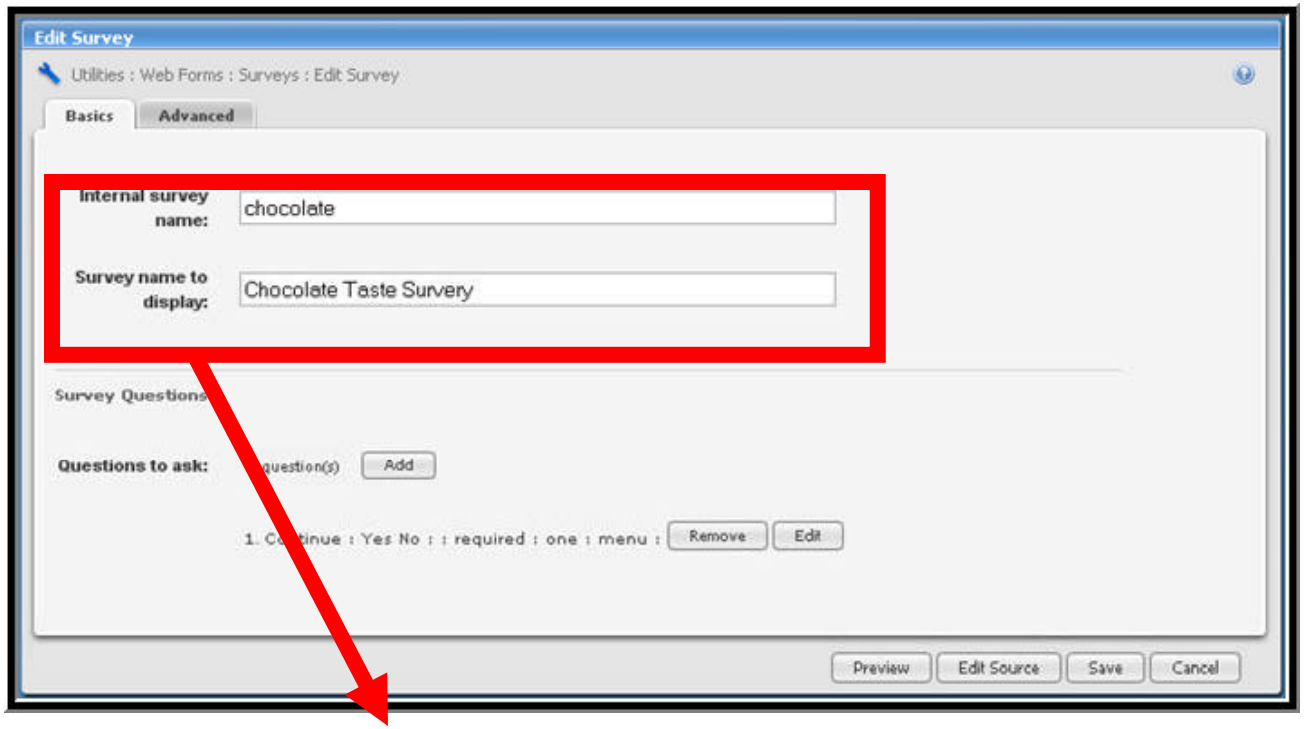
1. Choose Create New
2. Give the survey a name
3. Click “Add” on Questions to Ask:
   - Multiple Choice
   - Text
4. Preview and Save
5. Edit Source Code
6. Link Survey to Content

Survey (Step 1)



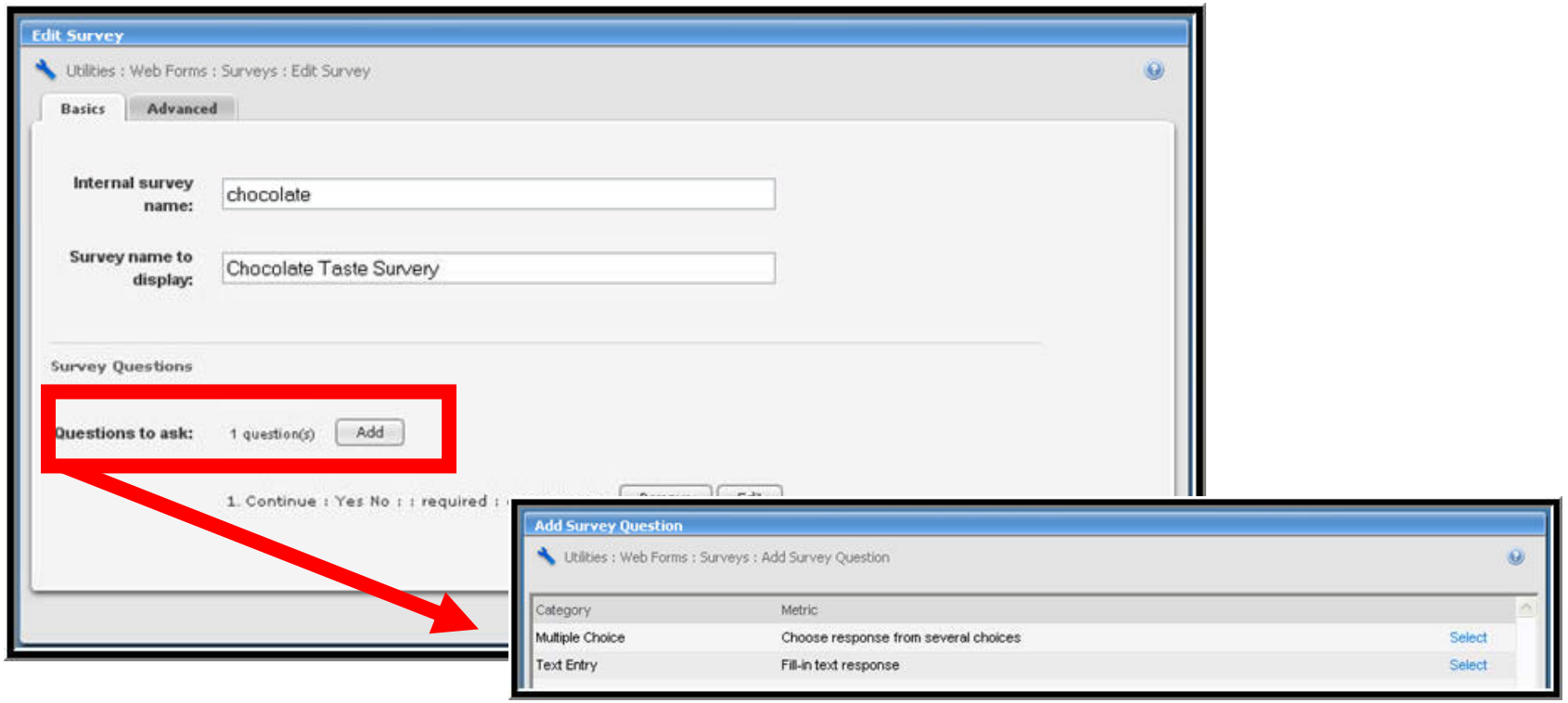
Create new surveys in Utilities: Web Forms: Surveys

Survey (Step 2)



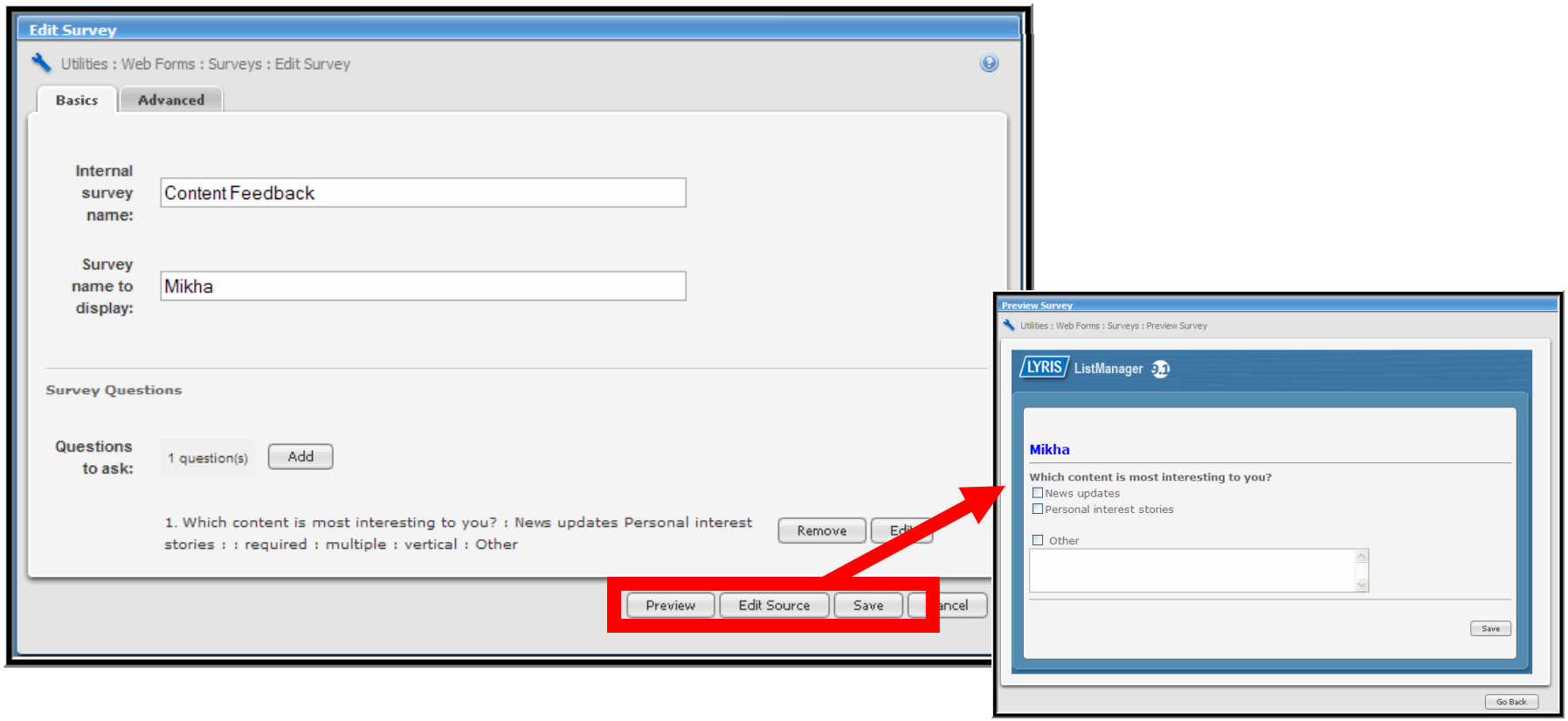
Give the Survey an internal name and a display name

Survey (Step 3)



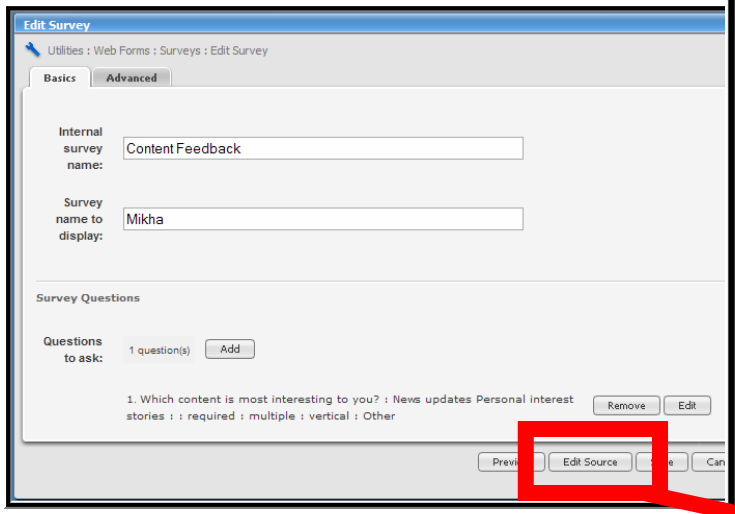
Integrate multiple choice or text entry questions

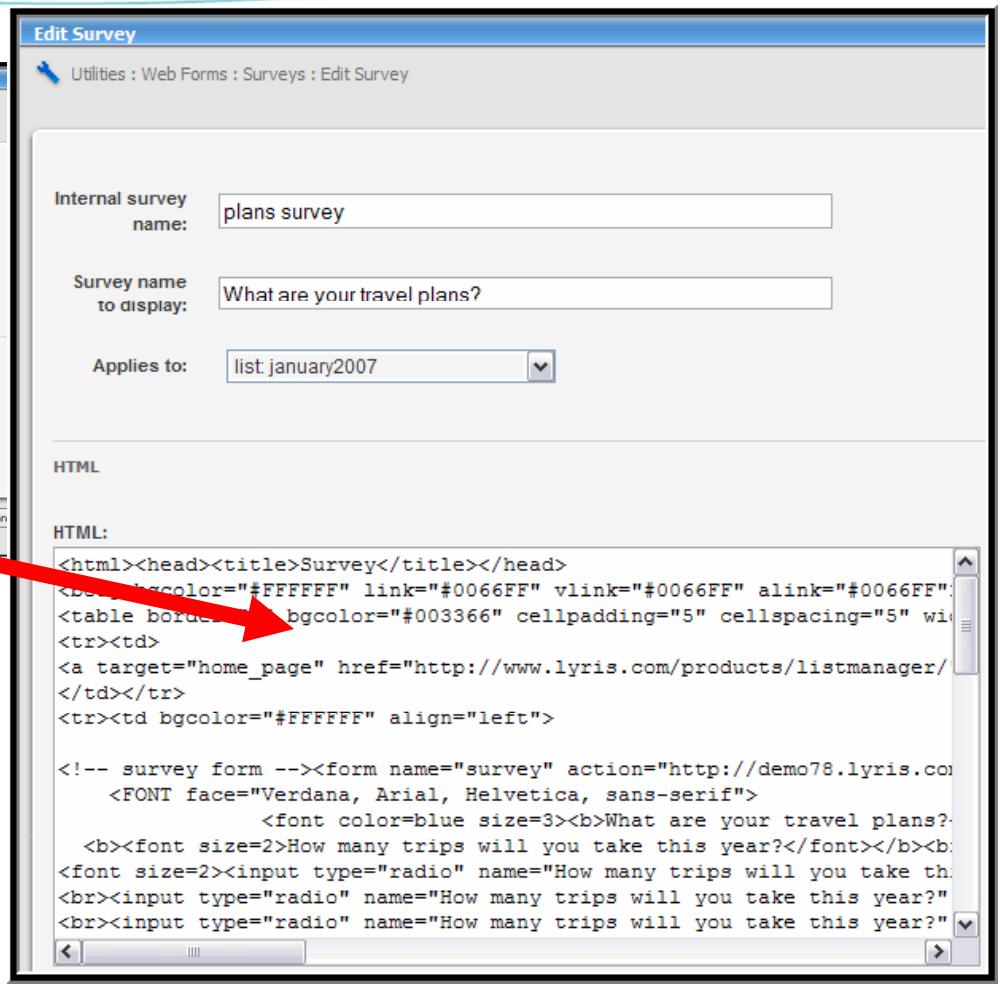
Survey (Step 4)



Preview design and save survey

Survey (Step 5)





“Edit Source” and have complete creative control

Survey (Step 6)

Advanced Training Survey

Thank you for taking the time to fill out this survey. The results of this survey are critical in helping improve our services and your training experience.

Which training courses have you previously participated in?

(Check all that apply)

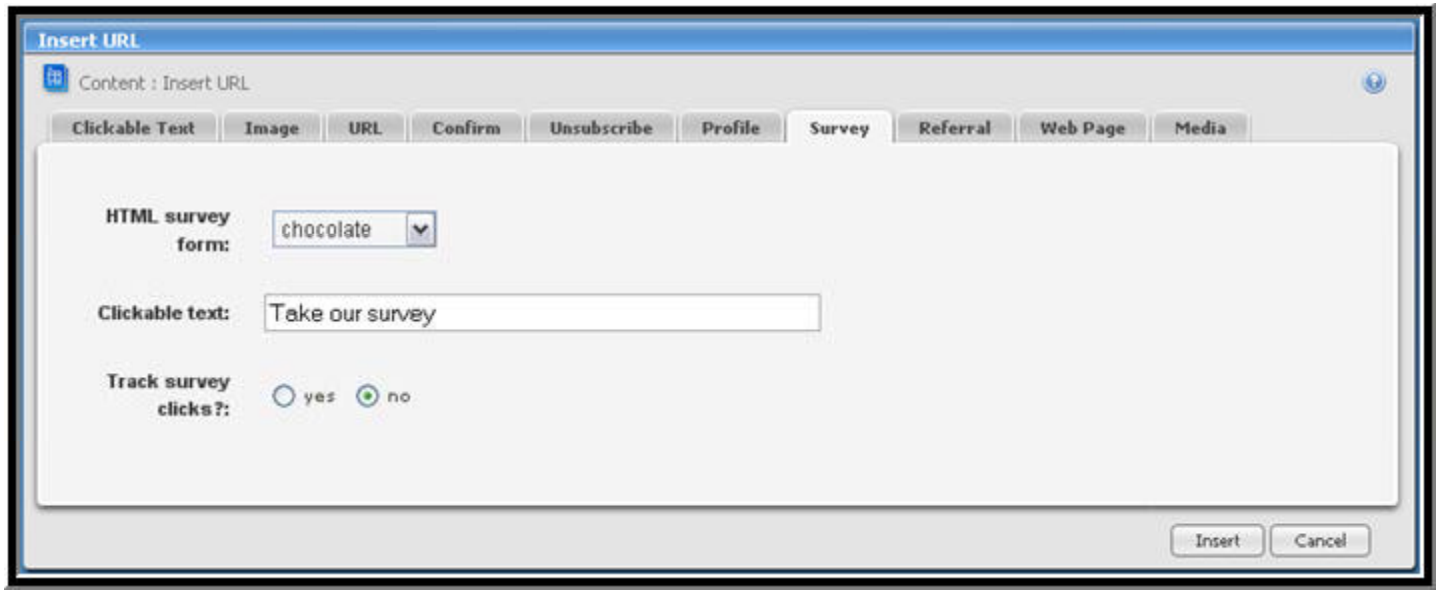
- ☐ Basic (Fundamentals, Hosting)
- ☐ Advanced
- ☐ Enterprise
- ☐ Discussion Forums
- ☐ Administrators

How would you rate the training you have received in the following areas:

	Excellent	Above Average	Average	Below Average	Poor
Quality of Instruction	○	○	○	○	○
Relevance of Course Content	○	○	○	○	○
Course Material Provided (PDF)	○	○	○	○	○
Availability of Course	○	○	○	○	○

Once your survey is complete, you are ready to include a link in the message of the mailing

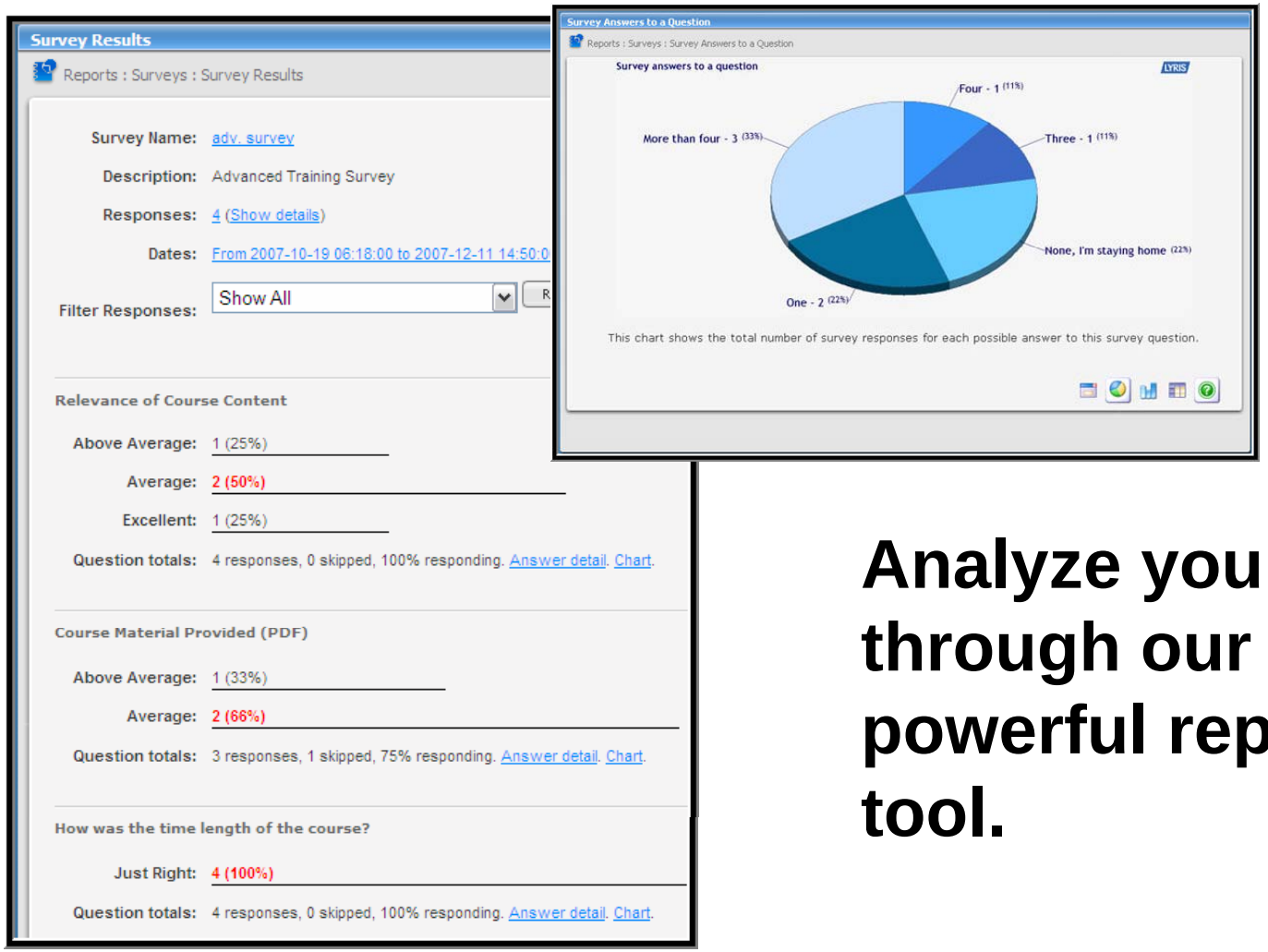
Survey (Step 6)



Use “Insert URL” in the message content area

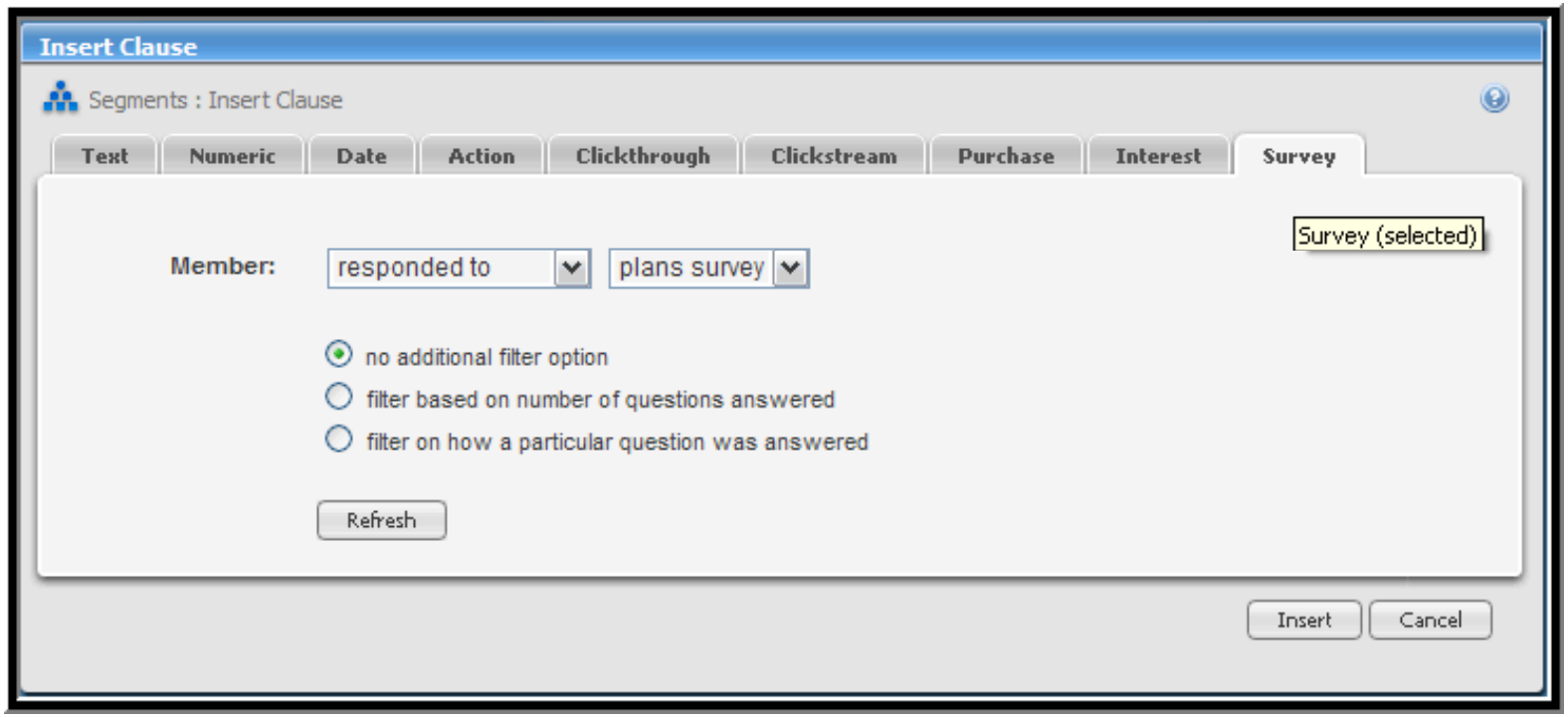
- **Specify the survey to be linked**
- **Specify what the link text should read**

Survey Reports



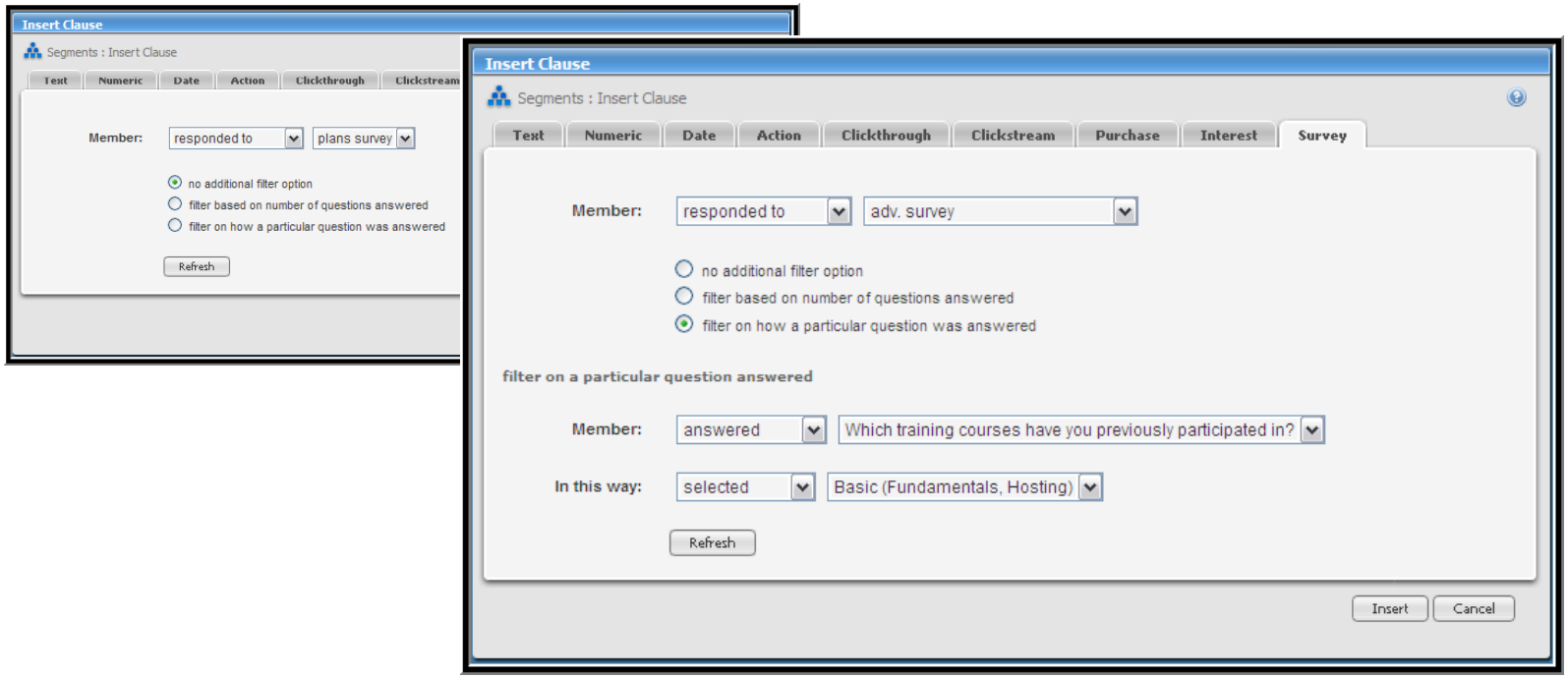
Analyze your results through our powerful reporting tool.

Survey Segments



Based on survey results target a specific audience through segmentation

Survey Segments



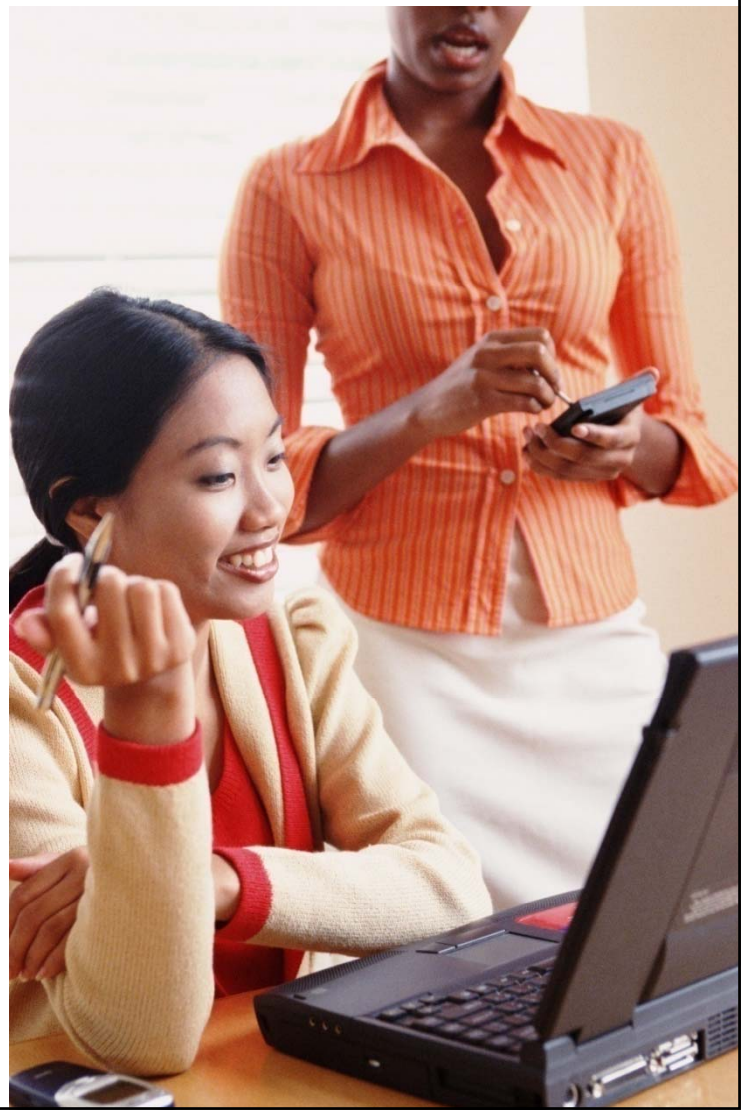
Based on survey results target a specific audience through segmentation. For example those who have answered a specific question

Surveys

- Tracking & Segmentation
- MailStreaming
- Recipient Limits
- Surveys
- Refer-a-Friend
- Conditional Content
- Q&A

Refer-A-Friend

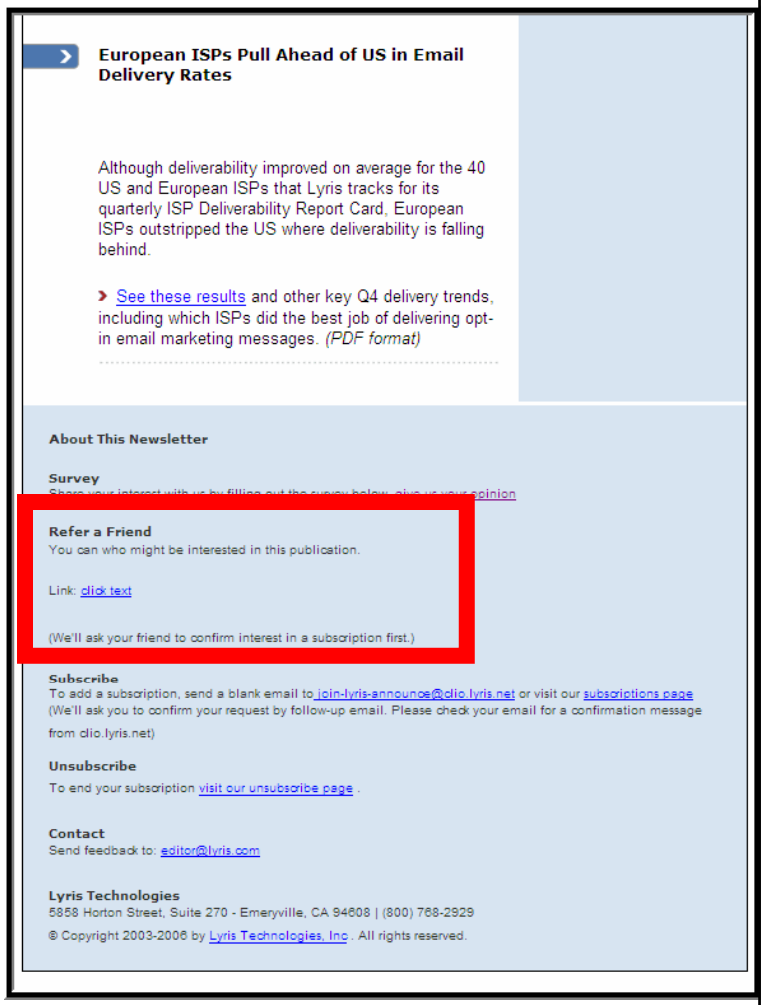
- Encourages current list members to invite their friends to join
- List grows “organically”
  - Friends know if their friends would be interested in joining
- Many fail-safes prevent people from being added maliciously



Refer-A-Friend

How It Works:

1. You send out mailing with a referral link where can member invite a friend to join the list.
2. List member clicks on link and enters friends email address using the refer form.
3. Invitees get an invitation email explaining how to join list.



European ISPs Pull Ahead of US in Email Delivery Rates

Although deliverability improved on average for the 40 US and European ISPs that Lyris tracks for its quarterly ISP Deliverability Report Card, European ISPs outstripped the US where deliverability is falling behind.

› See these results and other key Q4 delivery trends, including which ISPs did the best job of delivering opt-in email marketing messages. *(PDF format)*

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Survey

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Link: click text

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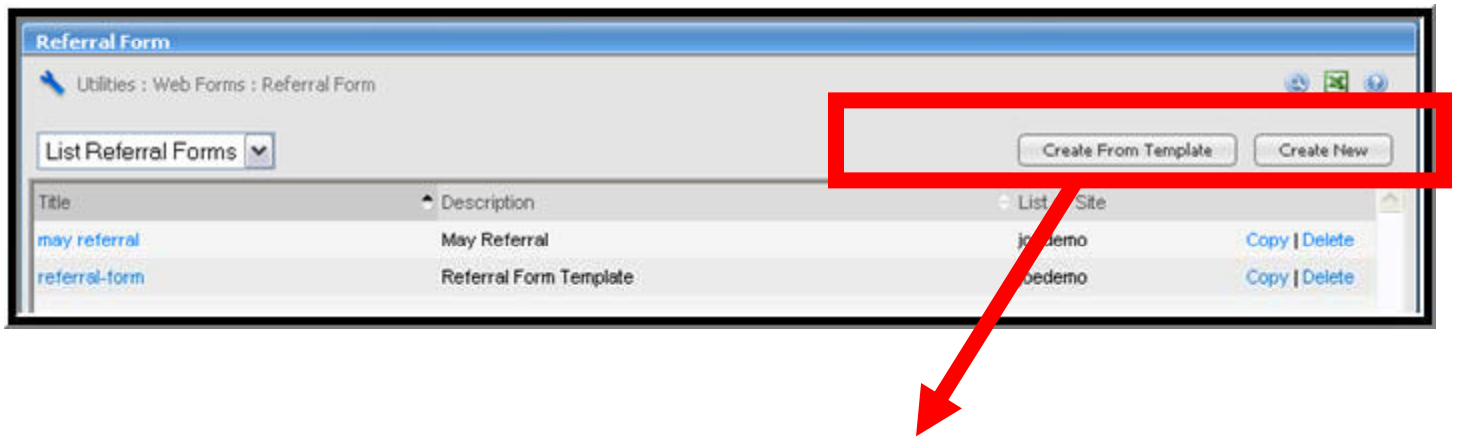
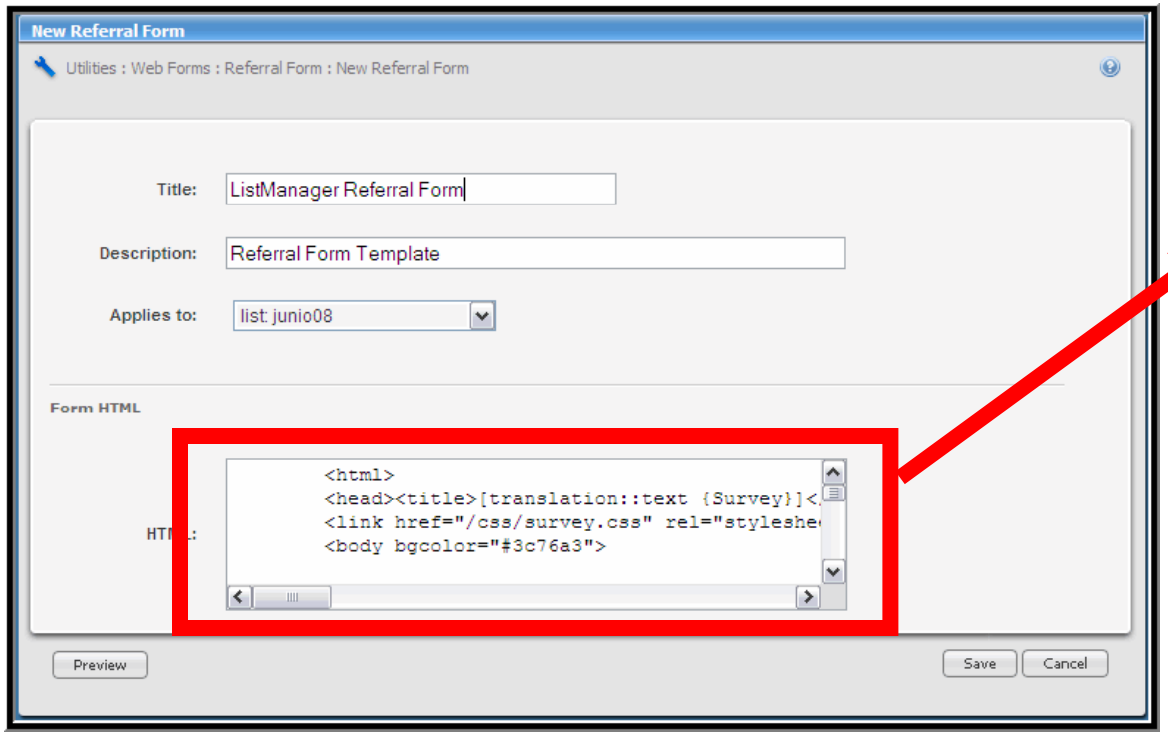
Refer-a-Friend (1)



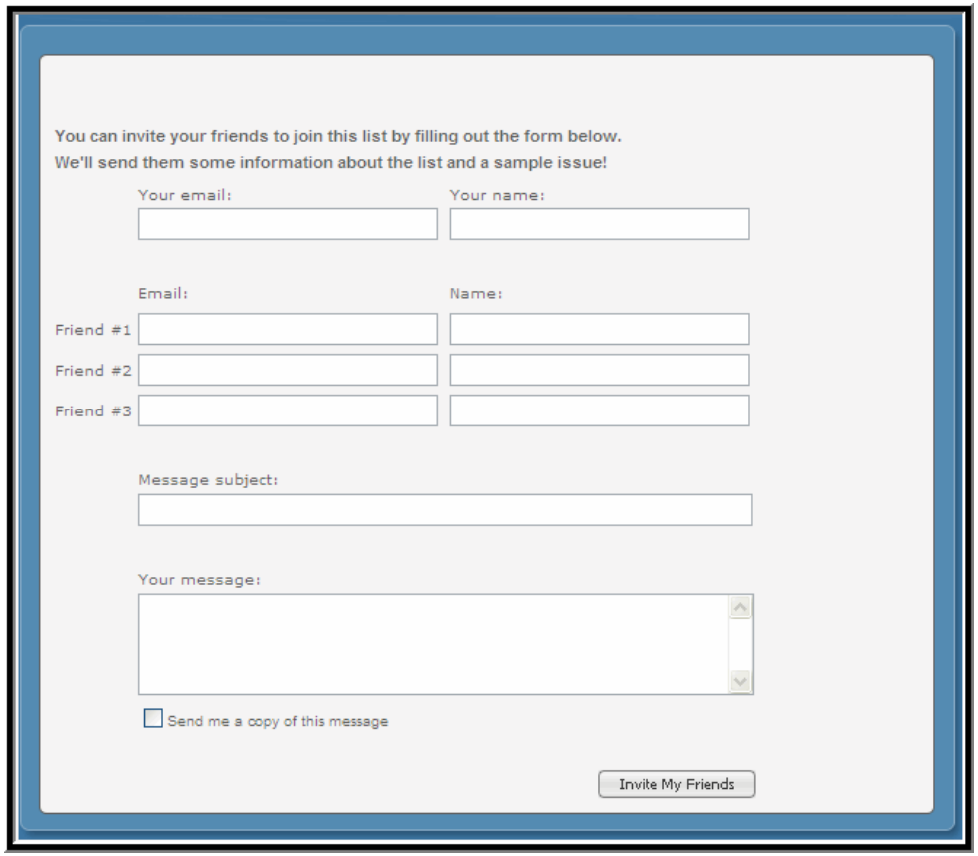
When creating the form, choose "Create From Template" to generate the form

Refer-a-Friend (2)



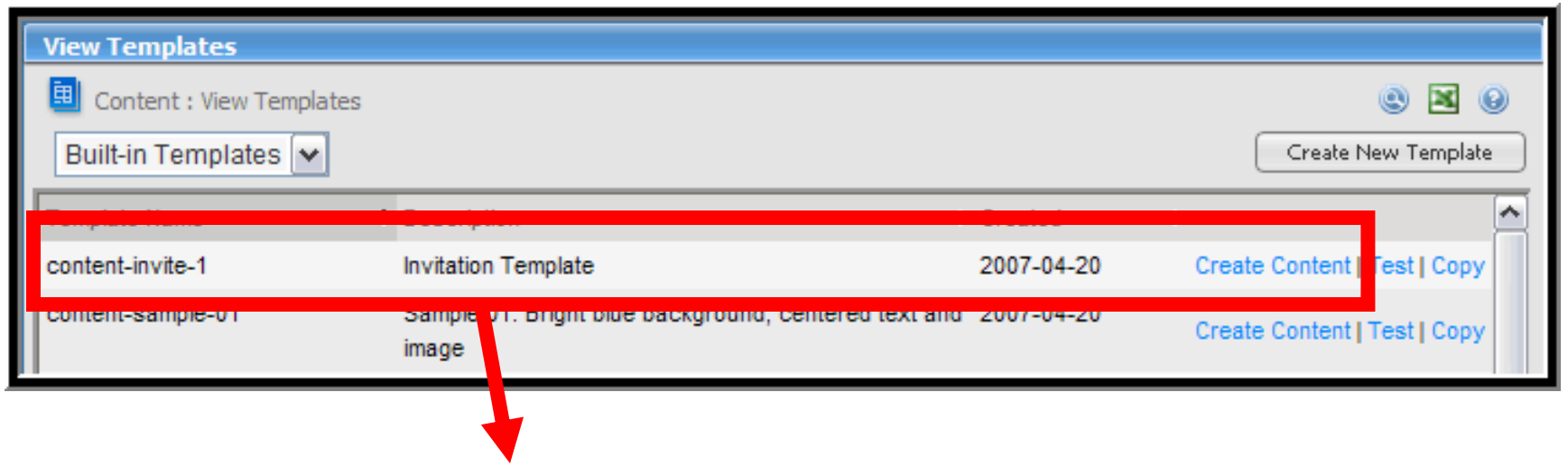
The HTML will give you full control over the design

Refer-a-Friend (3)



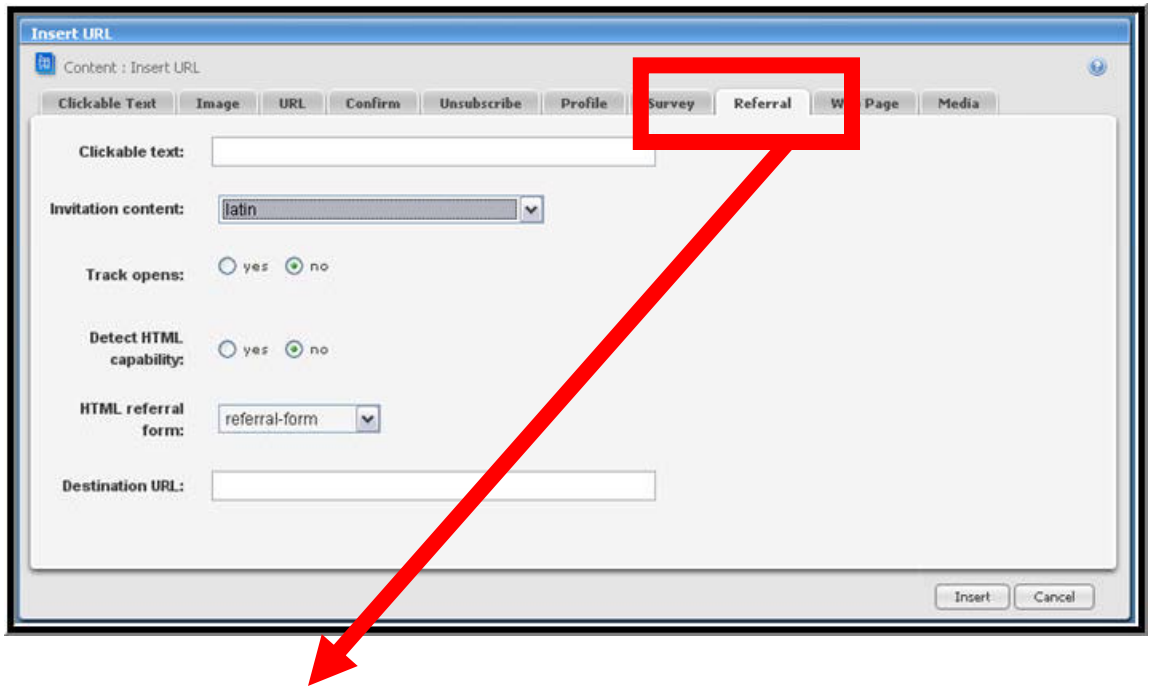
Once the form is designed, create the invitation…

Refer-a-Friend (4)



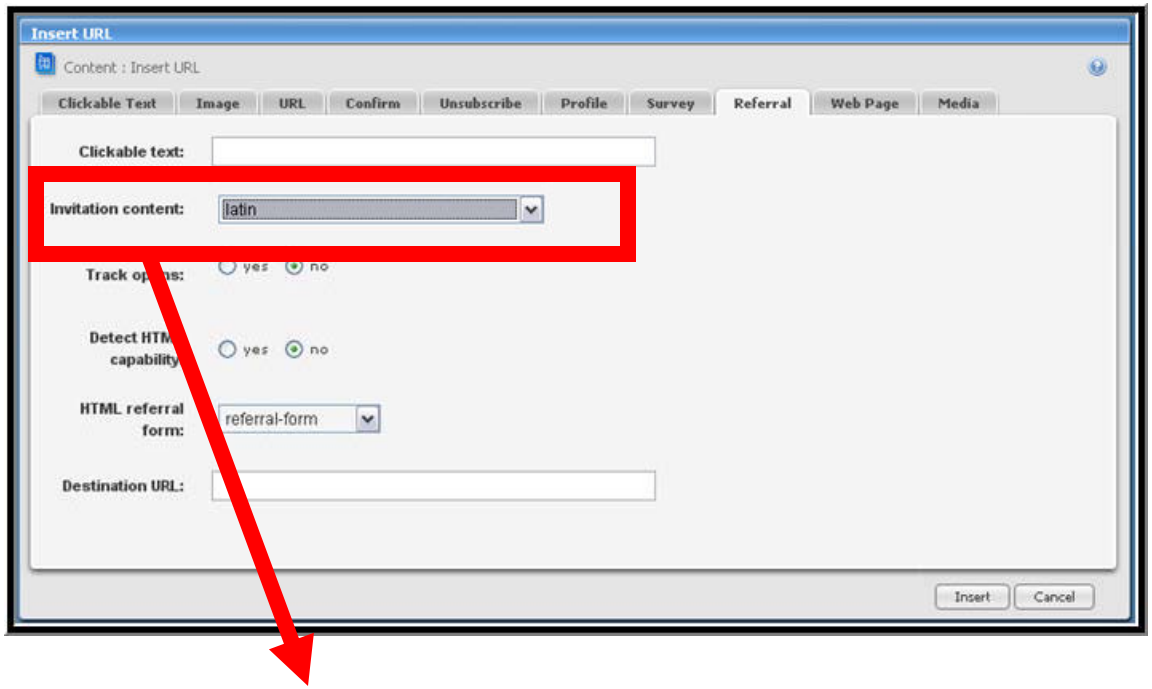
Customize the “Invitation Template” that will be sent from the referral form

Refer-a-Friend (5)



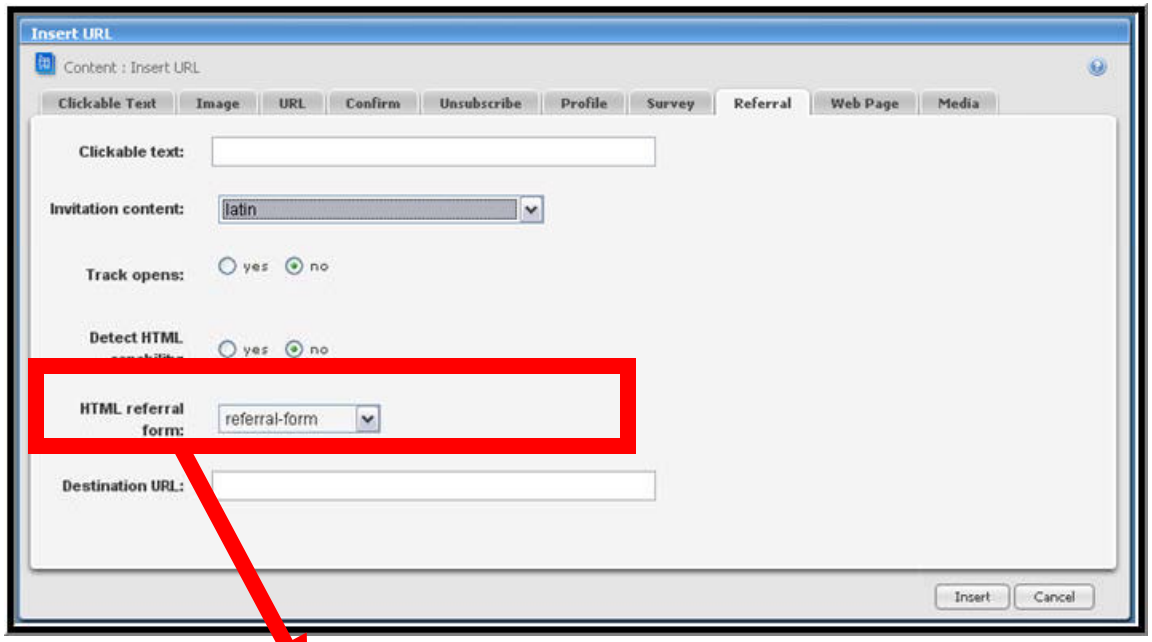
In the content area, insert the URL to the Referral Form

Refer-a-Friend (6)



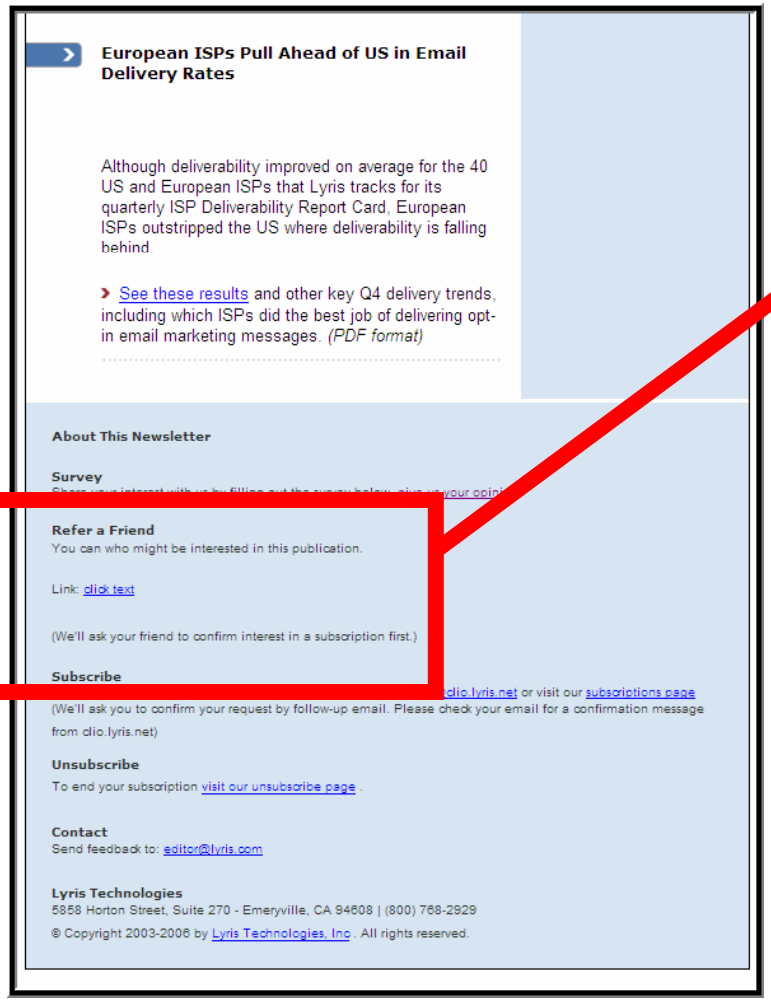
Indicate which invitation should be sent out

Refer-a-Friend (7)



Indicate which form members should fill out upon clicking on the link

Refer-a-Friend (8)



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About This Newsletter

Survey

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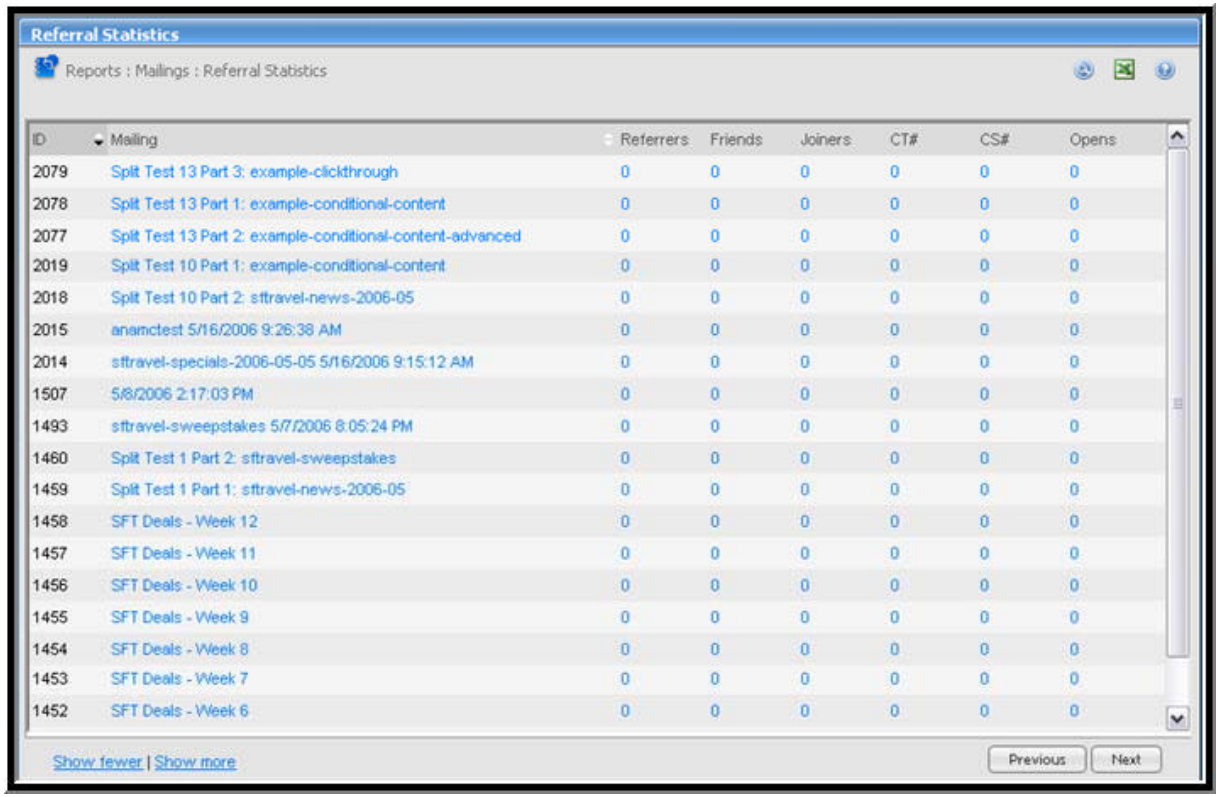
When members click on the link, the form will appear

Refer-A-Friend Report



ID	Mailing	Referrers	Friends	Joiners	CT#	CS#	Opens
2079	Split Test 13 Part 3: example-clickthrough	0	0	0	0	0	0
2078	Split Test 13 Part 1: example-conditional-content	0	0	0	0	0	0
2077	Split Test 13 Part 2: example-conditional-content-advanced	0	0	0	0	0	0
2019	Split Test 10 Part 1: example-conditional-content	0	0	0	0	0	0
2018	Split Test 10 Part 2: sftravel-news-2006-05	0	0	0	0	0	0
2015	anamctest 5/16/2006 9:26:38 AM	0	0	0	0	0	0
2014	sftravel-specials-2006-05-05 5/16/2006 9:15:12 AM	0	0	0	0	0	0
1507	5/8/2006 2:17:03 PM	0	0	0	0	0	0
1493	sftravel-sweepstakes 5/7/2006 8:05:24 PM	0	0	0	0	0	0
1460	Split Test 1 Part 2: sftravel-sweepstakes	0	0	0	0	0	0
1459	Split Test 1 Part 1: sftravel-news-2006-05	0	0	0	0	0	0
1458	SFT Deals - Week 12	0	0	0	0	0	0
1457	SFT Deals - Week 11	0	0	0	0	0	0
1456	SFT Deals - Week 10	0	0	0	0	0	0
1455	SFT Deals - Week 9	0	0	0	0	0	0
1454	SFT Deals - Week 8	0	0	0	0	0	0
1453	SFT Deals - Week 7	0	0	0	0	0	0
1452	SFT Deals - Week 6	0	0	0	0	0	0

See how many members have referred friends in *Reports: Mailings: Referral Statistics*

Conditional Content

- Tracking & Segmentation
- MailStreaming
- Recipient Limits
- Surveys
- Refer-a-Friend
- Conditional Content
- Q&A

Conditional Content Overview

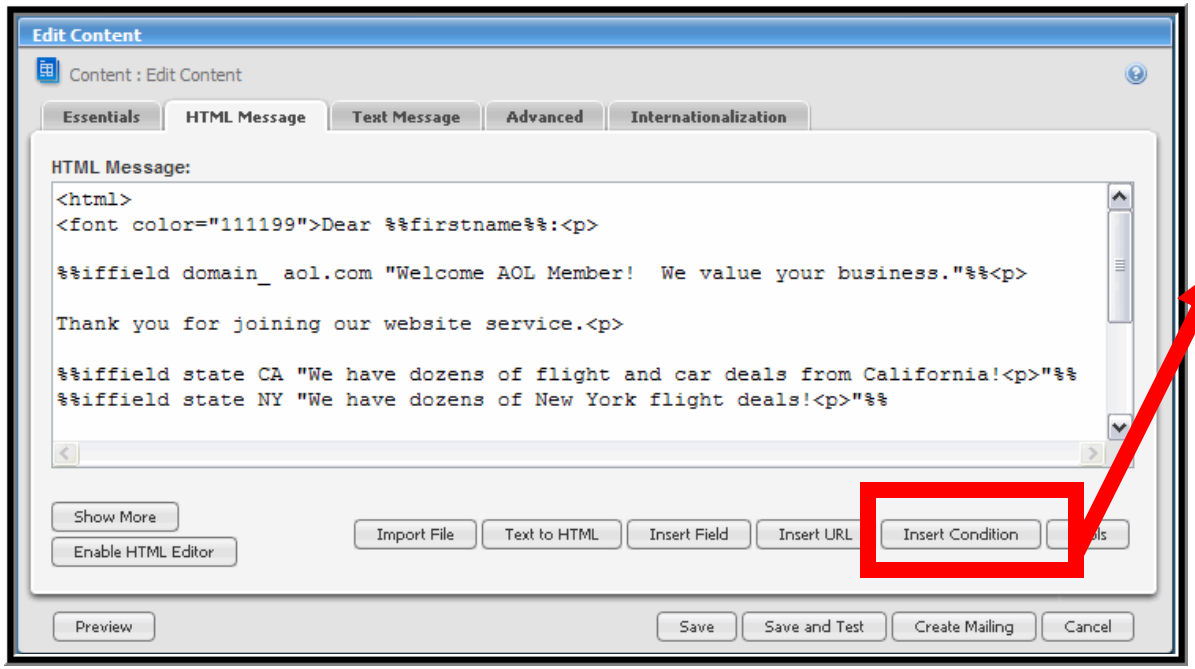
What is *Conditional Content*?

- Message text changes depending on the characteristics of each unique member

Example:

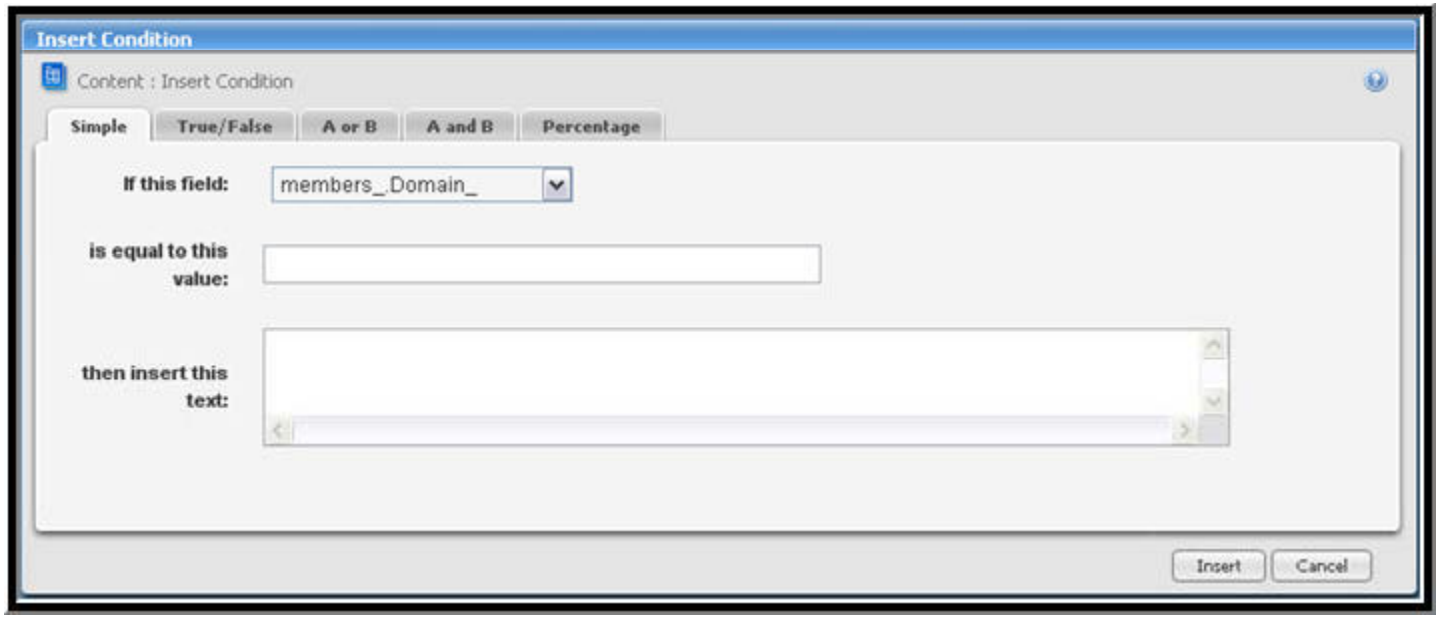
- Members living in San Francisco receive information about flight specials from San Francisco, AND...
- Members living elsewhere get information about specials relevant to them—or nothing, if you prefer

Insert Condition



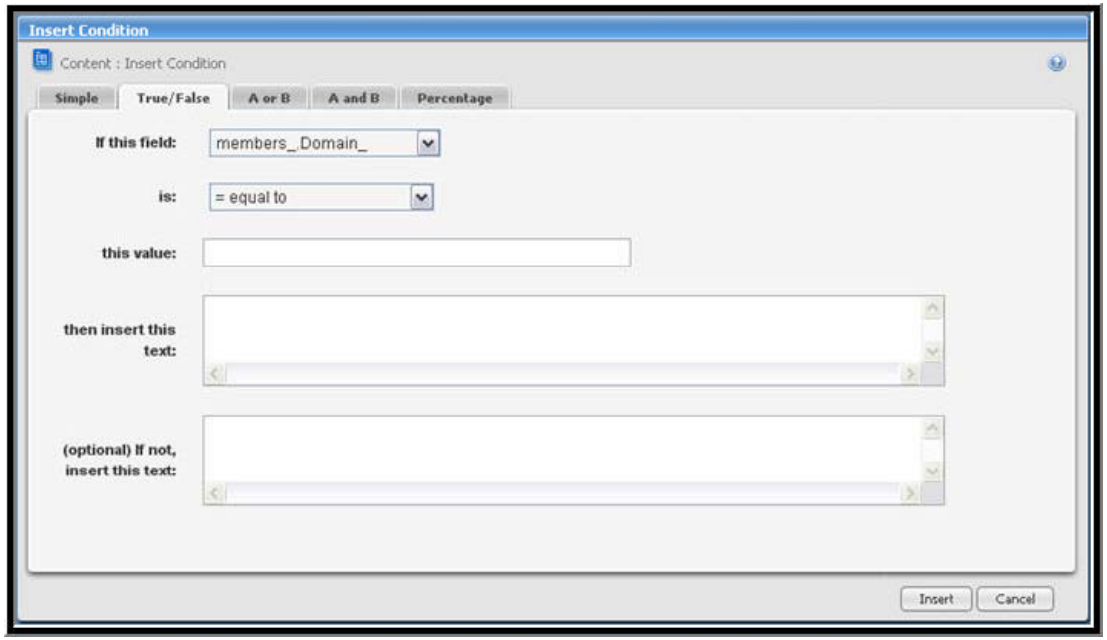
- Select ***Insert Condition***
- Conditional content is based on recipient's field

Simple Condition



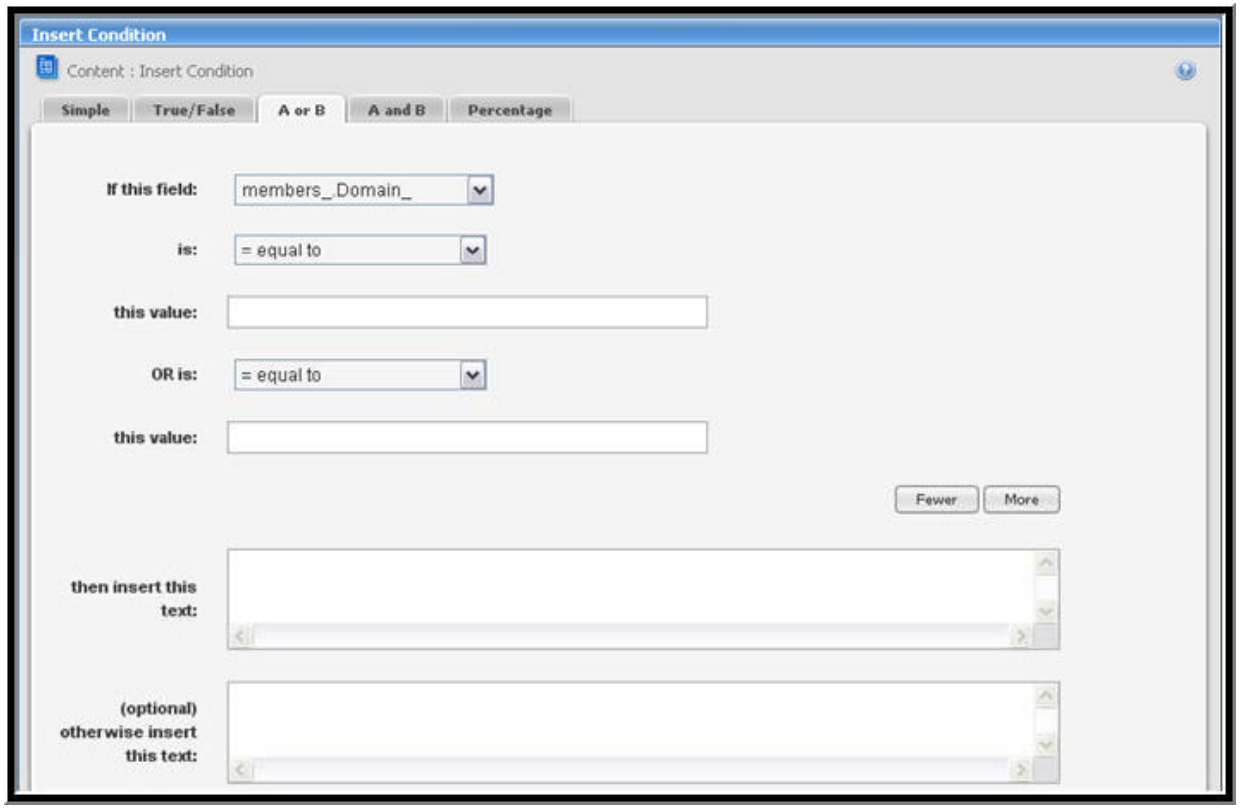
- Select the field you'd like ListManager to examine in order to insert conditional text
- Insert specified text if field equals specified value
- If not equal, then nothing is inserted

True/False Condition



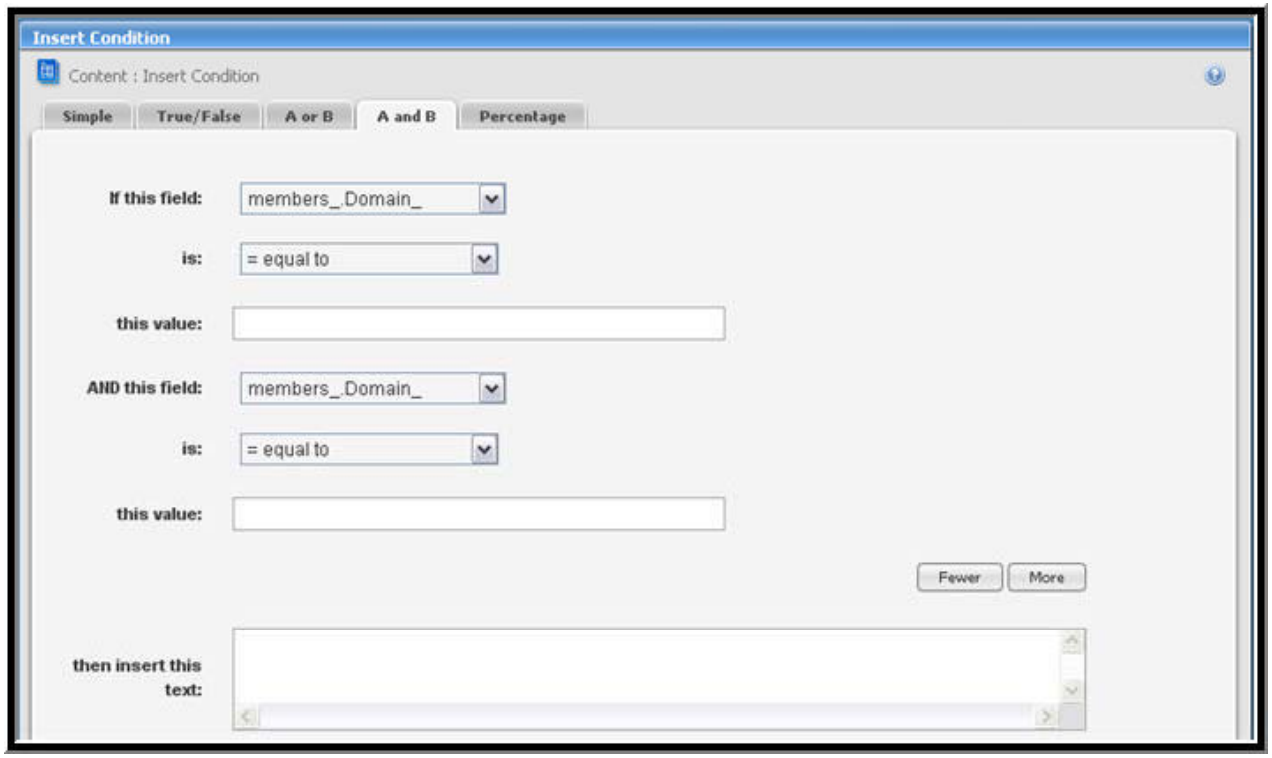
Follow the logic for Simple Condition, but specify alternate text if the condition is not met

A or B Condition



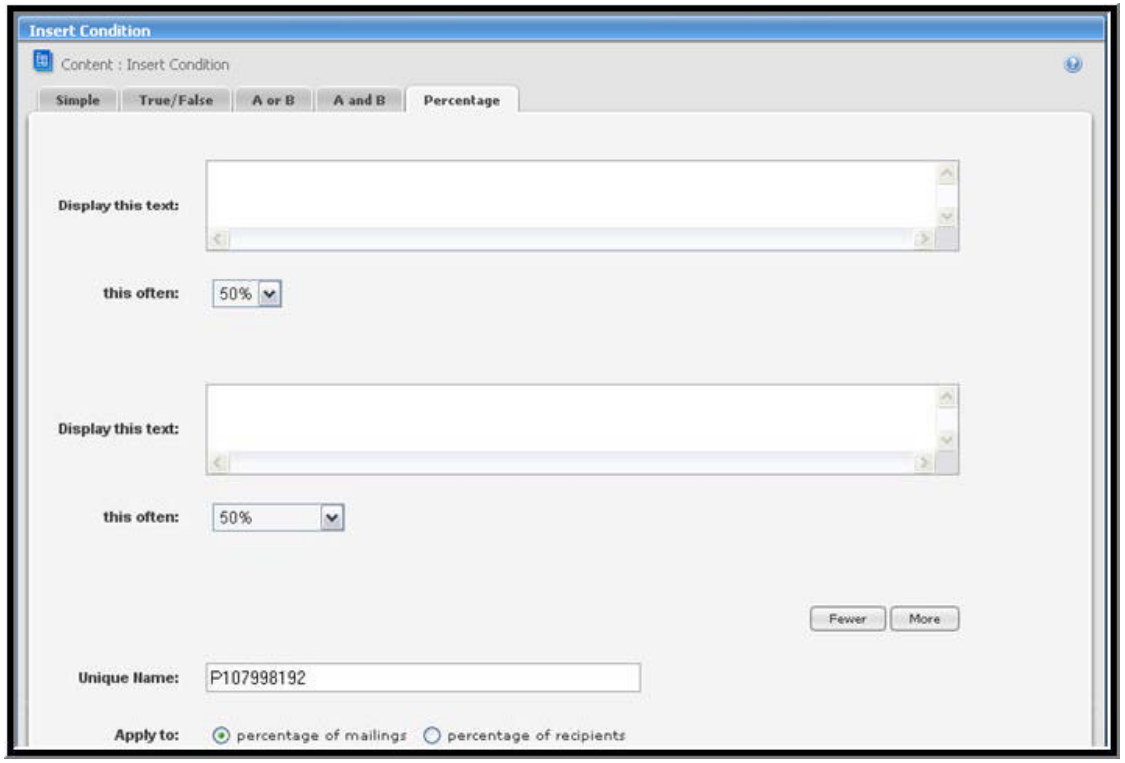
- Recipient can meet any one of many conditions
- Add more conditions if needed

A and B Condition



- Recipient must meet ALL conditions
- Can also add more conditions

Percentage Condition



Use *Percentage* to rotate ads in your content

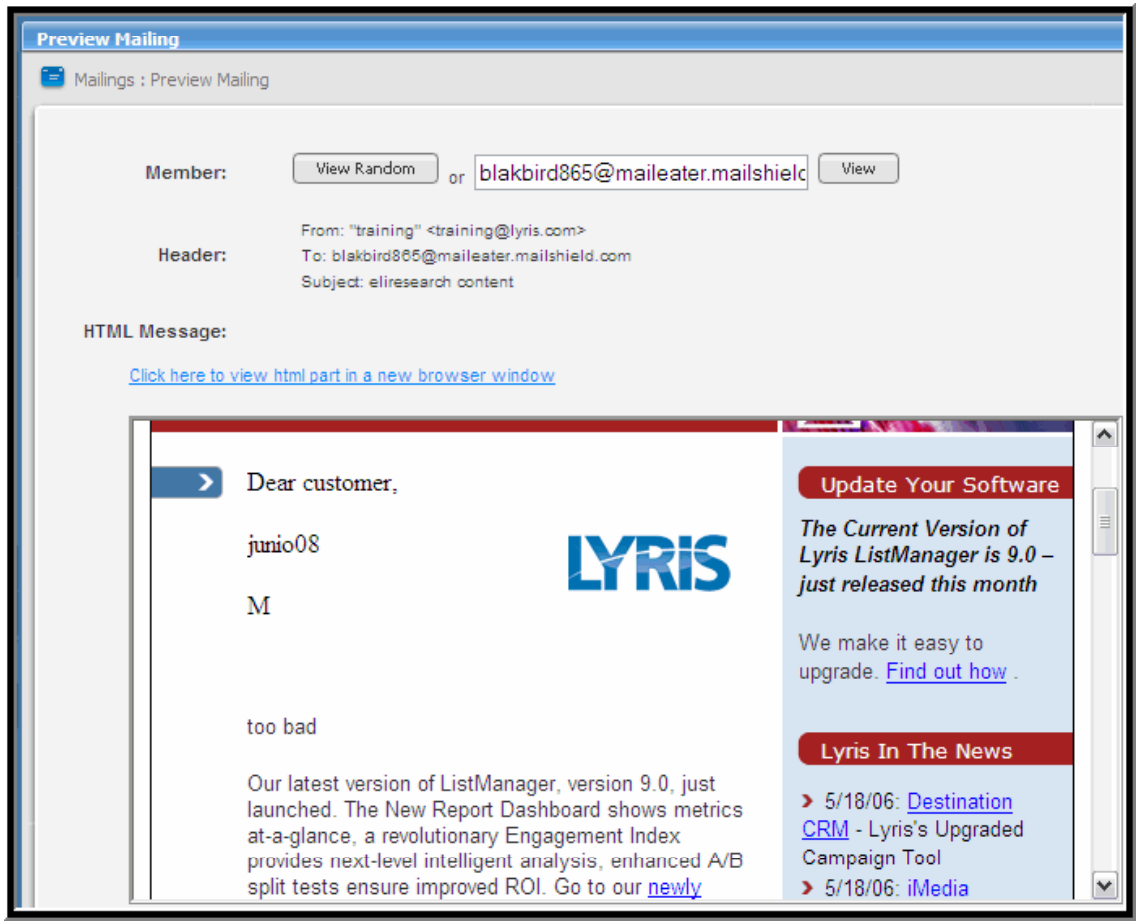
Percentage Condition (2)

- **Rotate the text between mailings—**
  - 25% of mailings receive one text, 75% another
- **Everyone gets the same content each time**
- **Best for templates**

- **Rotate the text between recipients—**
  - 25% of recipients receive one text, 75% another
- **Best if using content once**

Test Conditional Content

Preview shows you merged content for a random or specific email address



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