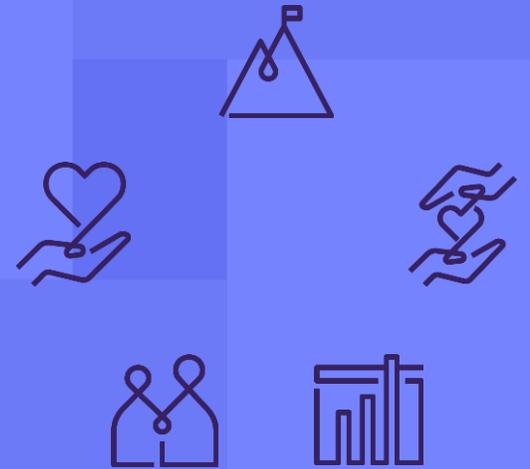


DONOR ENGAGEMENT

Analyzing Email Effectiveness



Introduction & Learning Objective

Meet your Trainer...

Ryan Sauve

Training Specialist

Donor Engagement

EveryAction



Agenda

Agenda

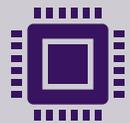
1. Viewing results on the Targeted Email dashboard
2. Reviewing individual contact records
3. Creating a list of recipients using the Targeted Emails or Targeted Email Summary sections in CAL
4. Using one of the default email report templates in Report Manager
5. Q&A

Viewing Results on the Targeted Email Dashboard

Tracking Targeted Email Performance and Statistics



If you are new to email reporting, it can be helpful to make sure you understand what all of the terms mean that you will be seeing.



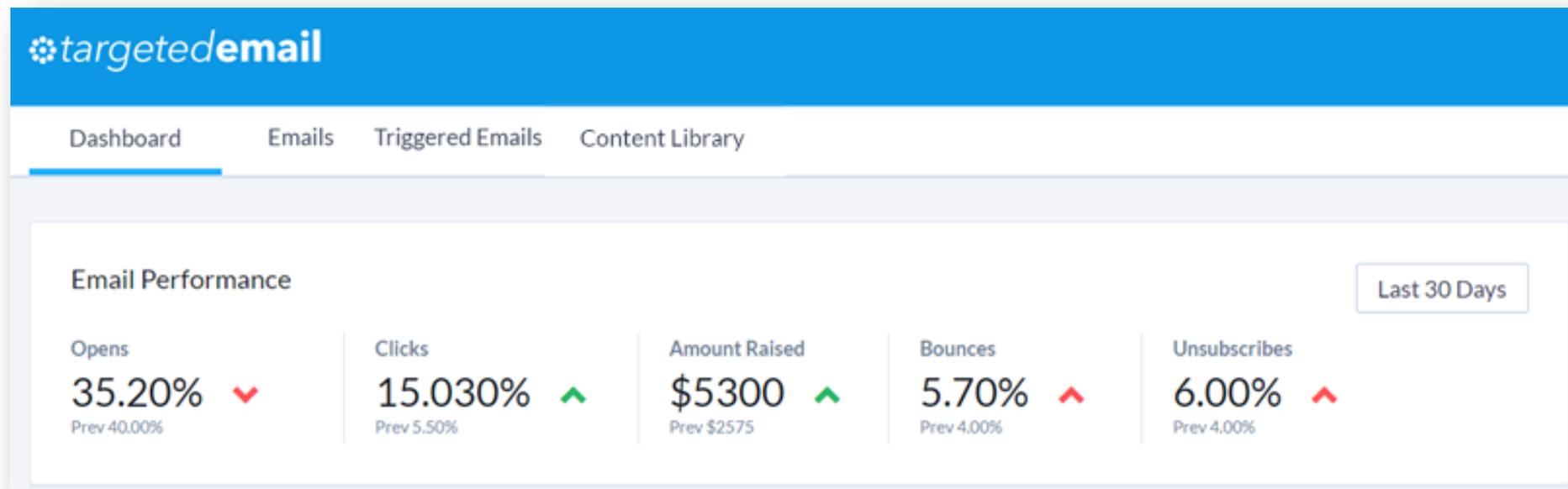
You should also understand the impact that email privacy policies can have on your results, including Apple Mail's privacy protection program



Finally, you should make sure your existing email program uses the best practices to ensure deliverability.

Using the Targeted Email Dashboard

The **Targeted Email dashboard** is the best place to get a quick overview of how healthy your email program is. You will see statistics on how well your emails have performed over the last 30 days and how their performance compares to the previous 30 days.



Using the Targeted Email Dashboard

Below the summary section, you will **see the most recently sent emails and their performance metrics**. You will see how many recipients there were for each email and the percentage of opens, clicks, bounces, and unsubscribes. If you hover over the percentages, you can view the hard count. To see a complete list of sent emails, select View All or use the Emails tab at the top of the page.

Sent								View All
Name	Recipients	Opens	Clicks	Conv. Rate	Amt. Raised	Bounce	Unsub.	
Year End Tax Receipt 2019 Sent by Dora Dogood Jun 4, 2021 10:37 AM	1275	37.50%	0.00%	0.00%	\$0.00	12.50%	0.00%	
PCADV - End Domestic Violence Sent by Dora Dogood Feb 12, 2021 12:26 PM	2,092	42.15%	0.00%	0.00%	\$0.00	4.17%	0.10%	
Fall Event Sent by Javier Gonzalez Oct 27, 2020 12:45 PM	475	44.44%	29.63%	29.63%	\$2,945.00	11.11%	8.70%	
Spring Event Sent by Sam Tsu Mar 3, 2020 9:20 AM	675	47.10%	23.87%	25.75%	\$9,750.00	5.80%	12.75%	
Save the Oceans Campaign Sent by Maria Hsu Dec 30, 2019 3:16 PM	4,513	48.00%	20.89%	15.90%	\$12,950.00	9.72%	1.8%	

Using the Targeted Email Dashboard

You can get more details about each email by using **the dropdown to the right of the email name** to open the results page.

You can hover over the percentages to get exact counts.

Save the Whales

Email Details

Email Name	Save the Whales
Date Sent	Oct 11, 2017 4:19 PM
Sender	Dora Dogood
Email Subject	Can you join us?
Included In Audience	<input checked="" type="radio"/> Random
Excluded From Audience	Contacts In Email Series

Detailed Results

Statistics	This Email	Historical Stats
Recipients	9,875	416,157
Opens	33.00%	7.14%
Total Opens [?]	55.00%	7.14%
Clicks	15.00%	11.23%

Reviewing Email Statistics on Contact Records

Reviewing Email Statistics on Contact Records

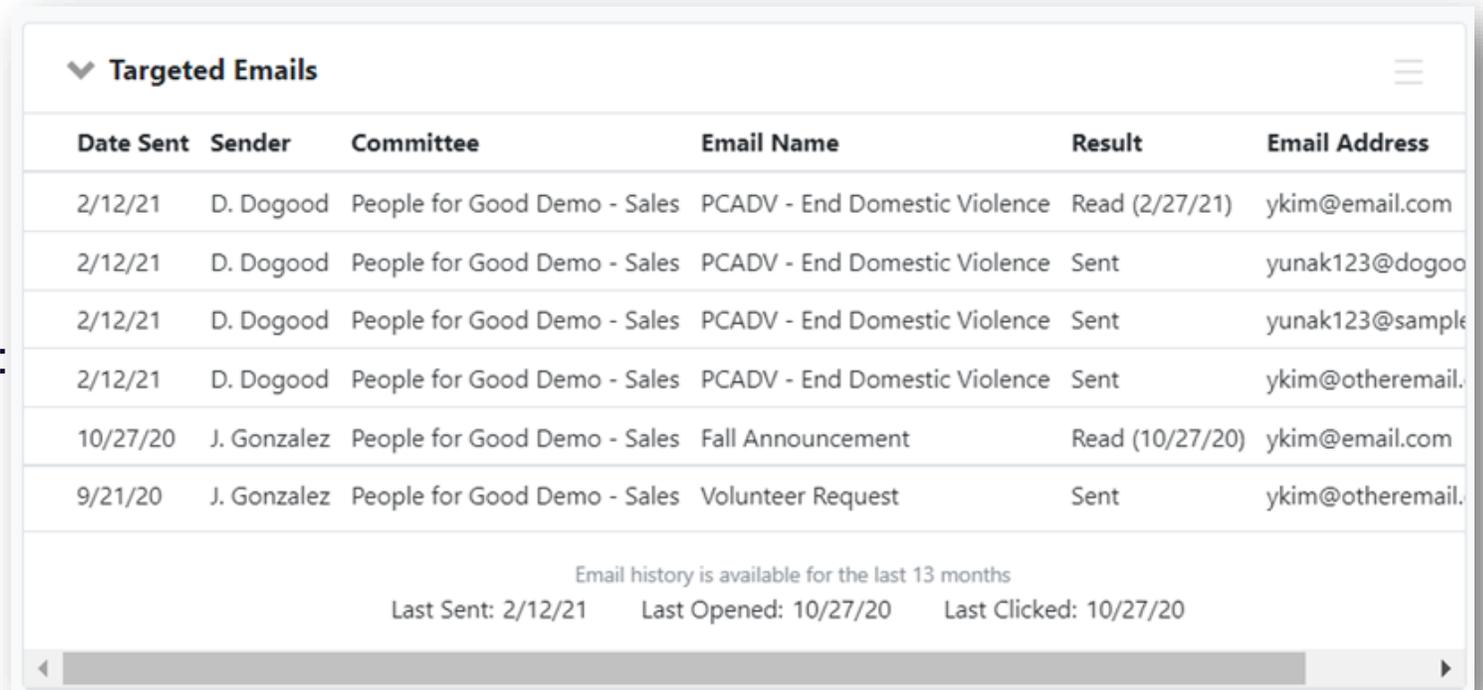
To see which emails a supporter received and how they responded, **expand the Targeted Emails section on their contact record.**

Possible responses include:

- **Sent** (this means they did not take any action)
- **Read** (this means they opened) and date opened
- **Clicked** and date clicked
- **Bounced** and date bounced
- **Unsubscribed** and date unsubscribed

You'll also see a summary at the bottom for:

- Last Sent
- Last Opened
- Last Clicked



▼ Targeted Emails					
Date Sent	Sender	Committee	Email Name	Result	Email Address
2/12/21	D. Dogood	People for Good Demo - Sales	PCADV - End Domestic Violence	Read (2/27/21)	ykim@email.com
2/12/21	D. Dogood	People for Good Demo - Sales	PCADV - End Domestic Violence	Sent	yunak123@dogoo
2/12/21	D. Dogood	People for Good Demo - Sales	PCADV - End Domestic Violence	Sent	yunak123@sample
2/12/21	D. Dogood	People for Good Demo - Sales	PCADV - End Domestic Violence	Sent	ykim@otheremail.
10/27/20	J. Gonzalez	People for Good Demo - Sales	Fall Announcement	Read (10/27/20)	ykim@email.com
9/21/20	J. Gonzalez	People for Good Demo - Sales	Volunteer Request	Sent	ykim@otheremail.

Email history is available for the last 13 months
Last Sent: 2/12/21 Last Opened: 10/27/20 Last Clicked: 10/27/20

Reviewing Email Statistics on Contact Records

If you want to **review all the email addresses for that particular contact and the current subscription statuses**, you can open the Email section or open the Overview page.

Type	Email	Status	Confirmation Status [?]	Source
Personal <input type="button" value="⌵"/>	email@example.com Set Preferred	Unsubscribed <input type="button" value="⌵"/>	--	User Added <input type="button" value="⌵"/>
Other <input type="button" value="⌵"/>	erodriguez@example.com*	Subscribed <input type="button" value="⌵"/>	Pending <input type="button" value="⌵"/>	User Added <input type="button" value="⌵"/>
Other <input type="button" value="⌵"/>	<input type="text"/>			

Reporting on Email Performance

Report Manager

Report Manager offers several templates designed track your email performance and discover where you can improve your program.

Email Comparison Report

Email Performance Report

Email Test Case Comparison Report

Email Links Comparison Report

Email Address Status Report

Email Comparison Report

The Email Comparison Report summarizes the performance for each sent email. It does not list recipients of each email but it provides an overview of results including opens, clicks, conversions, donations, hard bounces, soft bounces, and unsubscribes.

You can filter by Email Type to see Single emails or emails that were part of a Series, such as Triggered Emails or emails in an Automation.



Email Performance Report

The Email Performance Report allows you to select an email that was sent in the last 13 months, and view the result for each recipient including opens, clicks, conversions, donations, bounces, and unsubscribes.

This report only counts Hard and Soft bounces in the Bounce category.



Email Test Case Comparison Report

The Email Test Case Comparison Report allows you to compare how the variants in your A/B tests performed. It contains one row per email test case.

Emails without test cases, where no split test was run, will only have a single row.

You can also add columns for From Email, From Name, and Subject Line to this report, making it a good report to use even if you did not run a test case if you want to include your subject lines in your reports.



Email Links Comparison Report

To discover the response rate to the links in your emails, use the Email Links Comparison Report. Filter or group the links by UTM (Urchin Tracking Module) codes or other email details to compare link performance across multiple emails.

With this report, you can identify which email elements work best for improving donor responses or supporter engagement.



Email Address Status Report

The Email Address Status Report contains one row per email address, regardless of receiving any emails, and their subscription and Confirmed Opt-In status, and if unsubscribed, the method by which the unsubscribe happened.

You can also add additional columns to these reports that will help you differentiate machine opens from your actual email opens. Please see the associated help documentation on machine opens and tracking open rates.



Tracking Bounce Rates

Depending on where you are viewing Targeted Email statistics, you may see different numbers for bounce rates.

- **Targeted Email Dashboard and Comparison Report** counts Hard Bounces, Soft Bounces, and Failed Delivery.
- **Email Performance Report** only counts Hard and Soft Bounces in the total.
- **Contact Details** includes Unsubscribed for Hard Bounce totals.
- **Create a List "bounce"** search includes both Hard and Soft Bounces.



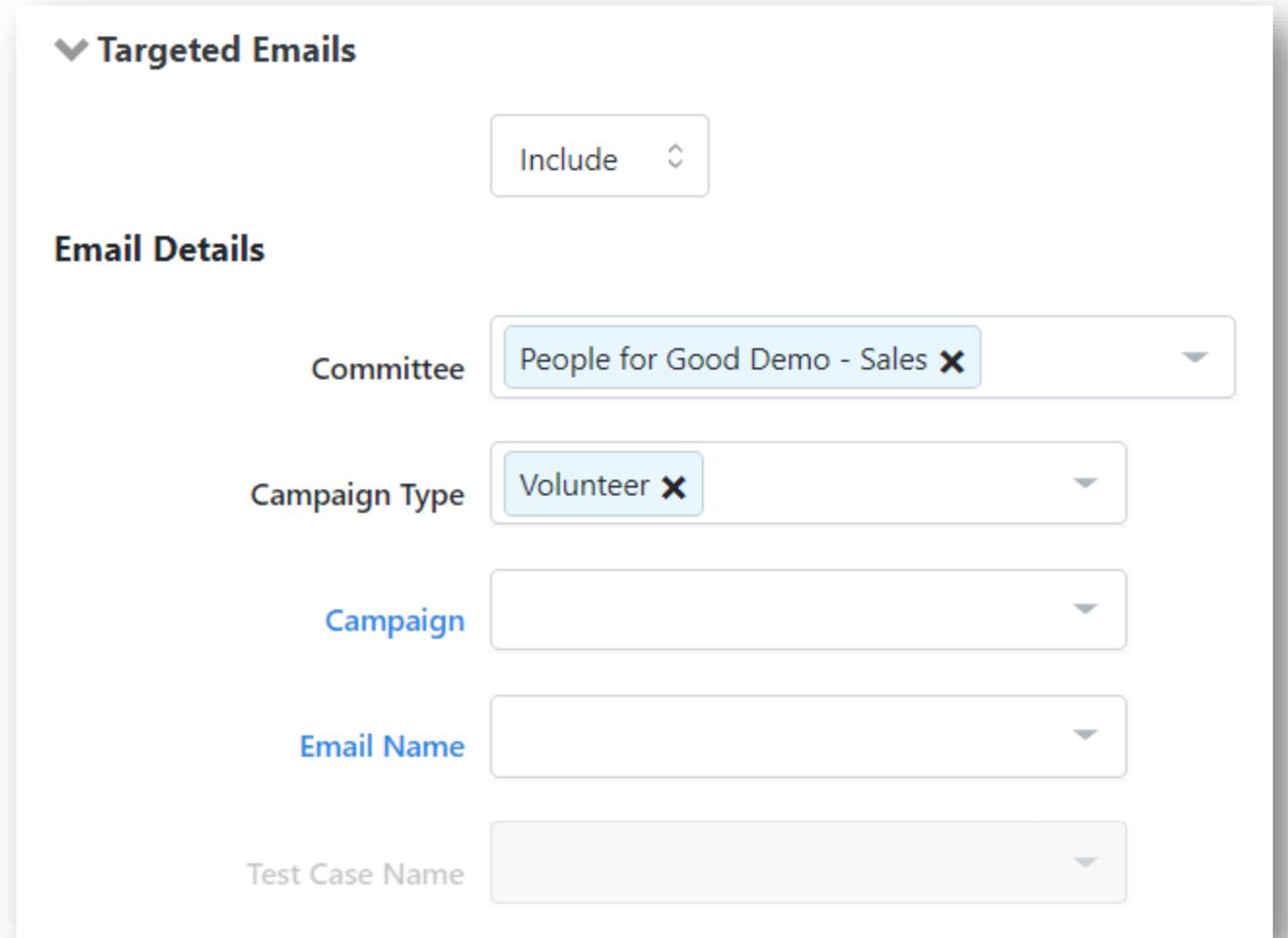
Creating Lists of People Based on Email Sends

Targeted Emails Section in Create a List

You can **use the Targeted Emails section in Create a List to search for contact records** that do or do not have particular email results.

For example, you could search for anyone who was sent an email in the last six months but did not open it.

Or, you can find people who opened a message but did not click any links.



The screenshot shows a user interface for filtering contact records. At the top, there is a section titled "Targeted Emails" with a dropdown arrow. Below this, there is a button labeled "Include" with a double-headed arrow icon. Underneath, the "Email Details" section contains several filter options, each with a dropdown arrow:

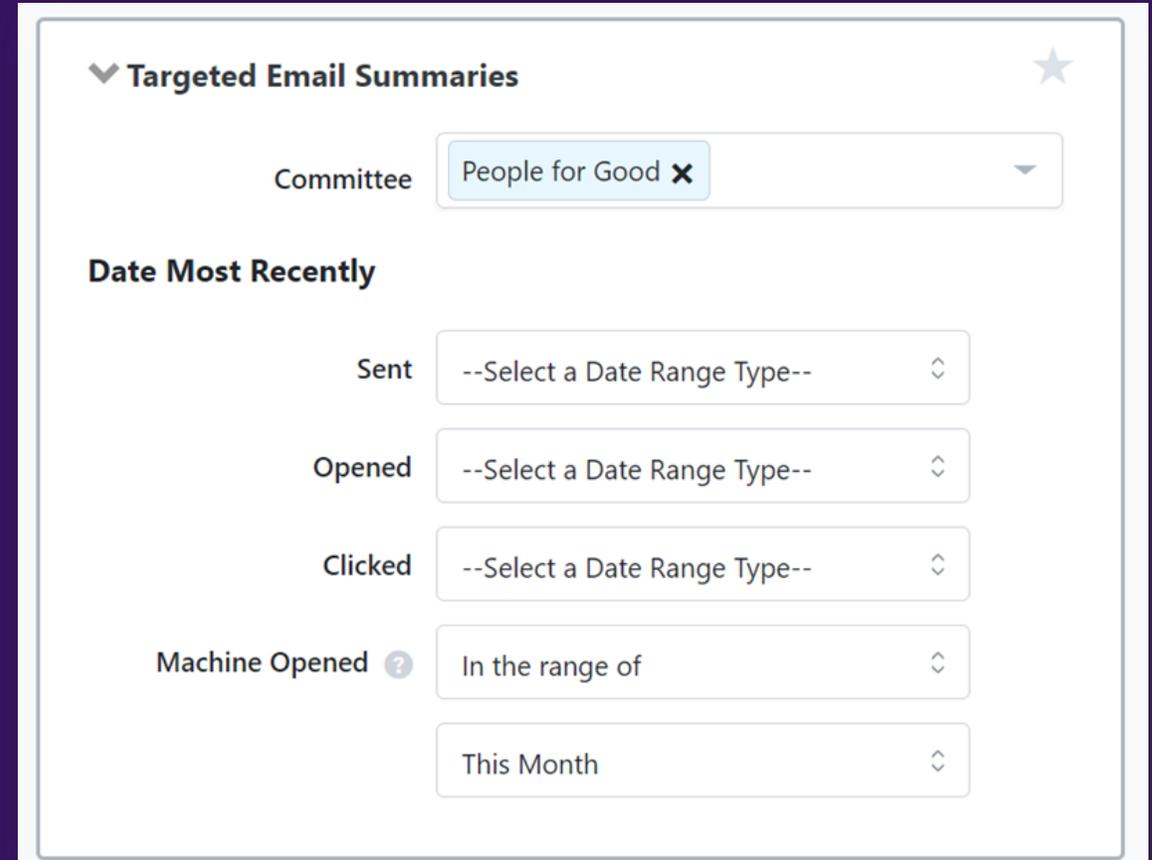
- Committee:** A dropdown menu showing "People for Good Demo - Sales" with a close icon (X) and a dropdown arrow.
- Campaign Type:** A dropdown menu showing "Volunteer" with a close icon (X) and a dropdown arrow.
- Campaign:** An empty dropdown menu with a dropdown arrow.
- Email Name:** An empty dropdown menu with a dropdown arrow.
- Test Case Name:** An empty dropdown menu with a dropdown arrow.

Targeted Email Summaries

You can also **use Targeted Email Summaries to filter contacts by the most recent date** they were sent, opened, or clicked an email.

This allows you to easily target or exclude contacts based on their recent email engagement.

You can also discover who was part of your machine open segment, making it easier to target them for other outreach channels if necessary.



The screenshot shows a user interface for filtering email summaries. At the top, there is a section titled "Targeted Email Summaries" with a dropdown arrow and a star icon. Below this, there is a "Committee" filter set to "People for Good" with a close button (X) and a dropdown arrow. Underneath, there is a section titled "Date Most Recently" with four filters: "Sent", "Opened", "Clicked", and "Machine Opened". Each of the first three filters has a dropdown menu currently showing "--Select a Date Range Type--". The "Machine Opened" filter has a question mark icon and a dropdown menu showing "In the range of" and "This Month".

Email Scoring

Email Scoring

Email Scoring is an automatic process that improves your ability to reach your supporters and helps email providers like *Gmail* and *Yahoo* see your communications as legitimate.

In **Targeted Email**, you can use these scores to improve your segmentation, excluding inactive email addresses which can lower your domain reputation with email providers.



Understanding Our Automated Email Scoring Process



Email Scoring happens in an automatic way when you use our system for delivery. Each email address in your database is given a score from 1 to 10. (Unsubscribed or opted-out email addresses are not scored.) As supporters open or click on emails they receive, their score is updated to move them higher in rank. Recent activity has a higher value than past actions. Email addresses that bounce or that don't respond to your messages will start to drop in rank over time.



Every email address has a unique score, so if your contact has more than one email address, each of their addresses will have its own score. If an email address is duplicated for some reason for that contact, both instances will have the same score in our system.

Filtering Based on Email Score in Targeted Email

When sending a **Targeted Email**, you can filter out specific email addresses based on their engagement score. This is especially helpful when dealing with contacts that have two or more email addresses subscribed but only respond to you using one email address.

You can opt to do the exclusion of low engagement supporters in **Targeted Email > Select Recipients > Exclude from Audience > Show Additional Exclusions > Email Address Performance**. New emails start at a 5, so you will want to include at least 5 and above for any broad outreach programs.

You can also set Email Score exclusion levels for specific domains. If you have recurring problems with the domain socialgood, you can exclude all socialgood email addresses with a score of 3 or less.

Email Address Performance

Excluding the lowest performing email addresses improves your deliverability and helps ensure your email lands in the Inbox and not the SPAM folder

[Learn More](#)

Exclude low performing email addresses with a score of

Using CAL to Search for Your More Engaged Supporters

Every contact email list undergoes attrition over time, so our tools let you segment out users who have become disengaged. You can reserve your outreach to less committed supporters for campaigns that more closely match what they've supported the past or you can design a specific re-engagement campaign to increase your conversions with these contacts.

When creating lists for email campaigns, you can use **Create A List > Targeted Email Summaries** to filter contacts by the most recent date they were sent, opened, or clicked an email. This allows you to easily target or exclude contacts based on their recent email engagement. We generally recommend that you only send email to contacts who have engaged with your email program in the last six to nine months unless you are specifically targeting contacts for a re-engagement campaign.

The screenshot shows the 'Targeted Email Summaries' search interface. It features a sidebar on the left with navigation options like 'Contacts', 'Up', 'Participant List', 'ons', and 'mail'. The main content area is titled 'Targeted Email Summaries' and includes several filter fields: 'Committee' (a dropdown menu), 'Most Recent Sent Date' (a date range selector), 'Most Recent Open Date' (a date range selector), and 'Most Recent Click Date' (a date range selector). Below these filters are three expandable sections: 'Contributions', 'Debts', and 'Direct Response Efforts', each with a star icon. On the right side, there is a 'Suppressions' section with options to 'exclude Deceased and include Bad Addresses and include Do Not Mail' and a 'Refresh Step' button. Below this is a 'Preview My Results' button. At the bottom right, there is a '+ Add Step' button and a green 'Run Search' button. A blue notification box at the bottom right states: 'Running this search will clear your current list of 0 contacts.'

Viewing Email Scores on the Email Address Status Report

If you want to see a summary of email scores for your contacts, you can use the **Email Address Status** report. You can add a column labelled **Email Score** that will show you each contact's score in the system.

For an overview of how your email program is performing, use the dropdown menu to choose **Group By > Email Score** to see a count of how many email addresses are at each score level.

You can schedule this report to run weekly or monthly to monitor changes over time.

Email Name	Email Test Case Name	Subject Line	Recipients	Unique Open Rate	Unique Click Rate	Conversion Rate	Total Contributions	Amount Raised
Support People for Good	Support People for Good Subject Line 1	Support People for Good	1	0.00%	0.00%	0.00%	0	\$0.00
Support People for Good	Support People for Good Subject Line 2	Join People For Good	1	100.00%	100.00%	0.00%	0	\$0.00
Support People for Good	Support People for Good Subject Line 3	Are you for good?	1	0.00%	0.00%	0.00%	0	\$0.00
Support People for Good	Support People for Good Subject Line 2_Winner	Join People For Good	4	50.00%	0.00%	0.00%	0	\$0.00

Q&A

Additional Resources

Support

- Contact your System Administrator
- Email help@EveryAction.com
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM



Help Center Resources

- [How to: Track Targeted Email performance and statistics](#)
- [Fundamentals: Email performance terms](#)
- [Training Webinar: Sending and Reporting on Emails](#)
- [Improving Email Deliverability with Email Scoring](#)



Additional Training

- Bonterra Academy:
<https://help.everyaction.com/s/article/Bonterra-Academy-Self-Signup>
- Foundational Webinar Series
- Upcoming initiatives
- Videos in Bonterra Academy



Thank You for Attending!

