

Reporting – The Roadmap for Success

insight

Whitney Hutchinson | October 2007



Reporting, and the nuances of how we should approach it, is an interesting topic. How many days post-drop should you check results? Should you look at standard metrics, opens, clicks and conversions? And how do you factor in variables such as messaging, segmentation, frequency and the impact of other channels?

The myriad dimensions available for scrutiny in email results can be daunting, and many people just stick to the basics. We should not drown ourselves in data. But let me suggest that we all need to look deeper if we want our reporting to fulfill its purpose of becoming a roadmap for longer-term success. We should focus on the metrics and dimensions that are unique to our individual goals, objectives and business needs and that allow us to create actionable steps to improve our programs moving forward.

So what does this roadmap look like? What are the ingredients of a good email report?

1. **Benchmarks.** First, understand what your specific benchmarks are, and, if applicable, how those compare to others in your industry vertical. What benchmarks do you want to work from and try to improve over time?

2. **Response Models.** How do customers typically respond to your email messages? Do you get 90% of your conversions in the first 48 hours, or is your product/service such that longer-term consumer thought is needed? Defining your response curves and understanding them as being fluid -- ever-changing and in need of a watchful eye -- will make sure that when you pull data, you're getting a clear and full picture of the true impact of your program(s).

3. **KPIs.** Define your key performance indicators, or KPIs. Fellow Insider David Baker wrote an article http://blogs.mediapost.com/email_insider/?p=310 on this a year ago, and I'd suggest you read it for a good representative sampling of typical KPIs. In general, these are the metrics that are important to your specific business. If you are looking to create brand awareness or engagement, your indicator might be opens, clicks or referred friends. If you want to drive sales, then you want to look at conversion rate, revenue and cost per conversion. Whatever these metrics are, they should be actionable and mean something -- both to those who manage the programs, and the higher-ups who need to buy into your efforts.

4. **Putting it together.** It is important to measure performance campaign over campaign. If you don't have a historical reference of your email campaign performance, please start immediately! This can be as easy as creating an Excel spreadsheet where you can track mailing over mailing. Keeping a record will allow you to see overall performance trending and understand seasonality, list hygiene issues and/or deliverability red flags.

Once you have your mailing-over-mailing scenario set up, you can start to create pivot tables as a way to sort the data and look at more specific bits of information. Over time you can look at data dimensions like:

Segmentation. How do different customer segments do over time? How does their performance change based on the messaging they receive? How do different segments grow or shrink over time? What is your most valuable segment?

Messaging. What messages resonate with particular segments? What are your "winning" offers, CTAs, general messages?

Creative. Which templates work best, what format? How do particular users interact with emails - where do they click, what behaviors are created?

Utilizing pivot tables does require some forethought in terms of sensible naming conventions for the dimensions you wish to track.

Finally, you can take an even more advanced stab at it and utilize a business intelligence group to build custom reports highlighting your KPIs and trending over time. Custom reports of this sort might enable you more easily to integrate supplementary channels (online or offline) into your results. To sum up, a good email report shows where you've come from, what you've done along the way, and clearly highlights where you want to go. A good email report is like a map, showing you the specific turns, starts and stops necessary to drive you toward success.

About the Author

Whitney Hutchinson – Strategy Director

As Strategy Director, Whitney is responsible for overall strategy and campaign planning for client's eCRM/Email campaigns. Whitney has over 15 years of marketing experience, with her primary focus in direct marketing. Prior to joining Avenue A Razorfish, Whitney managed the direct marketing efforts for Airborne Express, a Fortune 500 transportation company, where she was responsible for the small business customer communication as well as all direct marketing for the corporation. Whitney is a past board member of the Seattle Direct Marketing Association, and a graduate of the University of Washington. Whitney has been with AARF for 7 years.

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