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Your Keap email campaign performance tool

A how-to guide

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Introduction

The tool provides 3 resources to help you analyze your email performance:

- **Campaign dashboard**: Lets you run metrics on up to 5 campaigns at a time, giving you a complete picture of the success of each campaign

- **A/B test site**: Lets you measure A/B testing (aka split testing) on 2 campaigns, giving you a quick picture of what's working and what could use improvement

- **Month-to-month analysis**: Lets you track a long term campaign (like a newsletter) over twelve months to see your peaks and valleys so that you can identify success and repeat it

This Excel tool is designed to complement our guide, "Guide to Email Metrics," which provides detail on each of the key metrics you'll need to understand and improve your email campaign strategies. If you haven't read it yet, now's the time. It's a quick and valuable read.

These instructions are a quick start explanation on how to use the tool. Please note that they do not provide a how-to for gathering the data you will input into the worksheets. Nor do they give detailed suggestions on how the data can be used to improve your marketing efforts. You will, however, find a few suggestions on how to interpret the results, as well as additional content you can access to sharpen your efforts.

The metrics used in this tool assume your email campaigns follow a typical format: an email campaign that includes a link to a landing page where the recipient can take an action (download a resource, complete a form, etc.), or a link within the email that serves as an action itself (i.e., a link to a file download).

When you track your email opens (open rate), clicks on links (click-thru rate), and completion of your desired outcome (conversion rate), you'll gain a stronger understanding of the success of your campaign.
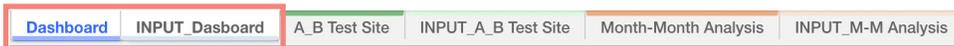
You will also need to track the negative interactions associated with your campaigns: unsubscribes and spam complaints. These will help you understand what your audience does and doesn't want from you.

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When you combine these and some other basic metrics, you'll have a great understanding of where your campaigns work and where they need improvement.

Campaign dashboard

There is 1 dashboard for each campaign. This is designed for email broadcasts, where you send a single email to a segmented list. The dashboard allows you to see a full array of analytics to assess the success of your campaigns. The graphic analysis makes it quick and easy to see key metrics at a glance.

Each resource in this Excel tool has 2 color-coded tabs at the foot of the spreadsheet. The campaign dashboard is coded in blue. The "**INPUT_Dashboard**" tab is where you will enter your raw data. The "**Dashboard**" tab contains the analytics.

| Dashboard | INPUT_Dasboard | A_B Test Site | INPUT_A_B Test Site | Month-Month Analysis | INPUT_M-M Analysis |

1. Start with the input sheet by opening the "**INPUT_Dashboard**" tab.

    a. There are 5 columns for entering data on each of up to five different campaigns.
        Note: the sheet is pre-populated with generic data to show how it should look when entered and how it will display on the dashboard. You can overwrite this example data with your own numbers.

    b. Be sure to enter the campaign name at the top to distinguish it from your other campaigns.

    c. Enter your data in each of the cells.

        Note: The "Total Emails Delivered" cells automatically calculate based on the other inputs, so do not enter any data in those cells.

    d. The key to success is consistency in the metrics you use. For example, your budget for the campaign should be measured in the same way for every campaign (i.e. If you measure cost of your effort, say $/hr as part of your costs, in 1 campaign, be sure to use that same measurement in all campaigns. If you exclude it in certain cases, you won't get accurate cost/conversion numbers to compare campaign value.)

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	A	B	C
1		INPUT PAGE FOR DASHBOARD ONLY	
2			
3			
4		Campaign Name:	example campaign [rename and [Enter Campa
5			reuse for campaign #1]
6			
7		Total unique emails Sent for this campaign	100000
8		Total Hard Bounces	237
9		Total Soft Bounces	185
10		Total Emails Delivered [calculates automatically]	99578
11		Opens	35673
12		Spam reports	13
13		Unsubscribes	850
14		Number of Clicks	4218
15		Recipients who took action	1253
16		Budget for this campaign	$ 1,000.00 $
17			

2. Open the Dashboard by clicking the "**Dashboard**" tab.

   a. The dashboard is designed so that you can display only the campaigns you'd like to see. On the far left of the sheet, you'll see ➕ or ➖ buttons. Use the ➕ to expand a dashboard and the ➖ to hide it.
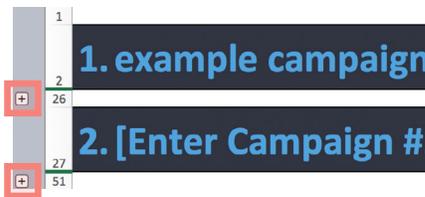
   b. Each dashboard has 2 graphs, 1 on the left, and 1 on the right. In the middle of the dashboard you'll find a complete set of metrics by the numbers.

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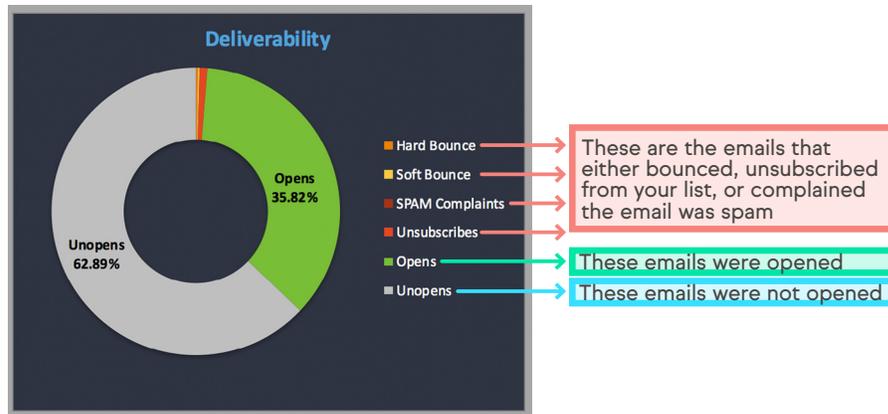
c. Understanding the Deliverability graphic

    i. This shows you how your total email blast reached its audience.

    ii. Your **bounce rates** show the percent of the email blast that were not delivered.

    iii. The **Opens**, **Unopens**, **Spam complaints**, and **Unsubscribes** show you how your delivered emails were received by your list recipients.

d. Understanding the Engagement graphic
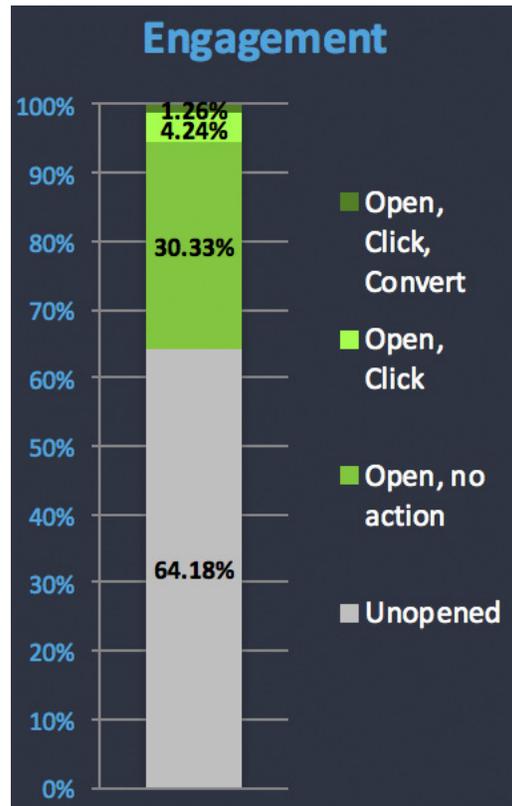
    i. This bar graph shows how your delivered email converted.

    ii. This graphic focuses on the emails that were delivered but not marked as spam or lead to unsubscribes.

    iii. 4 types of actions are tracked:

        1. Unopened emails

        2. Opens but no further action taken

        3. Opens with a click through but no conversion

        4. Opens with a click through and a conversion

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A/B test site

This resource provides a place for you to compare the performance of an email broadcast that you've set up for an A/B test. This is designed for a test of a single email blast that has 1 variance you're testing (such as an email subject line). The broadcast must be sent to 2 separate sets of email addresses; to be successful, you must not overlap the lists. The test site dashboard allows you to see at a glance key analytics to help you assess which variation performed better.

Each resource in this Excel tool has 2 color coded tabs at the foot of the spreadsheet. The A_B Test Site is coded in green. The "**INPUT_A_B Test Site**" tab is where you will enter your raw data. The "**A_B Test Site**" tab contains the analytics.

Dashboard	INPUT_Dasboard	**A_B Test Site**	**INPUT_A_B Test Site**	Month-Month Analysis	INPUT_M-M Analysis

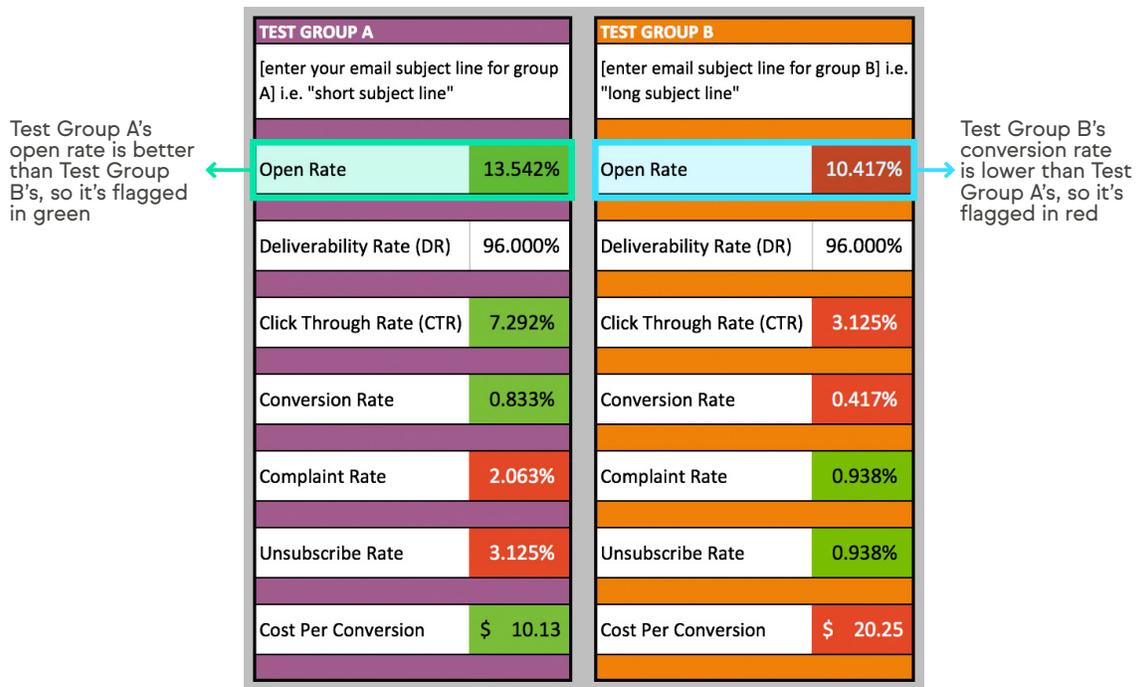| **INPUT PAGE FOR A_B TEST SITE ONLY**		
Campaign Name:	**[enter campaign title]**	
	TEST GROUP A	**TEST GROUP B**
	Email Subject Line A: [enter your email subject line for g	**Email Subject Line B:** [enter email subject line for group B] i
Total unique emails Sent for this campaign	5000	5000
Total Hard Bounces	100	100
Total Soft Bounces	100	100
Total Emails Delivered [calculates automatically]	4800	4800
Opens	650	500
Spam reports	99	45
Unsubscribes	150	45
Number of Clicks	350	150
Recipients who took action	40	20
Budget for this campaign	$ 405.00	$ 405.00

1. Start with the input sheet by opening the "**INPUT_A_B Test Site**" tab.

    a. There are 2 columns for entering data, 1 column for test group A, and 1 column for test group B.
        Note: The sheet is pre-populated with generic data to show how the data should look when entered, and how it will display on the dashboard. You must overwrite this example data with your own numbers.

    b. Be sure to enter the campaign name at the top to distinguish it from your other campaigns.

        Enter the email subject lines for the A/B test.

    c. Enter your data in each of the cells.

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> **Note**: The "Total Emails Delivered" cells automatically calculate based on the other inputs, so do not enter any data in those cells.

d. To be certain that you make a fair A/B test, you must be consistent in your measurement. For example, your budget for the campaign should be measured in the same way for every campaign (i.e. If you measure cost of your effort, say $/hr as part of your costs, in 1 campaign, be sure to use that same measurement in all campaigns. If you exclude it in certain cases, you won't get accurate cost/conversion numbers to compare campaign value.)

2. Open the A_B Test Site by clicking the "**A_B Test Site**" tab.

a. The dashboard shows a side-by-side comparison of key analytics for each test group. Whenever a test group performs better in a category, that test group's metric turns green; where it was weaker, it turns red. This gives you a quick snapshot at which campaign generally did better.

TEST GROUP A		TEST GROUP B	
[enter your email subject line for group A] i.e. "short subject line"		[enter email subject line for group B] i.e. "long subject line"	
Open Rate	13.542%	Open Rate	10.417%
Deliverability Rate (DR)	96.000%	Deliverability Rate (DR)	96.000%
Click Through Rate (CTR)	7.292%	Click Through Rate (CTR)	3.125%
Conversion Rate	0.833%	Conversion Rate	0.417%
Complaint Rate	2.063%	Complaint Rate	0.938%
Unsubscribe Rate	3.125%	Unsubscribe Rate	0.938%
Cost Per Conversion	$ 10.13	Cost Per Conversion	$ 20.25

Test Group A's open rate is better than Test Group B's, so it's flagged in green

Test Group B's conversion rate is lower than Test Group A's, so it's flagged in red

b. The dashboard also has a graphic bar graph that shows side-by-side comparison of engagement metrics, like open rate, click through rate, and conversion rate.

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Month-month analysis

This resource provides a place for you to review the monthly performance of an ongoing email campaign, such as a newsletter or recurring product update. The dashboard allows you to quickly assess peaks and valleys in your campaign so that you see what works and repeat that success.

Each resource in this Excel tool has 2 color-coded tabs at the foot of the spreadsheet. The Month-Month Analysis is coded in orange. The "INPUT_M-M Analysis" tab is where you will enter your raw data. The "Month-Month Analysis" tab contains the analytics.

Dashboard	INPUT_Dasboard	A_B Test Site	INPUT_A_B Test Site	Month-Month Analysis	INPUT_M-M Analysis

1. Start with the input sheet by opening the "**INPUT_M-M Analysis**" tab.

   a. There is 1 column for each month of the calendar year. The default is January, but you can re-name the column headers to start the calendar in whichever month you'd like. The Analysis dashboard, however, only displays data for 12 months.
   Note: The sheet is pre-populated with generic data to show how the data should look when entered and how it will display on the dashboard. You must overwrite this example data with your own numbers.

   b. Be sure to enter the campaign name at the top to distinguish it from your other campaigns.

   c. Enter your data in each of the cells.

   Note: The "Total Emails Delivered" cells automatically calculate based on the other inputs, so do not enter any data in those cells.

INPUT PAGE FOR Month-to-Month Analysis ONLY					
Campaign Name:	[enter campaign title]				
	January	February	March	April	
Total unique emails Sent/month	450	456	460	466	
Total Hard Bounces/month	11	10	15	2	
Total Soft Bounces/month	12	20	12	10	
Total Emails Delivered/month [calculates automatically]	427	426	433	454	
Opens/month	180	195	50	215	
Spam reports/month	1	2	1	1	
Unsubscribes/month	9	11	9	3	
Number of Clicks/month	18	35	20	2	
Recipients who took action/month	4	20	9	0	

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    d.   If you do not yet have twelve months of data, enter zero in the months for which there's no data to report.

    e.   To be certain that you make a fair monthly assessment, you must be consistent in your measurement. For example, your budget for the campaign should be measured in the same way for every campaign (i.e. If you measure cost of your effort, say $/hr as part of your costs, in 1 campaign, be sure to use that same measurement in all campaigns. If you exclude it in certain cases, you won't get accurate cost/conversion numbers to compare campaign value.)

2.   Open the Month-Month Analysis by clicking the "**Month-Month Analysis**" tab.

    a.   The dashboard shows 2 graphs displaying activity over the reporting period.

    b.   Understanding the Month-Month Engagement graphic

        i.   This shows your monthly engagement metrics over the reporting period: open rate, click through rate, and conversion rate

        ii.   Months with clear peaks can help you understand which content was successful, and clear valleys can help you discover what content didn't work.
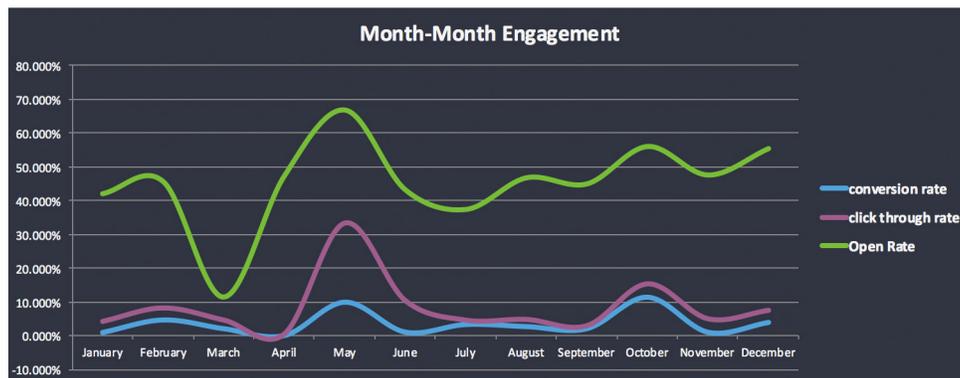
    c.   Understanding the **Complaint Rate & Unsubscribe Rate** graphic

        i.   This shows the monthly occurrences of negative feedback from your campaign.

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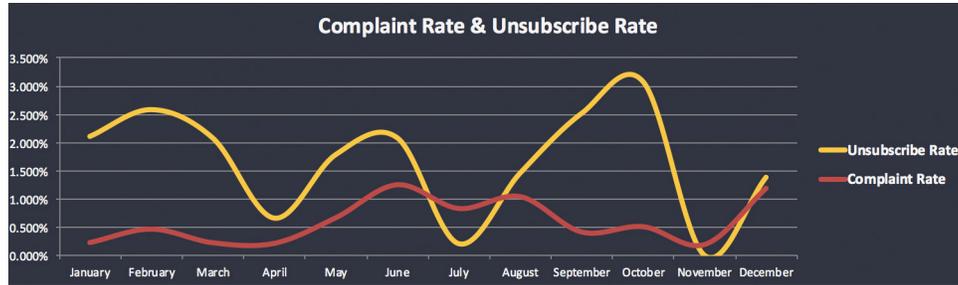
ii. Take clear peaks in your unsubscribe rate seriously. There could be many reasons people would unsubscribe. It's worth investigating. Likewise, low unsubscribe rates show that your campaigns are working.

iii. Also take clear peaks in your complaint rate seriously. There are many reasons why emails are seen as spam, but when you see more spam complaints, you should consider what in your email could have come across as "spammy."

Take special note of your spam rate, too. Rates above 0.1 percent (that's 1 complaint out of 1,000 emails) can jeopardize your deliverability in the future. Check out our e-book, "Maximize your email deliverability" for more information.

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