Since November meeting…

Groups trained for BBIS:
Nursing, Student Life Advancement, Arts and Sciences, Vet Med (1/24)

Groups with Email on Acid access (or in progress):
EHE, Engineering, Wexner Center for the Arts, College of Medicine, Med Center Development, Fisher, Vet Med, Arts and Sciences
Wexner Center for the Arts & Email on Acid
Valerie Kohlwey, Marketing Data Coordinator
vkohlwey@wexarts.org

• Email Testing
  • Device Compatibility

• Email Analytics
  • Device Usage
  • Engagement

• Web Analytics
  • Google URL Tagging
Email Testing – Device Compatibility

EOA Tool: Email Preview
Email Analytics – Device Usage
EOA Tool: Email Analytics, Email Clients

Top 5 Display Engines
- WebKit: 67%
- MSWord: 11%
- IE: 8%
- Firefox: 14%
- Other: 1%

Top 5 Browsers
- Apple Mail: 26%
- Firefox: 26%
- IE: 11%
- Chrome: 7%
- Safari: 6%

Top 5 Mobile Devices
- iPhone: 39%
- iPad: 39%
- Android: 6%
- iPod: 4%
- Generic Mobile: 1%
- Other: 1%
Email Analytics – Engagement

EOA Tool: Email Analytics, Compare Multiple
Email Analytics – Engagement

EOA Tool: Email Analytics, Heat Map
Web Analytics – Google URL Tagging

VS

<table>
<thead>
<tr>
<th>TAG</th>
</tr>
</thead>
</table>
Web Analytics – Google URL Tagging
Tips for starting out...

• Add the automatic email preview address to your BBIS test lists for easy use
• Don’t forget that you will have to add the BBIS unsubscribe/privacy policy links by hand after inserting the EOA code in BBIS
• Make sure all links are working - UTM tags can break links with #’s and special characters need to be escaped (such as ampersands)
• Adjust the read, skim, and delete times to match the content of your email

How we plan to use EOA...

• Develop an understanding of what email clients are being used by our various lists
• Use gathered information and the Email Client Preview tool as we redesign our emails
• Reduce time spent on adding UTM tags to all emails, not just weekly newsletters
• Ongoing SPAM Tests
Calendar discussion

Connie Wanstreet
Digital Strategist, Interactive Communications
<table>
<thead>
<tr>
<th>Sun</th>
<th>Mon</th>
<th>Tue</th>
<th>Wed</th>
<th>Thu</th>
<th>Fri</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>OAA: Students First RES-BEE: News PRNT: Buck Brief WCA: This Week</td>
<td>2</td>
<td>PHR: Men’s Basketball DEV-REC: Multiple Donation</td>
<td>3</td>
<td>ASC: Tuition Bash reminder ASC: Feminist Studies WCA: Holiday store</td>
</tr>
<tr>
<td></td>
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<tr>
<td>14</td>
<td>15</td>
<td>16</td>
<td>17</td>
<td>18</td>
<td>19</td>
</tr>
<tr>
<td>PRNT: OnCampus – parents</td>
<td>WCA: This Week</td>
<td>CSW: Happy Holidays</td>
<td>CSW: Happy Holidays</td>
<td>CSW: Sugar Bowl Pre-game PH: Happy Holiday</td>
<td>AA: Pre-game event WCA: Transfigurations</td>
</tr>
<tr>
<td>AA: CSS Sports</td>
<td>WCA: This Week</td>
<td>ASC: Basketball Tailgate AIA: Home game bash</td>
<td>FAS: Basketball Tailgate</td>
<td>FAS: Basketball Tailgate</td>
<td>WCA: Pre-game event</td>
</tr>
<tr>
<td>LAW: Happy Holidays</td>
<td>FASE: Season’s Greetings</td>
<td>DEV-REC: Multiple Donation</td>
<td>DEV-REC: Multiple Donation</td>
<td>DEV-REC: Multiple Donation</td>
<td>WCA: Transfigurations</td>
</tr>
<tr>
<td>21</td>
<td>22</td>
<td>23</td>
<td>24</td>
<td>25</td>
<td>26</td>
</tr>
<tr>
<td>CSW: stillman: Elite Training</td>
<td>DEV: Celebrate 125 Years STUD: Best Wishes</td>
<td>DEV-REC: Multiple Donation</td>
<td>DEV-AG: Happy Holidays</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WCA: This Week</td>
<td>WCA: This Week</td>
<td>DEV-PC: FC Benefits PH: MaryLand Basketball PH: Tuesday Times PH: Class of 74 fund</td>
<td>WCA: Special thanks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>COM: Season’s Greetings</td>
<td>COM: Season’s Greetings</td>
<td>AIA: Football championship</td>
<td>AA: Humor that Works LAW: Scholarship thank you</td>
<td></td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>29</td>
<td>30</td>
<td>31</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Avoiding BBIS pitfalls
Avoiding BBIS pitfalls

1. Mind the data source
   • It’s set at the template level
   • “None” works for most scenarios unless you want to add merge fields or send to subscribers
<table>
<thead>
<tr>
<th>Data source</th>
<th>Generates automatic recipient list?</th>
<th>Merge fields available?</th>
<th>Use case</th>
<th>Limitations</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>No</td>
<td>No</td>
<td>Most flexible; can go to any kind of list; you don’t care about merge fields or subscribers</td>
<td>Can't be sent to subscribers; no merge fields</td>
</tr>
<tr>
<td>Appeal</td>
<td>Yes (based on specific appeal code)</td>
<td>No</td>
<td>You want to send to subscribers and don’t care about merge fields</td>
<td>Additional lists are constituent only; no merge fields</td>
</tr>
<tr>
<td>Constituent</td>
<td>No</td>
<td>Yes (from TAS)</td>
<td>All constituents are in TAS and you want to use merge fields from TAS</td>
<td>Can't be sent to subscribers or imported lists</td>
</tr>
<tr>
<td>Imported list</td>
<td>Yes (that one imported list)</td>
<td>Yes (from list)</td>
<td>Constituents aren't in TAS and you want to use merge fields from the list</td>
<td>Can't be sent to additional lists or subscribers</td>
</tr>
</tbody>
</table>
Avoiding BBIS pitfalls

2. Understand message status
   • Upon hitting send, status will change as it cycles through to delivery
   • The only time to worry is “Exception” or “Exception on Server”—the message failed
   • File a ticket with 2Tech, CCing Julie Vargo, to ask Blackbaud to investigate
## TEST TEST TEST (Message report)

<table>
<thead>
<tr>
<th>Message report</th>
<th>Recipients</th>
<th>Properties</th>
</tr>
</thead>
</table>

### Delivery summary

<table>
<thead>
<tr>
<th>Messages sent</th>
<th>Click-throughs</th>
<th>Conversions</th>
</tr>
</thead>
</table>

**Status:** Prepared

_Last updated on 1/8/2015 12:04:00 AM_
When you send an email, the program prepares the email, retrieves any merge data from other Blackbaud programs, processes the email, and then uploads the email to the Blackbaud Internet Solutions mail server to be sent to its recipients.

After you send an email, you can view the current **status** of the sent message or newsletter issue. To view the delivery **status** of an email, access its Message Report or Issue Report screen and select the Summary tab. In the **Delivery status** frame, the **Status** field displays the current **status** of the email.

- **“Created”** – The email is created but is not yet prepared for processing.
- **“Prepared”** – The email is in the queue to be processed.
- **“Processing”** – The email is being processed. This includes retrieving merge data from another Blackbaud program.
- **“Processed”** – The program processed the email, and it is in the queue to upload to the mail server.
- **“No Valid Recipients”** – The email cannot be delivered to the selected email list. For example, the email list may not contain any recipients or its recipients may not have valid email addresses.
- **“Uploading”** – The website is uploading the email to the Blackbaud Internet Solutions mail server.
- **“Upload Failed”** – The website could not upload the email to the mail server. When this happens, the website automatically tries to upload the email again.
- **“Accepted”** – The mail server received the email and put it in the queue to be processed.
- **“Active”** – The mail server is processing the email to prepare it for delivery.
- **“Completed”** – The mail server processed the email, and it was sent or is in the queue to be sent.

**Note:** When the **Status** field displays “Completed,” the mail server may be in the process of sending the email to its recipients. Some messages or newsletter issues in the email may not yet be sent.

- **“Exception”** – The email could not be uploaded to the Blackbaud Internet Solutions mail server due to an error when the website processed the email.
- **“Exception on Server”** – The email could not be sent due to an error on the Blackbaud Internet Solutions mail server.
Avoiding BBIS pitfalls

3. Save images to correct folder
   • If using BBIS for image hosting, specify your unit folder when uploading, during step 2
   • Default is the general images folder
   • If unit folder isn’t specified, image won’t be where you expect
Avoiding BBIS pitfalls

4. Help 2Tech help you
   • When emailing 2Tech for a BBIS query, say which unit you’re from so they can apply correct solicit (opt out) codes
   • Be clear as possible about audience
   • Request a BBIS query/list specifically—a regular TAS query isn’t enough
Questions?

Comments?

Thank you for coming.

Next meeting is March 12, 2015, 2:30-3:30 p.m., #110B Hale Hall.