



kitewheel

orchestrate great experiences

Kitewheel Email Tracking and Personalization

The slide features a dark blue background with a diagonal light blue stripe. Several dandelion seeds are scattered across the frame, some in sharp focus and others blurred. The text "Training Overview" is centered in white.

Training Overview

Kitewheel Email Personalization Outcomes

- ◀ Useful tools and requirements
- ◀ Reasons to track engagement and personalize on email
- ◀ Using the email adaptor in Kitewheel Hub
- ◀ Send trigger emails via any ESP- REST Webservice
 - ◀ Standard templates
 - ◀ Templates with personalization on send
 - ◀ Managing email cadence
- ◀ Email tracking- ePixel
- ◀ Email rendering and dynamic redirect- Personalization on open
- ◀ Certification

Kitewheel Personas & Target Audience

Client

CHLOE



- Defines Business Requirements
- Defines KPIs, Goals and Metrics to track
- Tracks progress against goals on Journey Insights

Secondary

Strategy

SOPHIE



- Translates business requirements into Journeys Map
- Captures journey details, metrics and goals

Primary

Solution Design
&
Configuration

CHARLES



- Solution Design
- Identifies data sources
- Configures rules
- Creates outcomes
- Develop and test
- Deploy

Primary

Technical
&
Support

THOMAS



- Enable tech environment - servers, database
- Handle security and internet facing services
- Support accounts and projects

Secondary

Useful Tools and Requirements

- Email Service Provider Account
 - Access key/ Token or API key
 - Template in ESP
- Postman for debugging



Getting Started

Why track engagement on email

- ✦ Email is one of the most used and how effective channels in Marketing
- ✦ With so many emails sent to a digitally active user, it is important to measure how engaged the user is with your emails
- ✦ Email Tracking Events:
 - ✦ Opens: User opens the email. We like to track the specific email they opened, the time of this engagement and the device they used to open the email
 - ✦ Clicks: User clicks on a link in the email. The link usually drives the user to a landing page on the website or a form (registration, login, etc)
 - ✦ Unsubscribes: User asks to be removed from a mailing list. Tracked by getting data from the database of record/ ESP
 - ✦ Bounces: The email could not be delivered to the user on this email address. Tracked by getting data from the database of record

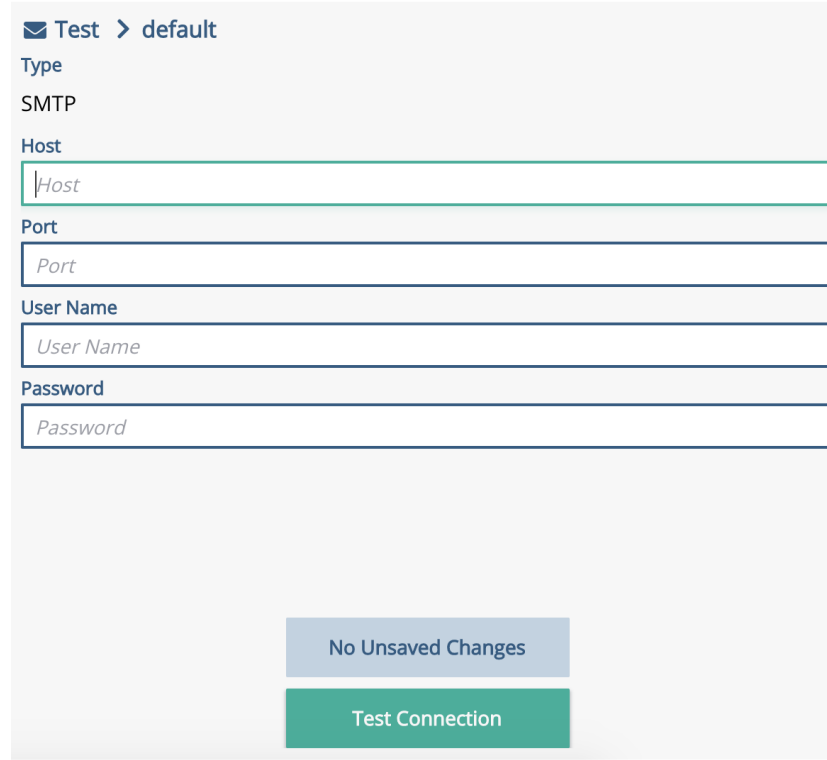
Why personalize email

- ◀ With so many emails sent to a digitally active user, it is important to deliver the right message at the right time
- ◀ Email Personalization can be:
 - ◀ Send email templates based on the user's attributes and past interactions- for example: user bought a product five days ago on the website and we send them an email asking for product feedback
 - ◀ Send email templates at the right time based on the user's behavior- for example: user opens last two emails on a Saturday morning so send the next email on a Saturday morning
 - ◀ Personalize on the ESP's template- use the ESP's template to customize part of the email before sending the email across. This can be used to “build” many different emails on a standard template for each user
 - ◀ Dynamic Email Content Delivery- When the user opens the email, decide and deliver dynamic content based on past interactions, attributes and behavior- for example: email opened in the morning has a breakfast offer and email opened in the afternoon has a lunch coupon.

Kitewheel's email adaptor

- ◀ The Email Write Adaptor sends an HTML email through an SMTP [Email Connection](#)

The previously mentioned tracking capabilities can be added to emails created in the graphs using this email adaptor, or can be added to emails triggered from other tools



The screenshot shows a configuration panel for an SMTP connection. At the top, it indicates the connection is named 'Test' and is part of a 'default' group. Below this, the 'Type' is set to 'SMTP'. There are four input fields: 'Host' (containing the placeholder text 'Host'), 'Port' (containing the placeholder text 'Port'), 'User Name' (containing the placeholder text 'User Name'), and 'Password' (containing the placeholder text 'Password'). At the bottom of the panel, there are two buttons: a light blue button labeled 'No Unsaved Changes' and a green button labeled 'Test Connection'.

Kitewheel's email adaptor

- ◀ The Email body and subject can be parameterized using any data elements.
- ◀ The To and From fields can be specified by any data element.

Email Write Options ⓘ Validate

^ Required Recipient Fields

To: ←

From: ←

∨ Optional Recipient Fields

Additional Fields

Subject

Message Body

```
1 <!DOCTYPE html>
2 <html style="margin: 0px; padding: 0px">
3 <head>
4 <meta http-equiv="Content-Type" content="text/html; charset=utf-8">
5 <title>kruiselines - home</title>
6 
7 </head>
8 <body style="background: #263746; font-family: Verdana; margin: 0px; padding: 0px" bgcolor="#263746">
9 <style type="text/css">
```

Parameters

No Unsavd Changes

Preview Email

Using Email Services Provider to trigger emails

- ◀ Using the REST Web Service Adaptor
- ◀ Connect to ESPs like IBM Watson Marketing (Silverpop), SFMC (Exact Target), Mandrill/ MailChimp, etc.
- ◀ Using the API provided by the ESP:
 - ◀ Connect to the authentication endpoint and get the token (for example on SFMC and IBM Watson Marketing) [optional]
 - ◀ Get the user's ID or email address
 - ◀ Hash the user's ID or email address [optional]
 - ◀ Use the token/ API key to send the template to the user
- ◀ Standard Templates can be set up by the Email team and Kitewheel only needs to know the email name/ email template ID/ list ID to trigger the email.

Using Email Services Provider to personalize on send

- ◀ Some ESP allow templates to have personalization on arts of the template
- ◀ When triggering these emails, Kitewheel can add personalization details in the request body
- ◀ In this example, the subscriber attributes contain the personalized values

```
1  {
2    "From": {
3      "Address": "sender@kitewheel.com",
4      "Name": "Learning Account"
5    },
6    "To": {
7      "Address": "recipient@kitewheel.com",
8      "SubscriberKey": "9924e52778144edd86000986427e7131",
9      "ContactAttributes": {
10       "SubscriberAttributes": {
11         "OfferInstruction": "test value 1",
12         "ExpireDate": "2019-06-20",
13         "First_Name": "Larry",
14         "Last_Name": "David"
15       }
16     }
17   }
18 }
19 }
```

Managing email cadence

- ◀ Kitewheel can manage email cadence using database tables to wait until the right time to trigger an email
- ◀ Using a DB listener, we can listen for the time to send an email on this table, check email opt-in and send the email
- ◀ Trigger emails are usually sent right away. Some ESP have a trigger email queue and email could take up to 5 hours to be sent if the queue is very deep



Email Tracking

ePixel- Email Open tracking

- ◀ In the API listener settings, there is an option to get an ePixel to track email open activity
- ◀ Select the ePixel with “No Cookie”
- ◀ Add specific information about the email and user in the [YOUR DATA HERE] section of the pixel link.

Listener Editor

Listener Type

API Listener Options ⓘ

Environment

Listener Id

19f45635659bb37849c56a24dc1e59a3

> Standard

> Web Tracking & Recommendation

▼ Pixel Tracking

Copy the following snippet to add to your email's HTML body, and replace [YOUR DATA HERE]

```

```

Email Click Tracking

- ⏪ The Kitewheel graph API now support a Dynamic Content or /dc extension
- ⏪ This means that dynamic redirects and authorization can be applied to the graph API

```
https://api.kitewheel.com/api/v1/listener/19f45635659bb37849c56a24dc1e59a3/dc
```

- ⏪ This would allow us to track email link clicks and return a 302 redirect URL

```
{  
  "statusCode": 302,  
  "redirectURL": "https://kitewheel.com"  
}
```


Email dynamic content

- ◀ Using `http statusCode 418`, we can return content back to the email and have it displayed
- ◀ This can be used to populate several sections of an email



Thank You