Campaign Functional Description

PRODUCT MANUAL | August 2023

1 Foreword

Copyright

User is aware that this manual may contain errors or inaccuracies and that it may be revised without advance notice. This manual is updated frequently.

Marigold welcomes any recommendations or suggestions regarding the manual, as it helps to continuously improve the quality of our products and manuals.

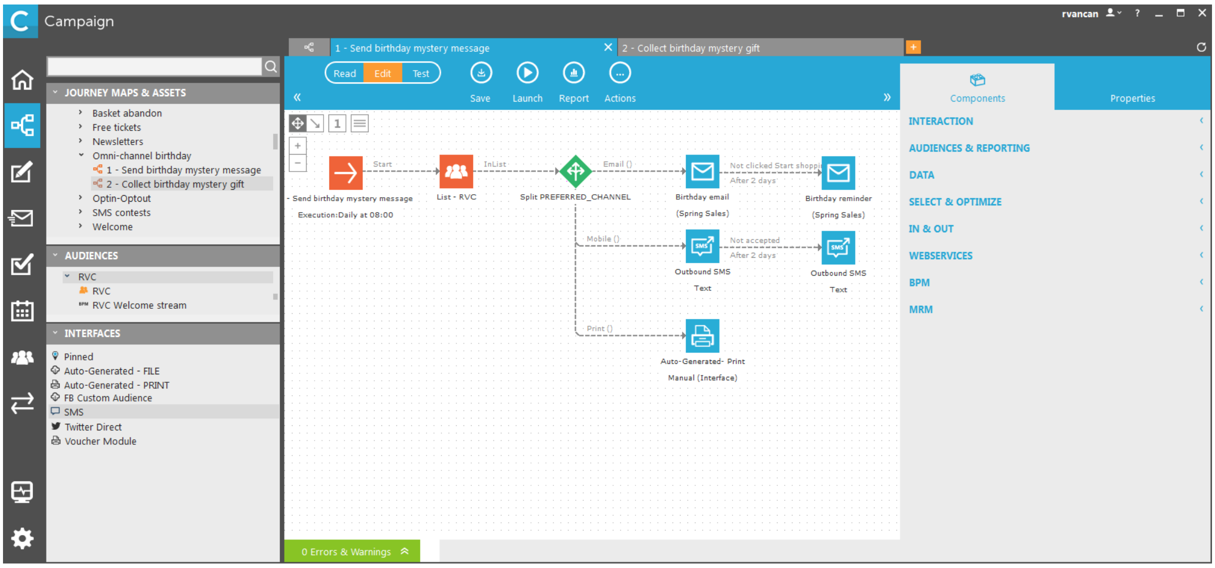
2 Table of Contents

3 Introduction

With Campaign marketers can graphically design **cross-channel and multi-step** interactive communication scenarios for all types of communication channels including traditional channels, e-mail, SMS, social media, micro-sites, print, digital documents, call-center integration and mobile devices.

Some features:

- Graphical definition of multi-step cross-channel campaigns;
- Personalization in every interaction channel, inbound and outbound;
- Graphical target audience selection and segmentation;
- Event-driven and profile-driven marketing campaigns;
- Personalized life-cycle campaigns;
- Integrated online surveying.

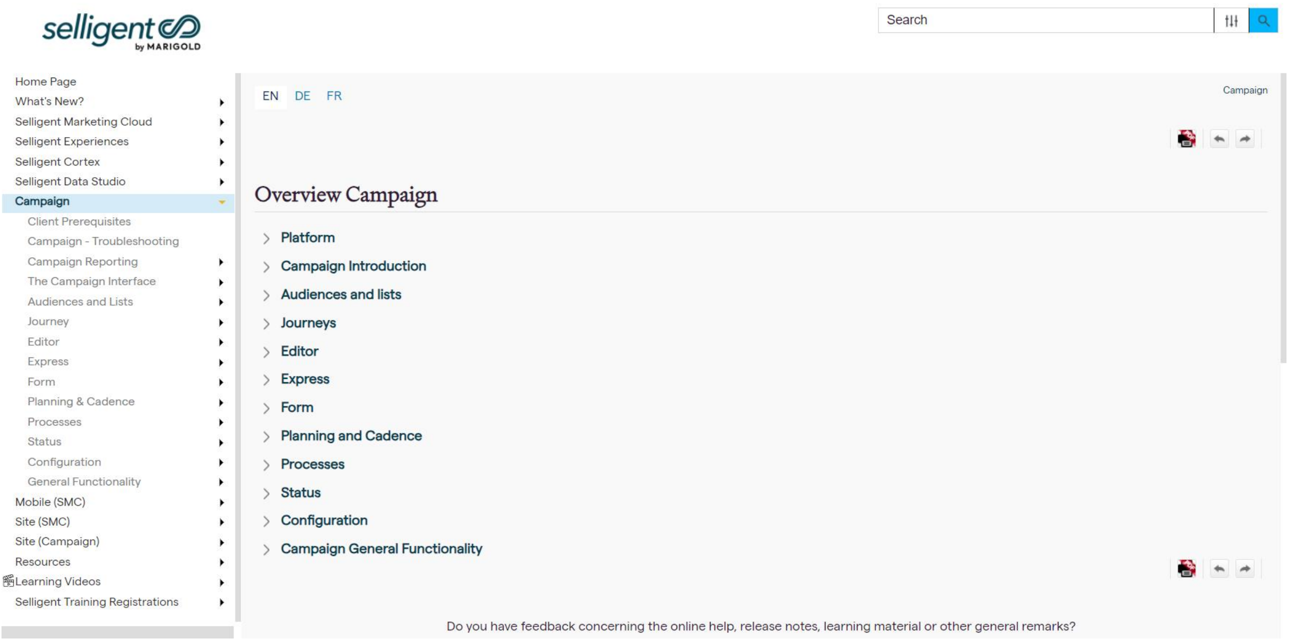


4 Plug & play installation

Campaign is launched, multi-browser on a Microsoft Windows OS (minimum Windows XP professional SP2). It requires a one-time installation of a small application “Selligent launcher” which can be downloaded and installed from within the browser.

5 Online help

Campaign has an extensive and comprehensive online help, including plenty of examples, available within the module. The Help also contains a number of videos explaining how to use the tool. These videos will continuously be extended with new ones.

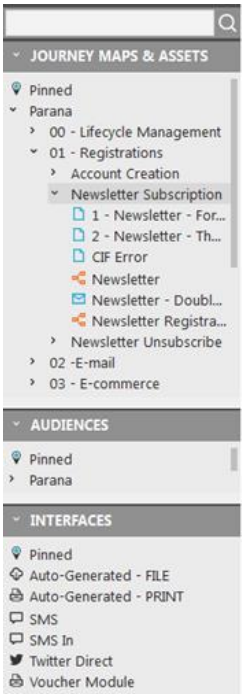


6 Multi-language support (end-user and contacts)

The Campaign interface is currently available in 5 languages: English, French, German, Dutch and Spanish. The end-user can change his language in his user profile.

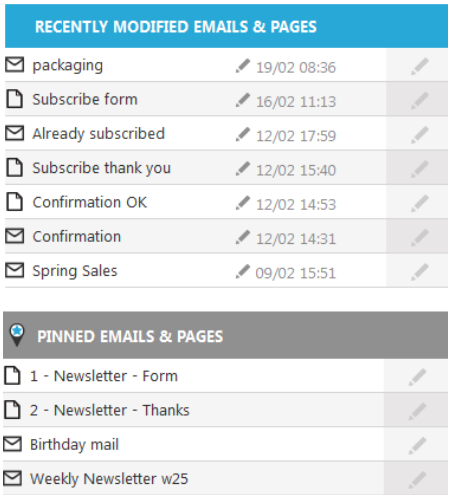
Campaign has an open database model. So, for the contacts stored in the database, it is up to the client to define the preferred business logic on how to handle the contact's language. Usually, a field in the audience list, holding the contacts, defines the language of the contact. Language personalization, audience selections and segments can be based on this language field.
In Campaign any language can be added to translate on the fly pick lists, labels for forms, error messages…

7 Folder structure and search



Campaign has a **folder "tree-view"** to easily access all journeys, assets (emails, webpages, eforms…), lists and any other element that is managed within Campaign. Switching between assets to edit them is easy. Simply double-click any element in the folder tree-view. E.g., double-click an email to edit it in the Editor, or a journey to edit it under "Journeys".
Drag-and-drop any asset and audience item from the folder tree-view to create a journey.

Above this folder "tree-view" is a **search bar** to search for any element in Campaign. Search by the element's name or id (e.g., journey id).

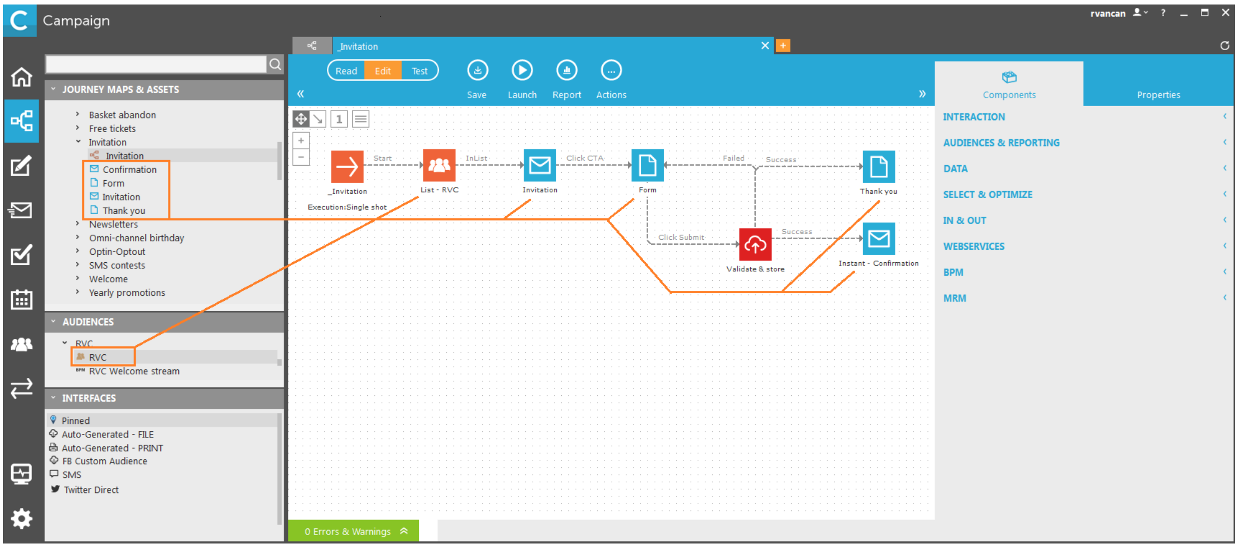


The folder tree-view also has a default **"Pinned"** folder. A user can pin any item of his choice. This provides quick access to all favorite elements.

Apart from the "Pinned" folder, every "Home" tab lists an overview of all pinned, but also recently modified elements. E.g., the "Journeys" home tab lists all pinned and recently modified journeys, while the "Editor" home tab lists pinned and recently modified emails and pages. Pin any element, not only journeys, emails and pages, but also surveys, interfaces, exports, scheduled tasks…

8 Journeys

A journey is a graphic interpretation of the story from a contact's perspective. Each step in a contact's story is visually managed by journey "components". Campaign provides a graphical interface where components, predefined or not, are dragged and dropped and links are created. Communication scenarios can be composed in no time.
E.g., the contact receives an invitation email for a contest, he clicks the call-to-action in the email and lands on a form. He fills out and submits the form. The form data needs to be validated and stored. The contact sees a thank you page and receives a follow-up email.



A marketing campaign scenario can be built from multiple journeys, and contacts in a journey can be redirected to other journeys based on specific feedback, events or triggers. Moreover, parts of journeys can be re-used in other journeys and a single journey can be called from several other journeys.

Some features:

- Design journeys in an intuitive graphical drag-and-drop environment
- Organize email blasts
- Define interactive journeys with messages (emails, webpages, forms...)
- Conduct surveys
- Contests
- Invitations
- Triggered communication based on profile attributes, contact responses and times
- Life cycles
- Check the integrity of journeys
- Simulate journeys before planning
- Plan journeys in time
- Take into account communications cadence (message throttling)

8.1 JOURNEY SCHEDULING TYPES

A **single shot** journey is executed once and automatically put on hold after execution. A typical example is a newsletter that is sent once to all contacts in the audience.

A **data driven** (recurring) journey can be scheduled once a week, daily, hourly, every ten minutes... The selected audience can vary. At each interval the audience is checked and the journey will be executed for new contacts that are in target at that moment. An example of this type is a journey were people registering on your website will get a welcome email.

A **triggered** journey is executed at a predefined moment in time. The execution is not limited to a fixed interval but can be set any moment in time. (E.g., 18/10 at 10:00, 23/10 at 17h, etc.). There is no limit to the number of triggers that can be defined.

Apart from these three scheduling types, it is also possible to execute **action-driven** journeys. An example is a transactional email. Each time the contact does something (action), an email needs to be sent. E.g., the contact orders an item, abandons his basket, does not pay his invoice on time, etc.

8.2 JOURNEY EXECUTION: LAUNCH, PAUSE, PARTIAL RUN AND RESTART, PLANNING

Each journey can be launched, paused or stopped with a single click.

When a journey is **launched**, all contacts in the target audience will receive the message. If the journey is "single shot" scheduled, the execution will pause after the message was sent to each contact. For "data-driven" or "triggered" journeys the target audience is checked with each execution interval.

Journey can be paused; no messages are sent, but webpages, forms, surveys, etc. are still accessible. When the journey is **stopped**, no emails are sent and webpages, forms, surveys... are no longer accessible. Clicks leading to these assets will redirect to a defined location. This can be an URL, another webpage or another journey. E.g., if a contest ends, redirect contacts to a "Contest ended" webpage.

Journeys can be paused, stopped and **restarted** at any time. When a journey is paused, you can modify or optimize the journey however you want. As soon as you restart the journey, sending messages will immediately resume where it left off.

Journeys have starting and ending dates and they can be **planned precisely**. Campaign provides a planning tool that visualizes all journeys for a given time frame. In addition, to avoid over-communication, Journeys can be added to a "communications cadence" plan. This allows limiting the number of messages a contact receives to avoid email or message fatigue (see "Message planning & throttling (communication cadence)").

8.3 CREATE, MODIFY, DELETE, ARCHIVE JOURNEYS

Create journeys graphically by dragging and dropping components. Components are the building blocks of a journey, used to construct a scenario (e.g., broadcasting a newsletter). Each component represents a step in the scenario. Link the components to create a logic structure and define the path the contact follows throughout the journey. Each component has its proper links, called "events". E.g., a Data component is used to validate and store data and has the "Success" and "Failed" events.

When a journey is paused or in "design" mode, you can **modify or optimize** the journey however you want. As soon as you restart the journey, sending messages will immediately resume where it left off.

Journeys can be **deleted** at any time if the end-user has the right to do so. All stored interactions (views, clicks...) of the journey are kept.
Journeys can also be **archived**. In this case the journey's interactions will be removed, but it will remain visible in the folder tree-view. The archived journey can be duplicated to create a new journey.

8.4 RE-USE JOURNEYS AS TEMPLATES, RE-USE PARTS OF JOURNEYS, COMBINE JOURNEYS

Journeys can be **duplicated** with a single click. All settings are duplicated: journey properties, audience selection, components... Interactions however will not be duplicated, as it is a new journey. It is the easiest way to re-use a journey. If a type of journey is used often, it is easy to create one ‘master’ journey (template), duplicate it and modify the duplicate as needed.

Parts of a journey can also be re-used by **copying and pasting them** in another journey.

Several journeys can be part of a single marketing campaign, each journey being a small part of the complete scenario. And one and the same journey can be used in multiple scenarios as well. The different journeys can be **combined**.
A typical example is an opt-out journey. All “unsubscribe” links in newsletters can point to one opt-out journey. This way the opt-out only needs to be created once for all newsletters.

8.5 JOURNEY CATEGORIES

Journeys can be **categorized**. Define journey categories globally and link a journey to a certain category ‘label’. For example: Promotional, Periodical, Upsell, Acquisition, Loyalty...

A second level can also be used to categorize journeys with “**Product**” labels. These could be the main product categories.

Journey categories and products labels can be taken into account when creating a “communication cadence” plan. This allows limiting the number of messages a contact receives to avoid email or message fatigue (see ”Message planning & throttling (communication cadence)”). In this case, a plan can be created for journeys with a certain category or product label.

8.6 TESTING JOURNEYS AND MESSAGES

Firstly, the end-user can **simulate** a journey’s execution prior to the actual activation. The journey can be put in **“test” mode**, meaning only test contacts will receive the journey’s messages.

“Test emails” can be send to a single test contact or multiple selected test contacts. These profiles can be used to thoroughly test the entire journey, or even several linked journeys at once. Test personalization, segmentation, or simulate the whole process by clicking through each step with the test contact’s profile.

Secondly, a journey can also be **“previewed”** be selecting a single test contact and clicking through each step with the test contact’s profile. A detailed **logging panel** lists each step that is executed by Campaign including the time to execute them (in milliseconds): generating emails and pages, testing validation rules and storing data, finding contacts, executing journey rules, etc.

Thirdly, all emails and webpages can be **previewed** as they would be displayed on desktop, tablet and mobile devices. And this in different screen resolutions. This allows the end-user to test the **responsive design** of the email or webpage. You can also preview personalization and segmentation of the message, including email headers and pre-headers.

Finally, with Campaign’s built-in **Litmus integration**, all emails can be previewed in over 30 email clients, browser and device combinations. This also includes **spam test** reports on all major spam filters like SpamAssassin, Barracuda, Postini, MessageLabs, Gmail, Outlook and more.

8.7 JOURNEY AUDIENCE

There are numerous ways of selecting and targeting contacts in journeys. The initial journey audience is determined with the **Audience component**. You can use it to select an entire audience list, a predefined segment (sub-selection) of the audience list or to filter the contacts based on any information available. Campaign provides a Filter designer tool to create selections.

For more information on predefined segments and the Filter designer tool, see "Selections".

8.8 CONTACT CATEGORIZATION WITH STATES

Journeys can also be used to categorize contacts. These journeys define the 'state' a contact can be in. E.g., for a global customer life cycle this can be "welcome, retention, loyalty..." For a specific welcome scenario, this might be the different steps of the communication plan: "first touch, first reminder, don't miss out..."

Contacts can change state when they do something. For instance, change the state from "Welcome" to "Retention" in a customer lifecycle, when he registered in the registration journey.

8.9 SELECT & OPTIMIZE

Within a journey there are several components (Decision, Split...) to change the path of the contact, based on the contact's stored profile data, internal variables, which link he clicks, the values he submitted in a form... Or to change the contact's path if he is already in another audience or not.

Components can be linked together to create a **multi-step** journey. For example, one of the components is a "Decision" component with a yes or no outcome. In a "Question of the day" contest use decision components to check if the contact answered a question before he can see the next question.
Or a decision could be: "Has the contact visited my website in the last two weeks". Contacts who visited will get the regular e-mail, while contacts who did not will get an email with a special incentive to convince them to visit your website again or more frequently.

This decision component is only one of the components to create multiple steps or paths. Other components define other options, apart from a yes-or-no outcome based on a condition.

The previous paragraph already stated that the contact can be in certain 'states'. These states can also be the different steps of a communication plan (see " Contact categorization with states").

With the **Wave component** you control the number of waves used to send a message. E.g., you have a contest on your website which hands out a very popular price. And want to avoid the contest page to go down from too much traffic, you can send the invitation email in multiple waves instead of all at once.

With the **Time component** you can decide when an email should be sent. E.g., an email that only should be send during working hours. Or which route the contact takes in the journey, based on the time condition set in the Time component. E.g., if the contact clicks "Submit" on weekdays, he will see a different page then in the weekends.

As stated earlier (see " Journey scheduling types"), start and end dates can be set. Journeys can precisely be timed and planned.

8.10 DATA VALIDATION, STORAGE AND RETRIEVAL IN JOURNEYS

There are several components to store data within a journey. Submitted form data or parameter values can be **validated and stored** on the contacts profile, whether it is the audience list or a linked list.

A Campaign form can be made accessible online (e.g., on the website) for unknown persons (anonymous profiles). If these anonymous profiles fill out and submit the form, a **lookup** can be made in the journey, based on the submitted form data (e.g., check on email address), to see if the anonymous profile is in fact a 'known' contact already stored in the database. Decide if the path in the journey should be continued with the known or anonymous profile.

Internal variables can be set within a journey, whether it is journey specific, for an audience list or for the entire system (called "shared storage" variables).

The components to validate, store and retrieve data can manage most data scenarios in a journey. But if needed, any **custom** client-specific calculation, complex storage, validation or other logic operations that need to be executed for a contact in the journey, can be done using the **"Stored procedure component"**. The stored procedure subroutine is created in Campaign and used in the journey.

8.11 WEBSERVICES

In a journey, the **Soap service component** can connect to any external SOAP web service to send and retrieve data for a specific contact at a specific moment. E.g., the contact fills out and submits a form to make an appointment and the Soap service component connects to a web service that creates the appointment in an external system. With the **HTTP service component** even a simple http request can be made to send and retrieve data.

Campaign also links to Salesforce and Microsoft Dynamics (and of course Marigold's own CRM system "CDM" natively) through the "CRM connector". This connector is capable of transferring data and synchronizing Salesforce "Campaigns" and Microsoft Dynamics "Marketing lists" from and to Campaign. Furthermore, Campaign reports and journeys can be added to the CRM system (see "

Linking to external systems").

The **CRM connector component** is a part of the CRM connector and can create new instances of objects in the CRM system within a Campaign journey. E.g., new lead, new opportunity, new case, new appointment...

8.12 TESTING CONVERSION EFFECTIVENESS

Campaign natively includes A/B testing, Multivariate testing and control groups.

With **A/B testing** test up to 7 versions of a message. Decide the size of the test audience as an absolute number or a percentage. Campaign selects the contacts of each test audience for each version randomly. Decide the winning version yourself or let Campaign send the winning version automatically.

With **Multivariate testing** test a large amount of content variations in a single message. This can be an email, but also a webpage. Create multiple variants in one single message by adding various subject lines, text,

images or a combination of text and images (called articles). Campaign creates the variants automatically, taking each possible combination of the various elements. There is no limit to the number of combinations that can be tested. Every combination of these different elements (images, text and articles) is tested to find the best performing combination and use that version to send it to all remaining participants. The 'winning version' is chosen if there is a ‘statistically significant difference’ between the different variants, or when a certain time or number of clicks has been reached.
The ‘statistically significant difference’ is a statistical calculation that calculates if the result (number of clicks between the different version) is based on coincidence or not. If you only have 2 clicks on an item, the chance that the clicks are coincidental is high. The more clicks you have on an item, the chance becomes lower.

The **Control Groups** component splits the journey's audience into groups of contacts, each with its own path to follow in the journey. The different groups are created based on a fixed number or percentage and are calculated and re-calculated at each execution of the journey. Each path can be followed by a message, but it does not have to be. Define a group that did not receive any message to compare with the groups that did.

8.13 ACCESSING JOURNEY CONTENT

Apart from broadcasting messages (emails, SMS, print…) to contacts in journeys, webpages, forms and surveys can be made accessible in different ways.

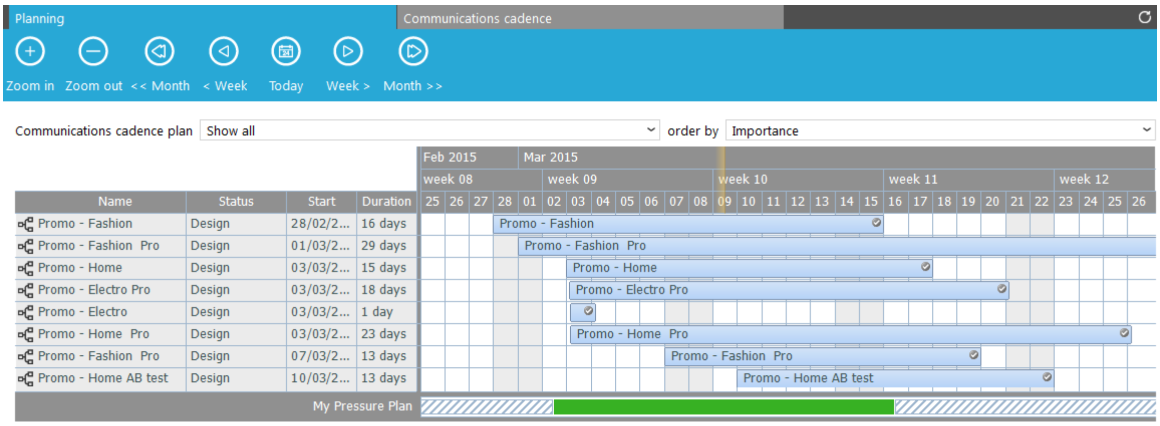
Firstly, contacts can have direct access to webpages or forms when clicking a link in a Campaign message.

Secondly, the webpage or form can also be made accessible online (e.g., on the website) for unknown persons (anonymous profiles) by using the Campaign webpage or form’s **URL as a hyperlink**.
But the webpage or form’s content can also be integrated in your website, **for known contacts or anonymous profiles**. Campaign offers a server-side content integration called **“content rendering”**. The Campaign webpage or form’s content can be retrieved as data and merged with your existing website(s) pages. The client’s website development team decides where on the website page the Campaign content should appear. Campaign provides a library with classes and methods to integrate the content in your website.

Finally, the Campaign webpage or form can also be ‘decorated’ with a content renderer page in the journey. Instead of using Campaign’s default renderer (optiextension) the journey uses an alternative content renderer. Again, the client’s website development team decides where on this website page the Campaign content should appear. This page can have your navigation, headers, footers, banners… plus the Campaign webpage or form content.

8.14 MESSAGE PLANNING & THROTTLING (COMMUNICATION CADENCE)

Journeys can be added to the **planning**. The planning module is ideal to manage multiple journeys over a period of time and can be used to decide their actual scheduling times. It gives a clear view on what is planned and if there is an overlap.



The planning can be combined with "**Communication cadence**". Communication cadence allows limiting the number of messages a contact receives to avoid email or message fatigue. A communication cadence plan can be created, deciding how many messages a contact can receive in a certain time period. E.g., 3 messages per week. Journeys are added to the plan, and if there are already too many messages send within the timeframe, contacts are excluded from the journey's target audience. Multiple communication cadence plans can be created.
The journey timing is defined in the planning module showing how many contacts are excluded and included in the journey's audiences.

Plans can be defined for specific channels. E.g. only for emails or SMS messages, or offline channels like Print. But a plan can also be a combination of several channels.
Journey categories and products labels can also be taken into account when creating a communication cadence plan. In this case, a plan can be created applying only to journeys with a certain category or product label.

9 Assets

DESIGN

Design emails, webpages, forms in Campaign's **full WYSIWYG + Source Editor**. Drag and drop HTML and form components (tables, images, input fields...) to the WYSIWYG panel where you can further edit the markup. You can also use the Source editor to edit the source code. The source editor has line numbering, collapsing, autocomplete and color coding.

A predefined email **header** (from-, to-, reply-address....) can be set. Select different sending queues, e.g., a default one for regular emails and a separate one for test emails. For multi-brand or multi-country emails you can use a different email domain depending on the brand or country. E.g., brand 1 sends from info@brand1.com while brand 2 sends the same email from info@brand2.com. Or send the English version of the email from info@companyname.co.uk and the French version from info@companyname.fr.
Easily define **subject lines and pre-headers**. Create different versions of the subject line and pre-header by setting conditions based on contact profile information.
Add **attachments** to your emails. These can be files (PDF...), contact cards or appointments.
The Editor can **extract text from HTML** automatically to create text emails, which saves a lot of work.

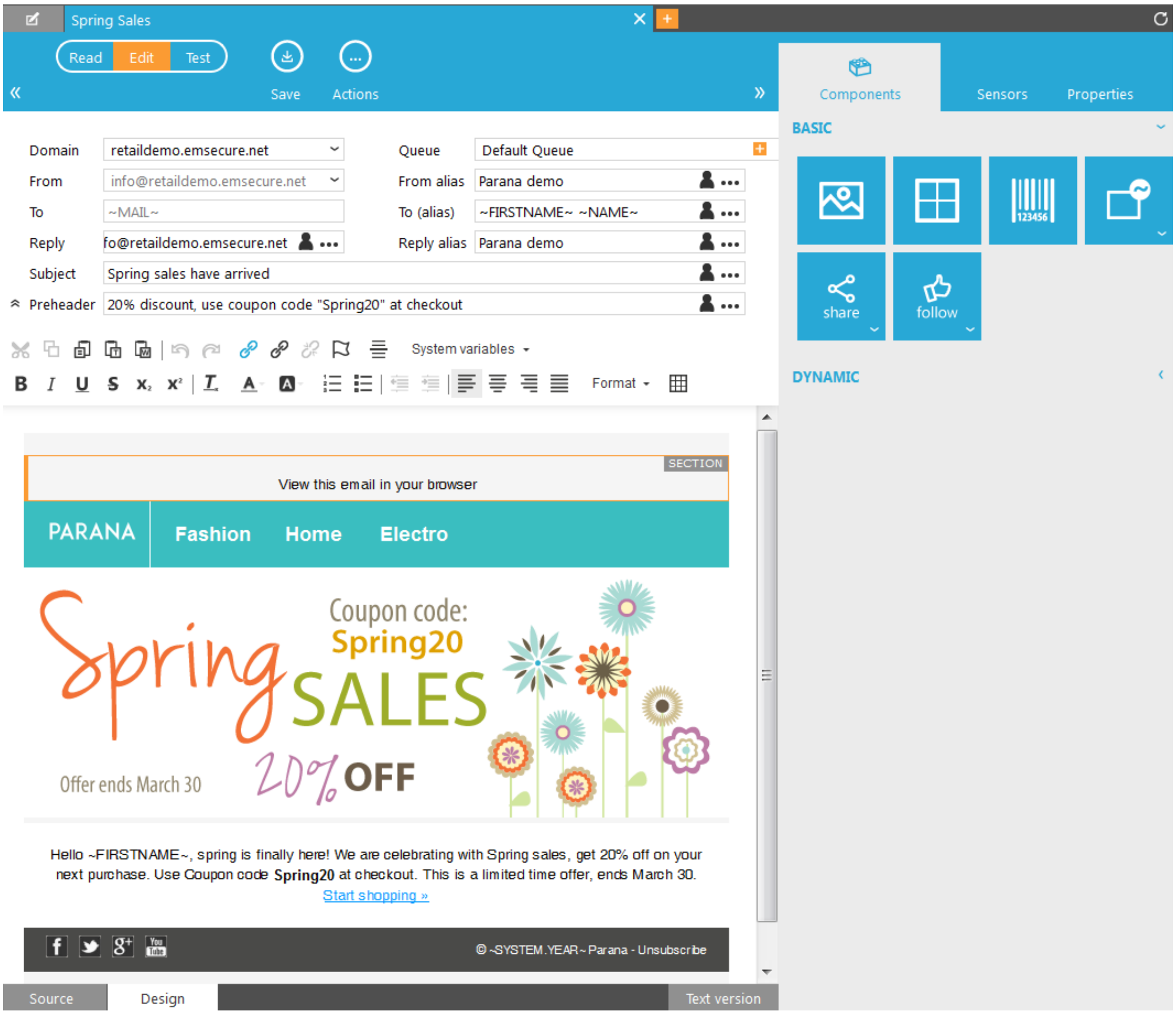
The **image and script libraries** are easily accessible from the folder tree-view. Create subfolders and drag images and scripts from a local drive to these libraries to upload them. Drag them back to the local drive to download them.

Build newsletter templates in the Editor and allow non-tech-savvy users to **create and send newsletters easily** with the **Express** module. See " Templates and Express".

Some features of the Editor:

- Authoring of emails, digital pages, forms and surveys.
- Access to the contact profile and profile extensions in order to personalize messages.
- Integrate measurable hyperlinks (sensors) in messages for reporting reasons and follow-up
- Use of system and custom variables
- Efficiently create personalized content.
- Organize messages in multi-level folders.
- Real-time Spam check (multiple checks such as domain checks, SpamAssassin...)
- Message preview with Litmus

- Subject line and pre-header previews
- Image library
- Create email templates for use in Express
- Easily create and send template-based emails in Express



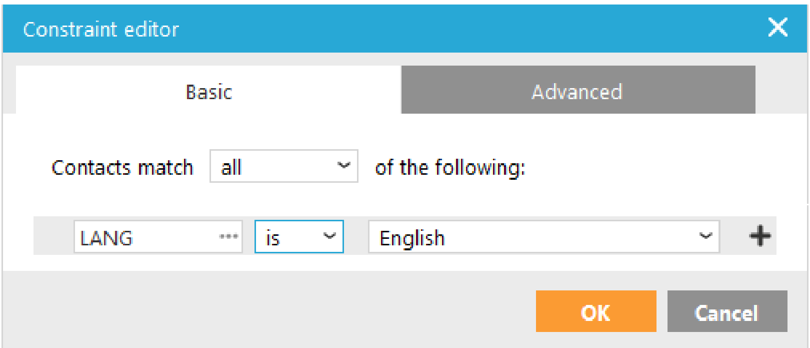
9.1 IMPORT HTML

Apart from designing messages, the Editor is capable of importing HTML files. You can design your messages in your standard authoring environments, like Adobe Dreamweaver or any other, and import them for use in Campaign. Simply drag and drop the file in the Editor. Both imported and designed messages can be saved as templates, from which new messages are created.

9.2 PERSONALIZE AND SEGMENT

Personalization and segmentation features offer unmatched flexibility to create highly targeted communications with the least effort. Based on easily available contact information stored in the Audience lists, messages are enriched with personalization fields.

A message can be composed of different sections, which are either included or excluded, based on profile and other information. These conditions, whether to include or exclude sections, are created with the intuitive Constraint Editor.



9.3 MEASURABLE HYPERLINKS & TRACKING PARAMETERS

Measurable hyperlinks are called “sensors” in Campaign. There is no additional setup to make a hyperlink ‘measurable’, as all hyperlinks defined as sensors are measured by default. Each time a contact clicks a sensor, the click is stored and used in the reporting. A sensor can point to an URL, an element in a journey or the action can be defined in the journey itself.

Campaign standardizes the way Google Analytics, Nedstat, Xiti and Adobe tracking parameters are added to hyperlinks in emails. ..

Track if a click in an email resulted in a purchase, an upsell or any other conversion. Add JavaScript similar to Google Analytics to your website pages to send data back to Campaign. Campaign links the contact’s email click to the data sent back. This can be product info, purchase info, or any other parameter. If a quantity and price are sent back, Campaign automatically calculates a revenue in the journey reports.

9.4LANGUAGE SUPPORT AND TRANSLATIONS

In Campaign you can add as many languages as needed. Select a language in the message or define the message language based on a contact profile field. This language will be used in the message for translations of contact profile fields (e.g., salutations), pick list values, labels for forms, error messages…

By using translations, one message can be created for different languages.

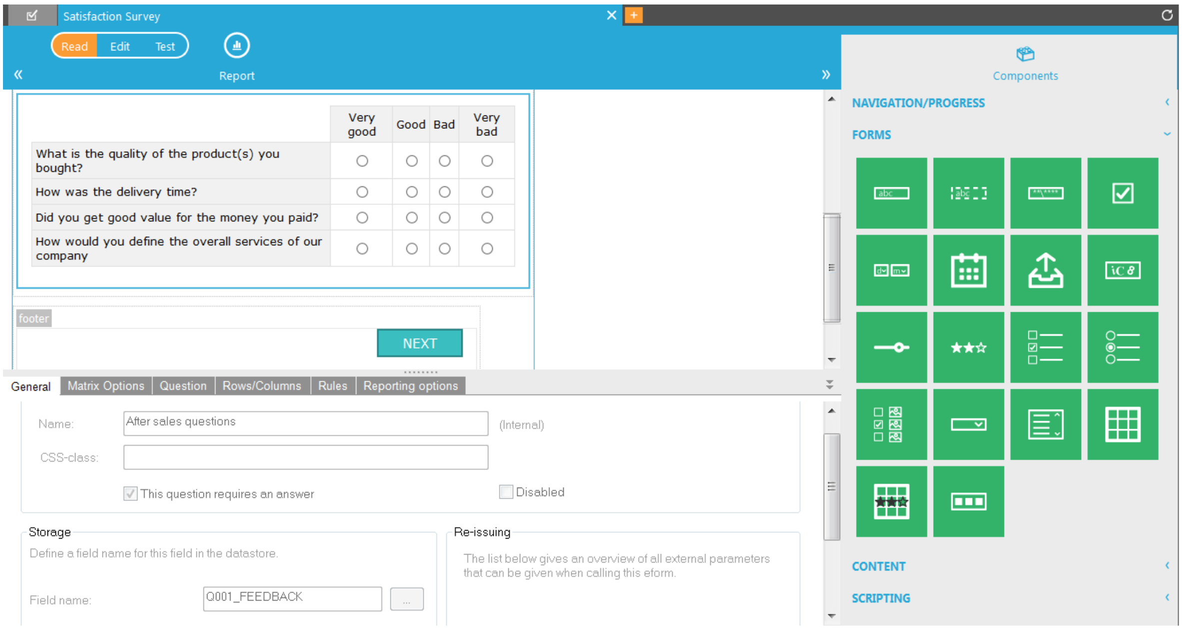
Translations can be for the entire message, but also only apply for sections within the message. This way, one message can be created with a section for each language.

Translations for text content blocks can also be provided using XML translation files. The XML translation files provide the translations for each content block. A file per language. The message template has placeholders where the translations should go. A translation agency can provide the translated XML files which are imported in the message template. Automatically new messages are created from the message template at import, one for each language. E.g., importing 3 language files will result in 3 new emails in the Editor.

9.5 SURVEYS WITH EFORM

Surveys are created in a dedicated module eForm:

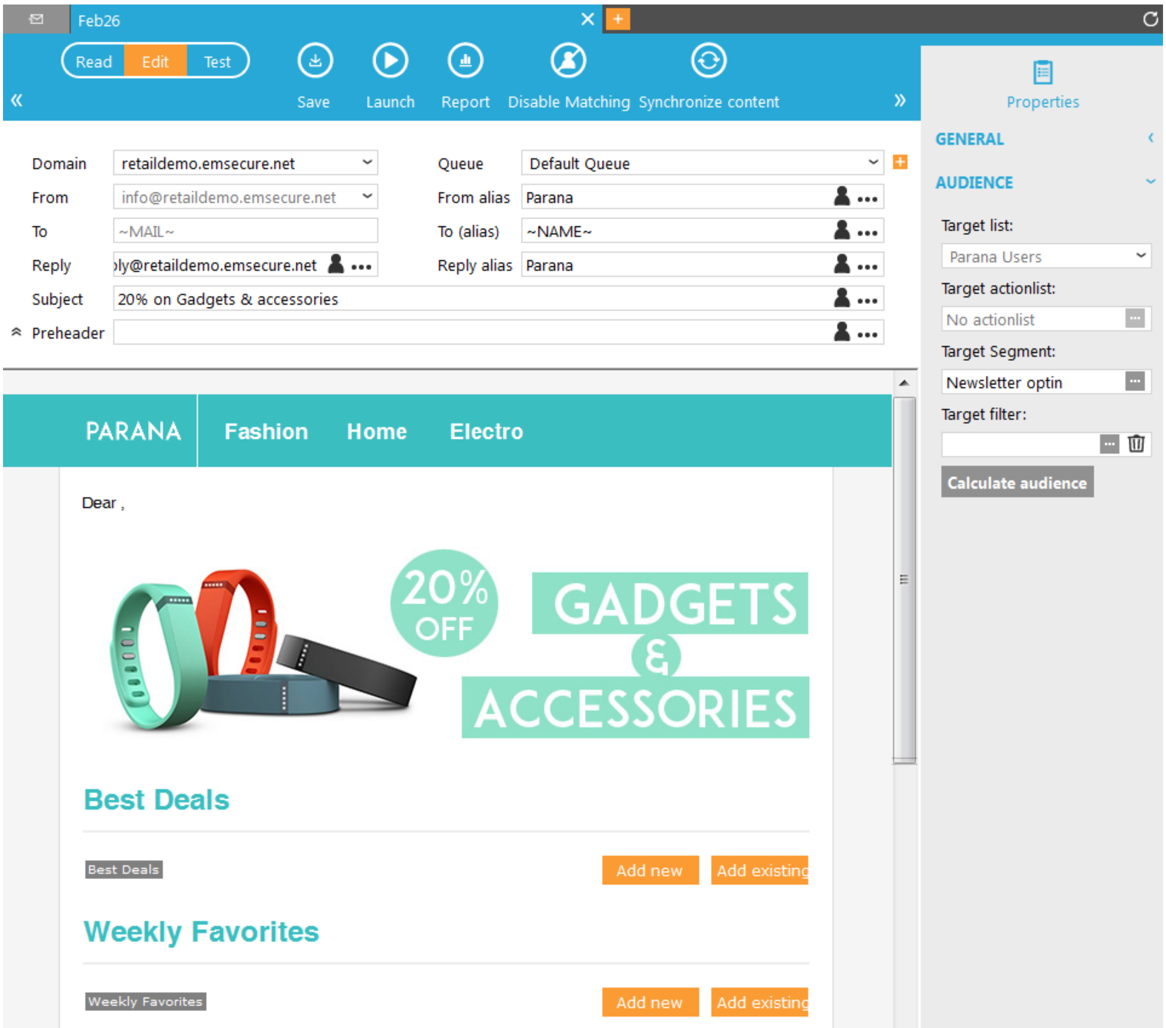
- In 3 steps initialize your survey: set the location, audience, languages and style. Form automatically creates a table to store the contact's answers. Each time you add a question the table is updated to hold the answers.
- Create and manage different language specific styles for your surveys.
- Pages are created with a single button-click. Drag and drop pages and questions to move them around. All Questions have an optional description and inline help box providing additional information about the question to your contacts.
- An extensive library of form elements is dragged and dropped on survey pages. Text fields, radio buttons, checkboxes, dropdowns, matrices, Calendar controls, image uploaders, captcha, sliders, raters and more.
- Add navigation controls once and apply it to all pages: Back and next buttons, page indicators and a progress bar.
- Add content blocks, headers, and hyperlinks to create a comprehensive survey. Even add contact specific barcodes to your survey.
- Add custom JavaScript to execute when a survey page loads or is submitted.
- Rules can be defined to show or hide pages, questions, and answers on previously given answers.
- Questions can also be shown conditionally based on the contact's profile data or previously given answers.
- All the contact's answers are directly linked to his profile and can easily be used to define target audiences, personalization, or logic decisions in journeys.
- Reuse already created questions in new surveys. Or simply link to them and manage questions and answers centrally.
- Manage different translations. Export them as a csv or xml file to send to a translation agency and import the translated files.
- Test before deploying the survey. Create backups by storing different version and decide which version should be deployed.
- Define follow-up events to continue the contact's path in the journey.
- Access survey reports directly in Form and filter reports based on the contact's profile data or previously given answers.



9.6 TEMPLATES AND EXPRESS

Newsletter or email templates are created in the Editor. These templates define how the eventual emails, created from the template, should look and behave. The templates have editable regions defined, where content can be added to the emails. Add the content and send the email from the Express module. Express allows non-tech-savvy users to add content to newsletters and send them out:

- No HTML knowledge required. Express has an easy interface to create the emails, simply add new to the email by filling out fields per article. The appropriate fields are defined in the template. Or select from a list of existing articles.
- Easily select the target audience. This can be predefined in the template, allowing Express user only to work with specific target audiences.
- The express user can add constraints to show articles they add to specific contacts. E.g., different discount articles can be shown to different contact groups.
- Preview, test and send the email from within Express. Express will create the journey automatically. The Express user does not have to be introduced to journeys.



All this can also be done automatically from an external system, addressing Campaign's Broadcast API (web service). This allows you to create and send the email from the external system, a CMS for example. No Express needed.

Another option is to prepare an XML or RSS feed and have Express retrieve it when the email is created. The XML or RSS feed location is redefined in the template. E.g., all the newsletter articles are retrieved from an XML file and automatically loaded in the new email created in Express. The Express user only needs to check and send the newsletter.

These templates also come with "**automated content matching**". Matching logic will match contact profile attributes with the possible newsletter content. So different contacts will see different content for the same newsletter depending on their profile. This way you can match the content of the newsletter to the contacts interests, shopping behavior...

9.7 MULTIVARIATE MESSAGES

With **Multivariate testing** you can test a large amount of content variations in a single message. This can be an email, but also a webpage. In the Editor, create multiple variants in one single message by adding various subject lines, text, images or a combination of text and images (called articles). The variants are created automatically, taking each possible combination of the various elements.

The multivariate message is send from a journey. For more information on multivariate testing.

9.8 VERSIONING

Create backups of a message by storing different version of the message during the development phase. Backups can be created at any moment. Add comments to each version so you know what the version changes are. A message can be restored to a certain version or create a new copy from a versions.

10 Data and selections

10.1 DATA MODEL

Campaign has an **open database model**. It does not impose a certain structure to clients to manage their campaigns. The client is free to define the preferred business logic for handling his contact data, whether it is brand- or country-based, or according to any other client's company structure.

Having an open database model implies that, when first acquiring Campaign, some considerations have to be made. One of the first things to consider is what information is needed in Campaign. Probably a system managing the client's data is already in place, and not all of it is necessary for campaign management. Campaign is not a substitute for a data warehouse. For instance, importing all purchase data 'as-is' to send transactional emails is not necessary. Prefer to import and use aggregated purchase data from the data warehouse to manage transactional marketing campaigns.
Exchange data between Campaign and any other system, plus any regular calculations or other logic with Campaign's scheduled **Tasks**.

To define the initial model used in Campaign, is important to note that the audience list (contacts table) is the focal point in Campaign. Understandably, because all marketing campaigns focus on the contacts. Thus, the audience plays a central role, and all related data is linked to it (the contact's purchase info, preferences...). This implies that Campaign works with a star-based schema (no snowflake). This needs to be taken in consideration when defining the initial data model. Of course, Marigold professionals will help with the initial setup process.

10.2 LIST TYPES

The client's data is classified in list (table) types. These types determine how the data is used in Campaign. E.g., an 'audience' list holds all contact directly related information. It is used in journeys to target contacts. While a 'data' list can hold any contact data not directly related to the contact's profile. E.g., User preferences, loyalty card info, purchase info, contest and survey answers...
But as already stated, since Campaign has an open database model, some of this related information could also be stored on the audience list itself. It is entirely up to the client to define the preferred business logic. These 'data' lists are linked to the 'audience' list. Campaign offers the flexibility to configure different kind of relations between the tables (1-on-1, 1-on-many...)

Other list types define not-contact-related data. E.g., an 'article' list stores the articles of email newsletters. Articles often consist of text, images, hyperlinks, etc. These elements are stored in the article list.

The main user-defined list types are **audience, data, article, action and product**. There are also internal defined types (taxonomy, social, Form...) but do not need to be configured by the user.

10.3 MANAGING DATA MANUALLY

Campaign provides a graphical interface to manually manage tables and their data. No SQL scripting is required. But it also offers a SQL scripting pane for the skilled SQL professional. Every aspect is turned on or off for an end-user with access rights (scripting pane, table manipulation, data access...)

- Lists (i.e. tables) are easily **created, modified and deleted** in Campaign. Fields are added by simply defining a name and a field type (numeric, text, date time...).

- You can configure different kind of **relations** between the lists (1-on-1, 1-on-many...) by selecting the parent and child table, the primary and foreign key. A unique "scope" name identifies the relation. If the relation is 1-on-1, fields from the child table can be used directly in message personalization and segmentation. Journey audience selections can be made based on the parent table (the audience list), but also on the linked table. See "Selections".
- The interface also offers an easy way to set unique or not-unique, clustered or not-clustered **indexes,** aiding in creating a performant database.
- **You can query** all tables. The result records can be exported to Excel, SPSS, csv or another delimited file type. Add, modify or delete records one by one. For importing multiple records see "
-
- Data transfer and integration".

  - A skilled SQL professional can create **stored procedures** for **custom** client-specific calculation, complex storage, validation or other logic operations. These stored procedures can be used to alter contact data in journeys. They are also used in Campaign's scheduled Tasks during data exchange and automated data manipulation.
    See "
  -
  - Data transfer and integration".

10.4 AUTOMATIC EXTENDING THE CONTACT PROFILE DATA

Campaign is capable of automatically extending the contact's profile based on his behavior in Campaign or from data acquired from other Marigold modules like Site, Recommendations and FrontOffice. This 'extended' data can be used in target audience selections, personalization and segmentation.

With the **taxonomy** feature the contact's profile is extended based on his click behavior in Campaign. Categorize the measurable hyperlinks (sensors) in emails, newsletters, webpages... and Campaign will automatically store how many times the contact clicked per category. It also stores the division per category in percentage and the top 5 clicked categories directly on the contact's profile. This extended data also includes how many emails he received, viewed and clicked.

When using **social components** Campaign automatically stores how many times he shared an item (e.g. an article in a newsletter), how many of his friends followed the shared items and what his preferred social

network is to share items. Contact that share a lot and/or have many followers can be considered as your "brand ambassadors" on social media.
After the contact logged on using a social login component, **use his social network data** for marketing campaigns. Depending on the granted permissions at login, Campaign automatically retrieves the contact's social network data to enrich his profile. His profile is 'extended' with his social network profile (Facebook, Twitter and others via Janrain). E.g., for Facebook this can be his public profile data, friends list, likes, interests, etc. (See also "Social networks".)

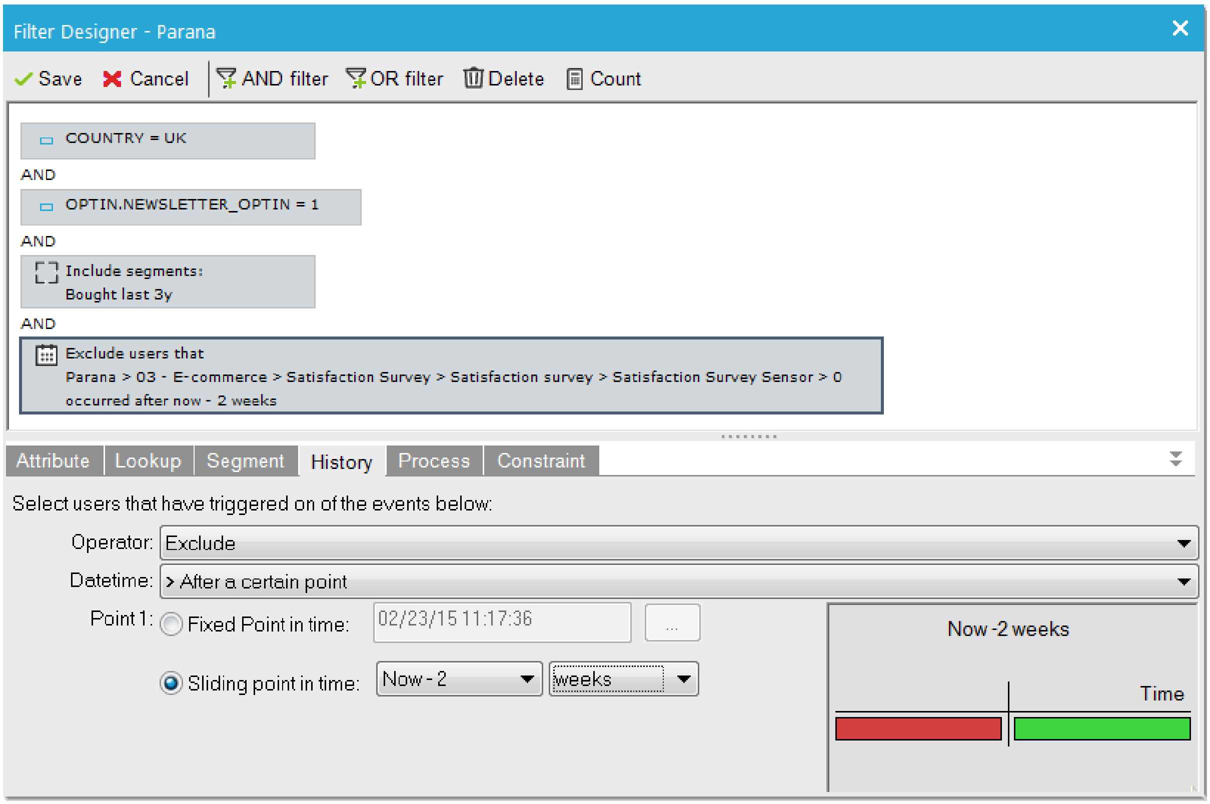
Automatically extending the contact's profile with data acquired from other Marigold modules:

- **Site** is a behavioral profiling and website personalization module. It tracks visitor behavior on websites and presents the visitor 'offers' based on his behavior. If the visitor is a known contact in Campaign, data from both modules is exchanged. As a result, in Campaign the contact's online behavior and 'offer conversion' data is available for target audience selections, personalization and segmentation. Journeys can also be used to follow up on contacts if they converted or not in Site.
- **Data Studio** is a data mining module that gives the client better insights in all his contacts marketing, purchase and other data. The client can analyze this data visually and discover patterns with different modelling techniques. These insights and discoveries are transferred to Campaign to better steer marketing actions.

10.5 SELECTIONS

Predefined "segments" are sub-selections of the audience list, they group a number of contacts together. These segments can be used and re-used in journeys to target the contacts grouped in the segment. E.g., "the weekly newsletter's opted-in contacts" is a segment defined once and used in each week's newsletter journey. This is a **dynamic segment**, each week the number of opted in contacts can change. A segment can also be a 'snapshot' of a number of contacts at a certain moment in time. This is called a **static segment**. E.g., the winners of a contest. It will always be the same contacts.

Dynamic segments are created graphically with the "filter designer". The **filter designer** provides a graphical way of creating SQL constraints, without the need for SQL scripting knowledge. Use contact profile data (age, gender...) to define your target audience, but also historic response data, purchase transactions (if imported in Campaign), subscription data, data from other Marigold modules like Site, survey data, etc. Campaign automatically converts these interactions to actionable data. For example, journey actions based on the answers a contact gave in a satisfaction survey, or send a reminder email based on whether a customer clicked or did not click the previous email.
With each added filter, the remaining number of contacts is displayed according to the initial target audience. A skilled SQL professional can also built their own SQL constraints within the filter designer. This can be turned on or off for an end-user with access rights.



10.6 LIST QUALITY AND BOUNCE MANAGEMENT

The audience list is one of your most valuable marketing resources. It holds contact information needed in journeys to target your contacts. In this aspect, duplicate contact records should be avoided, not to target the same contact twice when sending messages. Campaign offers an easy functionality called **“de-duplicate”** to identify duplicate records and take appropriate action:

- Remove the duplicates,
- opt-out the duplicates so they are not included in the communication process,
- or add them to an “exclude” segment that is excluded from other segments and selections.

This “de-duplication” feature is also available as a journey **Deduplication component** to remove the duplicate contact records in a journey.

Next to de-duplication, there is also a feature **“email quality”** that **automatically manages bounces** and unsubscribes (opt-out) the contact. Define when a contact should be opted-out:

- If his email address is syntactically incorrect,
- or has a non-existing domain,
- or if it bounces (hard or soft bounces) certain times.

Bounce management is very important and influences the sending "reputation". When emails do not bounce and have good content, the email provider allows to send more emails, i.e. a "good" reputation. When ignoring bounces or delivering bad email content, the email provider allows to send less emails, and the sending ip address reputation is lower. Ip addresses can also become "blacklisted", meaning the ip addresses cannot send to the email provider at all.
This of course affects your business directly. If half of the audience list contains Hotmail addresses and you are not allowed to send to them, the consequences can be devastating.

Having a 'clean' sending list is imperative. With Campaign this is setup with a few clicks and managed in an automated way.

10.7 CONTACT COMMUNICATION HISTORY

All the contact's communication history is stored, always. Whenever and when a message is sent, delivered, viewed, or clicked. Each click on a measurable hyperlink (sensor) in any message is stored. For all interactions on all channels. For how long? Well, forever.

This historical information can be used to create target audience selections. E.g., everyone that did not yet click in an email within two weeks, to send a reminder email. Or anyone that did not react to any of the communications in the past month...

11 Data transfer and integration

11.1 MANUAL IMPORT AND EXPORTS

There are multiple ways of importing and exporting data. One of them is manually with a wizard that guides through each step of the import or export process.

With the import data wizard check for duplicate records in the import file, decide the action (update, insert or both), map fields and optionally group the imported records in a segment.

Apart from querying records and simply exporting them to Excel or a csv-file, it is also possible to setup a scheduled export that runs at a certain time interval manually with the export wizard. Easily select the records to export, the format (Excel, SPSS, csv, or another delimited file type) and schedule the export. Send the export file as an attachment in an email or upload it to an FTP location.

11.2 SCHEDULED TASKS (AUTOMATED IMPORTS, EXPORTS AND SQL JOBS)

Exchange data between Campaign and any other system at certain time intervals, plus any regular calculations or other logic with Campaign's build-in scheduled **Tasks**.

For scheduled data imports and exports, Campaign employs ELT (Extraction, Transformation and Load) logic using batch processing tasks over SFTP, FTPS, FTP or a repository. Files can be unzipped and decrypted (PGP) by the processor. It is possible to export rejected records during the transformation process.

Execute complex SQL jobs automated at certain interval. The SQL job processor can process multiple stored procedures sequentially. With each step define what should happen if the procedure was successful or failed.

With the “Batch tasks” process group and execute tasks sequentially in one task.
E.g., import data – sql jobs – export data.

Send notification emails, including the process details, when tasks were completed or failed.

11.3 API

Campaign offers an extensive secured API, both SOAP as REST, for real-time management of contact data and journey execution:

- Retrieve, create and update lists (tables)
- Retrieve, create and modify list relations
- Create, modify and delete list fields
- Retrieve, create and update contact data
- Retrieve the unique contact hash code
- Execute journeys
- Create and add contact to segments
- Insert records for transactional mailings (“action” records)
- Create and send template based newsletters

12 Supported channels

Execute communication strategies across **all channels**. Apart from traditional online outbound channels like email, webpages, surveys and SMS also offline channels, mobile push notifications and social networks can be used. Define inbound channels like incoming SMS messages and use them in your journeys. If you need an additional channel, inbound or outbound, that is not supported by default, custom plug-in “interfaces” can easily be created and used in journeys (see “

Linking to external systems”).

12.1 OFFLINE CHANNELS

With the **Print** component create personalized Microsoft Word files based on a Microsoft Word template. Use the contact’s attributes as Microsoft Word ‘merge’ fields to personalize the documents. Send the files automated to the printer on a regular basis, or after a journey has been executed.

Add the additional **PDF** interface to generate personalized PDF files for the contact based on a webpage created in Campaign.
Or generate **flat data files** (Excel, SPSS, csv, or another delimited file type) with the Data export component to send automated from within a journey to the printer or any third party you require.

12.2 MOBILE SOLUTIONS

Send **SMS messages** via your own mobile provider or use Marigold's third-party mobile provider to send your messages. Define an inbound interface to handle all incoming SMS messages and act accordingly in journeys. Even create a **"dialogue"** with the contact through incoming and outgoing SMS messages.

Send simple and rich mobile **push notifications**; Display in-app messages or in-app content. Capture **mobile app behavior** to enrich the contact's profile and define communication strategies. All with Campaign's native mobile solution. Implementing Marigold's SDK in your mobile app is necessary.

Automatically enrich the contact's profile with **mobile usage information**. E.g., how much does he use his mobile device to interact with your messages and what is the division between mobile or desktop devices.

12.3 SOCIAL NETWORKS

Use different social components to add social buttons to your message. Allow contacts to **like or share** your articles, contests, or any other marketing campaign on multiple social platforms. Campaign automatically stores how many times he shared an item (e.g., an article in a newsletter), how many of his friends followed the shared items and what his preferred social network is to share items.

Use social login components so the contact can **login** with their Facebook, Twitter account (natively) or other social accounts (supported through Campaign's Janrain integration).

After the contact logged on using a social login component, **use his social network data** for marketing campaigns. Depending on the granted permissions at login, Campaign automatically retrieves the contact's social network data to enrich his profile. His profile is 'extended' with his social network profile (Facebook, Twitter and others via Janrain). E.g., for Facebook this can be his public profile data, friends list, likes, interests, etc.

With the Social publish component **post messages** on your company's or brand's Facebook page or Twitter account. Even use Campaign webpages as content for Facebook pages. And send the contact private messages to his Twitter account with the Twitter Direct message interface. (Note that Twitter requires both parties to follow each other in order to send private messages.)

12.4 MULTI-CHANNEL OR CROSS-CHANNEL JOURNEYS

Combine any online and offline channel in a multi-channel or a cross-channel journey.

For example, invite the contact by email to an event and keep him up-to-date with mobile messages. After he participated the event, send him a personalized printed discount voucher thanking him for his participation.

13 Linking to external systems

Campaign has built-in features to link with a number of external systems. Apart from sending mobile messages and linking to social networks (see "

Supported channels”), Campaign also links to **Salesforce and Microsoft Dynamics** (and of course Marigold’s own CRM system “CDM” natively) through the **“CRM connector”**:

- Data transfer between Campaign and the CRM system is setup automatically to synchronize contacts, leads or any other CRM data from and to Campaign.
- Synchronize Salesforce “Campaigns” and Microsoft Dynamics “Marketing lists” to Campaign. They will appear as segments on the audience list to be used as target audiences in journeys
- With the “CRM connector component” create new instances of objects in the CRM system within a Campaign journey. E.g. new lead, new opportunity, new case, new appointment...
- Show Campaign contact and overview reports in the CRM system
- Integrate and use journeys in the CRM system

Campaign also connects to the ecommerce platform **Demandware and Magento**:

- Synchronize Demandware/Magento contacts, products and orders data from and to Campaign.
- Send “abandon basket” emails when a contact abandons his basket within the Demandware/Magento platform.
- Store Demandware/Magento contact info in Campaign to use in selections, segmentation and personalization: order values, product values, discount values, gift info, visits and many more.

Any other integration, inbound or outbound, between client specific third-party platform and Campaign is possible through a **custom plug-in based interface**. A plug-in handles the communication between the third party and Campaign. The interface itself is used in Campaign journeys, as an inbound or outbound channel. For example, client specific code generators, ERP’s, ecommerce platforms, CRM’s...
Contact responses for the interface can be defined as ‘events’ in the journey, to continue the path for the contact in the journey. E.g “not responded, positive or negative reaction”. ‘Feedback’ events can also be defined where feedback from (or about) the contact is expected before progressing in the journey.

Sellligent closely follows the market trends and needs regarding Campaign Management & Marketing Automation. Based on needs, Marigold looks into the possibilities for partnership with third party vendors.

14 System management

14.1 USER MANAGEMENT AND ACCESS RIGHTS

With Campaign’s User management it is perfectly manageable to set a rights policy based on brands, countries, or other client’s company structures.

Define users, user groups and roles. Grant users access rights to different modules, module functionalities/actions and assets:

- The different modules: Editor, journeys, lists...
- Functionalities per module: launch journeys, edit html source...
- Actions per module: create, read, modify, delete....
- Assets: Folders, Lists, segments, journeys, emails, pages....

14.2 SYSTEM SETTINGS & GLOBAL VARIABLES

The system manager can easily manage all system settings and define variables used globally throughout the system in journeys, messages, etc. Add languages for translations in pick lists, labels for forms, error messages.... All these and many other settings are managed in one place, “Configuration”.

14.3 MAIL TRANSFER AGENT AND GRID SETTINGS

MTA (Mail Transmitting Agent) is responsible for the delivery of emails generated Campaign. The MTA processes high volumes of email traffic at the highest possible speeds. The MTA works with dedicated IP’s.

Another option is to send emails through the GRID. The GRID is a central, shared, intelligent mail transmitting platform. It provides more than 1000 IP addresses for sending out enormous volumes of emails at the highest speeds. In this case a virtual MTA is configured on the client installation, routing all emails created in Campaign to the GRID.

Sending emails is based on configuration rules and quality checks defined in Campaign:

- Define engines and email queues.
- Assign IPs to engines. E.g., for new IP’s warm-up.
- Define sending and speed limits.
- Define email domains with their configuration (DNS, domain keys...).
  E.g., define email domains depending on brands or countries.
- Assign email domains to queues. A queue can be selected when creating emails in the Editor.
  E.g., the default queue for regular emails and a separate queue for test emails.
- Set domain-throttling for different email domains to avoid black-listing (server saturation) or connection closing.
- Create domain keys (DKIM) for authenticating sender and email integrity.

Marigold also provides automated reputation monitoring and has a dedicated team continuously monitoring reputation.

14.4 PACKAGING

Campaign supports DTAP (Development, Testing, Acceptance and Production) in the form of deployment packages to migrate items from one environment to another.
You can package and deploy one or more journeys, or even complete folders of journeys with all their dependencies: lists, emails, webpages, etc. Or package and deploy assets (emails, pages and surveys) separately.

When transferring an item to another environment, configurations might be different: URLs, email domains, from- and to-addresses, etc. E.g., the email domain might change from *“staging.companyname.com”* to “*mailing.companyname.com*”. Package mapping between both environments defines correspondences between the different items and the conversion is automatically applied when deploying.

15 Reporting

All Campaign reporting is accessible from the Portal, therefore described in-depth in the Portal's functional description. Here the Live e-mail view: track the progress of your e-mail campaigns in real-time.

- Audience list reports: consult list growth, opt-outs, distribution of data over different key fields (e.g. gender, language...).
- Create your own audience pivot reports. E.g., monthly opt-outs, delivery info per day and language...
- Reports on the different used channels.
- Consult a specific contact's interaction history.
- Journey and email delivery statistics (CTR, CTO, bounces, email clients...)
- Journey execution times and incidents (i.e. alerts when something went wrong during journey execution).
- Compare delivery info from different mailings.
- Survey reports.
- Export info.
- System-wide email delivery reports.
  E.g. consult the delivery rate from the top 20 domains for the last 30 days
- Insights in the systems (hardware) performance.
- Creating custom reports, including reports based on client-specific data returned from a stored procedure .

Almost every graphic and chart can be exported as an image, PDF or to Excel respectively.