

# How to choose the best-in-class b2c **marketing automation software**



# Chapter list

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# Event Tracking & Monitoring

Any kind of user interaction with your app (web or mobile) can be captured as an event. The event also has additional data, called attributes. The attributes give context to the event which become useful while analyzing the event or while creating a targeted segment.



## 1.1 Event Tracking

Event tracking lets you track user actions and inactions on your apps, which enables you to create segments, analyze behavior, run contextual engagement campaigns and everything in between.

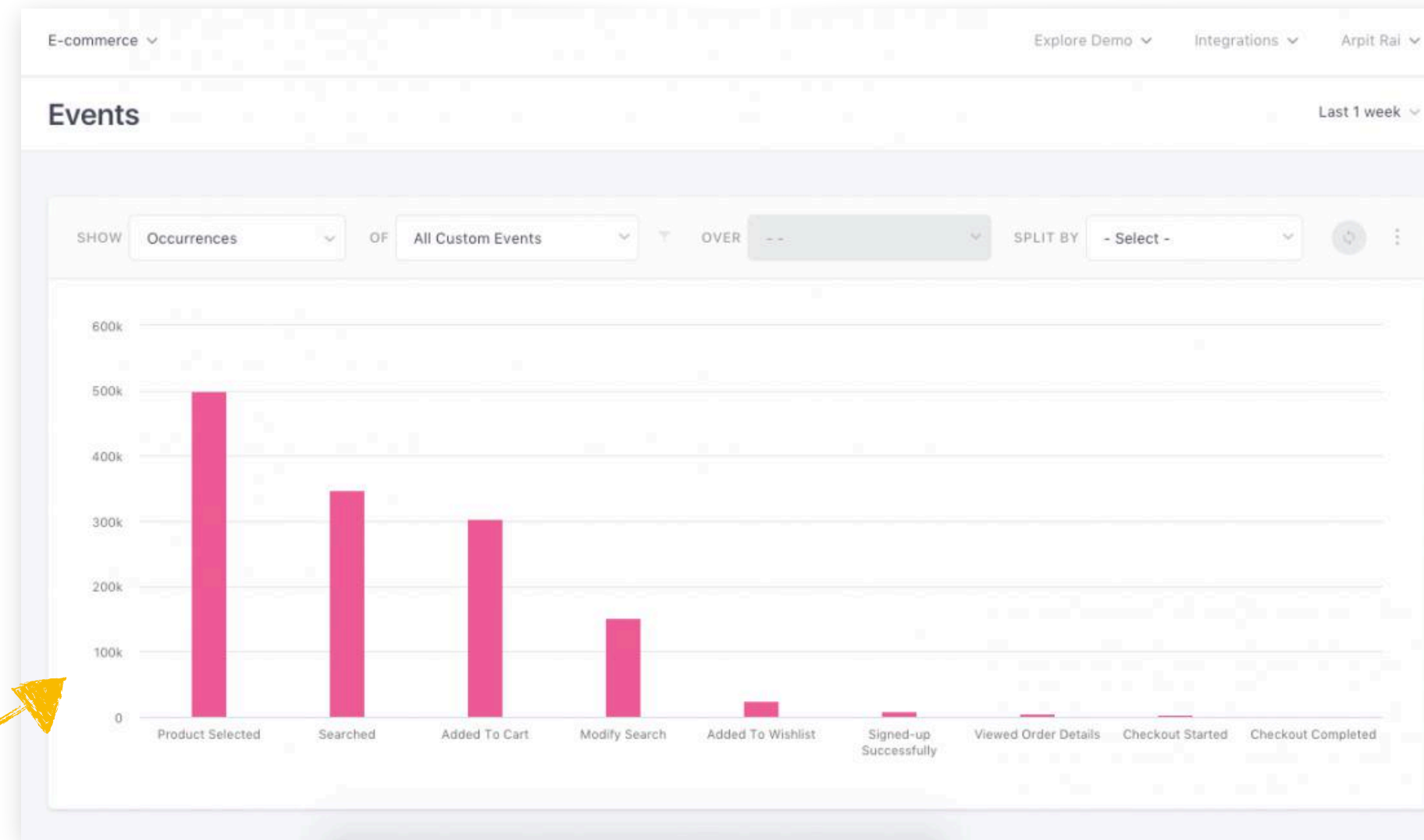
### Use-Cases

**Track the behavior of users on your website and app.**

This is the primary use-case of events. Any kind of action by the user like [song played](#), [item purchased](#), [added to wishlist](#), [installed](#), [uninstalled](#) can be recorded as an event.

**Know which actions are most popular or least popular in your app**

Check the adjacent chart. We are seeing the visual representation of all your events in the decreasing order of total occurrence (or uniques) of those events. As we see 'Checkout completed' is the least popular event, while 'Product viewed' is its polar opposite. So, [users are viewing your products, but aren't purchasing them](#).



## Key Questions To Ask Your Vendor

### Can we change event name from the dashboard?

Conventionally, changing event name is carried from the backend which is not convenient. Hence, ask for this capability from your vendor.

### What are the data points that get captured automatically?

Your MAP should automatically track some user actions which are normally called system events. They technically make life easier. Get the list of such events from vendor's doc and compare it with other products.

### Do you allow terminating an event?

Oftentimes tracking an event becomes futile. So it becomes a good idea to stop tracking it to keep the dashboard and reporting clean.

### Can we group events?

There could be three distinct events like- purchase\_byCOD, purchase\_byCC and purchase\_byNetB. However, for various reporting use-cases, you would want to group these three events under just- 'purchase', thereby creating the need for this capability.

OTT(Demo) Explore Demo Integrations View

### Data Management

User attributes list **Events list** Upload user data Upload events data

EVENTS	DATA TYPE	WEBSITE <sup>1</sup>	ANDROID <sup>1</sup>	IOS <sup>1</sup>	OTHERS <sup>1</sup>	ACTION
gt_complete_registration		SUCCESS	STALE	STALE	STALE	⋮
gt_download		NO DATA	STALE	STALE		⋮
gt_login		SUCCESS	STALE	STALE	NO DATA	⋮
gt_page_view		ERROR	SUCCESS	SUCCESS	SUCCESS	⋮
gt_play		ERROR	STALE	STALE	STALE	⋮
gt_purchase		SUCCESS	STALE	SUCCESS	NO DATA	⋮
gt_renew		NO DATA	SUCCESS	NO DATA	NO DATA	⋮

*Note: A red arrow points to the 'STALE' status in the 'OTHERS' column for the 'gt\_complete\_registration' event, which has a 'Stop Tracking' button next to it.*

# 1.2 Uninstall Tracking

Technically, it is difficult to track uninstalls. Because when an app is uninstalled the SDK of the tracking system, say WebEngage, embedded inside it obviously won't run and hence it cannot track it. This makes Uninstall tracking a key differentiator for not all products provide it.

## Key Questions To Ask Your Vendor

### Can you track uninstall if the user has disabled push?

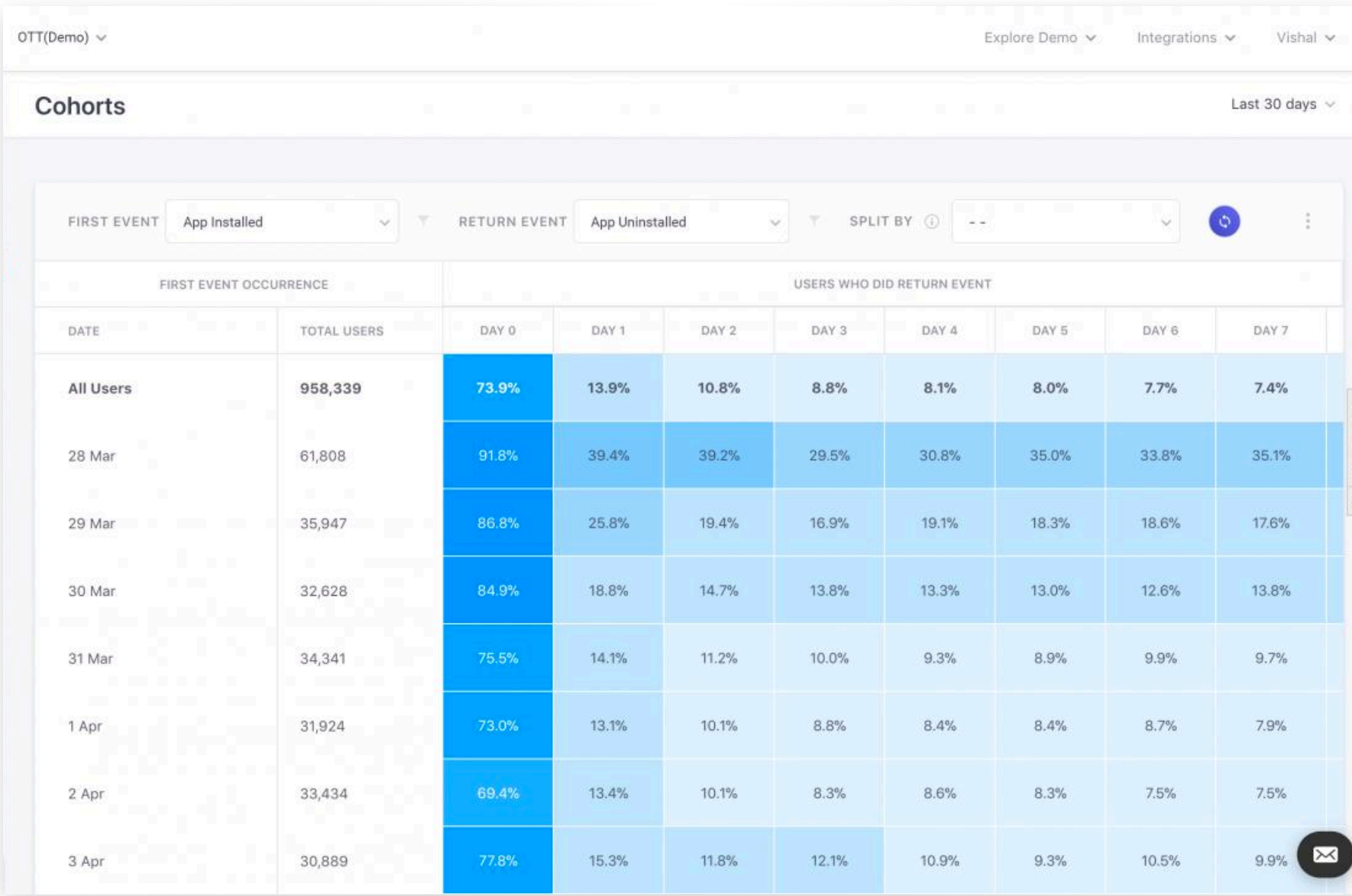
To track uninstall, the tracking system sends a silent push to the user's device. If the app is uninstalled, the push isn't delivered and the system treats it as uninstall. Question you vendor, what if the user has disabled push.

### What happens if the user re-installs?

Do they create a new profile for the user in the system or the same old one is reactivated for him?

### What if the device is turned off at the time of delivery of silent push?

It is highly likely, so understand the workaround that the product offers to address such instances.





# 1.3 Event Export

This capability is important in a sense that you would need to integrate with other products in your stack and also, you are going to eventually migrate. More importantly, the ability to export event data gives you total control over your user data.

## Key Questions To Ask Your Vendor

### How is the event export accomplished?

There are numerous ways- API, CSV or export to third-party service like Amazon S3. You would need this flexibility for you want independence to migrate to alternate product. Or, just access raw data to be able to use it on your own.

### How does the export process look like?

Check how much complexity is involved in the exporting the data. Does it require the involvement of dev?

Read More

### Event Export

Event CSV Custom



Event CSV Default

Event Title ☐

Event End Date ☐

Event Description ☐

Event Viewed ☐

Event Location ☐

Event Start Date ☐

DOWNLOAD CUSTOM CSV

Source- Wordpress

# Audience Segmentation

To ensure that the user clicks, it is imperative that we are able to send him the message that is relevant to him. How do we manage that? By targeting the message to the intended user for whom the message has been created. Essentially, analyze the behavioral and demographic data of all the users and identify the right audience.





## 2.1 Behavioral Segmentation

Behavioral segmentation means creating segments on the basis of actions that users have performed, or not performed (on the web and mobile app or across any engagement channel). Basically, grouping users on the basis of their behavior on your [app](#), [website](#), [email](#), [sms](#), [web message](#) and everything in between.

## Use-Cases

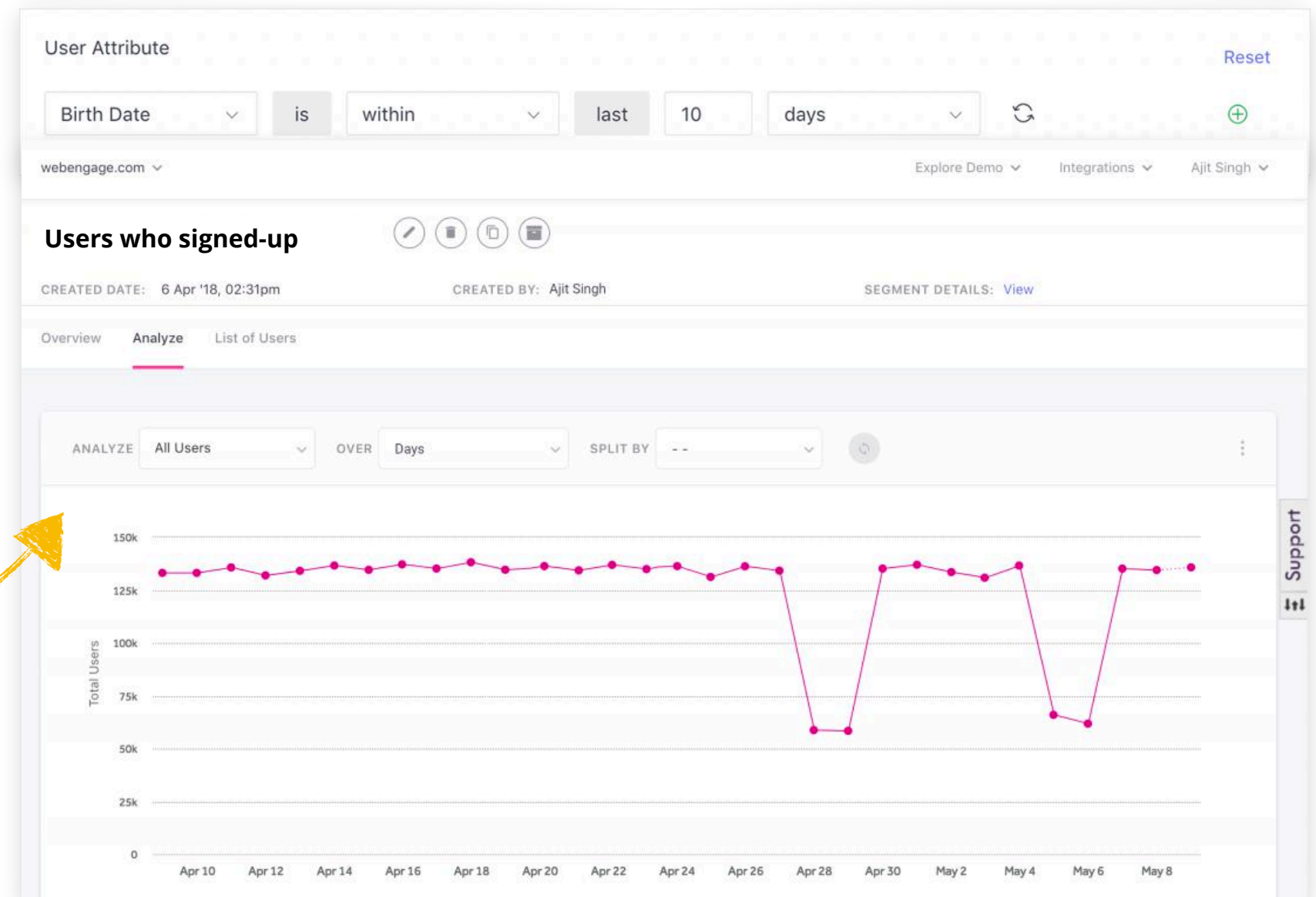
**Create segment of users who reached checkout page but haven't transacted for 30 minutes**

**Create segment of users whose birthday is in less than 10 days**

**Analyze a certain segment of users over days. Understand how a certain action is being performed by a segment of users over time.**

In the adjacent chart, we are analysing "Users who signed up". This essentially explains how 'sign up' action is being performed by users over days.

Segment **Rock\_lovers** contain all users  
who **played song** more than 3 times  
where **genre** is **rock**



## Key Questions To Ask Your Vendor

### At what interval is the segment refreshed?

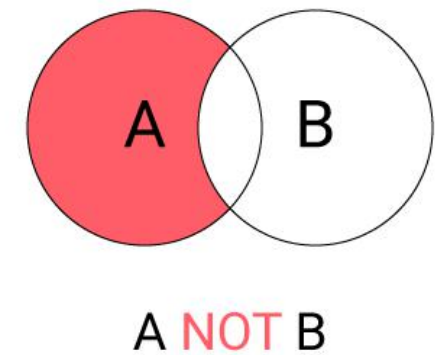
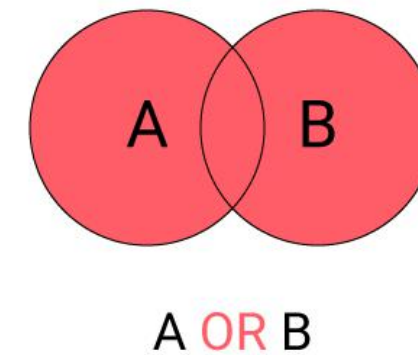
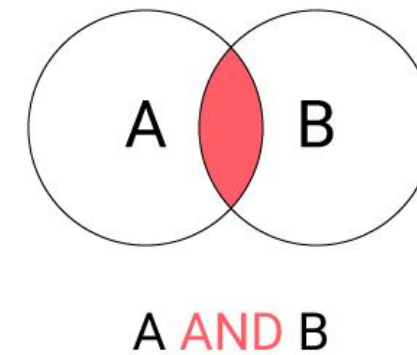
If you create and save a behavioral segment, find out at what interval is the segment dynamically refreshed.

### Can I create a segment on top of data collected from external systems like CRM, backend etc.?

A system should be agile enough to fetch data from external systems like CRM, Backend, Warehouse etc and build segments on it in real time.

### Do you allow the combination of boolean expressions in segment criteria?

Supposing A & B are two unique conditions, check if you can create the following combinations of rules for your campaign



A= Condition 1 | B= Condition 2

## 2.2 Dynamic Segmentation

A dynamic segment is a behavioral segment based on time.

A group of users who did an action in a common time period, say, users who have done x event in

- between last 15 & 9 days (Segment A) or,
- last 10 days (Segment B)

### Use-Cases

Create segment of users who have signed-up via display ads between last 1 week and 2 weeks.

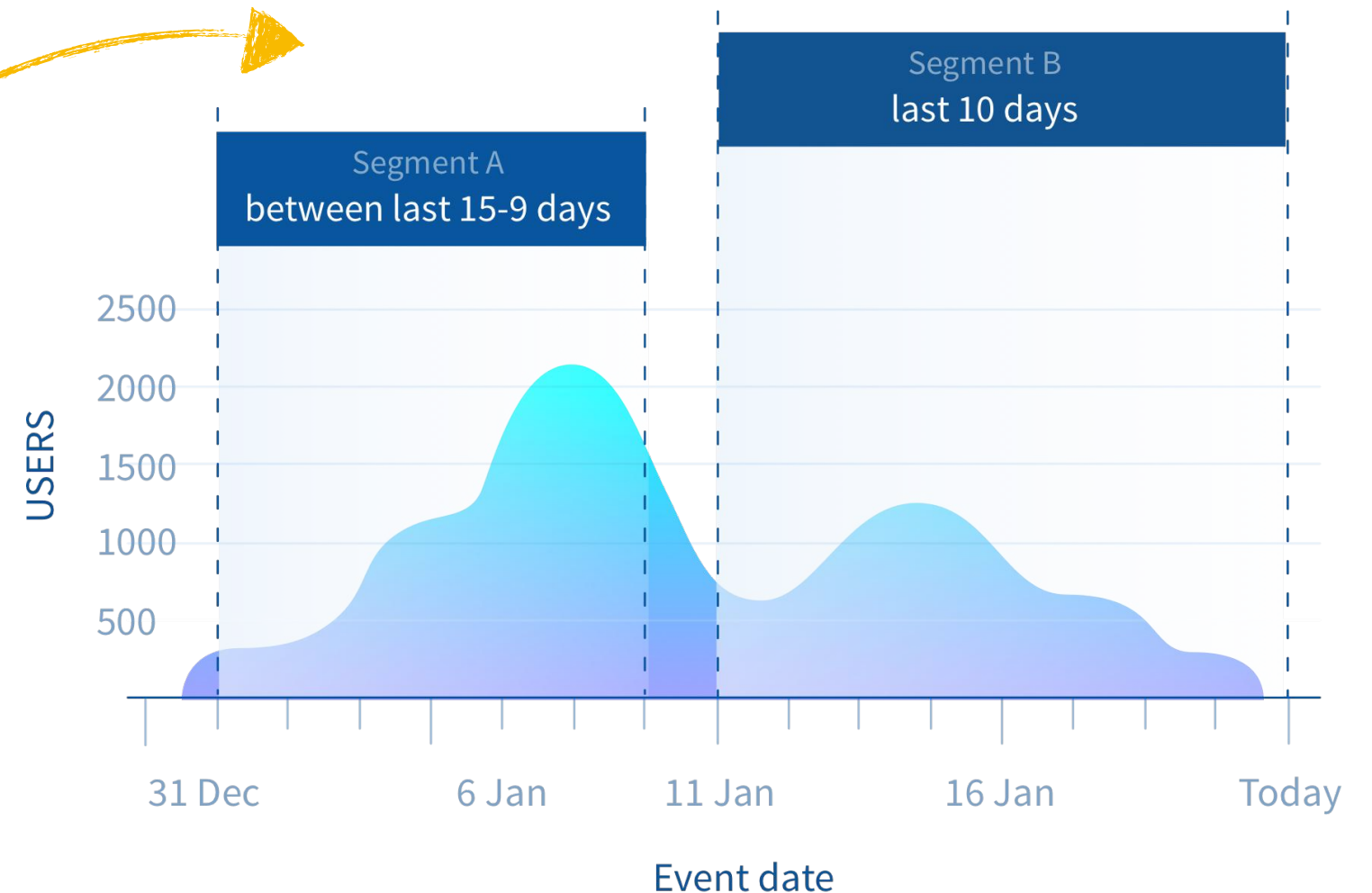
Send a message 3 days after the X event.

Segment **Rock\_lovers** contain all users

who **played song** more than 3 times

where **genre** is **rock**

within last 7 days



## Key Questions To Ask Your Vendor

### Do you allow segmenting users on the basis of their last action?

You basically wish to create segment of users on the basis of their last event. Say, segment of users whose last event was “app\_uninstall”, so that you could run a reactivation campaign.

### Do you allow segmenting users on the basis of their first action?

This is the exact opposite of the previous case. For instance, segment of users whose first event was purchase in the last 30 days.

### Do you allow segmenting users on the basis of the exact time of performing a certain action?

Say, you want to create a segment of users who ‘played video’ between 9-10 am. This way you know the best time to nudge them to perform ‘play video’ event via push notification.

The screenshot displays 'John Doe's Event History' with a list of events. A yellow arrow points from the 'App Uninstall' event to a push notification. The notification is from 'WebEngage' and says 'Hey John! You uninstalled? What went wrong? 😞'.

Last Event	App Uninstall
5 May '18, 09:25pm	Search
5 May '18, 09:20pm	Sort Applied
5 May '18, 09:18pm	Cart - Viewed
5 May '18, 09:15pm	Product - Page Viewed
5 May '18, 09:06pm	Product - Page Viewed
5 May '18, 08:58pm	Search
5 May '18, 08:53pm	Browse
5 May '18, 08:47pm	Search

Hey John! You uninstalled? What went wrong? 😞

WebEngage <hi@webengageapp.com> to me

[Read More](#)

# Analytics (Event Trends, Funnel, Cohorts)

Analyzing Cohorts, Funnels and Event trends are intrinsic to any Marketing automation solution meant for consumer businesses. They are the fundamental capability so they individually don't stand out as a differentiator. So, the key leverage is in the granularities and the nuances that the platform is providing on top of these key features.



## 3.1 Event Trends

Event trends or event analytics is the study of the events performed by users on your app and engagement channels. Or just any medium where you are able to capture user actions in the form of 'events'.

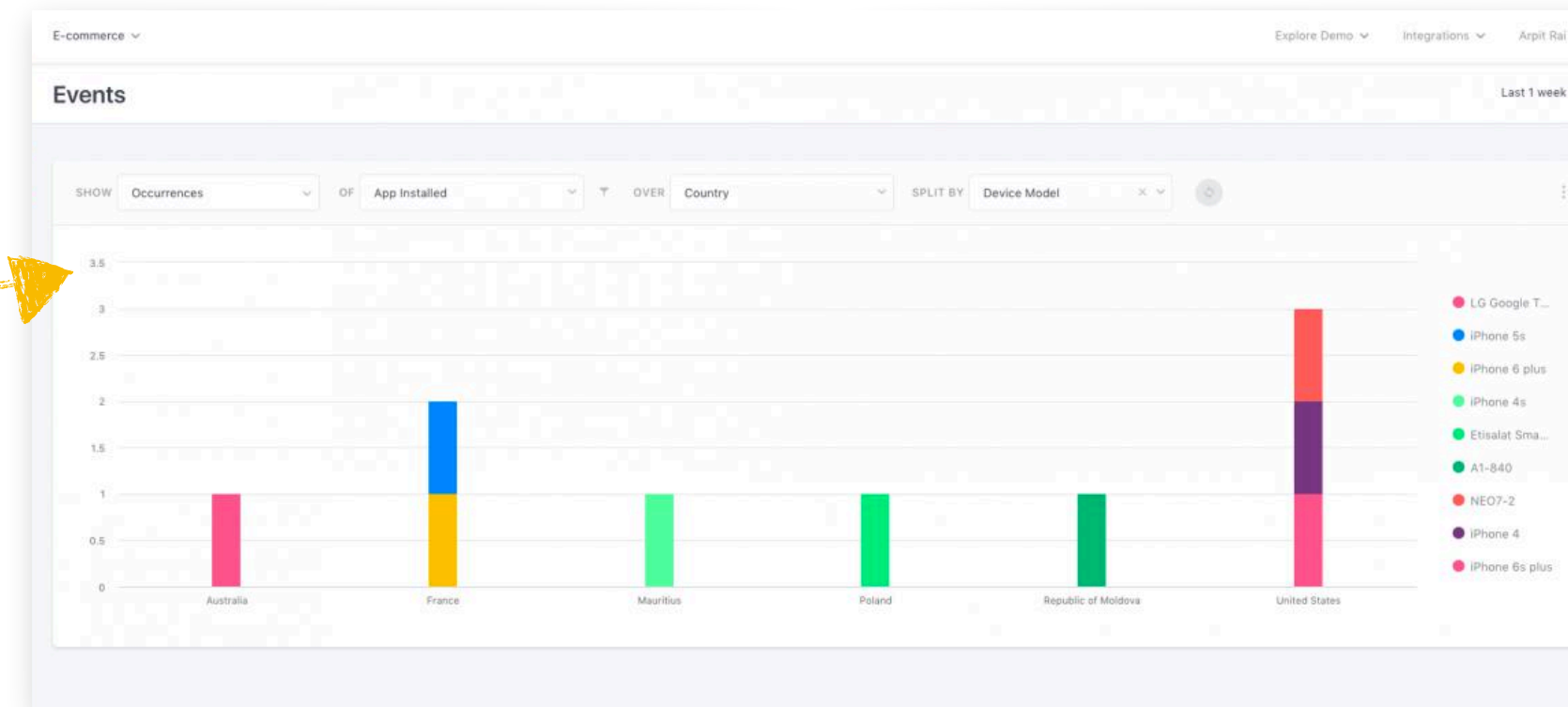
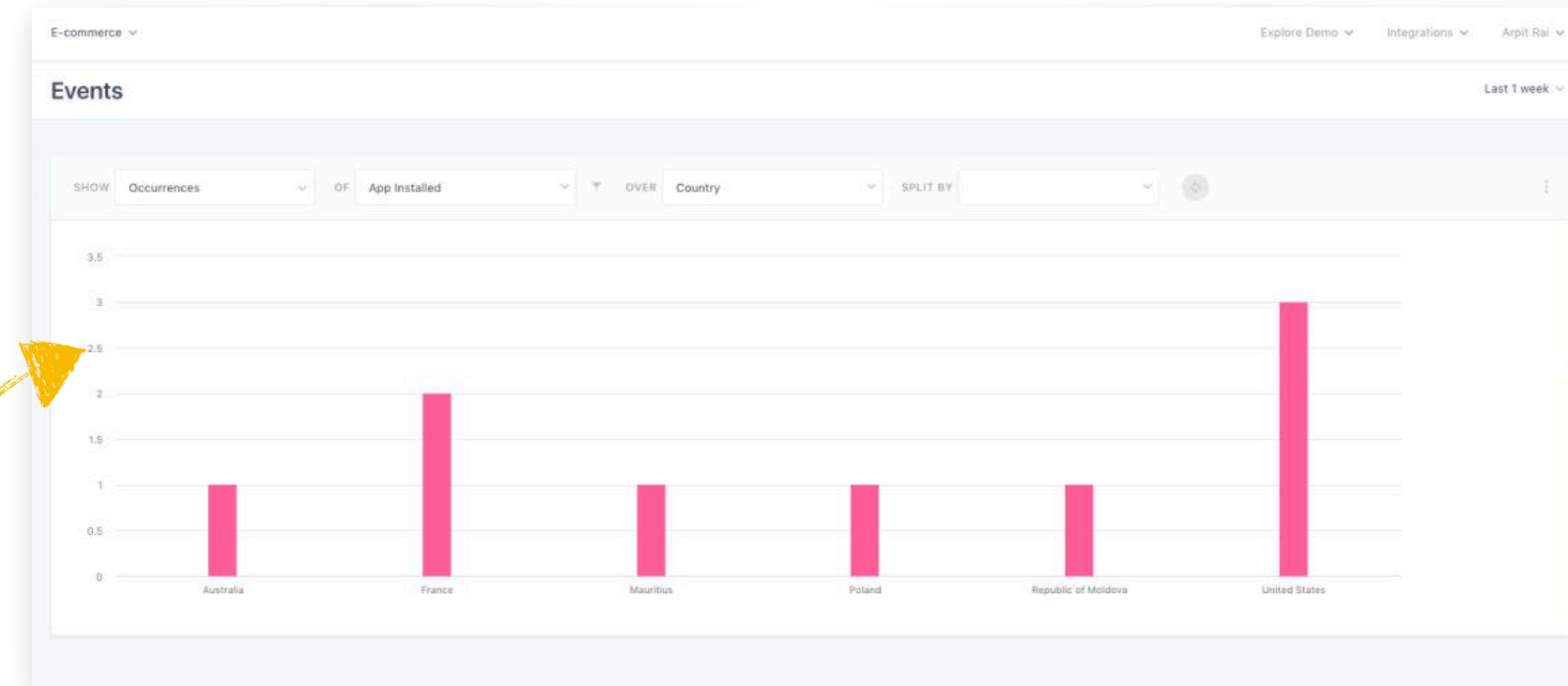
### Use-Cases

Breakdown of app installed by countries (analyzing events across single dimension)

Breakdown of account creation on the basis of countries and devices (analyzing events across two dimensions)

What are the top performing events weekly, monthly, daily etc

Distribution of 'app crash' occurrences across device types





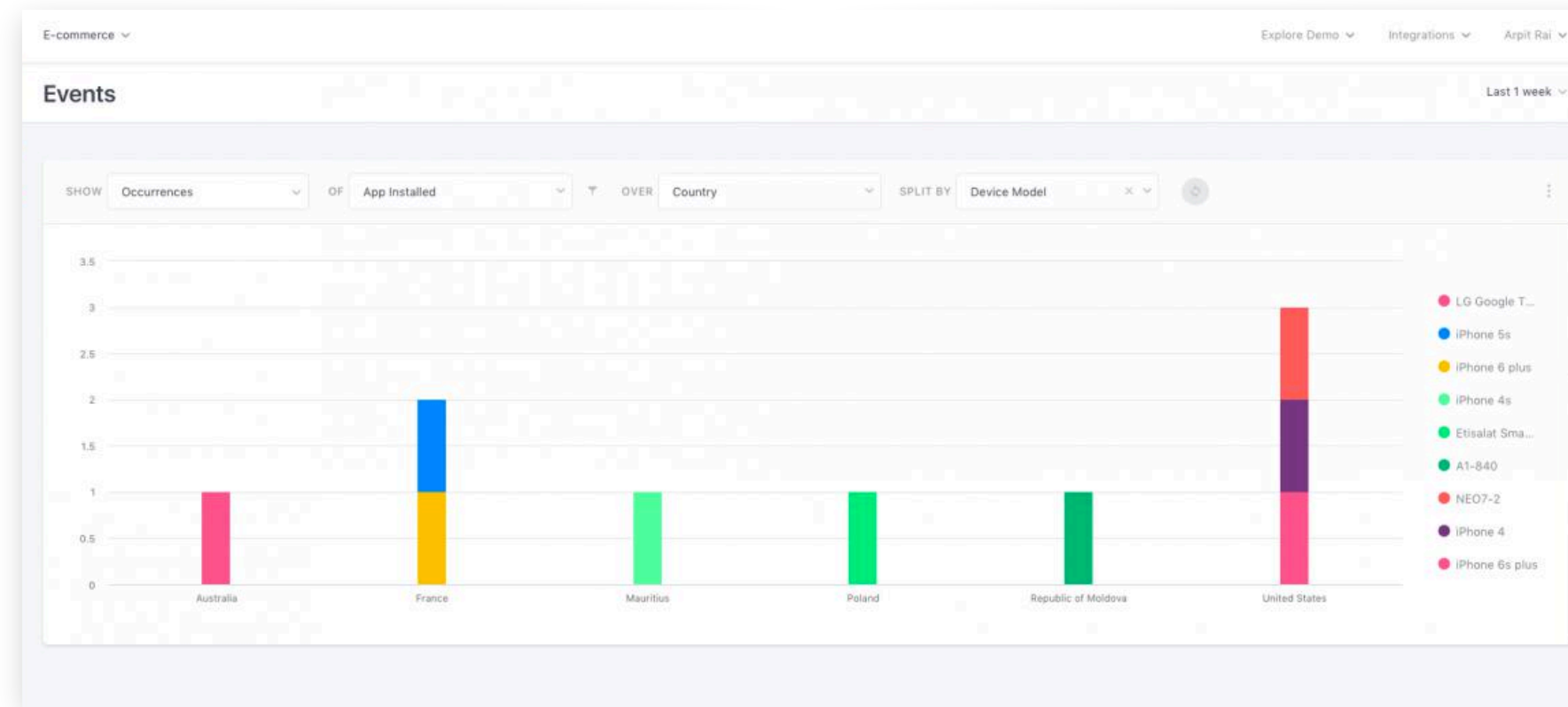
## Key Questions To Ask Your Vendor

### Can you analyze events across two dimensions?

If you go through the use-cases again you would observe a couple of things. In Use-Case #2 we are analyzing the same event that we did in Use-Case #1, but against two dimensions.

### Can you add filters to users while analyzing the trends?

Say you want to carry out an analysis for a particular segment of users who have subscribed to your newsletter. Now, can you 'analyze the breakdown of account creation over countries split by referral campaigns' only for this segment? See if your solution provides that.



## 3.2 Funnel Analytics

It is the retroactive analysis of the set of events arranged in a certain order. It essentially lets you visually track how users are dropping out along the way towards conversion, thereby giving you an idea of the bottlenecks that need to be fixed.

### Use-Cases

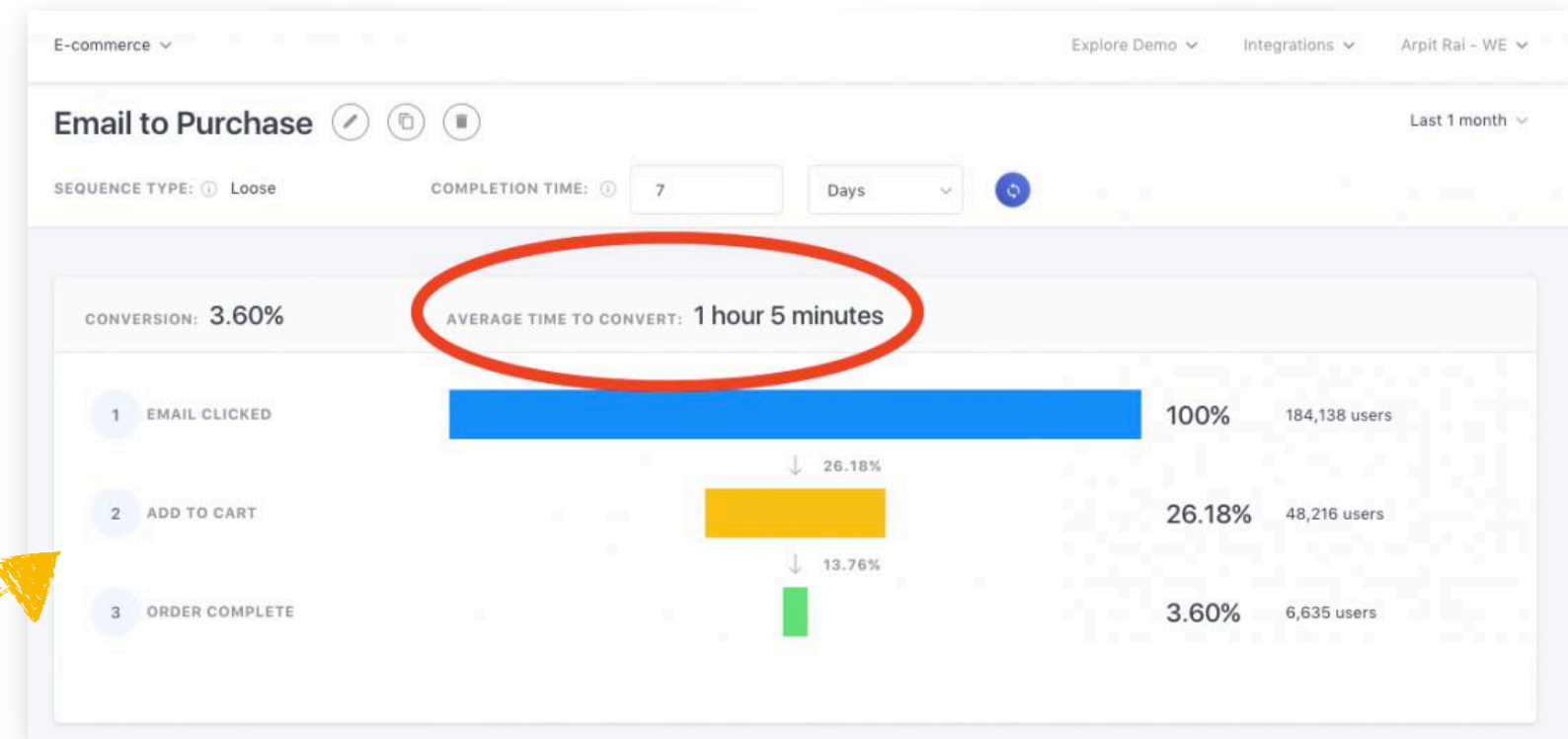
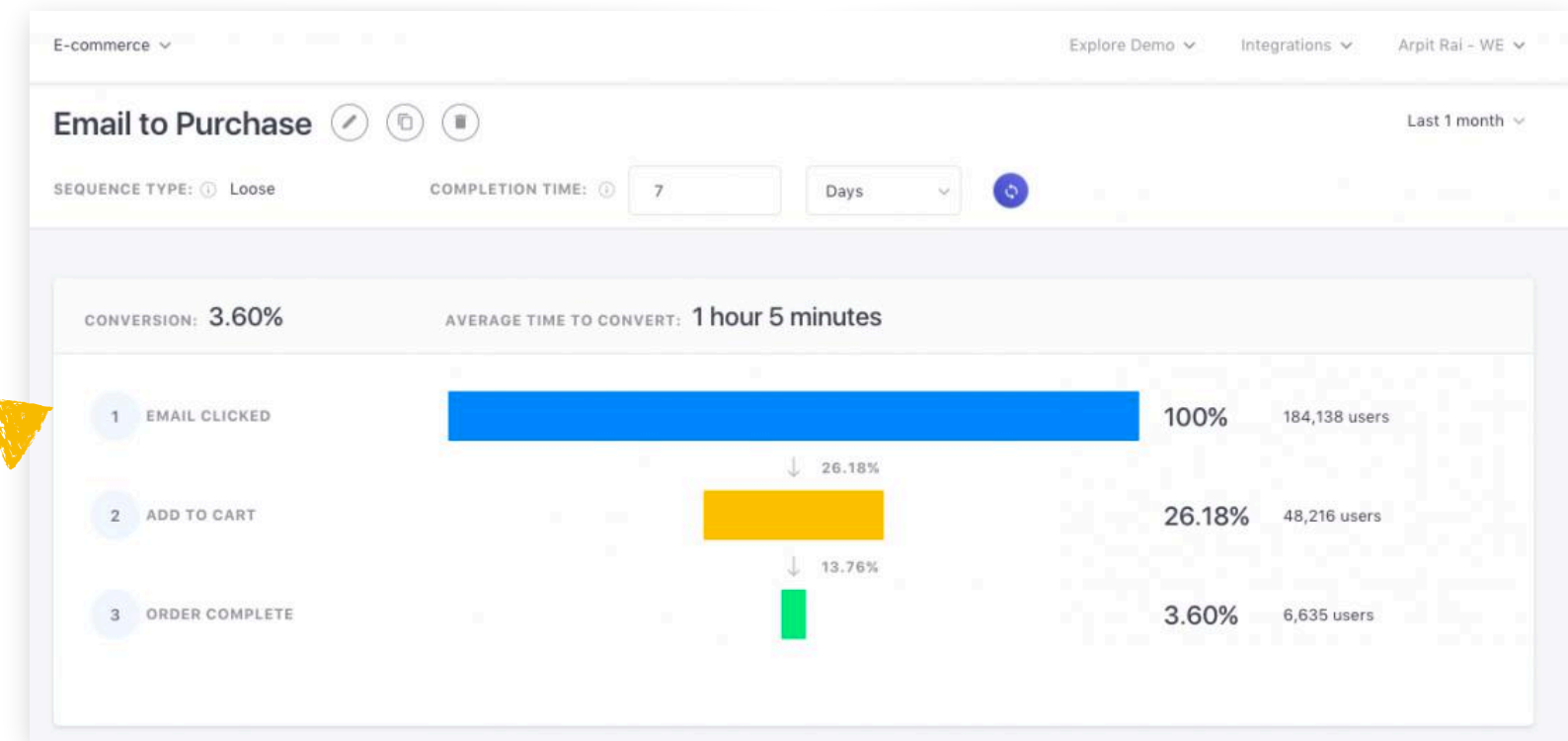
#### How to optimize the checkout flow?

Consider the following hypothetical funnel  
[Email Clicked](#)->[Add to cart](#)->[Order complete](#)

We are seeing that a significant chunk of users are dropping off at the 'Order Complete' stage clearly suggesting the problem area which needs optimization.

#### What is the average time taken by users to complete all the steps toward conversion?

Funnel analytics gives us the average conversion time. Say, you are in VOD business like Netflix and you wish to know the average time taken by users to watch video post install.



## Key Questions To Ask Your Vendor

### Do you provide side-by-side visual comparison of two funnels?

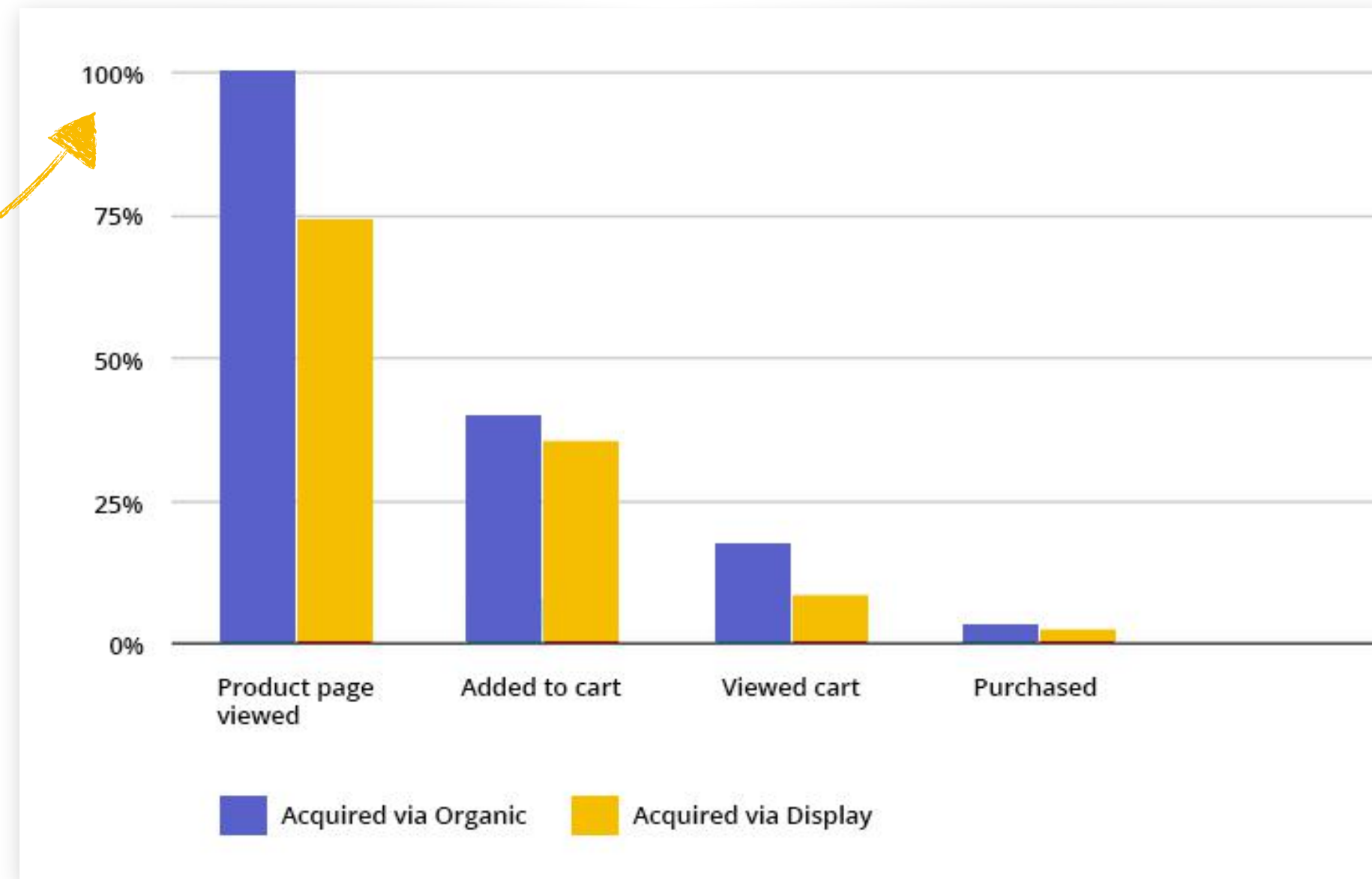
You would want to compare multiple segments against a common funnel. The side by side visualization of the two funnels gives an understanding of how the two segments are performing and where we need to put in some work.

### How do you account the users whose flow is bit out of order?

As in, instead of A->B->C->D (the defined funnel order), suppose the user traversed through A->B->C->A->D. The flow is not strictly linear according to the definition. Would he still be counted in the funnel?

### Do you show the median 'time to convert'?

'Average time to convert' is misleading. It is tampered by users who have very high or very less average time to convert.



## 3.3 Cohort Analysis

Cohort Analysis is the cornerstone of retention analytics. It helps us analyze the behavior of a certain group of users over time.

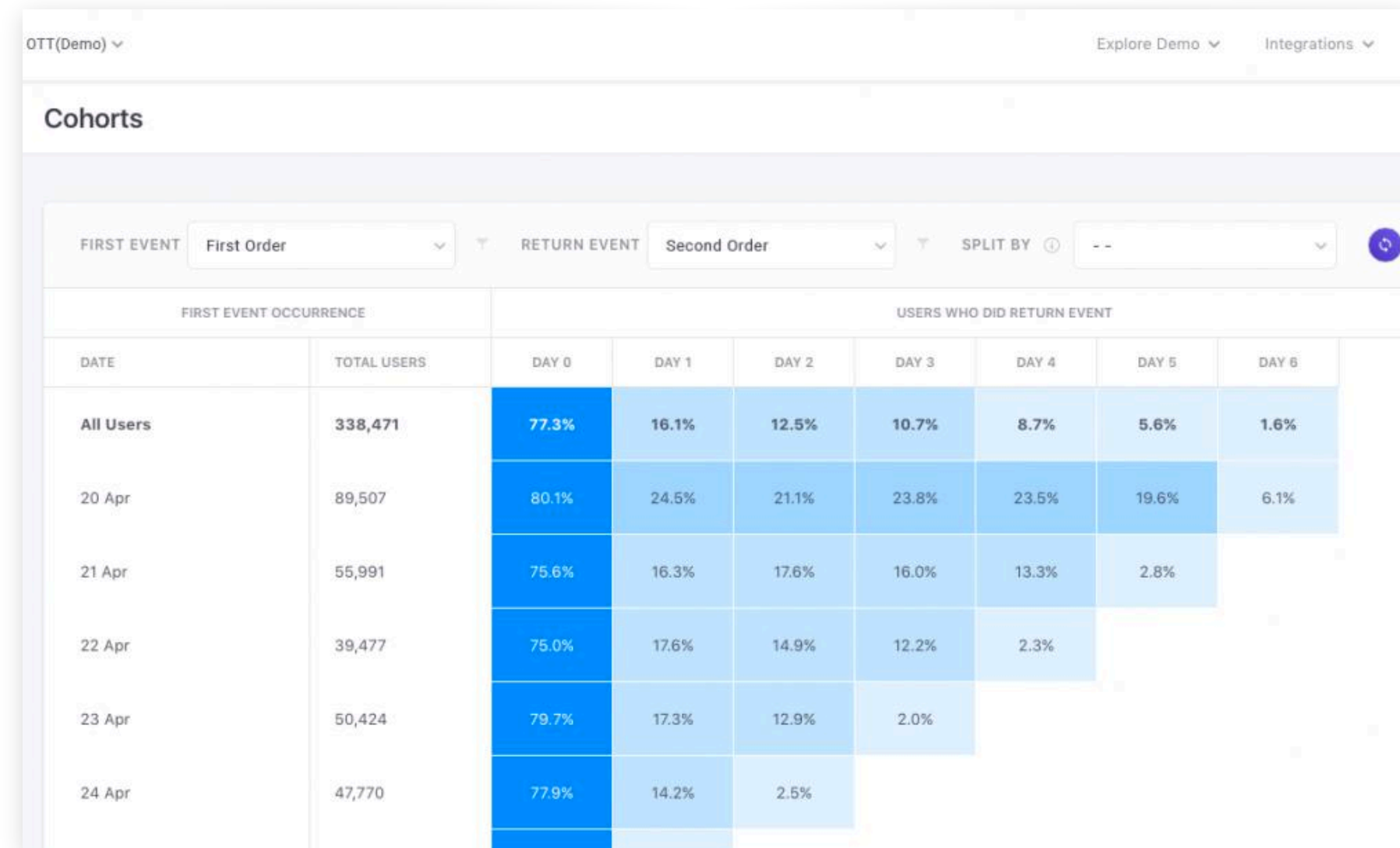
At its most basic level it tells you how well your users are sticking with your product over the span of, say, 30 days. The inferences you hear that X% of users uninstall the app after Y days is the product of Cohort Analysis. Follow the use-cases below to understand the nuances right.

### Use-Cases

Retention trend of users split by acquisition campaign

Retention pattern of new users from different OS

Analyze the Android cohort in the above to see the day wise trend of all the Android users



In the above cohort chart we are tracking 1-2nd reorder rate

# Key Questions To Ask Your Vendor

Can we add filter to the user while creating the chart?

Ability to add filters that we discussed in funnels is highly relevant here as well.

Can we analyze the retention pattern by different attributes?

For instance, in the adjacent chart, we are checking the purchase pattern of new users by country over a 7-day period and then finding out their distribution over countries.

Cohorts

Last 7

FIRST EVENT

Any Event

RETURN EVENT

Added to cart

SPLIT BY

Country

FIRST EVENT OCCURRENCE		USERS WHO DID RETURN EVENT					
COUNTRY	TOTAL USERS	DAY 0	DAY 1	DAY 2	DAY 3	DAY 4	DAY 5
United States	3,626	85.9%	28.4%	12.2%	2.5%	1.1%	1.0%
Russia	1,619	86.4%	28.9%	12.0%	2.5%	1.2%	0.9%
India	1,576	84.7%	27.1%	14.0%	2.9%	1.1%	1.4%
Algeria	1,573	84.0%	27.8%	12.1%	2.3%	0.9%	0.8%
South Africa	1,561	85.7%	28.3%	11.6%	2.6%	1.2%	1.0%

Read More

# Campaign Creation And Quality Assurance

In this chapter, we are going to look at the specifics of campaign creation and its quality assurance. You would be able to relate to this chapter if you are involved with marketing operations.





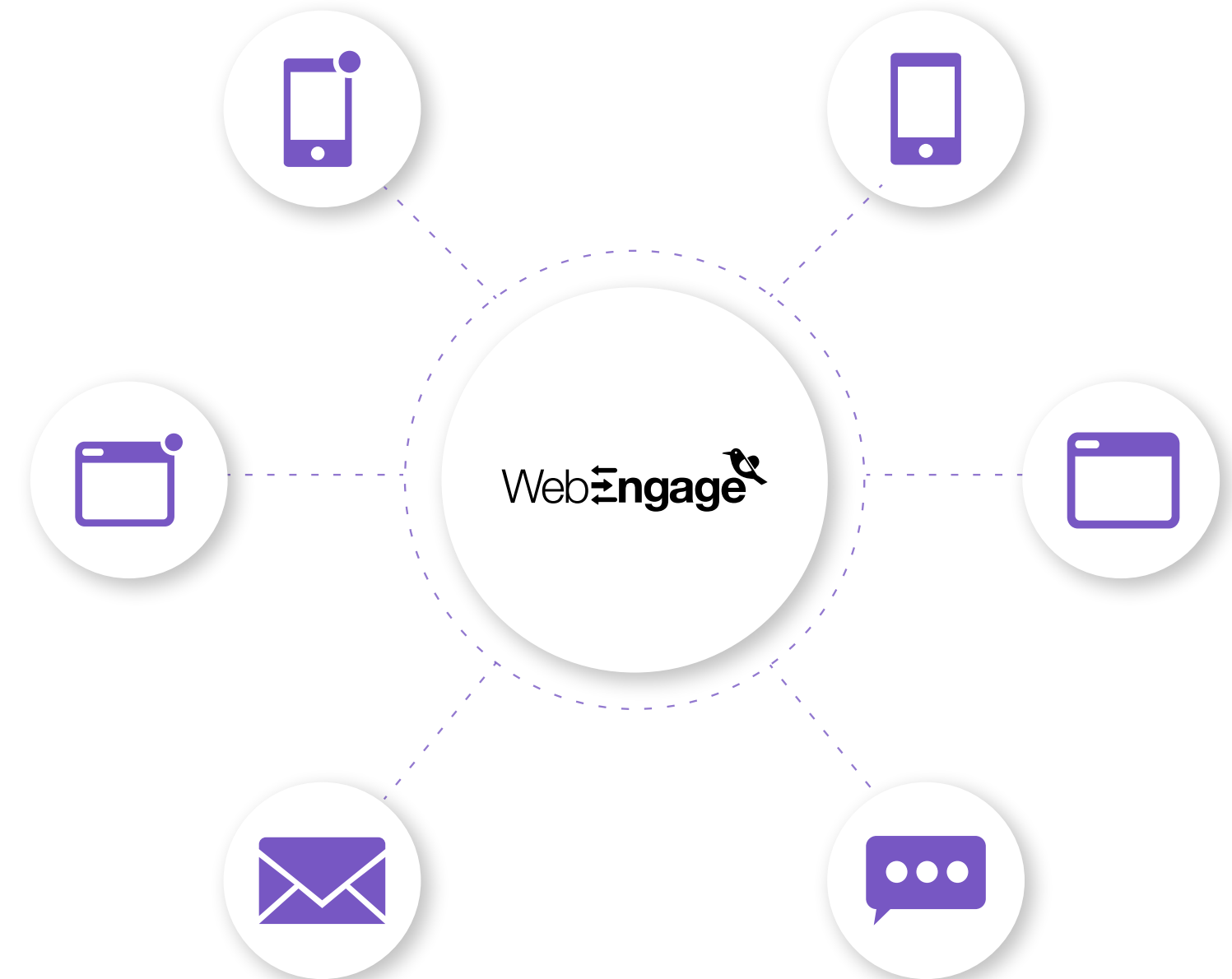
## 4.1 Channel

It is imperative that your marketing automation software provides you the channels through which you engage or market to your audience. For instance, if you are B2B product, it is strictly email. If you are totally mobile based then push and in-app are must, and if you are a media business then web-push is mandatory.

Besides, the need to engage the user in the omnichannel fashion means that you have the flexibility in terms of channels.

For instance, the WebEngage product provides 6 channels:

- Email • In-app • Mobile push • Web push
- SMS • Onsite messaging



## Key Questions to Ask Your Vendor

- **Do you allow same degree of personalization across all the channels?**
- **Can we combine campaigns across multiple channels to create a multiple channel experience**

## 4.2 Templating

You need ready-to-use templates of push notification, email, in-app and web messaging to instantly create your campaigns. Look out for them in your current solution. A large number of industry-specific templates will be the icing on the cake.

## Key Questions to Ask Your Vendor

### Can we create, edit and save templates for future needs?

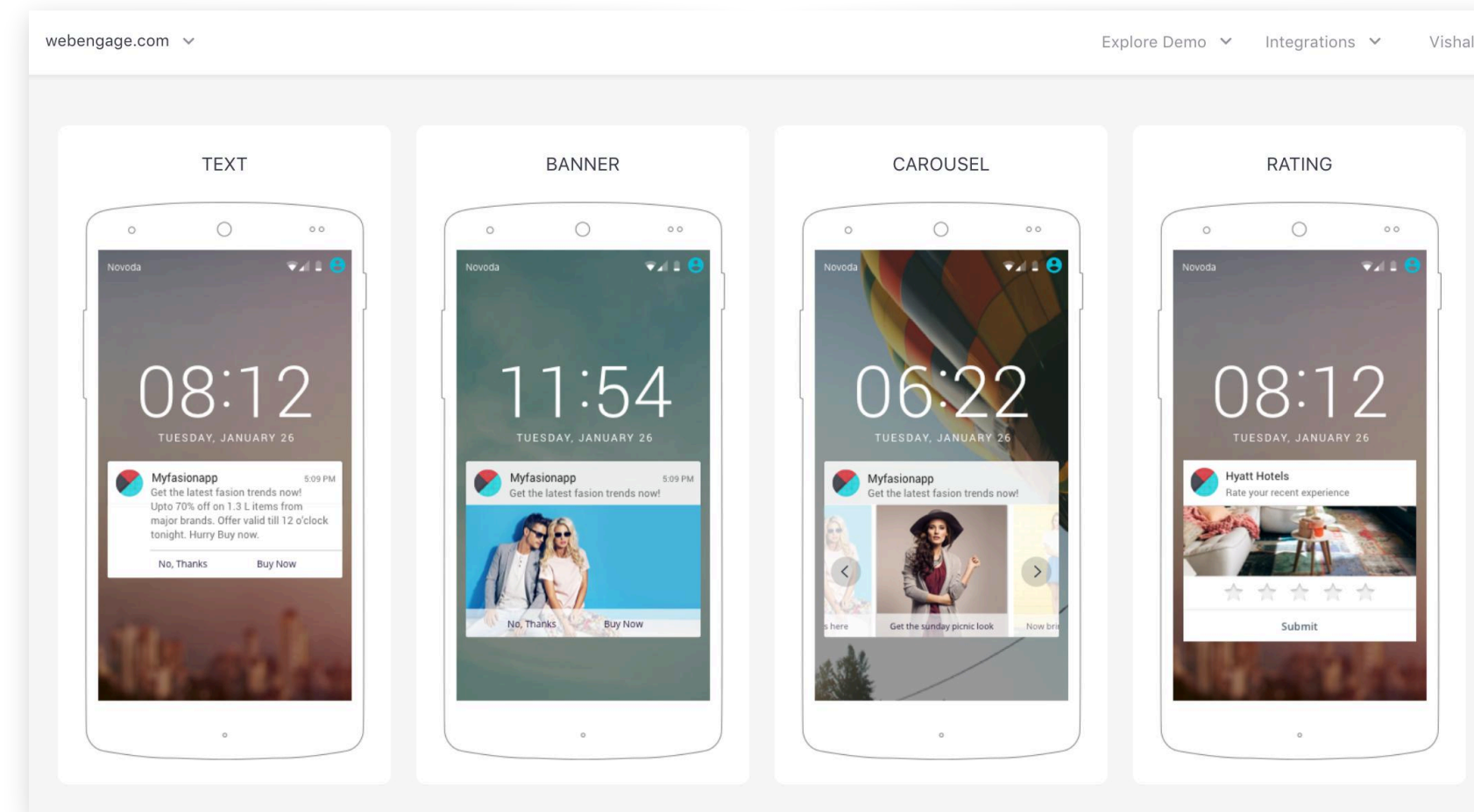
You need to ship things fast and the ability to manage templates on the dashboard is a strong plus.

### How efficiently can we add rich media to the content?

A right marketing automation solution should give you a simple way to add rich media to the message without relying on the dev team. Eg- Wordpress

### How compatible are the email templates with different email clients?

Make sure that the templates that are provided work seamlessly across all the email clients and not just optimized for Gmail.



## 4.3 Content Personalization

A good marketing automation software should enable you to effectively leverage any piece of information about the user. **Any data that you are tracking should effectively be available for use in a message.**



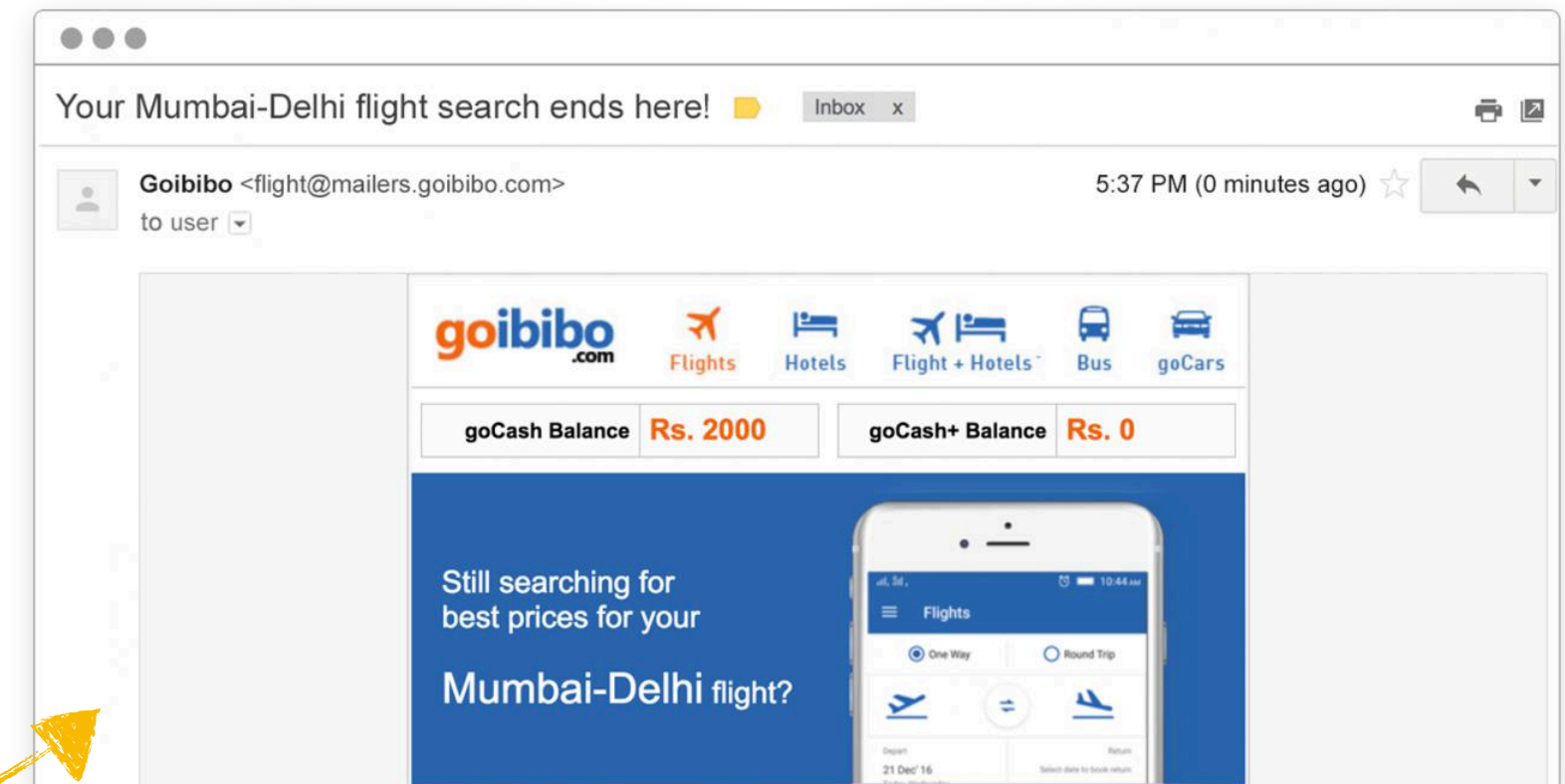
### Use-Cases

**Pop a notification with a discount voucher if the user abandons the checkout page**

This message from TAJ Hotels contains the offering on the SAME hotel that the user had abandoned a while ago.

**Send an email that leverages the search query of the user**

Goibibo sends a hyper-personalized email **based on the user's search history**. For instance - this email was sent to users who had searched for Mumbai-Delhi flight.



## 4.4 Automation Triggers

Automation means having the capability to activate a campaign as soon as the user satisfies a certain condition. The most popular automation use-case is probably 'welcome email', i.e. getting an email as soon as you subscribe to a newsletter.

### Use-Cases

#### Last event

If the user's last event was a purchase 6 months ago, run the reactivation campaign.

#### Have/have not done a custom event

This basically facilitates behavioral targeting. *At its core, the dynamic is simple - "if the user does this, do that"*.

#### Geofencing

Send a push notification when the user enters the proximity of your physical store.

#### Who should receive this Push Notification?

Send this message to:

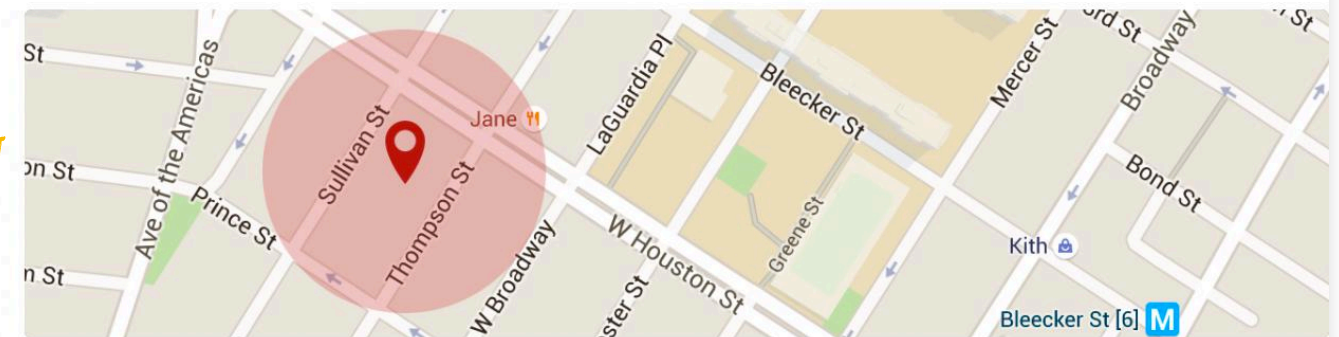
Segment *Premium Prospects* contains users:

- who have performed event '**app\_launch**'
- where '**event\_date**' is within '**last 7 days**'
- & who have performed event '**song\_download**'
- where '**song\_download\_count**' is greater than '**5**'

#### When to send this Push Notification?

- ☐ ASAP
- ☐ Later
- ☐ On Event
- ☒ Geo Fence

On Entering



Radius: 10 Kms Location: PlanetN, Thompson Street, New York, NY, United States



## Use-Cases

### Occasion

Send occasion-specific messages, like on birthday, new year, passing of warranty period of the purchased product etc.



User Attribute

Birth Date is within last 10 days

Reset

## Key Questions to ask Your Vendor

### Do you allow defining time gap between messages?

When everything is automated, it is likely that some campaigns get activated at the same time. They would, therefore, land on the user's device one after another making it look spammy.

### Do you allow setting frequency limit on recurring campaigns?

Suppose you are running a reminder campaign for users who do not renew their subscription. Now, you would need to stop the campaign after a certain number of times regardless of whether customer renews or not.

[Read More](#)

# Omni-Channel

Siloed engagement means running campaigns across multiple channels where sending rules of every campaign are independent of the other. This extends along the user lifecycle and naturally results in an inconsistent experience for users. For effective omni-channel engagement, you would need a tool to connect these siloed campaigns and ensure cohesion to achieve a common goal.





## 5.1 Omni-Channel Engagement Engine

I am alluding to something that is similar to WebEngage's 'Journey Designer'. For the uninitiated, it is a drag-and-drop builder that lets you link multiple campaigns across multiple channels. **It is like a Lego set wherein there is no limit to the ways in which you define the engagement with your users except your imagination.**

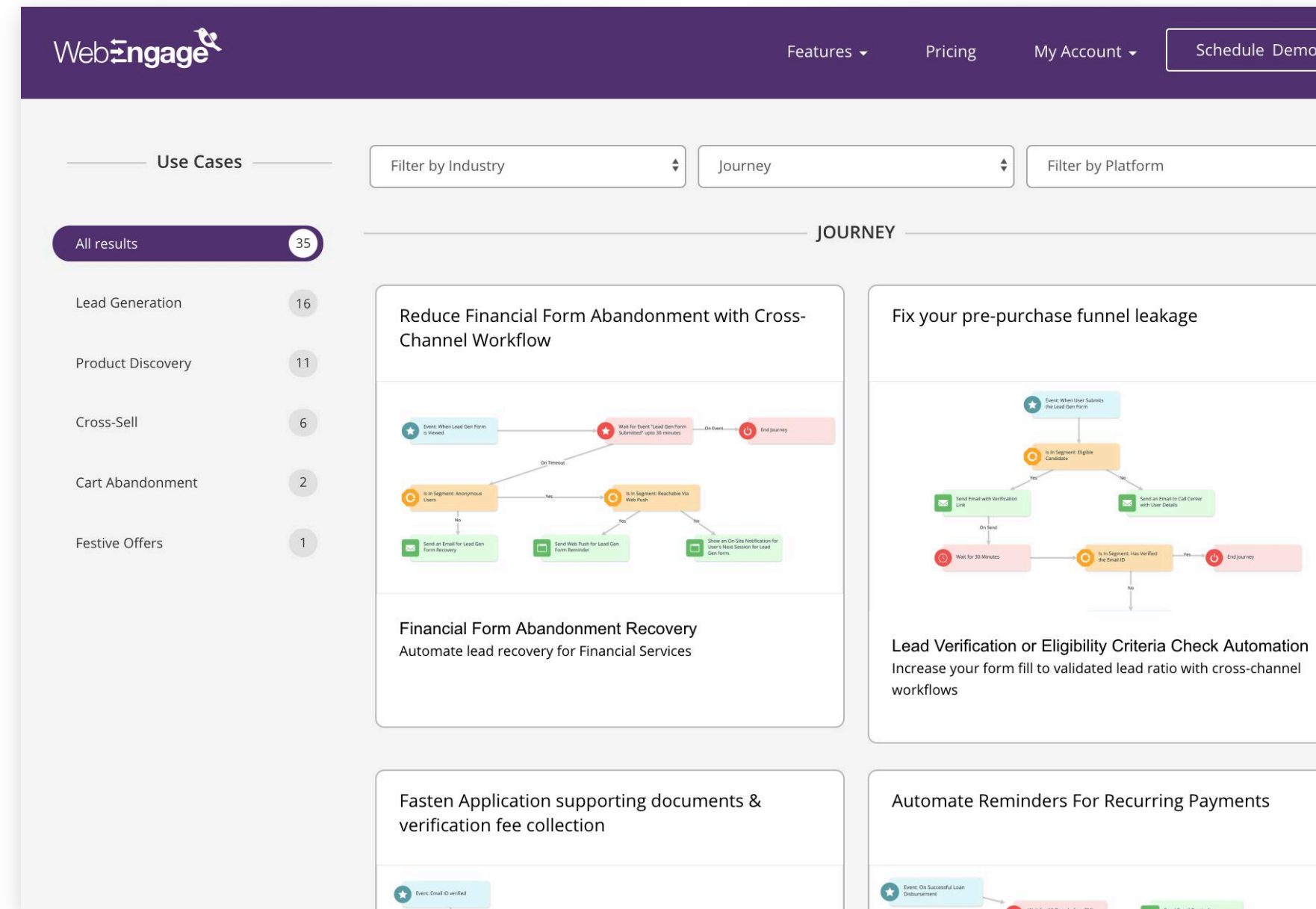
### Use-Cases

#### Journeys have infinite use-cases

As I said, it is like a Lego set. You think of your use-case and then try figuring out how you can solve it with a Journey.

Journey Designer is a remarkable tool to enable cross-channel engagement for your business. Its launch gave WebEngage a massive first-mover advantage, and leverage against other products.

If you are new to Journeys, check out this [Gallery](#). Here we have shortlisted some prominent omni-channel use-cases and explained how we can solve it via Journeys.



## Key Questions To Ask Your Vendor

### What are the automation triggers for the Journey?

Basically, the actions that would trigger a journey for the user. They are similar to 'Automation triggers' for campaigns that we discussed in [Campaigns](#).

### How many channels do you support?

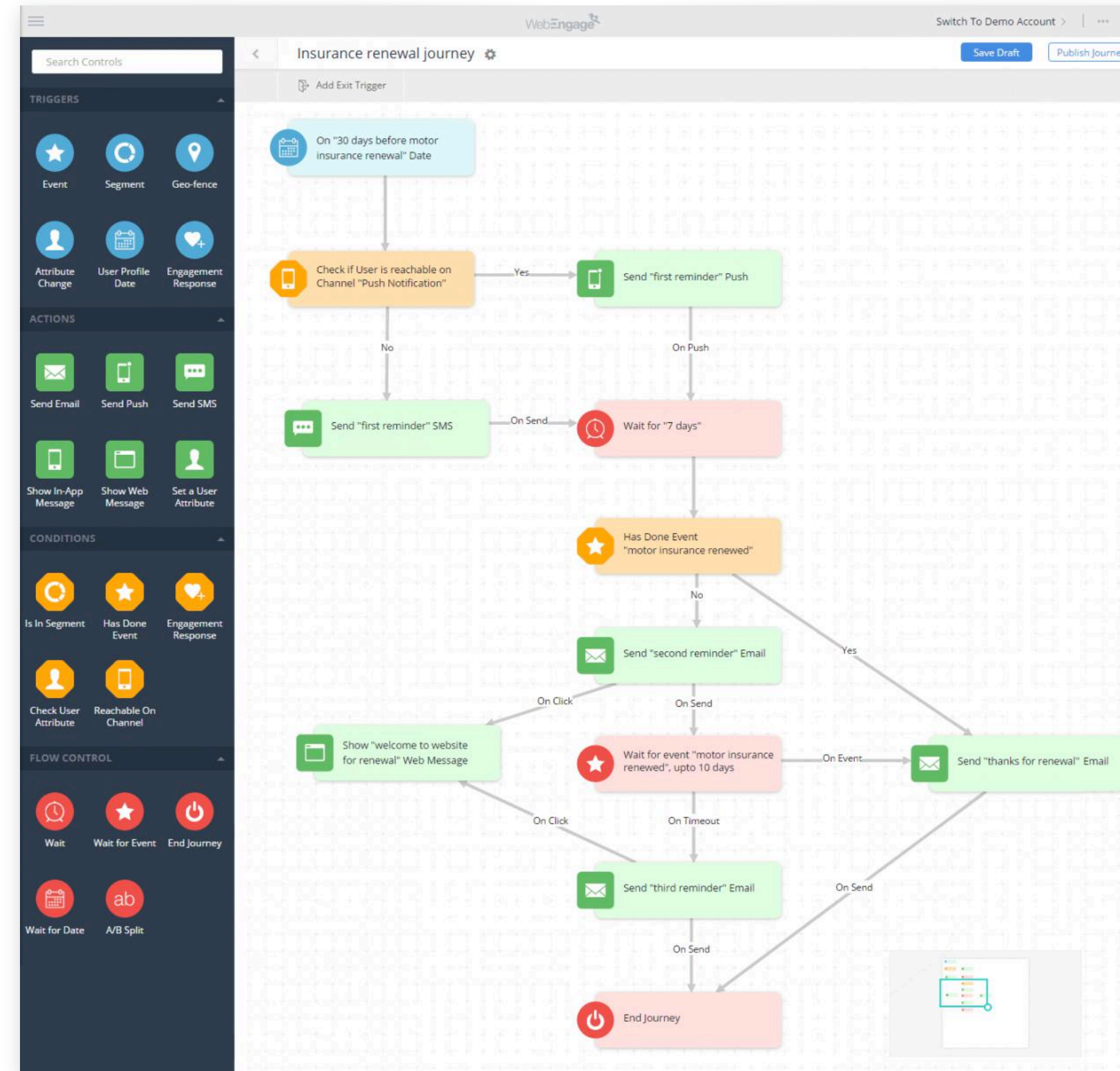
It makes a massive difference while building the workflows. WebEngage Journey supports 6 channels- [Web push](#), [mobile push](#), [onsite messaging](#), [email](#), [text](#) and [in-app](#).

### Can you fetch data from an external system via API in the Journey?

### Do you allow tracking conversions for the Journey?

That means you should be able to create test/control group and accordingly be able to measure and compare the performance of each one.

[Read More](#)



# Testing and Conversion Tracking

This chapter is the combination of two critical capabilities of a marketing automation platform:

- Testing- The degree to which your marketing automation platform allows you to do hypothesis testing.
- Conversion tracking- How much of the conversion can be directly attributed to your recent campaign? What was the conversion rate for users who weren't treated with any campaign at all? What is the conversion rate of each variant? Conversion tracking answers these pertinent questions.



## 6.1 Conversion Tracking & Control Group

By setting up a control group (CG) you would be able to measure the conversion of the users who were treated with your campaign against the users who weren't. This would essentially let you know the true impact of your campaign.

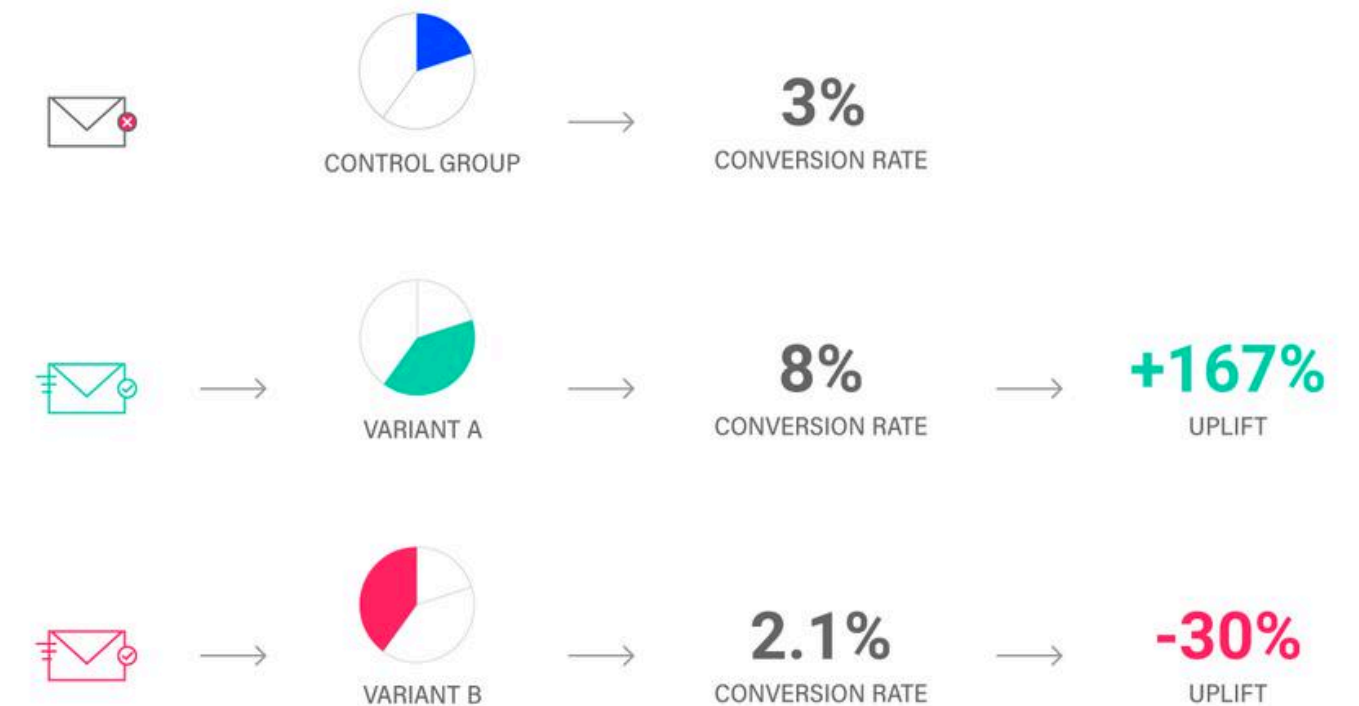
### Use-Cases

#### What is the conversion uplift provided by your campaign

The difference in the conversion of the control group and campaign is the uplift provided by it.

#### Identify the best variation

Doing conversion tracking for multiple variants tells you the winning variation and also the one/s which is performing below average.



## 6.2 A/B Testing

When the list size runs in millions than it is important to have advanced capability to run tests. Again A/B testing is in vogue. It’s everywhere. Let’s look at some of the caveats that one should be wary of while analyzing the variant testing capability of the platform.

### Key Questions To Ask Your Vendor

**What is the maximum number of variants that we can create?**


**If the email campaign has more than one link do you provide the stats for each of them?**

Aggregate CTR only gives the incomplete information. A solid email solution should be able to give you the heat-map view of the CTR.

**How does the reporting UX look like?**

Check for the reporting UX, as in how the overall campaign stats are displayed. It should be intuitive so that there is the least friction in comparing the metrics of all the variants.

Read More

All Triggered Journey Drafts								
Search by campaign name or tags								
Campaign Name	Type	Status	Start Date-End Date	Unique Impressions	Unique Closes	Unique Clicks	Unique Conversions	
 New Category Launch ^	Triggered	DRAFT	5 May - 24 May '18	265,451	37.96%	11.87%	19.48%	
----- Variation A (57%)				151307	33.16%	9.51%	15.78%	
----- Variation B (43%)				114144	44.63%	15.31%	24,04%	



# Ain't No Marketing Automation Perfect, So What To Do?





## Conclusion

None of the vendors in the market today can honestly check all the pointers mentioned in this guide. It's just not possible. Marketing Automation space doesn't have a Google or Salesforce.

At the broader level we may assume that we would need all the things mentioned here. In reality, we don't. Or at least not to the same degree that somebody else would. For instance, a popular VOD app which is live streaming a Football match would need a solid ability to create analytics dashboard that gives them reporting on day/hourly basis. A Fintech product wouldn't need analytics as much as the ability to cohesively engage their users across all channels. A new product with a small team, beyond everything, would need better access to training and support.

There is no one-size-fits-all approach that is in play. Focus on your problems. Ensure that the solution that you shortlist rightly address your use-cases. This ebook is essentially aimed to help you think in the right direction in terms of the marketing automation capabilities.

Hope it achieved what it set out to by some degree.



**38,000+** online businesses use WebEngage everyday to improve their user engagement and retention.

**Talk To Us Today**



WebEngage is a multi-channel user engagement platform which automates communication across users' lifecycle. It enables you to connect with them via. Web Messages (notification, survey and feedback), In-App Messages, Push Notifications, Emails and Text Messages.

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