

Insights: Marketing Cloud: Email Reporting Basics

Accelerator Webinar

Presenter Name, Title of Presenter email@salesforce.com. @twitterhandle

 This webinar will begin at 1:05 pm EDT

CUSTOMER
SUCCESS



salesforce

Premier Plan Customers
Don't forget to request
your 1:1 session
follow-up in the survey
after this call.

Welcome to this Accelerator Webinar!

In this session, we'll give you an overview of how to access basic reports for email, to get started using Marketing Cloud, so you can get the most out of your Salesforce investment.



Thank You for Being a Salesforce Customer





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Agenda

Accelerator Webinar

- Accelerators
Overview. Reach success faster with targeted engagements.
- What We'll Cover, Key Steps, and Timelines
Discuss the scope of this Accelerator Webinar.
- <Engagement-Specific Content>
<Description here>.
- <Engagement-Specific Content>
<Description here>.
- <Engagement-Specific Content>
<Description here>.
- Demo
<Description here>.

1:1 Follow Up (upon request)

- Review Common Use Cases
<Engagement-specific description>
- Hands-on Activity
<Engagement-specific description>
- Recommendations
Learn next steps.
- Product Roadmap
See what's coming next.

Agenda

Accelerator Webinar

- **Overview**
What challenge are we solving for you?
- **Reporting in Marketing Cloud**
Learn the various ways data is reported in Marketing Cloud.
- **In-App Analytics – Email Real-Time Tracking**
Learn about email tracking overview and click activity.
- **Standard Email Reporting**
Learn what standard reports are available, how to find them, create them, schedule them, and share them.
- **Marketing Cloud Mobile App**
Learn how to run your marketing from your phone.
- **Next Steps & Resources**
Learn about other resources and Accelerators to continue your progress.

Overview

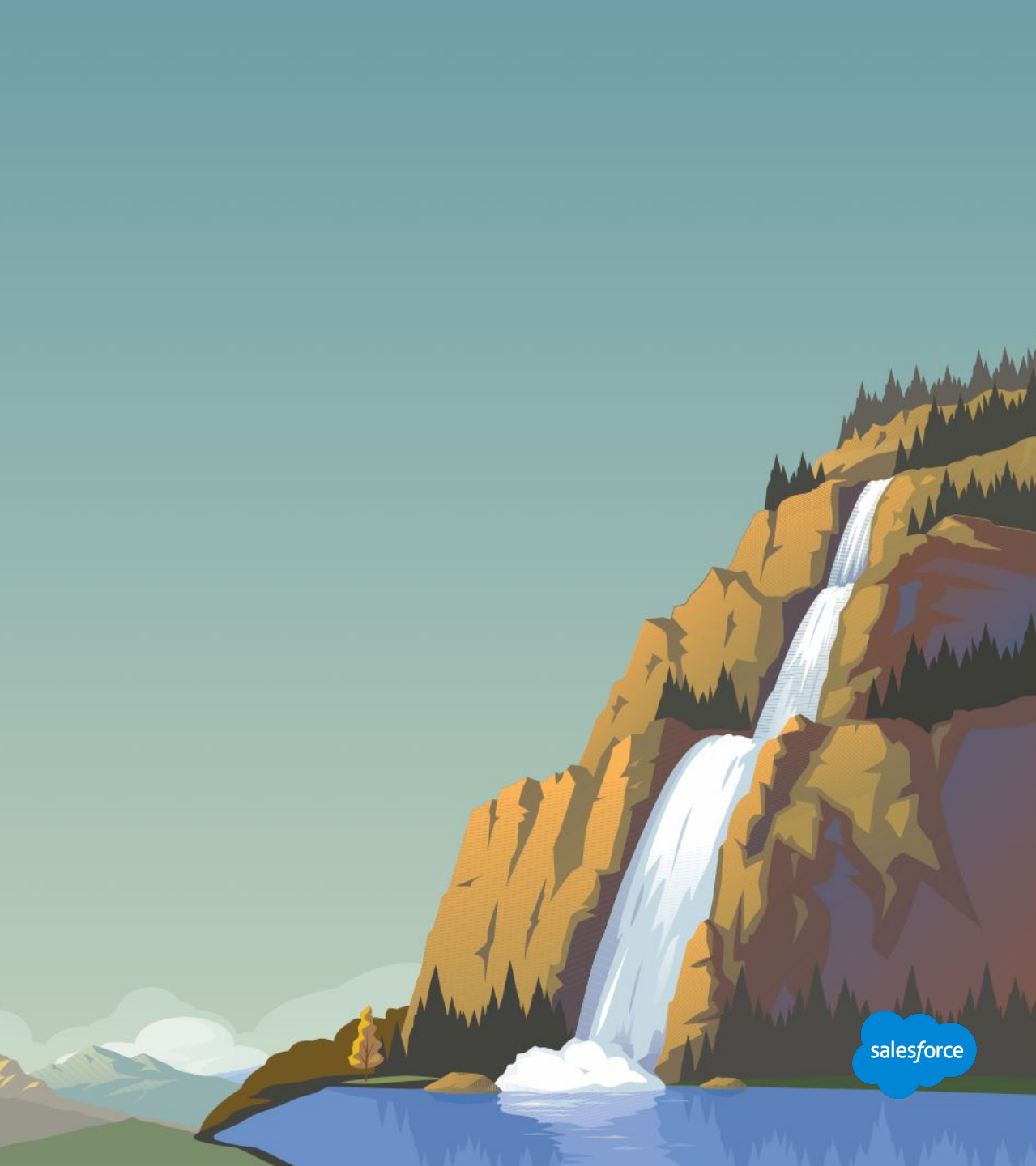
What challenge are we solving for you?

What you can Expect from this Accelerator:

- Learn about tracking and reporting for email in Marketing Cloud.
- Increase the visibility into your marketing metrics.
- Learn best practices and walk through running and automating reports.
- Provide recommendations and resources for future Accelerators.



Reporting in Marketing Cloud



DIRECTIONS HOW TO USE THIS SECTION

Many slides in this delivery are simply the outline for discussion.

This Accelerator will walk customers through the basics of reporting for email.

You will be jumping back and forth between slides and demos in this accelerator.

When you see the yellow **“Walk with Me”** banner, we suggest you demo the capabilities outlined directly in your account and encourage customers to follow along in their accounts.

High Performing Marketers Use Analytics Extensively

Determine subscriber engagement, retention, ROI or efficiency

Sends: How many emails are sent, when, by whom, etc.

Engagement: List-based data and performance.

Demographics: Insights about your subscribers.

Performance: Bounces, CTR, etc.

Tracking: A/B testing, landing page performance.

Compliance: Number of sends, by user, spam complaints, list size over time.

High-performing vs.
under-performing teams:



More likely to be extensively using
Marketing Analytics

Source: State of Marketing Report 2017

Marketing Cloud Analytics and Reporting

What's Available?

In-App Analytics

Near real-time tracking metrics, available as the marketer is working in Marketing Cloud products like Mobile Push, Email, Journey Builder, etc.

Campaign insights and message-level detail that may inspire an immediate reaction or change.

Available to all marketers.

Standard Reports

Understand channel performance with over 40 reports across journeys, email, mobile, social, and ads.

Basic reports that provide both high and low level of detail for products. Data tables + graphical output.

Available to all marketers.

Discover

Premium analytics solution for email campaign reporting with 80+ measures and attributes. Drag & drop interface allows marketer to define own report views.

Gives marketers ability to customize the views without involving queries or code.

Available in Corporate & Enterprise Packages

Web & Mobile Analytics

Basic real-time website or mobile app metrics with a degree of customer segmentation (create sendable DE).

Custom Reports

Report developed by Services to customer specifications.

Expands beyond standard reporting to build business-specific reports to measure what matters to you most.

Extracts

Raw data output as .csv/tab delim/XML (no graphical output). Standard & custom available for Email & Mobile Push.

Ideal for marketers who want to use Marketing Cloud data in another (analytics) system.

Marketing Command Center

High-level metrics and trends in real-time for Social Studio (Social Command Center); expanding to other Marketing Cloud products like Email and Journeys.

Large scale display; events, Executive Briefing Centers, corporate lobby or marketing operations floor.

In-App Analytics Email Real-time Tracking



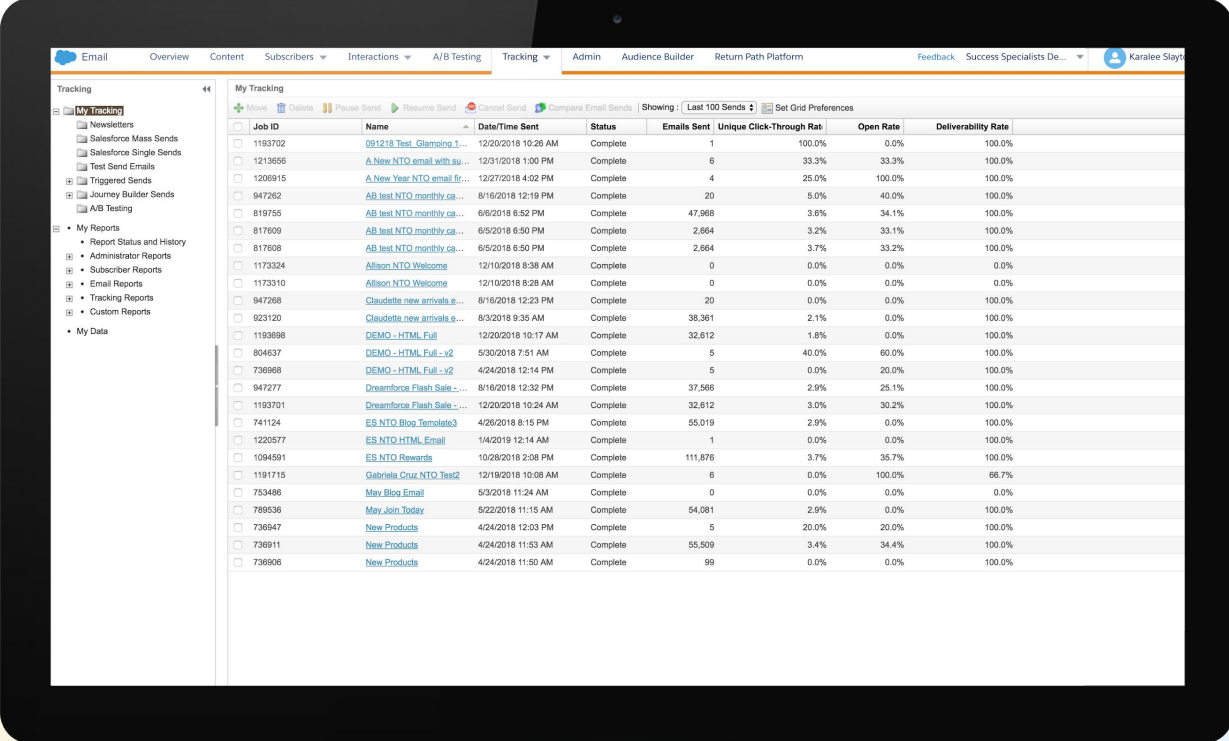
In-app Analytics

Tracking Overview

Near real-time tracking metrics, available as the marketer is working in Marketing Cloud products like Mobile Push, Email, Journey Builder, etc.

Campaign insights and message-level detail that may inspire an immediate reaction or change.

Available to all marketers.



Job ID	Name	Date/Time Sent	Status	Emails Sent	Unique Click-Through Rat	Open Rate	Deliverability Rate
1193702	091218_Test_Glamorg.1...	12/20/2018 10:26 AM	Complete	1	100.0%	0.0%	100.0%
1213656	A New NTO_email_with_bu...	12/31/2018 1:00 PM	Complete	6	33.3%	33.3%	100.0%
1206915	A New Year NTO_email_fr...	12/27/2018 4:02 PM	Complete	4	25.0%	100.0%	100.0%
947262	AB_test_NTO_monthly_ca...	8/16/2018 12:19 PM	Complete	20	5.0%	40.0%	100.0%
819755	AB_test_NTO_monthly_ca...	6/6/2018 6:52 PM	Complete	47,968	3.6%	34.1%	100.0%
817609	AB_test_NTO_monthly_ca...	6/5/2018 6:50 PM	Complete	2,664	3.2%	33.1%	100.0%
817608	AB_test_NTO_monthly_ca...	6/5/2018 6:50 PM	Complete	2,664	3.7%	33.2%	100.0%
1173324	Allison NTO Welcome	12/10/2018 8:38 AM	Complete	0	0.0%	0.0%	0.0%
1173310	Allison NTO Welcome	12/10/2018 8:28 AM	Complete	0	0.0%	0.0%	0.0%
947268	Claudette new arrivals e...	8/16/2018 12:23 PM	Complete	20	0.0%	0.0%	100.0%
923120	Claudette new arrivals e...	8/3/2018 9:35 AM	Complete	38,361	2.1%	0.0%	100.0%
1193698	DEMO - HTML Full	12/20/2018 10:17 AM	Complete	32,612	1.8%	0.0%	100.0%
804637	DEMO - HTML Full - v2	5/30/2018 7:51 AM	Complete	5	40.0%	60.0%	100.0%
739668	DEMO - HTML Full - v2	4/24/2018 12:14 PM	Complete	5	0.0%	20.0%	100.0%
947277	Dreamforce Flash Sale -...	8/16/2018 12:32 PM	Complete	37,566	2.9%	25.1%	100.0%
1193701	Dreamforce Flash Sale -...	12/20/2018 10:24 AM	Complete	32,612	3.0%	30.2%	100.0%
741124	ES NTO Blog Template3	4/26/2018 8:15 PM	Complete	55,019	2.9%	0.0%	100.0%
1220577	ES NTO HTML Email	1/4/2019 12:14 AM	Complete	1	0.0%	0.0%	100.0%
1094591	ES NTO Rewards	10/28/2018 2:08 PM	Complete	111,676	3.7%	35.7%	100.0%
1191715	Gabriela Cruz NTO Test2	12/19/2018 10:08 AM	Complete	6	0.0%	100.0%	66.7%
753486	May Blog Email	5/3/2018 11:24 AM	Complete	0	0.0%	0.0%	0.0%
789536	May Join Today	5/22/2018 11:15 AM	Complete	54,081	2.9%	0.0%	100.0%
736947	New Products	4/24/2018 12:03 PM	Complete	5	20.0%	20.0%	100.0%
736911	New Products	4/24/2018 11:53 AM	Complete	55,509	3.4%	34.4%	100.0%
736906	New Products	4/24/2018 11:50 AM	Complete	99	0.0%	0.0%	100.0%

Demo: Email Tracking

Monitor all email sends and metrics in one convenient dashboard

At a glance overview and status of all emails sent, sorted by latest send.

Metrics include:

- Status
- Emails sent and delivered
- Unique Click through rate
- Open rate
- Undeliverables and bounces
- Deliverability rate
- Unsubscribes

Job ID	Name	Date/Time Sent	Status	Emails Sent	Unique Click-Through Rate	Open Rate	Deliverability Rate
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Demo: My Tracking Click Activity Tab

Click of a specific email send

Link View

- **Link:** Every link in the email send.
- **Total Clicks:** Number of clicks per link based on the other links.
- **Unique Clicks:** Number of clicks per link based on the other links.
- **CTR:** Overall percentage of clicks per link.

Email Overlay View

- Heat map shows percentage of subscribers that clicked each link.

The screenshot shows the Salesforce Marketing Cloud interface for tracking click activity. The main content area displays a table with the following data:

Link	Total	Unique	Net CTRs
http://	632	632	1.2%
NTQ Website	638	610	1.1%
Coupon - Welcome No Click	576	549	1.0%
Unsubscribe	94	94	0.2%
Update Profile	84	84	0.2%
View Privacy Policy	84	84	0.2%
https://pages.exacttarget.com/PoweredByExactTarget?etrid=8209138&etmm=Salesforce Marketing Cloud&C...	82	82	0.2%
View as a Web Page	76	76	0.1%
Manage Subscriptions	75	75	0.1%
NTQ Website - Banner Ad	74	74	0.1%
http://	43	43	0.1%

In-App Analytics

Tips

- Keep organized by creating folders for different kinds of sends. Such as Test Sends, Triggered sends or A/B Testing sends.
- Tracking data stays in your account as long as you have your account.
- An email is only deemed “Delivered” when there isn’t a bounce receipt.
- If you use HTML Paste when creating emails/templates, you will be prompted to add the tracking pixel code.
- Opens are tracked using a tracking pixel in your emails. If a user has images turned off, it will not be considered “opened.” This could cause clicks to be higher than opens.

Standard Email Reporting



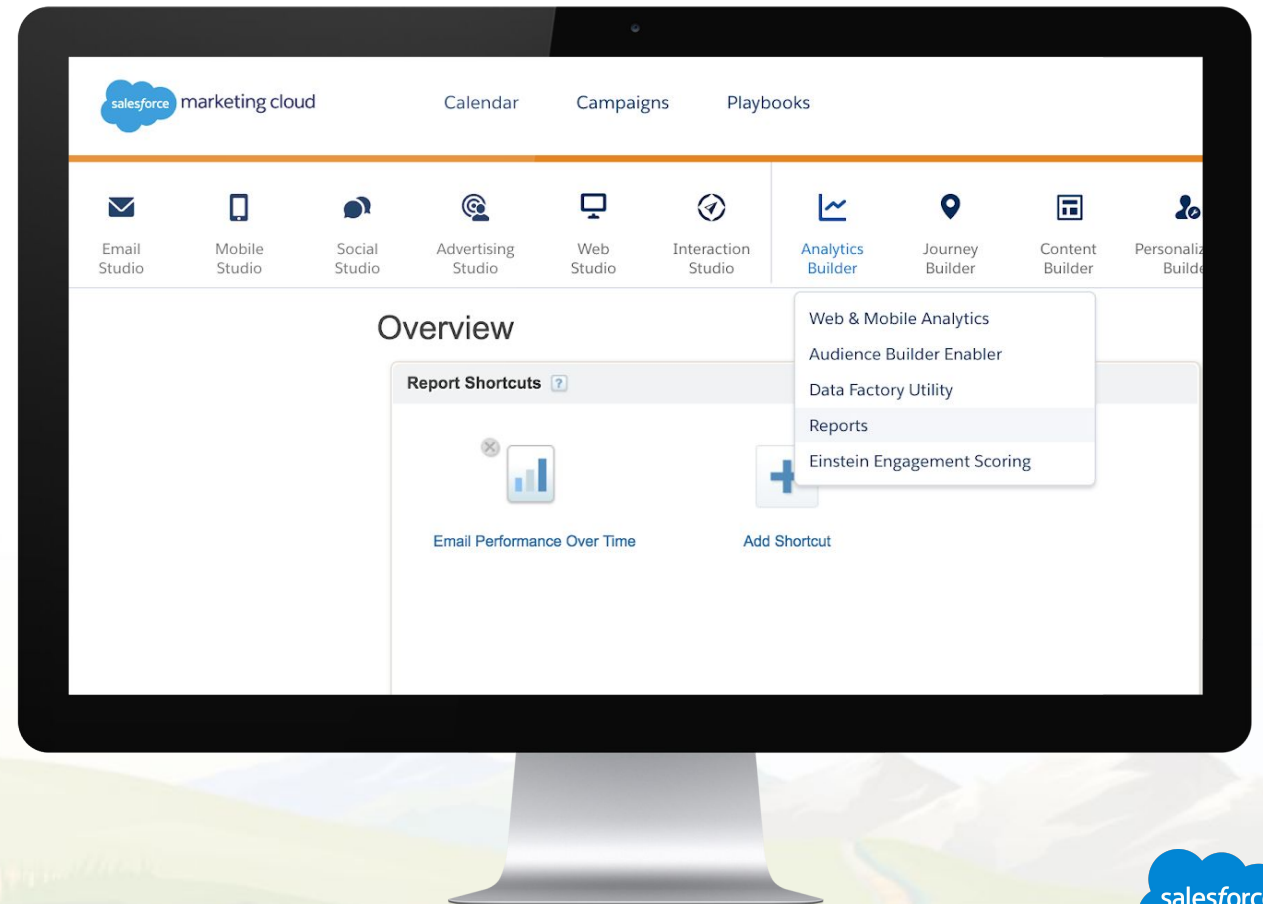
Analytics Builder - Reports

Gain deep insights into the behaviors and interests of your contacts across channels

Use these insights to set marketing goals and refine customer journeys.

With Analytics Builder, you can:

- Measure engagement and performance of your email campaigns.
- Use Collect to view contact behaviors such as clicks and purchases.
- Create targeted audiences based on predictive behavior models.
- Track each interaction in a journey and measure progress towards your target in a single interface within Journey Builder.
- With Discover Configure dashboard views to visualize data in flexible tables, charts, and graphs.



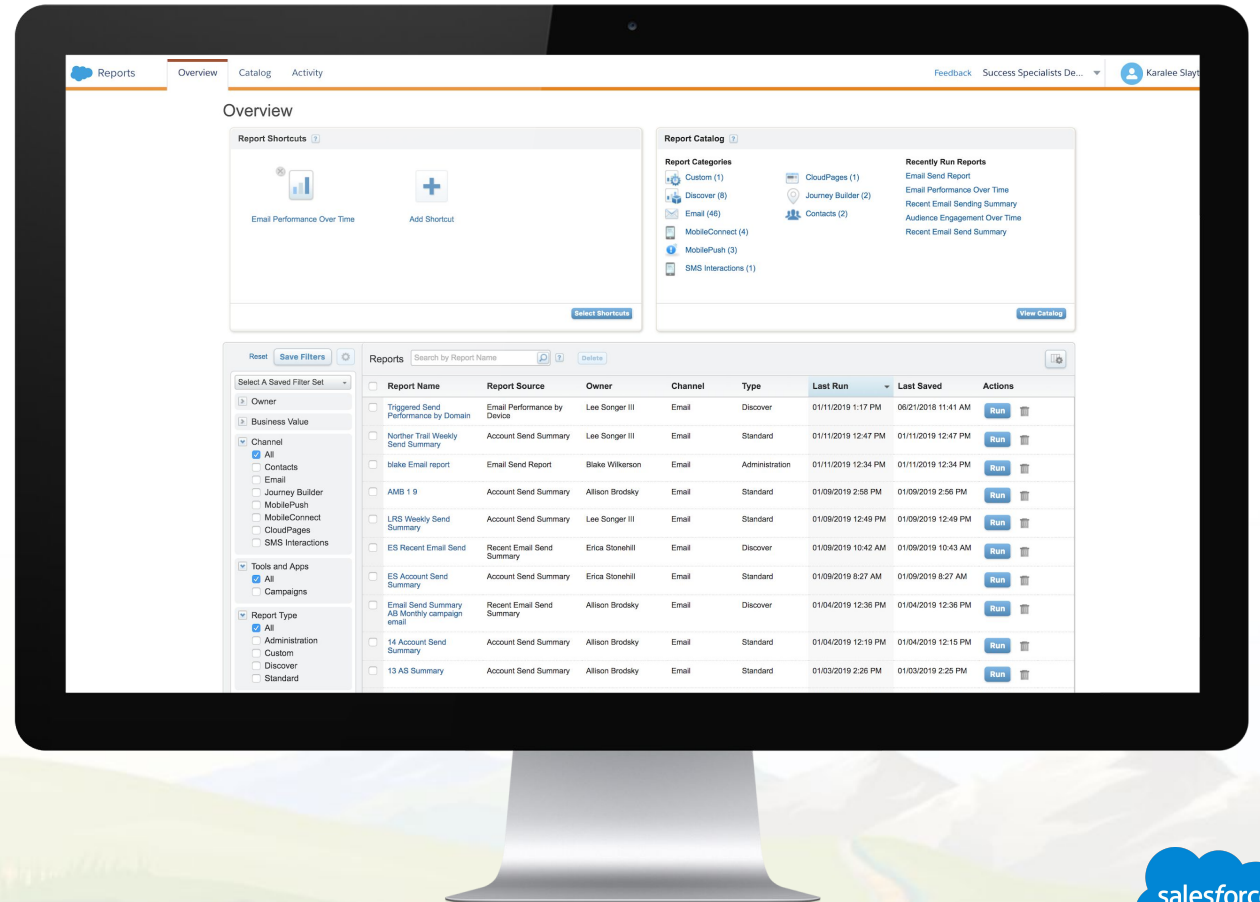
Dozens of Standard Email Reports Out-of-the-box

Create standard reports on core email performance

- 40+ Standard reports available across journeys, email, mobile, social and ads.
- Aggregate level reporting provides both high and low level of detail.
- Data tables + graphical output.
- Limited configuration options.
- Email reports are mostly list-based.

Examples Include:

- Subscriber reports.
- Email reports.
- Tracking reports.
- Deliverability reports.
- Dynamic content reports.
- Mobile device and subscriber reports.
- Campaign reports.



See the full list of reports available and examples.



Demo: Reports Overview Dashboard

Quick access to recently run reports and full report catalog

- New reports.
- Report shortcuts.
- Report catalog
- Report categories and recently run reports.
- Saved reports.
- Complete report catalog.

The screenshot displays the Salesforce Reports Overview Dashboard. The interface includes a top navigation bar with 'Reports', 'Overview', 'Catalog', and 'Activity' tabs. Below the navigation bar, there are several sections:

- Report Shortcuts:** A section with a 'Report Shortcuts' dropdown and two cards: 'Email Performance Over Time' and 'Add Shortcut'.
- Report Catalog:** A section with a 'Report Catalog' dropdown and two columns: 'Report Categories' (listing Custom (1), Discover (6), Email (46), MobileConnect (4), MobilePush (3), and SMS Interactions (1)) and 'Recently Run Reports' (listing Email Send Report, Email Performance Over Time, Recent Email Sending Summary, Audience Engagement Over Time, and Recent Email Send Summary).
- Reports Table:** A table with columns: Report Name, Report Source, Owner, Channel, Type, Last Run, Last Saved, and Actions. The table contains 13 rows of report data.

Report Name	Report Source	Owner	Channel	Type	Last Run	Last Saved	Actions
Triggered Send Performance by Domain	Email Performance by Device	Lee Songer III	Email	Discover	01/11/2019 1:17 PM	06/21/2018 11:41 AM	Run
Norther Trail Weekly Send Summary	Account Send Summary	Lee Songer III	Email	Standard	01/11/2019 12:47 PM	01/11/2019 12:47 PM	Run
blake Email report	Email Send Report	Blake Wilkerson	Email	Administration	01/11/2019 12:34 PM	01/11/2019 12:34 PM	Run
AMB 1 9	Account Send Summary	Allison Brodsky	Email	Standard	01/09/2019 2:58 PM	01/09/2019 2:56 PM	Run
LRS Weekly Send Summary	Account Send Summary	Lee Songer III	Email	Standard	01/09/2019 12:49 PM	01/09/2019 12:49 PM	Run
ES Recent Email Send Summary	Recent Email Send Summary	Erica Stonehill	Email	Discover	01/09/2019 10:42 AM	01/09/2019 10:43 AM	Run
ES Account Send Summary	Account Send Summary	Erica Stonehill	Email	Standard	01/09/2019 8:27 AM	01/09/2019 8:27 AM	Run
Email Send Summary AB Monthly campaign email	Recent Email Send Summary	Allison Brodsky	Email	Discover	01/04/2019 12:36 PM	01/04/2019 12:36 PM	Run
14 Account Send Summary	Account Send Summary	Allison Brodsky	Email	Standard	01/04/2019 12:19 PM	01/04/2019 12:15 PM	Run
13 AS Summary	Account Send Summary	Allison Brodsky	Email	Standard	01/03/2019 2:26 PM	01/03/2019 2:25 PM	Run

Demo: Reports Catalog

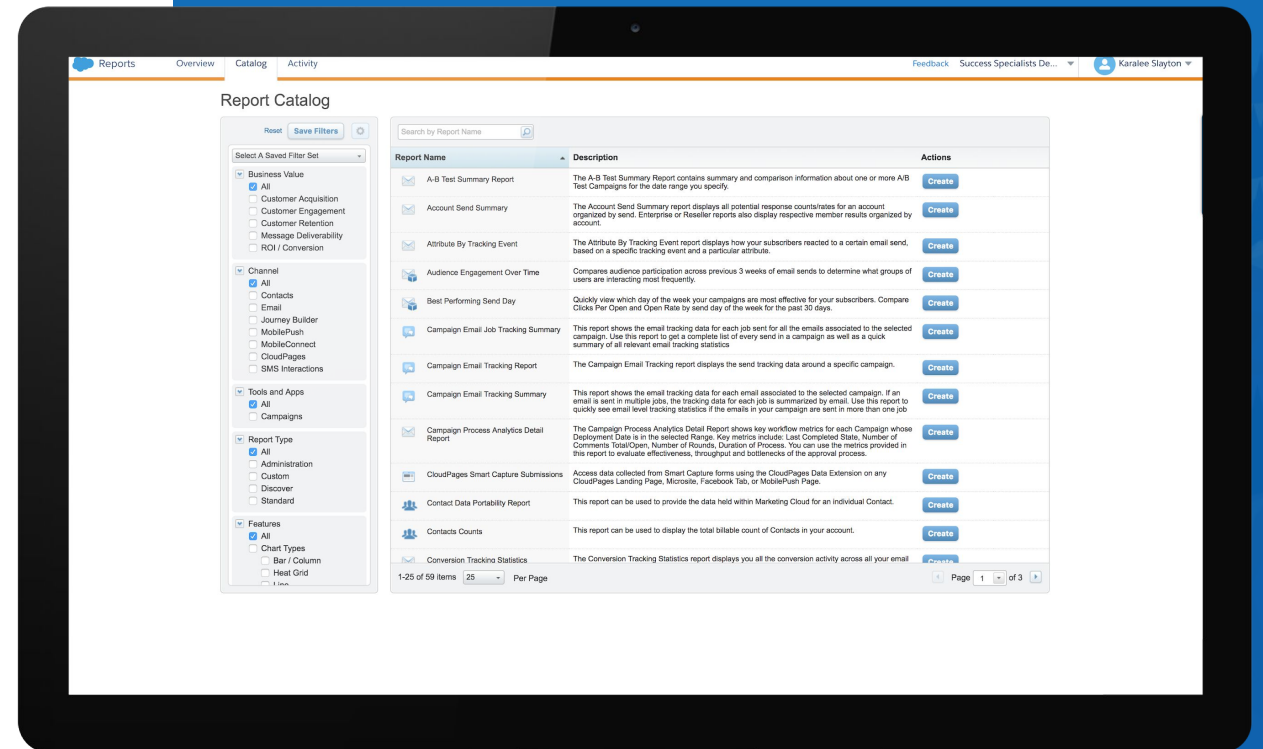
All available Marketing Cloud reports

Search by name or filter based on criteria, including:

- Business Value
- Channel
- Tools and Apps
- Report Type
- Features

Note: Discover reports are indicated by a blue cube icon and can only be accessed if you have Discover enabled in your account.

Note: Some reports can only be downloaded, or emailed, not viewed as a web page.

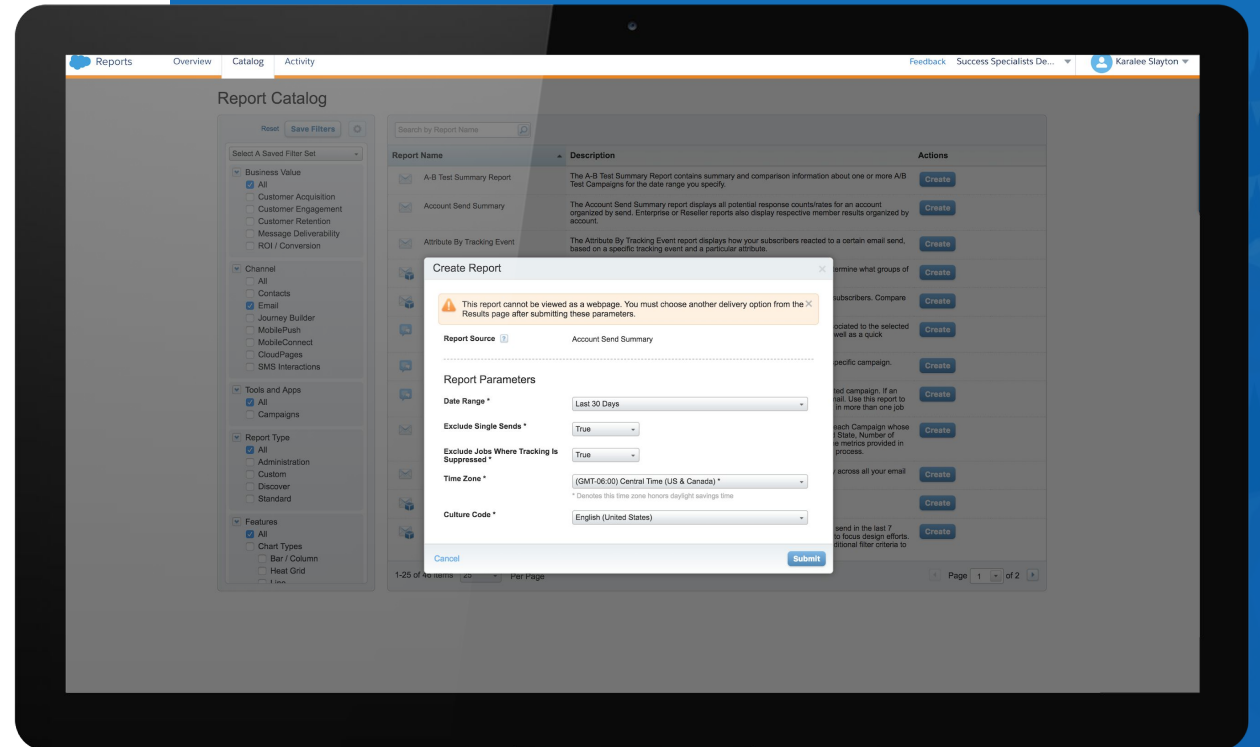


Demo: Creating Reports

Configure and run dozens of standard email reports

Report parameters vary by report. Typically, steps to create a report include:

1. Select a report.
2. Select an email send, campaign, list or DE depending on the report type.
3. Select attribute if a list based report.
4. Select date range, period or comparison period.
5. Select time zone.
6. Select culture code.

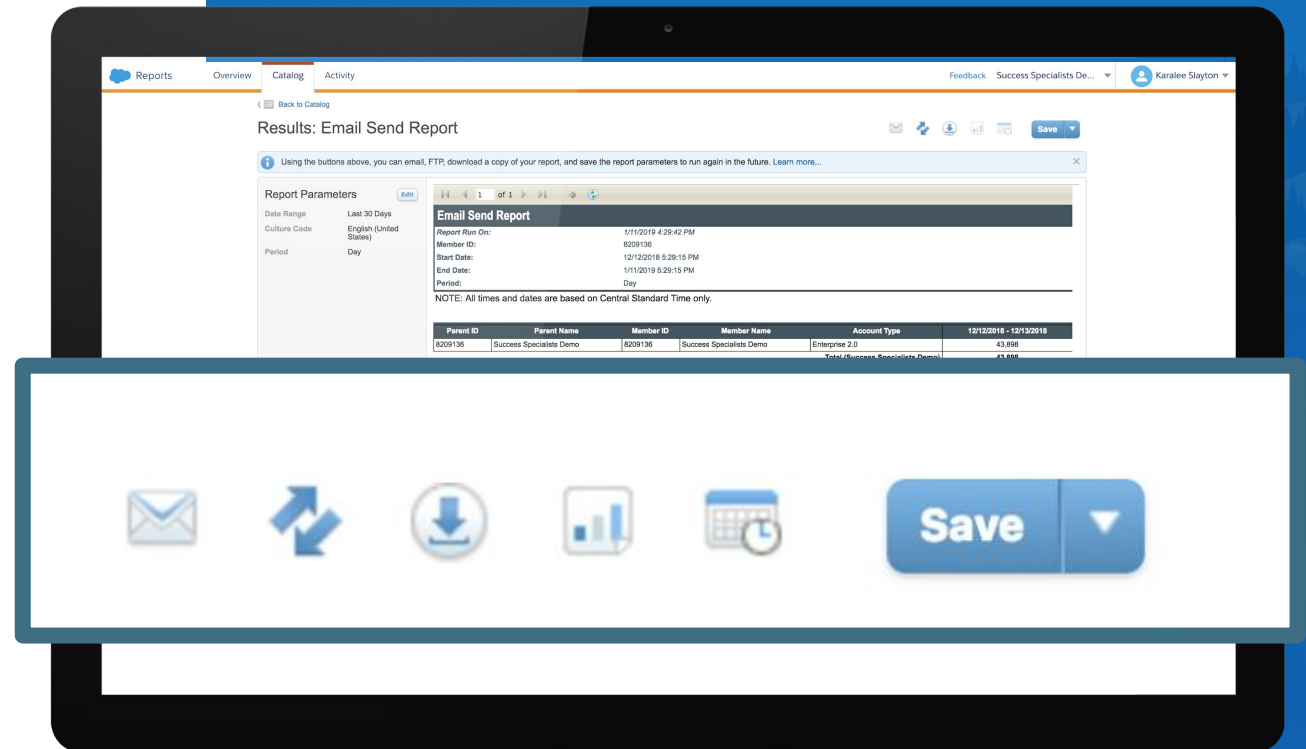


Demo: Sending and Receiving Reports

Save and share standard email reports

Once a report is saved, it can be:

- Emailed to a recipient.
- Sent to an FTP.
- Downloaded as:
 - Data file (.csv)
 - Excel spreadsheet (.xls or .xlsx)
 - TIFF image (.tif)
 - Adobe (.pdf)
 - XML (.xml)
 - Web Archive (.mht)
- Graphed.
- Scheduled to run again.



Demo: Save, Share and Automate Reports

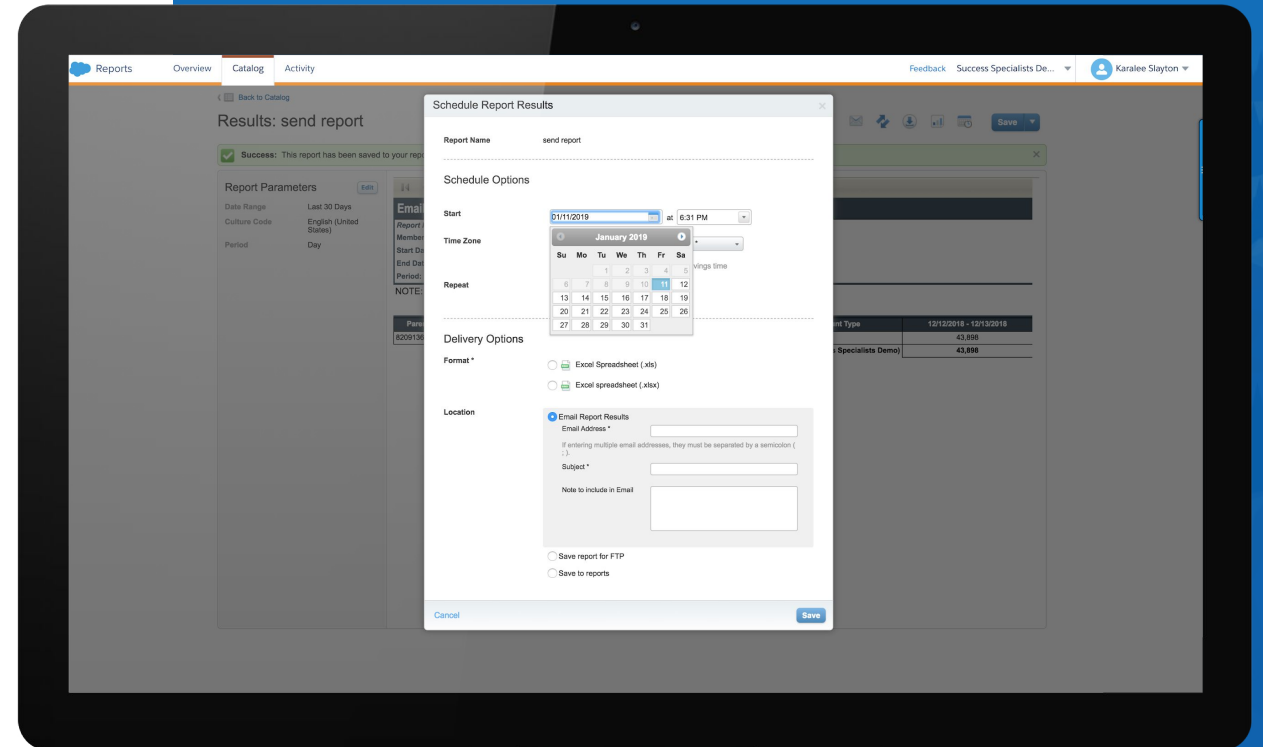
Save and share standard email reports

Schedule options include:

- Start date and time.
- Time Zone.
- Repeat frequency.

Delivery options:

- Format and location.



Standard Reporting

Best practices

- When you set a custom date range, the system generates a report based on data as it appears at 12:00 am on that date. To include data from the end date, set the end date parameter to the following day. For example, if you want to include data from May 1 through the end of the day on May 17, set May 18 as the end date.
- We recommend shorter data ranges for reporting parameters. If you select six months or a year, it could take a long time to run the report, depending on how much data is in the account. The report stops running if it has been active for more than three hours.
- Where noted, some reports are not available as a web page and require you to select a format for file export.
- Larger reports not available to be viewed as a web page will need to be delivered by email or sent to FTP.
- If you want to email reports to more than one recipient, include their email addresses separated by commas.
- Reports specific to a single send cannot be automated, (unless using a triggered send definition) Email performance by domain for example.
- Reporting capabilities are only available on standard DEs that are a core part of the MC. Reports for any customer created DE would be considered custom.
- The available Reports in Email Studio are no longer updated. Use Analytics Builder Reports for up-to-date Email Studio reports, Content Builder email reports, and more enhanced functionality.
- Use Discover to create custom reports. If you do not have Discover enabled in your account, contact your account representative for details.



Marketing Cloud Mobile App



Marketing Cloud Mobile App

Run your marketing from your phone

Track Performance

Manage emails, automations and journeys across multiple brands.

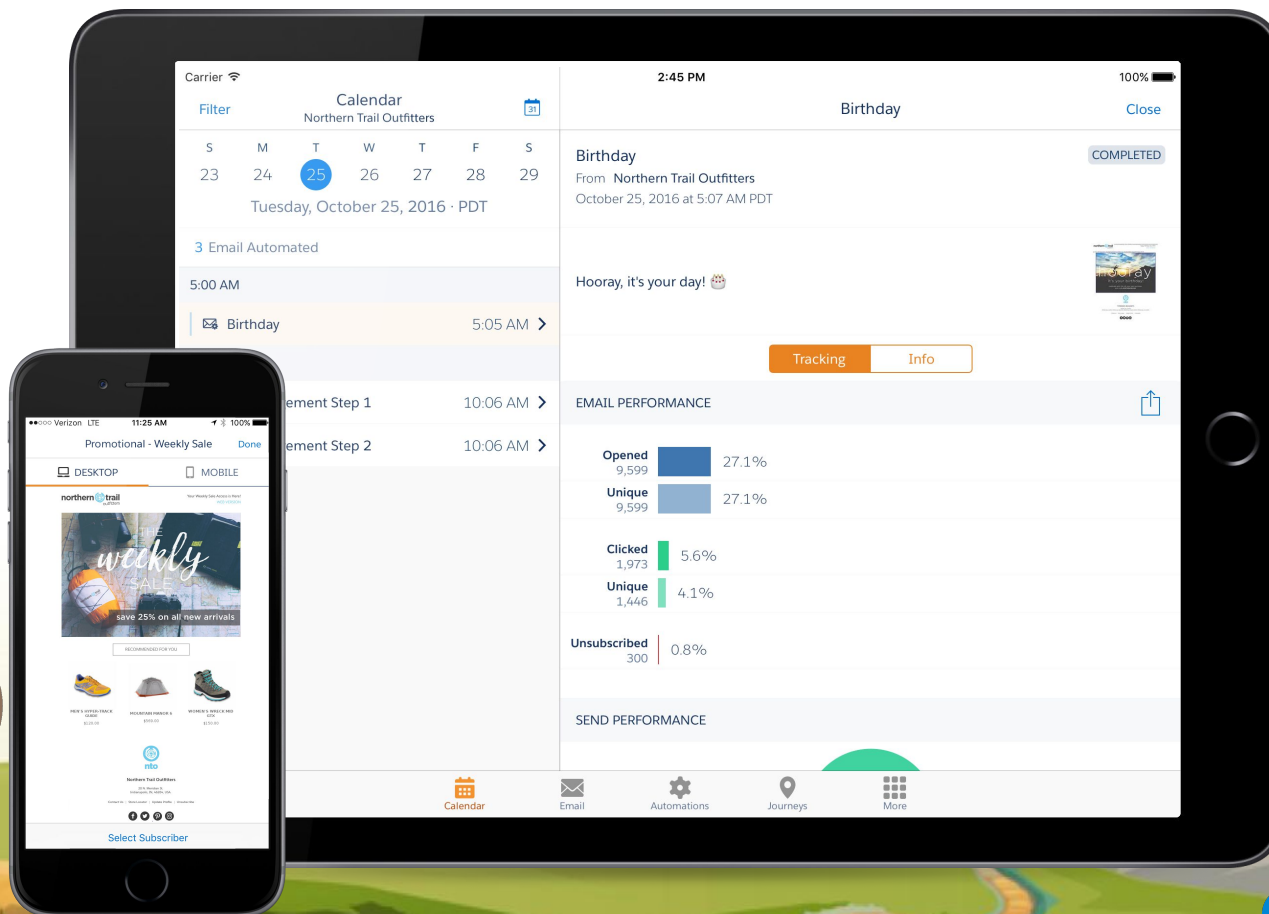
Take Action

Pause, resume and cancel email sends.

Send with Confidence

Approve email content, target your audience and send emails.

U.S. customers: Text "APP" to 38767 for a link to download the app.



Summary

Reminders and Tips to get started

- Marketing Cloud provides dozens of standard reports you can use to track and measure the effectiveness of campaigns.
- Reports can be automated to run on a cadence set by you, and you can choose to have the reports emailed to one or more addresses or exported through FTP.
- To access the Reports feature, go to Analytics Builder and select Reports.
- The Reports Overview screen provides access to all reports available for Email Studio, Mobile Studio, CloudPages, SocialPages, Microsites, Journey Builder and Contact Counts.



Resources and Next Steps



Marketing Cloud Resources

Standard Tracking and Reporting

- [Get Started with Reports](#)
- [Email Reports](#)
- [Reports FAQ](#)
- [Reporting Deep Dive](#)

Next Steps

Where to go from here

- 1 Join the [Salesforce Marketing Cloud Trailblazer Community](#)
- 2 Take the [Marketing Cloud Trailmix Trail](#)
- 3 **Premier Customers:** Request your 1:1 with a Salesforce Success Specialist and plan your next Accelerator (1:1 follow-up request is in the survey).
- 4 Not a Premier Customer but Interested in Learning More? **Reach out to your Salesforce Account Team** for more details.

We Can Guide Customers Every Step of the Journey

With resources, programs and experts to fit their needs

Adoption Services

Accelerators
Interactive Webinars & Events
Proactive Engagement

Always On Resources

Trailhead
Success Communities
Help Portal

Advisory Services

Architects
Customer-Centric Design
Strategic Services
Transformation Services

Do It
Myself

Show Me
How

Do It
With Me



customersuccessplatform

salesforce

Blaze Your Path to Success, Faster

With Success Plans to Take You Further

	Standard	Premier
Guided Journeys	✓	✓
Success Community	✓	✓
Trailhead	✓	✓
Accelerators & 1:1 follow up		✓
Developer Support		✓
Success Management		✓
Circles of Success		✓
Interactive Webinars		✓
Admin Assist		optional upgrade
Support	12/5 Online 2-Day Response	24/7 Phone & Online 1-Hour Critical Response

[Learn more about Premier Success](#)



Requirements for 1:1 Follow Up Session

Must be a Premier customer

All set?

You can request your 1:1 Follow-Up with a Salesforce Success Specialist through survey you will receive after this webinar concludes.



Resource requirements

- <Participation of your Business (Marketing Analyst/Manager) tasked to deliver targeted engagements.>
- Time commitment of 90 minutes.

Technical requirements

- <Einstein Engagement Scoring is activated and Scores are available in your org.>
- <If you have not yet activated Engagement Scores but have at least 90 days of email engagement data.>
- <1:1 session is not a good fit, if your Org has enabled Field Level Encryption, Contact Data Encryption, Tokenized Send Caveats.>

Premier Configuration Services

Included with Premier Success Plan, helps keep your instance of Marketing Cloud up to date by adjusting system configurations as your marketing programs and use cases expand.

CONFIGURATION CATEGORIES/TASKS	DESCRIPTION OF CONFIGURATION TASKS
Business Units	Create business units within a parent account
Sender Profiles	Create sender profiles to assign to send definitions
Data Extensions	Create data extensions with fields and data types to facilitate sending or data storage
Lists	Create lists to facilitate sending
Groups	Create groups by segmenting a list
Headers and Footers	Extract the header and footer content assigned to an account to enable customer review/modification
Delivery Profiles	Provide methods to manage headers and footers via delivery profiles
Account Settings	Review account settings within Administration to ensure proper configuration and customize settings as needed
Roles	Create roles and assign enabled permissions as requested
Send Logs	Create send log data extensions with additional fields as needed
Send Classifications	Create and configure send classifications with specific sender/delivery profiles
User	Create a user to access the Marketing Cloud
Reports	Create a standard report from the report catalog
Tracking Extract	Create an automation that pulls tracking data for a specific time frame or rolling date range
Automating a Report	Automate the delivery of a report from the report catalog
Data Extract	Create an automation to extract data from a data extension
Creating a Report	Reports Create a standard report from the report catalog

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Marketing Cloud Events

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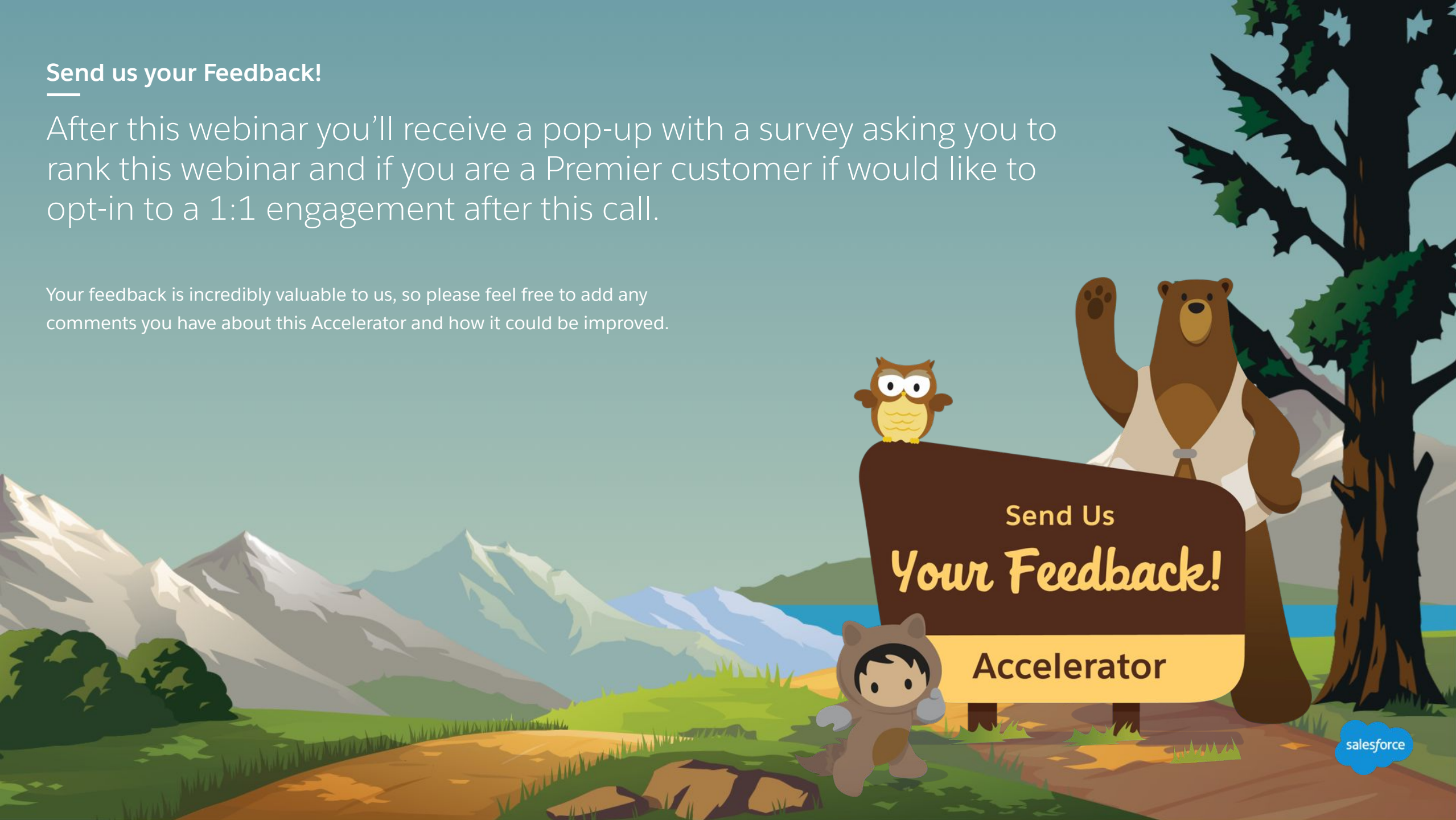
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Thank you

