⊠Campaigner

How to get the most out of your Campaigner trial

Welcome to Campaigner!

To make sure your email marketing journey is a success, we have prepared the following documentation for you. With these 5 steps, you will have all the knowledge you need to ensure you get the best ROI possible with your email marketing $\sqrt{2}$

STEP 1	EMAIL SETUP AND VALIDATION
STEP 2	CONTACT LISTS AND LIST SEGMENTATION
STEP 3	EMAIL DESIGN, CONTENT AND AB TESTING
STEP 4	AUTOMATION
STEP 5	REPORTING

Email setup and validation

Add a new sending email address

Your sending email address will, by default, be the one you signed up to Campaigner with. To use a different sending email address, click on the **'Account'** icon in the top right and select **'Account Settings'**.

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ashboard		🖛 Add Contects	-	Sign Out
Recently Modified Campaigns				Account Settings Revel Patisword, Ernal Restlications, Time Jobel Server Email Addresses and other settings
Name	Type	Status	Last Uj	Billing
campaign-Tuesday, August 10, 2021 9:09 AM	SMS	Draft	Aug 13	Upgrade Account, Billing Profile, Latest Invoice, Payment History
Thursday, August 12, 2021 - 1	Email	@ incomplete	Aug 12	Manage Users
Phillippa's SMS Test	SMS	@ Draft	Aug 12	User Roles, APV weys, SMTP access.

Then select **'Manage email addresses'**, add a new email address and click submit.

Manage account settings		
	UserID:	542680
	Username'	client_success@j2.com
	Password:	Change Password
	Date Format	YYYY-MM-DD 🔻
		Date format used when importing contacts
	Time Zone.	(GMT - 5:00) Eastern Standard Time 🔹
		Timezone used for scheduling and reporting
	Default Sender Address	client.success@j2.com
		Default email address used when creating email campaigns
		Manage email addresses
	News and updates:	Receive important news and updates from us on new product features, pricing and offers

A confirmation email will be sent to the email you entered. You will need to confirm it is a valid email address by following the instructions within the email.

Email validation with SPF, DKIM, and DMARC

Familiarizing yourself with and adopting email validation methods such as DKIM, SPF, and DMARC can help you avoid the spam folder. Let's look at what each means and how to set them up within your account.

Sender Policy Framework (SPF)

This is used to confirm that Campaigner has permission to send emails using your domain.

Setting up SPF configuration with Campaigner:

To configure SPF within Campaigner, create or update an existing TXT record for your sending sub-domain. In the TXT record, you must add an entry to point to our SPF subdomain.

Example: <yourdomain.exampledomain.com>

You will include: v=spf1 include:_spf.emailcampaigns.net ~all

Exception: If you have more than one SPF record on the same domain, use our 'ipv4' address instead of our SPF subdomain

DKIM Records (Domain Keys)

Domain Keys and DKIM have the same purpose as the SPF Record. Some ISPs/IEPs use these as an additional check of authenticity. These records are checked to verify that Campaigner has your permission to send using their domain.

Setting up DKIM configuration with Campaigner:

In your domain configuration settings, add a CNAME record using a root or sub-domain. Using the following example, you will replace "YourDomain.com" with your own domain.

em._domainkey.**yourdomain.com** CNAME dkim.emailcampaigns. net

Exception: Godaddy's CNAME config for DKIM would look like: em._domainkey CNAME dkim.emailcampaigns.net

DMARC Record

DMARC is another email authentication technology that all email markers should consider. DMARC helps receivers avoid false positives with transient failures in either DKIM or SPF; DMARC only fails if both fail. For assistance in publishing DMARC, please visit <u>http://dmarc.org</u>.

Setting up DMARC within Campaigner:

The first step is to set up a DKIM domain. You must publish your DMARC information with the exact details that you used for your DKIM. Once the configuration of DMARC/DKIM has been completed on your end, Campaigner will then offer validation services for your DMARC by setting up our sending servers with your domain.

STEP 2 Contact lists and list segmentation

Email marketing first begins with email address collection. Emails can be collected ongoing from website signups, customer purchases, or other online forms.

Always remember to only send email messages to people who have opted-in to receive emails from your brand. It is also essential to respect and remove anyone who has unsubscribed from any of your contact lists.

To further improve your campaign results, you can use Campaigner's list segmentation capabilities. List segmentation enables you to send highly targeted email campaigns. Meaning that you can target a specific audience with highly relevant content.

Contact lists

Follow the next steps to upload your first contact list into Campaigner:

Campaigner Dashboard Campaigns 🗸 Library ~ Lists 🗸 Contacts ~ Autoresponders ~ Experiments E-co Mailing Lists ashboard Segments Suppression Lists **Recently Modified Campaigns** Name Type Statu campaign-Tuesday, August 10, 2021 9:09 AM SMS Dra

From the top menu bar, select 'Lists' and then 'Mailing Lists'.

You will then select 'New Mailing List'.

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Dashboard	Campaigns 🗸	Library 🗸	Contacts 🗸	Lists 🗸	Autorespo	nders ~	Exp
Categories		Mailing	Lists				
View All		① New N	lailing List	▲ Import	🖉 Edit	¢ Refr	esh C
Demo Lists Live Send Lists							

Enter a name for your mailing list and select 'OK'.

Select the mailing list you created, and select 'Import Contacts'.

Manage Conta	acts		
Import Contacts	+ Add New	🖉 Edit	+

You can then browse for your mailing list and proceed to upload.

From Desktop	Upload your files	Preparing your data
Copy / Paste	Drag & Drop Files	For best results ensure that your data is properly formatted. See these instructions for how to form your data fields or download one of the following templates: Basic Template
ļ	Browse	(Includes only Email, Status and First Name) Download.xlsx 🖶 Download.csv
	Format: .csv,xls,xlsx,vcf,txt,tsv Max. file size: 500 MB	Advanced Template
	1	(Includes all editable Contact fields)
		Download xisx Download.csv

Segmentation

You can create specific lists based on the data you import into Campaigner. Campaigner also collects data based on when an email was last opened, location, and any clicks performed, which can provide you with an abundance of information to help create influential segments. Segments can either be static or dynamic.

An example of Campaigner's list segmentation capabilities would be creating a simple dynamic segment with contacts who have opened your emails in the last 60 days. Sending to an email segment like this would ensure that you have the best results possible for your next campaign.

To create a segment like this, select 'Lists' from the menu bar, and then select 'Segments'.

⊠Campaigner						
	Lists 🗸 Autoresponders	✓ Experiments	E-commerce 👻	Forr		
Dashboard	Mailing Lists		Add Contacts			
basinouru	Segments					
Recently Modified Campaigns	Suppression Lists					
Name		Туре	Status	Last		
campaign-Tuesday, August 10, 2021 9:09 AM		SMS	Draft	Aug		

Next, select 'New Segment'.



For the filter type, select 'Email action' from the drop-down menu.

Filter Gro	pup		
Filter type:	Select 🔻		
	Select	() Add filter	🗵 Remove filter
	Email Action		
AND •	Form Submission		
Filter type:	Contact field		
The type.	Segment/Mailing List		O Demove filler
	Location	(±) Add litter	(x) Remove filler
	Purchase Behavior		
(+) Add group	Workflow		
	SMS Action		

Select 'In the past 60 days' from the drop-down menu next to 'during this time period'.

▼	
Any	•
Did Open	•
In the past 60 days	▼)
	Any Did Open In the past 60 days

Click 'Next' and give the segment a name, ensure that you have selected 'Dynamic' as the segment type, and save.

STEP 3

Email design, content and ab testing

Design and content

To be a successful email marketer, you must have emails that appeal to the subscribers receiving the emails. To accomplish this, you should send them content that is relevant to their interests. For instance, if you own an eCommerce store, you would most likely send subscribers relevant information based on similar products they may have purchased from you before.

Having the right content to send to your contacts is just the first step in creating a successful email campaign. It is also important to include clear CTAs and ensure your email is optimized for mobile devices.

You can easily create great-looking emails using Campaigner's drag and drop email editor.

To get started, click 'Campaigns' from the top menu bar, then select 'Email Campaigns'.

Dashboard	Campaigns 🗸	Library 🗸	Contacts 🗸	Lists 🗸	Autoresponders ~
ashboard	Email Campaigi	ns			
uonocuru	SMS Campaign	S			
Recently Mod	dified Campaig	ns			
Name					

Next select 'New Email Campaign' to begin your campaign.



Select one of Campaigner's many pre-built email templates, which can be edited as needed or start from a blank email. Once you have made your selection, click **'Next'** to proceed.

On the editor screen, you can add content such as images and links. The tool section on the right provides you with various options to add to any email template.



If you have a pre-built email template that you wish to upload, simply switch to the Full Email Editor by selecting **'Campaigns' > 'Email Campaigns'** from the top menu and selecting the drop-down arrow next to **'New Email Campaign'**.

Er	mail	Са	ampaign	S					
	① Nev	v Ema	ail Campaign	•	🚜 Recipients	© So	chedule & Send	Ø Suppressi	on Li
	🗎 Del	ete	≒ Categor	Full	Email Editor				
				Dra	g & Drop Editor				
			Name	Uplo	ad HTML	IS	Recipients	Scheduled	La
	Ŧ		Search	Сор	y/Paste HTML	-	Search	Any 💌	A
			Friday, August 2021	From	m URL	raft	none selected	not scheduled	nc
			Thursday, Aug 12, 2021 - 1	ust	٠	Draft	none selected	not scheduled	nc

You have the option to copy/paste, upload a file containing the HTML, or select the **'Full Email Editor'** and paste your code on the HTML tab.



Preview and test

Be sure to take advantage of Campaigner's Preview & Test feature located in the top right, where you can send a copy of the email to yourself. Test on a desktop and a mobile device to see how it will look for your recipients before it is actually sent out.

Experiments (AB Testing)

Campaigner Experiments (also known as AB testing) will allow you to test specific elements of your email to see what resonates with your subscribers.

The test is performed on a small part of your email list where different variables compete against each other for an amount of time determined by you. The winning factor is also determined by you, whether it be unique opens, unique clicks, total clicks, or unique clicks on a specific link.

Run experiment for 12 Hours before de	termining the winner.
Use the following metric to determine the winner:	Unique opens 🔹
	Unique opens
	Unique clicks
	Total clicks
	Unique clicks on a specific link

To create an AB test, select 'Experiments' from the top menu or select 'Experiment' on the final step of email edit.

tacts 🗸	Lists 🗸	Autoresponders ~	Experiments	E-commerce 🗸	Forms 🗸	Workfl
0		2		-0)
Select Tem	plate	Edit HTML	E	dit Plain Text	Edit Email	Details

Subject: *	TEST A		Experiment
	🗢 Merge Fie	elds 🙂 Emojis 🔻 🛈	
Preheader:	This is the tea	ser content that will appear under the subject line.	Experiment
	🗢 Merge F	ields 🙂 Emojis 👻 🛈	
From Name: *	J2 Cloud Servic	es	Experiment
From Email: *	client.succes	s@j2.com	Experiment
		*	Indicates required
Subject A: *	TEST A		Lancel
	🗢 Merge Fie	elds 🙂 Emojis 👻 🛈	
	Subject B	TEST B	
		⊫ Merge Fields 🙂 Emojis 👻 ۞	
	Subject C	TEST C	
		← Merge Fields 😳 Emojis 🗸 ()	
		Start Experiment	
		Leave a copy of this campaign	

With Experiments, you can test **subject line**, **pre-header**, **from name**, **from email**, **or email design**.

Select an experiment type:	Subject 🔹	
Mariatian	Subject	
variation	Preheader	
A - Original	From Name	
	From Email	
	Design	
B - Variation	Variation - B	

You can add as many variations as you like. We recommend at least three to get the best range of results.

Variation	Description	Subject	Actions
A - Original	Variation - A	TEST A	/ ◙ @ ∞ છ
		∞ Merge Fields 🛛 ⊕ Emojis + 🛈	
B - Variation	Variation - B	TEST B	8
		🖘 Merge Fields 🛛 🚇 Emojis 👻 🛈	
C - Variation	Variation - C	TEST C	

AB testing with Campaigner's Experiments feature ensures the right content is being sent to your subscribers. The data you receive from any tests will provide you with all the information you need to run more successful campaigns in the future.

Automation

Email automation can nurture customer leads, perform effective onboarding experiences, send abandoned cart emails, and more straightforward tasks such as purchase thank you's and welcome letters.

Campaigner has two options for email automation which are both located in the top menu labelled as 'Autoresponders' and 'Workflows'.



In both cases, your automations can be set on a timer or triggered by an action. For instance, we can periodically check if a new email address has been added to any given list and send to all new addresses or send to them as soon as they enter the new list.

You will simply select which segment or list you wish to send emails to in both cases and program the actions accordingly.

Campaigner Autoresponders are for more straightforward actions which have a trigger, and then an email send action.



Campaigner Workflows allow for much more complex designs, including both SMS and emails in one workflow. You can set delays, perform actions based upon previous workflow actions, and update contact information all within the workflow.



Workflows, when appropriately used, can be a powerful tool for any marketer. Not all of your contacts will be in the same phase of their journey with your brand. Individually nurture your subscribers towards becoming customers by sending emails to match every stage of their journey.

Reporting

Last but certainly not least, it is essential to study the results of your email campaigns. Campaigner has reporting capabilities for all of the various types of email campaigns created within the platform.

Select '**Reports**' from the top menu bar and select which one you wish to view to study campaign results.

ıts	E-commerce 🗸	Forms - Workflows	Reports ~
	🛥 Add Contacts	▼ 🛛 New Email Can	Email Campaigns SMS Campaigns Contacts
	Status	Last Updated	Autoresponders
	Incomplete	Aug 13, 2021 2:18 PM	WORKTIOWS
	Incomplete	Aug 13, 2021 2:12 PM	SMTD
	Draft	Aug 13, 2021 12:08 PM	Landing Pages
	Incomplete	Aug 12, 2021 5:46 PM	NUL SCHL

For email campaigns, we provide valuable information such as complaints, unsubscribes, hard bounces and soft bounces. These learnings will allow you to spend some time cleaning your list if needed.

First Name	Lost Name	Email		Mobile Phone	Reason	Date Bounced +
			@yahoo.com		unknown.user	Aug 2, 2021 5:09 PM

It's also possible to see if a contact has clicked on mobile versus desktop, where within the email they have mostly clicked, and any location data that Campaigner has collected.

ent	7
)elivered:	6 (85.71%)
Bounced:	1 (14.29%)
lard Bounced:	1 (14.29%)
oft Bounced:	0 (0.00%)



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If you have any questions, please do not hesitate to contact our support team: support@campaigner.com

How to get the most out of your Campaigner trial

United States of America

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