



Brown Bag Learning Series - Engagement

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Presenters:



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Agenda:

- **Definitions**
- **Proxy Review**
- **Initial Onboarding Setup**
- **Custom Properties**
- **ESP Integrations**
- **Live Pixel Demonstration**
- **Q & A**
- **Resources**

Definitions

- Email Merge Tag
 - AKA the “e=” tag. Required for the pixel to work! Collects recipient data – commonly a subscriber ID or email address, but can be a static value
- Campaign Merge Tag
 - AKA the “c=” tag. Collects campaign data - creates a new pixel for every unique value.
 - **Should never, ever use a recipient-level merge tag.** Who can tell us why?
- Recipients
 - The number of unique e= values Everest sees – NOT the number of people that received the email
 - Example: e=1 will only be 1 recipient, whereas e=%%SUBSCRIBER_ID%% will be the number of unique subscriber IDs seen
- Opens Collected
 - The number of times the pixel fires – does not deduplicate. So if you open an email twice – it’s two opens!
 - Does not include proxies
- Location/Timezone
 - Information pulled from the server that loaded the image – may not reflect location of the user (VPNs)
- Devices
 - AKA an Operating System. Windows 10? iOS 17? Linux?
- Clients
 - AKA an App. Gmail app? Apple Mail? Chrome browser?

Privacy Proxy Overview

- Who has them?
 - Gmail, Yahoo, Apple
- What are they?
 - Fancy name? A modified user agent string
 - A method by which mailbox providers protect the privacy of their clients
- What's the impact?
 - Google
 - Reflects a “true open” but hides enthusiasm, location, device/client, and timezone data
 - Yahoo
 - Only for those using the Yahoo Mail client
 - Does not reflect a true open because the image is prefetched, but still provides location and timezone data
 - Apple
 - Pre-fetches images immediately upon delivery if a charger or internet connection is present – otherwise as soon as one becomes available
 - Does not reflect a true open, but still provides location and timezone data



Demo - Initial Onboarding

Custom Properties

- What are they?
 - Metrics you can track that Everest doesn't automatically look for
- How do they work?
 - Works just like the c= tag
 - Can use merge tags or static values
 - Everest will automatically pick up any custom properties contained in a pixel – even if the user hasn't added it in the UI
- Can we help set them up?
 - Static values – absolutely!
 - Merge tags – Nope. They have to know the merge tag of the database they are wanting to pull from. We cannot provide that information to them or troubleshoot it if there are problems since it's not our database.
- Why does my account have a bunch of custom properties in it – they've never set one up?
 - Remember how it's like the c= tag?
 - May also be historical data if they used to be RPP/250ok since those tags don't ever leave account unless user deletes them

ESP Integrations

- What are they?
 - Ways for clients to bring engagement data into Everest from their ESP
- How do they work?
 - Adobe Campaign – Secure file transfer
 - Everyone else – Everest connects with the ESP's API
- What does it display?
 - Depends on the ESP, but in general we bring over attempts, deliveries, deferrals, bounces, opens, etc
 - Some also will bring in templates or mailing lists for use in Design & Content and List Validation
- Why does SFMC not feed into engagement?
 - SFMC engagement metrics are attached to the campaigns themselves
- Is this the same as the webhook?
 - No. The webhook can be used with the various ESPs, but it requires a lot more setup, and it won't pull over the same data



Live Pixel Demonstration

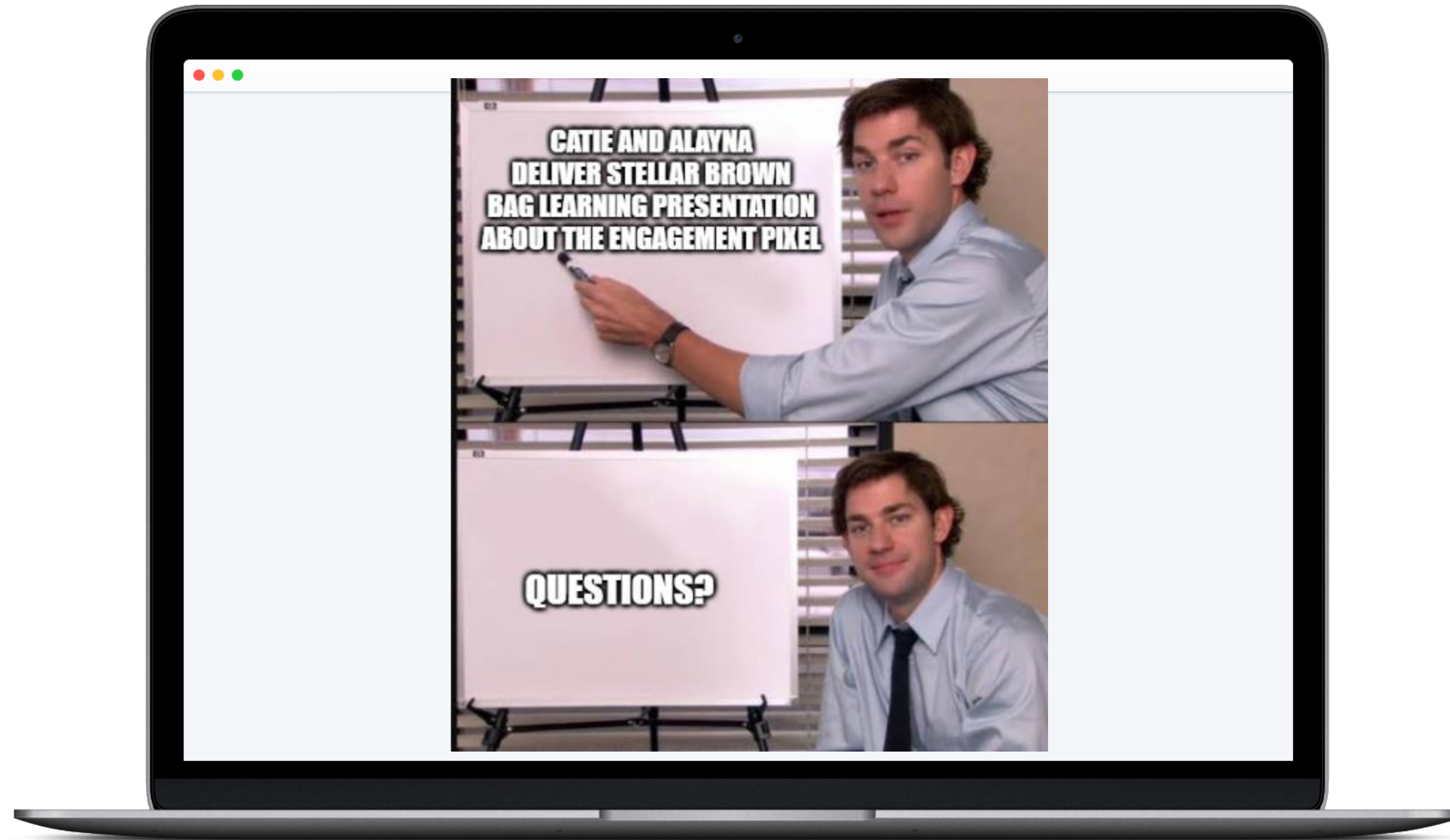


Your Questions from Slack

Slack Questions

- Do we have suggestions on how to map the data back to our renders available in Design and Content?
- What are good filtering options, how do download and compare opening rates for different platforms, what do the Google and Yahoo proxies do?
- Details on data exports when client wants more than the 5K records - how they open a ticket and logs under the audience exports tab, confirmation on what data includes proxies and does not, what the random filters that make no sense are that show up and why (you can look at Nordstrom Full Price for example) *Nordstrom (Full Price 100010794) (#902068)- Custom Properties :)*

Other Q&A



Resources

- Playbook: <https://knowledge.validity.com/hc/en-us/articles/4403870401563-Everest-Engagement-Playbook-Beginner>
- Advanced Setup Guide: <https://knowledge.validity.com/hc/en-us/articles/360060604911-Everest-Advanced-Setup-Guide-3-Engagement>
- Time of Day ranges: <https://knowledge.validity.com/hc/en-us/articles/360047238732-What-are-the-Time-of-Day-ranges-in-Everest-Engagement>
- Enthusiasm ranges: <https://knowledge.validity.com/hc/en-us/articles/360047239132-How-does-Everest-measure-Read-Skimmed-and-Glanced>
- Custom Domain requirements: <https://knowledge.validity.com/hc/en-us/articles/4413621340571-What-are-custom-domains-in-Everest-Engagement>

For ESP-specific merge tags, see articles provided below in the notes

