# Dominating with Data

## How applying a scientific approach to marketing data drove incredible success through email

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## CHALLENGE

- ✵ Nurture a list of purchased contacts with content assets so contact agrees to schedule a meeting when asked by a member of the sales team.

- ✵ Emails drove directly to asset(s); no form fills required to decrease abandonment

- ✵ The list was purchased, so data records were complete

## GOAL

- ✵ Keep the number of sales team contacts low for maximum ROI

## TIMELINE

- ✵ 10 months, including 2 months of preparation and onboarding

## OUTCOMES

**REQUIRED CONTACTS TO ACHIEVE MEETING ↓31%**

**UNIQUE OPEN RATE ↑88%**

**SCHEDULED MEETINGS ↑64%**

*The results were so impressive because the team followed the Three-Step Framework for Approaching Data.*

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# The Three-Step Framework for Approaching Marketing Data

## Step 1: Look & Listen

Break your desired outcomes into a series of single-focus questions that can be answered through data. Using your own insight and that of your team, form a hypothesis to test the aspect specified in the question. "Begin with the end in mind" applies here, as long as the end you're seeking is an accurate answer to your question rather than a *particular* answer.

## Step 2: Analyze & Learn

Develop a plan to test each hypothesis individually, as independent from other factors or changes as possible in the real world. Before testing, make sure you're tracking the relevant metrics consistently and accurately. Once you've gathered the resulting data, analyze the results.

## Step 3: Act & Iterate

Use the data you gathered during Step 2 to inform your next question(s) for your data. View your team's progress through the lens of an Agile framework, where the ultimate goal is improving the process itself and it's understood that the testing environment (the market) is constantly changing.

Following this framework is simple, but not necessarily easy. The most crucial thing to keep in mind when looking at data is this: approach it like a scientist. Bring your questions and hypotheses to your data; don't look at the data first to see what questions it might answer. (Your team can do that later, and it might yield some interesting results, but for strategic matters, put your questions first.)

If the idea of being a scientist isn't appealing, think of acting like a detective. Good detectives begin with a question ("Who has committed this crime?") and use the data sets they have to answer it. By comparison, most depictions of bad detectives show them starting with the most easily accessible evidence and shaping it into a narrative of their own design. Bad detectives are big fans of vanity metrics.

Like interrogations in police shows, interrogating your data is all about directing the right question to the right resource at the right time. For instance, using the traditional sales funnel as a framework for informing general marketing decisions, you can test your hypotheses by directing these questions to these specified data sets:

## Trust the Process

The scientific method has served those seeking verifiable information for nearly 500 years. Researchers the world over trust that process, because it begins with a question and seeks an answer, not the other way around. When you apply the scientific method to your own data, you can similarly trust its process, knowing that you're proceeding in the right direction.

Many scientific experiments reach the conclusion of "Hypothesis not confirmed; more research needed," and many detective cases aren't fully resolved and get classified as "cold," which essentially means "more research needed." This is bound to happen to some of your data interrogations, and that's to be expected. Use those experiences to inform the next question(s) you ask, which metrics you're tracking, and even how those metrics are tracked.

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# Using the Three-Step Framework to Transform Email Marketing

## Step 1: Look & Listen

*Break your desired outcomes into a series of single-focus questions that can be answered through data. Using your own insight and that of your team, form a hypothesis to test the aspect specified in the question.*

Testing was designed as an iterative process, with every new question and hypothesis building on the findings of the question and hypothesis that preceded it.

Additionally, the sequence of the questions began with the most important aspect of the campaign—the audience—and followed the micro-moments of engaging with an email.

At each micro-moment, the contact made a decision:

- ✳ Upon seeing the subject line
- ✳ Upon viewing the email
- ✳ Upon clicking the promoted asset(s)
- ✳ Upon engaging with the promoted content
- ✳ Etc.

## A SCIENTIFIC APPROACH TO MARKETING DATA

*When analyzing marketing data, approach it like a scientist. Be objective, and **bring questions and hypotheses to your data**; don't look at the data first to see what questions it might answer.*

**LOOK & LISTEN**

**1**
– Choose your question
– Target the metrics that matter
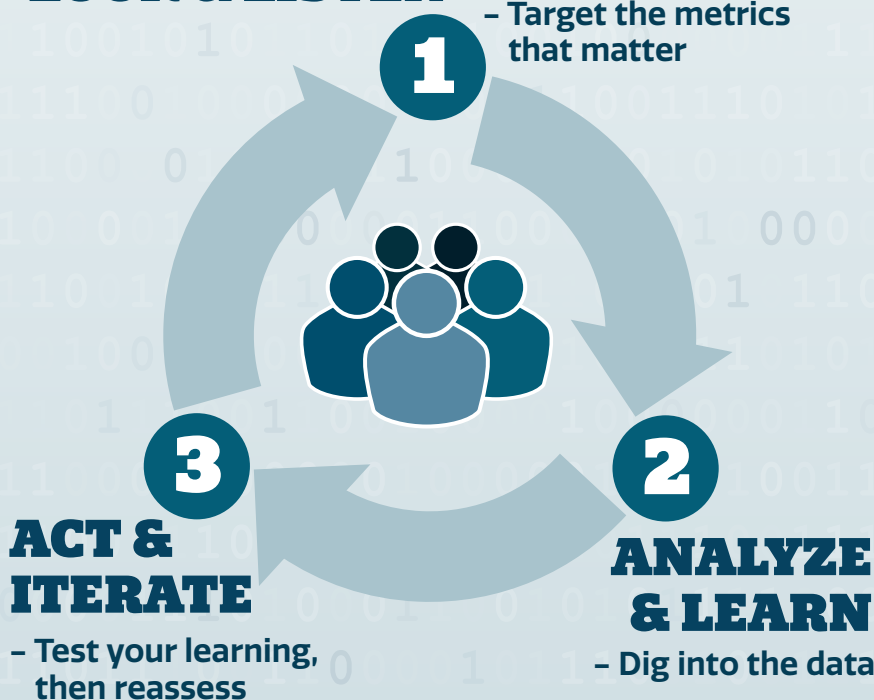
**3**
**ACT & ITERATE**
– Test your learning, then reassess

**2**
**ANALYZE & LEARN**
– Dig into the data

## Step 2: Analyze & Learn

*Develop a plan to test each hypothesis individually. Before testing, make sure you're tracking the relevant metrics consistently and accurately. Gather the resulting data and analyze the results.*

The questions asked were at a level where one variable per question could be tested. This might seem unnecessarily granular, but that kind of rigor is crucial to gauging a variable's actual performance. In any experiment, controlling the non-tested variables is every bit as important as testing the variable itself.

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If anything, trying to test more than one variable at a time would have been wasteful and counterproductive. Some data would have been generated, certainly, but its relevance would have been negligible because it would be almost impossible to tie it to any one factor.

## Step 3: Act & Iterate

*Use the gathered data to inform your next questions and tests. Remember that incremental improvements can make the most difference, especially in a testing environment that's constantly changing.*

Sometimes the findings of an earlier test prompted changes to the next question and hypothesis, and sometimes those changes came from human analysis and expertise. For instance, the original plan for audience cultivation was to segment the contacts, first by targeted product, type then by active/inactive, and purge all inactives.

However, the team recognized that starting segmentation with a product rather than the audience themselves ran counter to the guiding principles of marketing. Adjusting the test to reflect the importance of the audience and their behavior allowed the team to make more customer-centric decisions from the start.

Further, using human insight, the team decided to give the inactive list members a chance to decide for themselves whether or not they wanted to be purged. By introducing the "would you like to unsubscribe?" email, they got a much clearer picture of their audience's involvement based on the contacts' own choices. They even found that many contacts who had previously been designated as inactive would engage with the content at a level even greater than some of the "active" contacts once they had made the deliberate decision to receive content from the team.

# Working the Case: Applying the Three Steps to a Set of Questions

Note how each question builds on the one before it, so that even before the entire data interrogation is completed, the insight gained from the questions answered so far can be put to use improving marketing efforts.

This agile, iterative approach to data is much more practical than the traditional approach of completing all tests, then using the results. Further, using the results in ongoing activities provides even more data as to their efficacy.

## 1 Question

Will creating a definition around new, active, and inactive users help with targeting our audience?

## Hypothesis

If we categorize records into "new," "active," or "inactive," then we can get better insight into what content is engaging our audience.

## Findings

By creating three segments for deployments, metrics could be reported for new, active, and inactive audiences. This allowed us to determine what worked with new contacts and what converted inactive contacts to active contacts.

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# 2

## Question

Should we continue to email contacts who have never been active?

## Hypothesis

If we remove inactive contacts from the database, the remaining contacts will be likely to engage with the emails we send.

## Revised Hypothesis

If we send an email asking inactive contacts to unsubscribe, we will learn which contacts are truly disinterested or truly inactive.

## Findings

By sending the unsubscribe email, we could determine who no longer wanted to receive emails (unsubscribes), who wanted to stay in the communication stream (open, no unsubscribe) and who was truly inactive (no open). Unsubscribes and no-opens were then purged from the system, leaving a truly active audience.

### HYPOTHESIS CONFIRMED

# 4

## Question

Can we track clicks to CTA assets to determine how many contacts are engaging with content?

## Hypothesis

If emails link directly to assets and engagement is captured with blind forms, then weekly reporting will show engagement separated by asset promoted, email sent, and sub-campaign.

## Findings

Contacts who engage once are likely to engage multiple times in the same email or across various emails. We noticed that some domains engaged with every email around the time of send.

### HYPOTHESIS CONFIRMED

# 3

## Question

Do we have enough data to determine the perfect subject line?

## Hypothesis

If we analyze all historical subject lines, then we will be able to write a formula for the ideal subject line.

## Findings

We tested 180+ subject lines to provide statistically significant data around what engages the audience more. Throughout the process, subject lines were tagged with metadata including type of subject line (asset, benefit, question, ellipsis), level of personalization, references to brand or products, use of numbers, and character length.

| Subject Line Aspect | Open Rate |
| --- | --- |
| Personalized questions | +25% |
| Non-personalized questions | –39% |
| First name & company personalization | +68% |
| No first name & company personalization | –22% |
| City personalization | –38% |
| Brand reference | +19% |
| Number used ("15 ways...") | +14% |
| 20-29 characters used | –31% |
| 70-79 characters used | +23% |

The insight from this data helped us create a group of subject lines that, while not necessarily perfect, helped us target our contacts.

### HYPOTHESIS CONFIRMED

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# 5 Question

What is the right number of assets to be offered in an email?

## Hypothesis

If we promote one asset per email, then subject lines and copy can be more aligned with the offer, which may increase engagement.

## Findings

Emails offering one asset outperformed emails offering any other number of assets.

### HYPOTHESIS CONFIRMED

# 6 Question

Will personalization inside of emails result in a higher engagement rate?

## Hypothesis

If we carry subject line personalization into the email copy, then the message will be more consistent, causing engagement to increase.

## Findings

Performance for this change is hard to isolate due to several email changes occurring at the same time, including creative and audience segmentation. Moving forward, we will change only one component at a time to determine what moves the needle.

### HYPOTHESIS *NOT* CONFIRMED

# 7 Question

Does changing the time zone in which an email is sent impact open rate or CTA conversion?

## Hypothesis

If we send at the same time in each zone (9 a.m. EST, 9 a.m. CST, 9 a.m. PST), then we would see similar open rates and CTA conversions at 9 a.m., 10 a.m., and 12 p.m.

## Findings

Sending at the same time in each time zone had little impact on the open rate or CTA conversion. The largest audience was in the Eastern time zone; this could skew CTA conversion, but not open rate.

### HYPOTHESIS *NOT* CONFIRMED

# 8 Question

What is the best day of the week to send emails?

## Hypothesis

If we send emails over multiple days of the week, then we will be able to determine the best day to send based on engagement.

## Findings

Surprisingly, this audience engaged the most on the weekends. Sunday saw the highest open rates, with Saturday close behind. When it came to engagement, Tuesday saw the best click rate, with Saturday at about the same rate. We determined that the best send day was Saturday.

### HYPOTHESIS CONFIRMED

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## 9 Question

Can the current data tell us the best time to send emails?

### Hypothesis

If we review bulk API data of open times, then we will know when our audience is engaging the most.

### Findings

The largest percentage of opens are tied to the hour of the send time. This skews any results toward the hours when the most emails were deployed—in this case 7 a.m., 9 a.m. and 1 p.m.

**HYPOTHESIS *NOT* CONFIRMED**

## 10 Question

What is the best time of day to send emails?

### Hypothesis

If we A/B test send emails at various points in the day, then we will determine when our audience is most active.

### Findings

While we see the highest open rates at 4 p.m., getting contacts to engage with the CTA is best suited for first thing in the morning. Best time to send for opens: 4 p.m. Best time to send for clicks: 9 a.m.

**HYPOTHESIS CONFIRMED**

# Takeaways from This Case Study

- ❈ Avoid making early assumptions
- ❈ Align questions and hypotheses to desired outcomes
- ❈ Plan the work, work the plan (don't sacrifice for speed)
- ❈ Fight to stay objective (avoiding opinion trumping data)
- ❈ Test one aspect at a time; make it bite-size
- ❈ Improvements aren't guaranteed
- ❈ Keep asking, communicating, testing and optimizing

*Bulldog Solutions is a modern marketing agency exclusively focused on complex B2B. Headquartered in Austin, Texas, Bulldog drives business impact for some of the world's largest brands by balancing the tech with the creative, because B2B marketing performance requires the best of both. To learn more about the insights and direction for your planning, marketing tech stack support and turnkey marketing programs that Bulldog can provide, visit the Bulldog website.*

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