Creating and Running a Benchmark Campaign

https://campus.barracuda.com/doc/84967789/

This article describes how to create and run a specific type of email campaign – a benchmark campaign. For background information, refer to Understanding Benchmark Campaigns.

The procedures are mostly identical to those described in Creating and Generating an Email Campaign, Differences, if any, are highlighted at the start of each section.

For information on benchmark campaign results, refer to Benchmark Results.

To create a benchmark campaign:

Create the Basic Campaign

Most of this information is the same as a basic email campaign. The essential differences in this section are in enabling content groups and setting the campaign intent, both in Step 4.

1. Navigate to **Campaigns > Campaign Manager**.
2. Click **New**.
3. For the **Campaign Type**, select Email Campaign. The Campaign Type for a specific campaign cannot be changed later.
4. Select the **Campaign Intent**. Select either **Testing** or **Testing (Excluded from Program Statistics)**. **This value of this setting is important for benchmark campaigns.**

   If you do not want your campaign to impact your Program Term data, select **Testing (Excluded from Program Statistics)** for the **Campaign Intent**.
   The system will recalculate Program Term data any time you change the Campaign Intent value. The recalculation time depends on the number of outbound records affected.
5. Enter the following information.
   - **Campaign Name** – Enter a descriptive name for the benchmark campaign.
   - **Enable Content Groups** – Select this checkbox to enable content groups. **This setting is required for benchmark campaigns.**
   - **Allow Domains on Block List** – Optional. Select this option to override settings that do not allow campaigns to run with a blocked domain in either a sending email or landing page. Note that emails from blocked domains will likely be blocked from delivery and users will likely not be able to click links to these blocked domains, so your campaign results might not be accurate with this override.
6. Click **Save**. The page refreshes.
7. Optional. Edit the information you entered in Step 5.
8. Optional. Provide the following information:
   - **Description** – Enter text to describe the campaign.
   - **Plan** – Select a plan associated with this campaign. Create and review plans under **Plan > Plan Manager**.
   - **Category** – Optional. Enter a category, like **Browser Lure**, to associate with this

campaign for tracking purposes.
9. **Lifecycle Status** displays **Upcoming**. This is a new campaign and has not yet been activated.

Set the Schedule

This information is exactly the same as a basic email campaign.

In the **Scheduling** section, specify the following information. The system will randomly send campaign emails in the window you define with Start and End Dates.

- **Schedule Based Upon** – Select the time zone for which you want to base the campaign schedule.
    - **Administrator's Time Zone** – Use the time zone you set in **My Preferences** under the profile icon 👤.
    - **Target's Time Zone** – Use the time zone for the target's location, as specified in the Address Book.
- **Start Date** – Select a date and time on which to start the campaign.
- **End Date** – Select a date and time on which to end the campaign, up to one year after the Start Date. Late messages (messages sent out after their scheduled time) can be sent up until the Cutoff Date.
- **Cutoff Date** – Select a date and time when results will no longer be collected for reporting. To ensure that you receive all of the results reporting, specify the Cutoff Date to be *after* the End Date. Having time between the End Date and Cutoff Date provides a cushion to account for factors that might delay a target's interacting with an email, like weekends and vacations.
- **Days of the Week** – Select one or more days of the week on which to send campaign emails.
- **Hour of Day "From", Hour of Day "Through"** – Select a time range during which you want to send campaign messages.

Specify Targets

This information is the same as a basic email campaign. Be sure to complete the following section – Specify the Content.

In the **Targets** section, specify the following information:

- **Emails to Send** – Enter the number of emails you want to send in this campaign. The actual number of emails will not exceed the number of matching Address Book entries – in other words, each email address receives no more than one email from each campaign. If you specify fewer Emails to Send than the number of matching email addresses, the system will randomly select email addresses to receive the emails.
Example: There are 50 matching email address entries. If you specify 50 emails to send, each address will receive an email. If you specify 20 emails to send, 20 of the email addresses will be randomly selected to receive the email.
    - **Set to X Matching Email Address Entries** – Click this shortcut button to set the

Emails to Send based on the number of matching email address entries from your selected Address Books with Advanced Filters applied.

- **Use Address Book Groups** – Optional. Select to use a single Address Book Group, rather than specifying a large number of individual address books. Then select the specific Address Book Group below. For additional information about Address Book Groups, refer to [How to Create an Address Book](#).

- **Select Address Books** – Select one or more Address Books to include in the campaign. Click the magnifying glass to view the number of entries of an Address Book and to edit it.

- **Create New Address Books** – Click to create a new Address Book. For details, refer to [How to Create an Address Book](#).

- **Show Advanced Filters** – Click to display optional hidden filters.

  Advanced Filters are used to determine which addresses in an Address Book to use as targets for the campaign. These same fields are also present in Address Books. Entering information in these fields in the campaign filters Address Book entries based on these criteria. So you can decide to send only to employees of a certain company, at a certain site, and at a certain organization level – like sending email only to Barracuda Networks employees at the Campbell, California office who are at the Director level.

  Note that Advanced Filter fields do not support Boolean search terms.

  - **Organization Area** – Part of the organization, like department or division, corresponding to the email address entry.
  - **Organization Level** – Title or management level corresponding to the email address entry.
  - **Organization Tenure** – How long the person has been with the organization. Can be a numerical or alphabetical entry.
  - **Company** – Name of the organization corresponding to the email address entry.
  - **Country** – Geographic country corresponding to the email address entry.
  - **Region** – Geographic region where the email address is located, like **EMEA** or **Northeast**.
  - **Site/Location** – Descriptor for the location of the email address, like **Manufacturing** or **Downtown Branch**.
  - **State** – Geographic state corresponding to the email address entry.
  - **Source** – The source of the email address. This field can be an Open Source Intelligence source or perhaps data from human resources or a response from a certain marketing campaign.
  - **Program Term Group** – Automatically displays user level for contact selection.
  - **Employment Type** – Descriptions of employment, like **Exempt**, **Non-Exempt**, **Seasonal**, **Temporary**, and so on.
  - **Cost Center** – Unit within the organization where costs related to the email address entry are charged.
  - **Custom Fields** – Enter any information you know to be in one of the custom fields in an Address Book.

Specify the Content

This section is essential to creating a benchmark campaign.

1. In the **Content** section, click **Add New Content Group**. In the dialog box, click **Yes** to save the current campaign and add the content group. The Content Center displays available email templates.
2. In the **Filter** panel on the left, under **Category**, click **Benchmark**, then click **Apply**. The matching benchmark-specific content displays in the Content Center page.
3. Click the card for the Content Group you want to use, then click **Import and Add to My Recent Campaign**.
   Do not edit a benchmark campaign. It is important that the content is standardized.
   You can only use one benchmark content group for a campaign. The system will not allow you to create a campaign with more than one content group.
4. Click **Go to My Recent Campaign.**

Specify Approval Comments

This information is exactly the same as a basic email campaign.

If the **Approval Required** box is selected, this campaign must be approved before you can Go Live with the campaign. If you choose, you can enter comments to the reviewer in the **Approval Comments** box.

> The **Approval Required** setting is configured in **Global Settings > Approvals > Campaign Approvals Required** . If approvals are required, you cannot move the campaign forward from **Approve** to **Go Live** mode without the proper approval. This setting does not affect your ability to move the campaign between **Design**, **Generate**, and **Approve** modes.

Specify Advanced Settings

This information is exactly the same as a basic email campaign.

All of these settings are optional.

1. Select the **Hide Campaign Results** box to hide the results from view. The results will still be collected. You might choose to use this setting when a campaign is past its cutoff date, so only current campaigns display in the results.
2. Select the **Exclude from Program Statistics** box to exclude all activity from this campaign from Program Statistics.
3. Select an image to associate with this campaign. Click **Browse** to select the image.

Save the Campaign

This information is exactly the same as a basic email campaign.

When you have completed all of the required actions above, click **Save** to save the campaign. The page refreshes.

Generate the Campaign

This information is exactly the same as a basic email campaign.

Under **General Settings**, in the **Stage** area, click **Generate**   . Click **Yes** when prompted. The campaign generates.
The generation process can take several minutes. You can move away from the screen or even log out without interrupting the generation process.

Next Steps

This information is exactly the same as a basic email campaign.

The next steps for the campaign are the same as for other campaigns. Continue with Approving an Email Campaign and Going Live.

For additional information on ensuring proper email flow, refer to Email Allow List and Best Practices.

After the cutoff date of your benchmark campaign, you will automatically receive a Benchmark Summary Report for the campaign. See Notification Settings for more information.

Figures

1. profileIcon1.png
2. 2.generate.png