ROI Goalsetter®

GETTING STARTED GUIDE
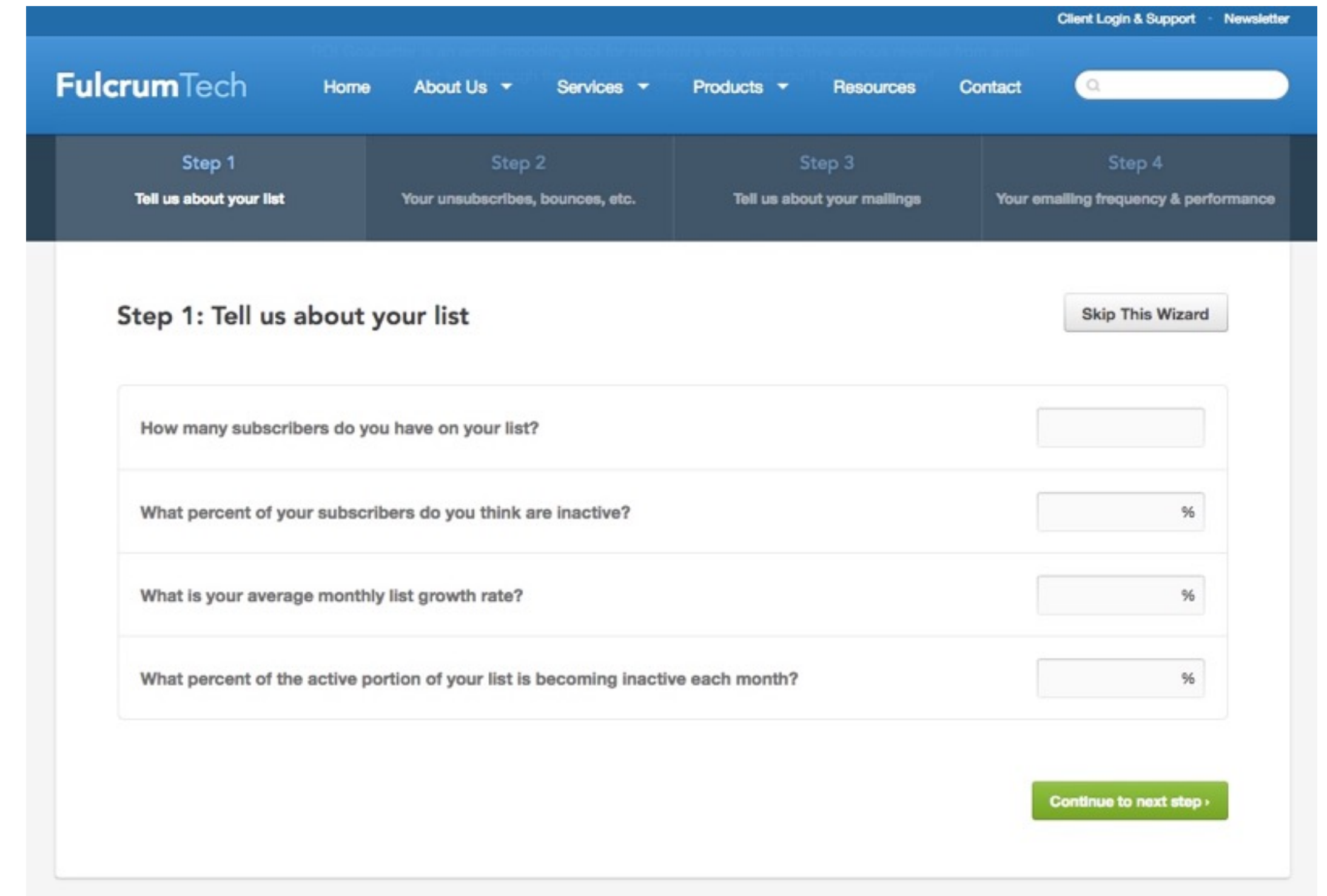
FulcrumTech™
Email Marketing Results You Can Measure

Welcome to your Getting Started guide!

The ROI Goalsetter tool is an easy-to-use yet powerful planning tool for email-marketing professionals. Email marketers have struggled for years to quantify the return on investment (ROI) of their email campaigns, and even more challenging has been calculating the measurable impact of various improvements to those campaigns. For example, how much more revenue, profit, and ROI will you achieve by improving your open rates, click-through rates, and list growth by an average of 1% each? The ROI Goalsetter tool lets you figure that out quickly and easily.

This guide walks you through how to use the ROI Goalsetter tool—from creating your initial scenario to the fun part of playing "what ifs" with your base scenario. You'll be amazed at how easy it is to justify even the simplest email improvement efforts!

Get started now by logging in to the ROI Goalsetter tool here!

STEP 1:
Enter historical details about your email campaigns

What you need to know:

The ROI Goalsetter tool is driven, initially, by your historical performance, including your list size, list growth, average unique open rates, average click-through rates, and so on.

You'll need to enter this historical information so we can create a base case scenario for you. If you do not have all of the information readily available, you can enter an educated guess (changing the initial parameters later is easy)!

STEP 1:
Enter historical details about your email campaigns

How to enter data:
The ROI Goalsetter tool provides two very easy ways to enter your data

Wizard: Log in on the home page of the ROI Goalsetter tool to get to Step 1 of the wizard, and simply complete each of the four steps. If you're not sure what data to enter, just click within any of the boxes for a description of what's being asked. Don't have an exact number? That's okay—simply enter a ballpark number. You can easily edit your data once you see the completed model, and you can always contact FulcrumTech for assistance.

Manual Entry: If you're already comfortable using the ROI Goalsetter tool, you may want to jump right to the model and enter data directly.

1. Log in on the ROI Goalsetter home page to get to Step 1 of the wizard.

2. At the top of that page, click "**Skip This Wizard**." You are now on the Results screen of the ROI Goalsetter tool, where you'll see values pre-populated into the fields: this is a sample scenario, designed for you to use as a guide.

3. Create a new scenario by clicking the "**+**" sign next to your sample Scenario. Click "**Skip This Wizard**," then enter your data into each tab. When you get to the "**Email Overview & Performance**" tab, enter the same values for Historical and Future. We'll explain why in the next section!

Give your scenario a name by double clicking on the tab text, "**Scenario 1**." You can delete unwanted scenarios by clicking "**Delete**" on the appropriate tab.

The ROI Goalsetter tool will allow you to **create and save up to four scenarios.**
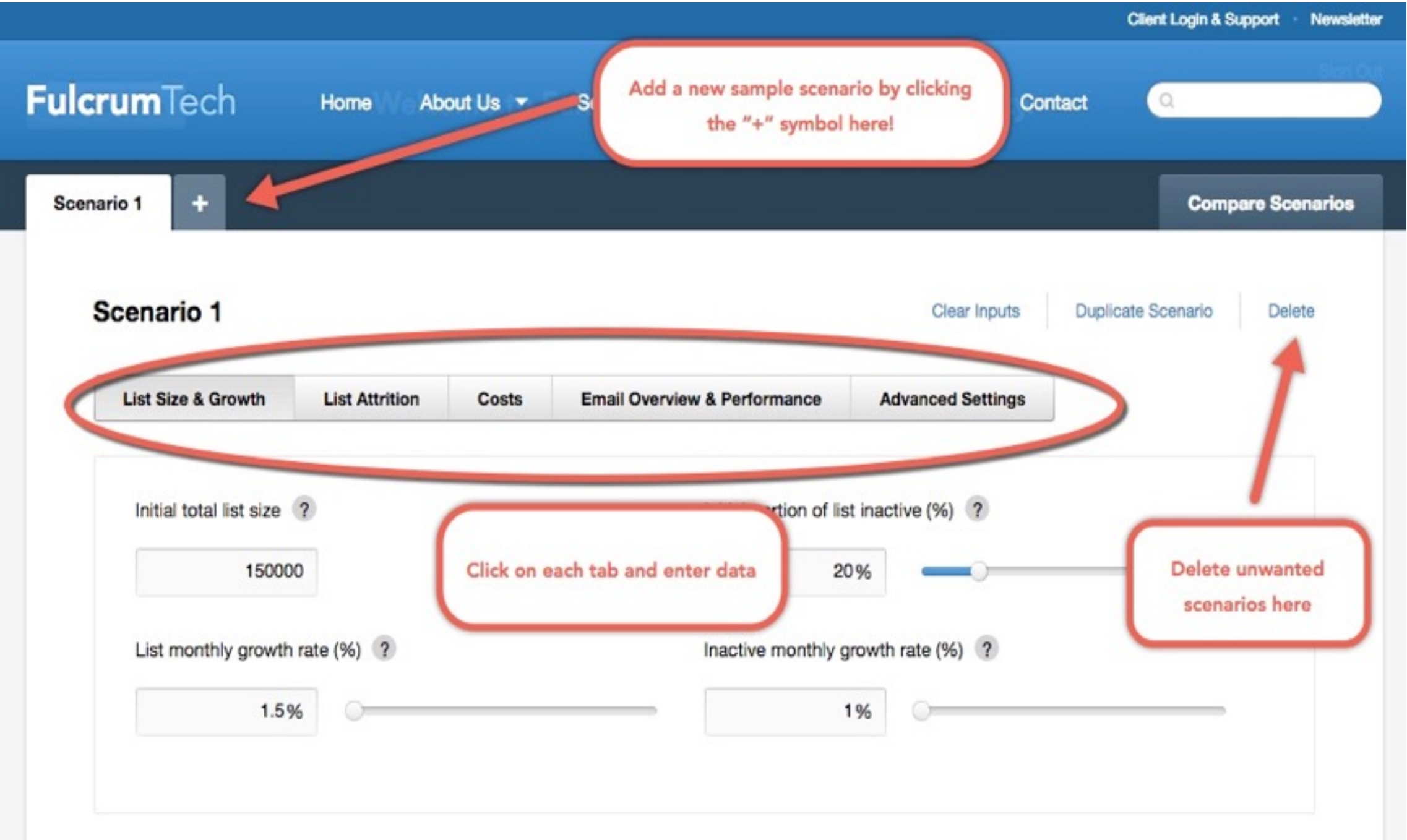
DON'T FORGET TO SAVE!

If you haven't saved your scenarios, be sure to click the **Save** button.

Congratulations! You have now created your base case scenario. You can see the projected 12-month performance of your email campaigns if you continue to have similar open rates, click-through rates, and so on, that you've had in the past.

In the **Results** section of the model, click on the **Data** button to see your results in a spreadsheet format.

Finally, you can download the data by clicking on the "**Download Data**" button from the Data view.
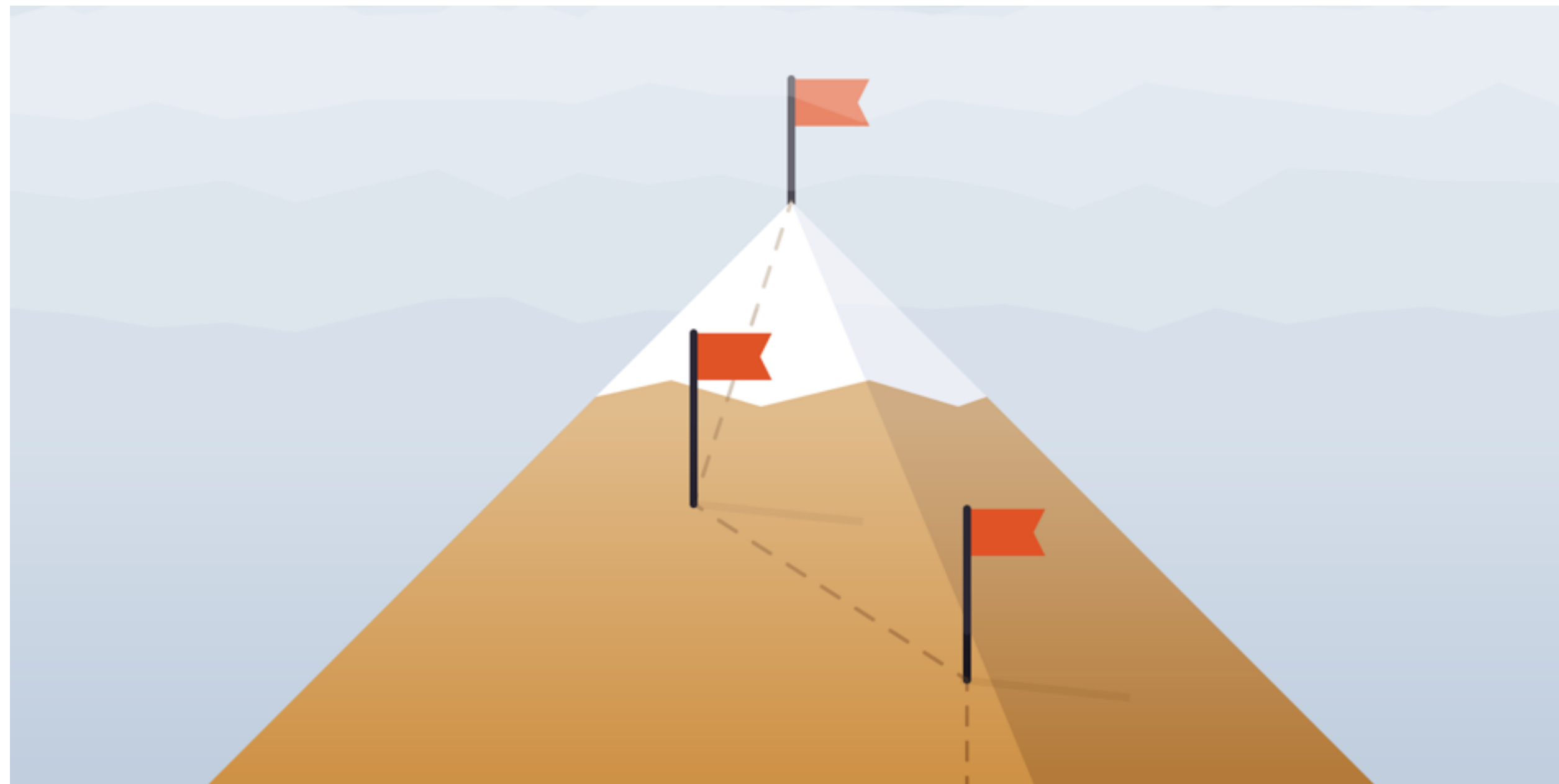
STEP 2:
Create variations of your base case scenario

In Step 1, you created your base case. Now it's time to create a scenario for improvement that you'll be able to share with your colleagues and executives. This is the real power of the ROI Goalsetter tool!

What you need to know:

The ROI Goalsetter tool has robust algorithms built into the calculations. As you play with future scenarios, you'll notice that changing some variables doesn't result in a direct, linear improvement in your results—that's intentional, as that's how it works in the real world. You will want to be careful as you begin to adjust your variables. Think about the impact of changing some items, such as mailings per month, as modifying these variables may also increase your unsubscribe rate. You'll want to consider how you may need to adjust other variables as well to make things as realistic as possible for you.

STEP 2:
Create variations of your base case scenario

Create a future scenario:
Creating a future scenario is easy with the ROI Goalsetter tool

1. **Duplicate your base case scenario:** Make your base case scenario active by clicking on its tab name. Click the Duplicate button. Then, double-click the tab name of the new scenario to give it a name (e.g., Future Scenario).

2. **Modify variables:** One of the quickest ways to see the impact of each change is to change to the Data view in the results section. You'll see Average Revenue clearly presented at the top of that section.

   a. Beginning with "**List Size & Growth,**" click on each tab of variables to begin entering new variables. For example, you may want to increase your monthly list growth from 1% to 2%.

   b. In the "**Email Overview & Performance**" tab, you should change only the future values for those items that have Historical and Future data. Your historical values should not be changed unless you made an error in your base case and had entered values that don't reflect your true historical performance.

3. **Compare to your base case:** Click "**Compare Scenarios**" on the right side of the screen.

   a. Select the scenarios you'd like to compare (e.g., Scenario 1 and Future Scenario) from the drop-down lists.

   b. See the comparison in either the Graph or Data view. You can also download the data by clicking on the Data view and selecting "**Download Data.**"
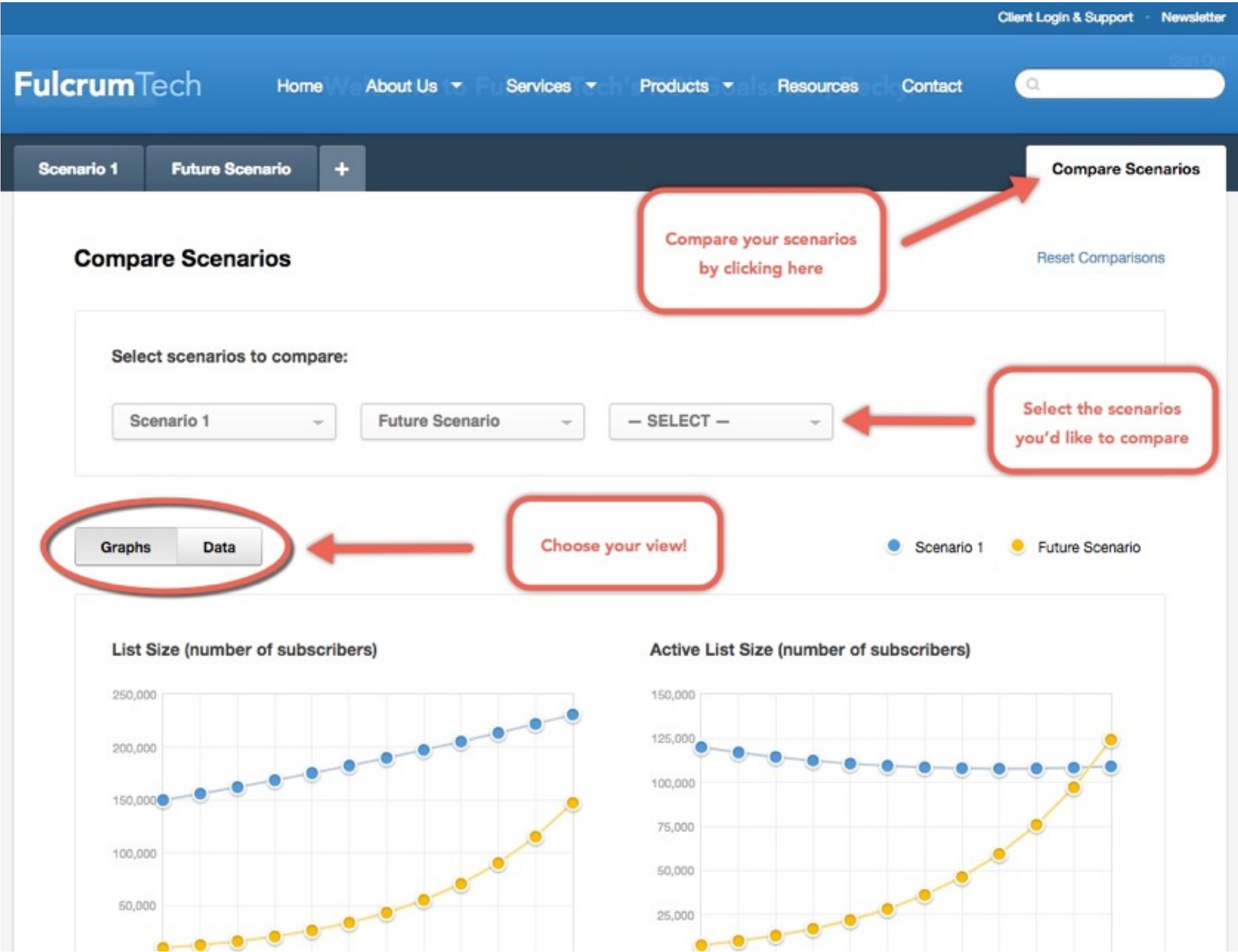
LET'S SUM IT UP!

There are numerous strategies for improving your email-marketing performance, and FulcrumTech can help you in a number of ways:

- Email optimization
- Email newsletters
- Landing-page optimization
- Promotional email

- Selecting an email service provider (ESP)
- Email-marketing assessments
- Migrating to a new ESP
- Deliverability analysis and improvement

NOW, MAKE IT HAPPEN!

Once you have modeled the possibilities for your email-marketing program and you know what changes you need to make, let us help! Whether you need to reduce unsubscribes, increase open rates, contend with inactives, or build your list, FulcrumTech's team of email-marketing experts can get you there.

Contact us for help bringing your email-marketing results to the next level!

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