CHEETAH DIGITAL

Cheetah Loyalty Campaigns
Configuration Guide

Version	Date	Description	Reviewed / Approved by
1.0	August 2019	Initial release	Cheetah Digital Product Management
1.1	September 2021	Added version history	Cheetah Digital Product Management

Contents

Introduction

This document describes how to use Cheetah Loyalty to run marketing campaigns. Campaigns can contain targeted offers and messages.

The intended audience is marketers with marketing operations experience. Some of the setup steps also require visual design skills such as creation of image assets.

Feature Highlights

Cheetah Loyalty provides powerful capabilities for running campaigns to reach customers with rich messages and targeted offers.

- Objective setting and tracking
- Audience-based targeting
- Optional audience "Snapshot" (static list)
- Campaigns can contain Offers and Messages
- Multiple concurrent campaigns
- Offer Targeting using Placements
- A/B Test Groups
- Control Groups
- Offer Groups for simple sub-audiences and testing
- Dashboards showing objectives, offers, messages, and custom metrics
- Campaign calendar

The main components are Campaigns, Offers, Offer Groups, and Placements.

Part 1: Setup

This section describes initial setup. Most steps in this section only need to be done once, or very rarely. Most of the instructions are high-level for easier readability and refer to Appendix A for deep-dives on particular topics.

Step 1: Placements

If you are using Campaigns to publish Offers, then you should configure your Placements first. Placements are part of Setup because your mobile and web developers will need to use them in their apps, and your email template developers will need to use them in the email template.

What is a Placement?

A **Placement** is a named place where content can be targeted, such as a mobile carousel, web carousel, or particular section of an email. For example, the top of the mobile app home screen might have the "Mobile Carousel" placement. This is a properly named place in the mobile app, and campaigns can put offers there, similar to how your local grocery store can display items on the "endcap". Placements allow marketers to express their ideas naturally, such as "put this offer into the mobile carousel". Multiple marketers or campaigns can even target their offers into the same Placement(s).

Standard Placements

The following Placements are provided with your program.

- **Mobile:** main offer list in mobile app
- **Web:** main offer list in in web app
- **Email** Primary: main offer (usually just one) at the top of an email

Creating a new Placement

1. Log into Cheetah Loyalty and go to Campaigns > Setup > Placements
2. Create a new Placement
3. Set Platform to Web, Mobile, or Email
4. Publish the Placement
5. Inform your mobile developer, or web developer, or email template developer about the new placement. For mobile and web apps the developer will need to add a new area of the screen. For email templates, you may need a new Dynamic Content section to be added, such as for a secondary offer.
6. If you already have created Campaigns, go to those Campaigns and enable your new placement, if desired.

Part 2: Basic Campaigns

Objective

Before building a campaign, always first think about what your campaign will be for, who it will target, and how it will improve your business. What constitutes success for your campaign? The Campaign Objective provides you with a way to model your goals and targets for the campaign, and then measure your success. Building a track record of repeated success is important for any marketing team.

See Part 5: Campaign Objectives for more details.

Audience

Campaign Audience

Audience definition

Control Group

Target Members (audience - control group)
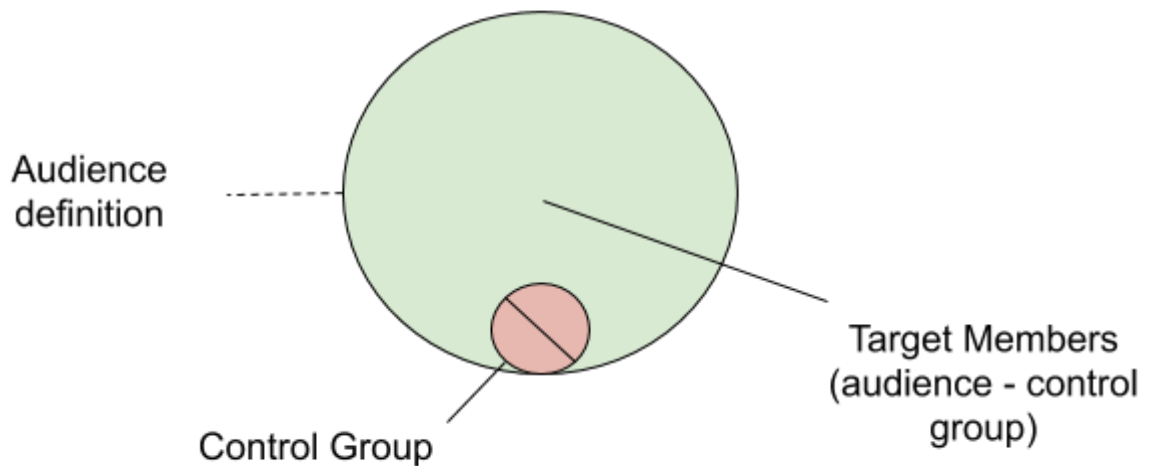
Offers

Placements

Part 3: Campaign Lifecycle

The Cheetah Loyalty campaign lifecycle follows real-world marketing campaigns. Brands can have multiple marketing campaigns running concurrently at the same time, from one or more marketing teams, worldwide.

State and Effectivity

Campaigns have State (draft/active/archived) and Effectivity (start/end dates). They can overlap and probably will quite often, especially if a customer has multiple marketers or teams.

Campaign Lifecycle

Campaign Lifecycle
They have have "State" with start/end dates

Campaign Offers (1:n)
An offer can only belong to one Campaign

"Summer Kickoff"
June 1 - August 1
State: active

Offer Offer Offer

"Mid Summer"
June 15 - August 15
State: active

Offer Offer Offer Offer

Concurrent Campaigns
Campaigns can overlap, running at the same time

"Back to School"
July 15 - September 15
State: draft

Offer Offer

Placements

A Placement is a named place where content can be displayed. Campaigns "Target" Offers to Placements. Multiple campaigns can target offers into the same Placements at the same time.
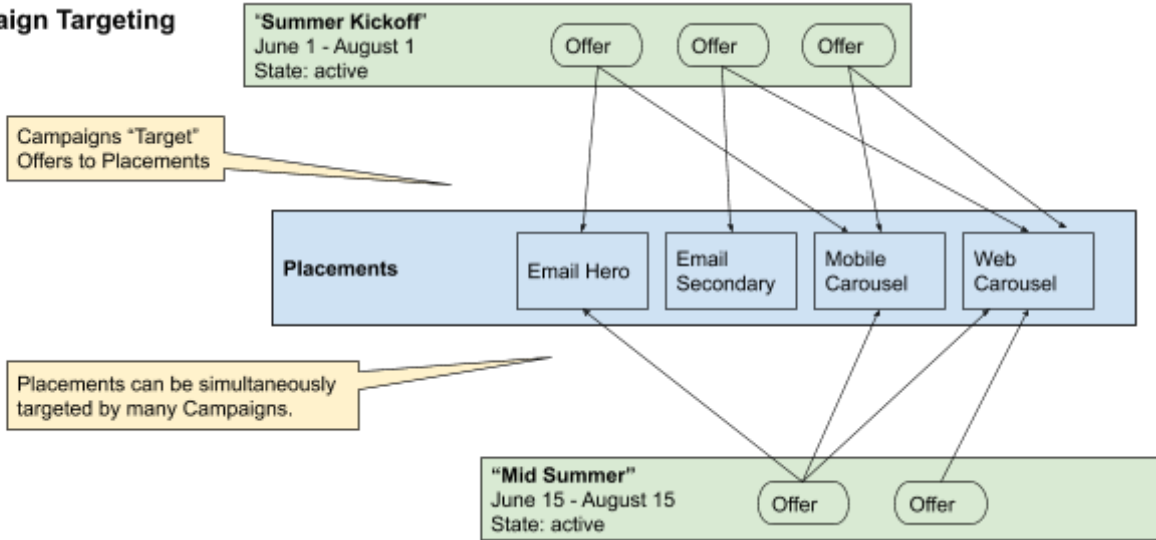
Clients Use Placements

Clients such as particular email messages or apps (web and mobile) use Placements to get their content. For example, a web app might get the content for it's carousel from the "Web Carousel" Placement. Campaigns target Offers into Placements by name.
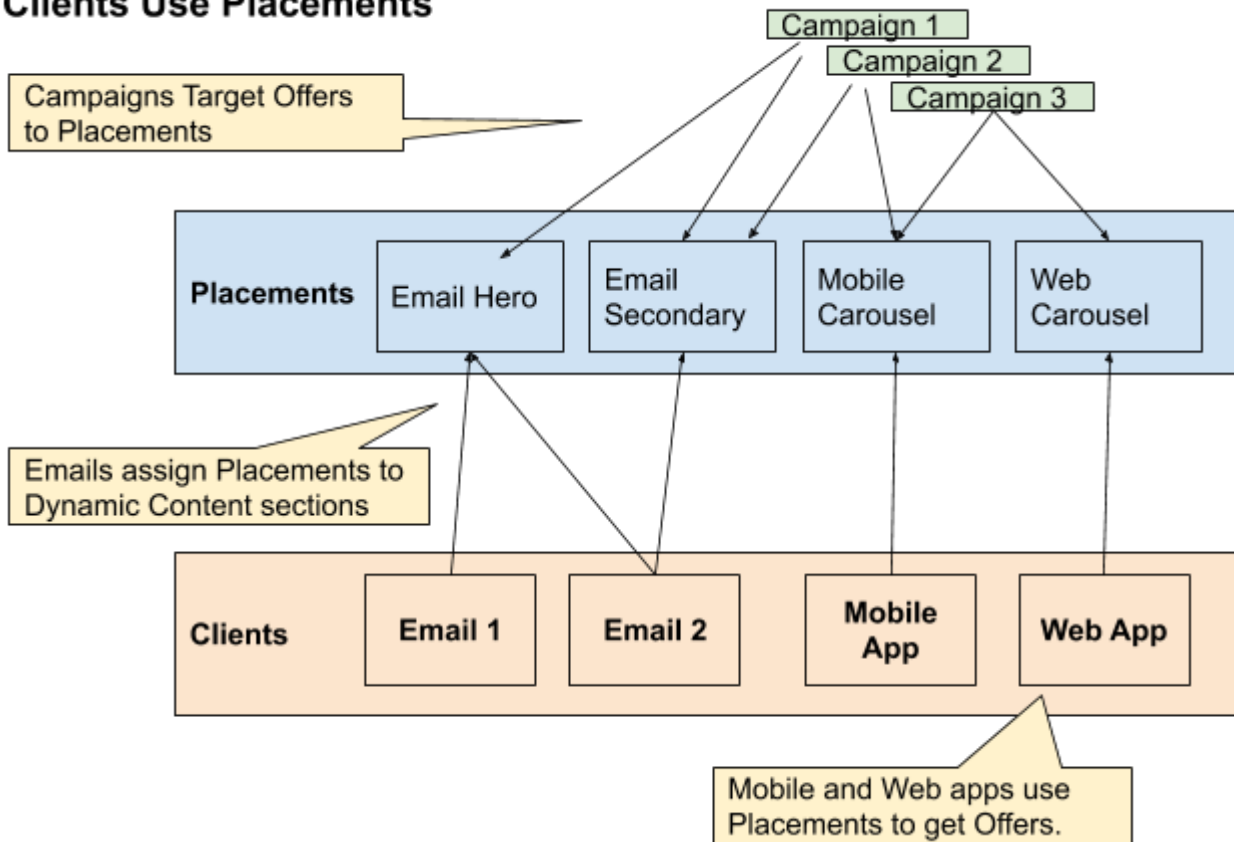
Campaign Member Targeting

As mentioned above, Campaigns target Placements, but they also target Members.

Each Campaign has an Audience definition, which are a kind of segment definition. A campaign only targets members who are in its audience.

Each Campaign can optionally have a **Control Group**, which is a set of members randomly selected from the audience. The Campaign will not target members who are in the Control Group.

So, the Campaign "Target Members" are those who are in the audience but not in the control group. Campaign offers will only appear for users who are in the set of Target Members.

This needs to be applied in the Offer Finder along with targeting of Placements.

GET /offers needs to be updated to check for Target Members, not just Placements. (Presumably Campaign Eligibility is already checked.)

Part 3: Offer Campaigns

Creating an Offer Campaign

1. Create campaign "Drive Frequency"
2. Create four offers and publish them
3. Define audience
4. Choose "Email" placement
5. Set effectivity and publish campaign
6. Create one email message with Email placement
7. Manually send the message

- **Campaign Offers**
  - Campaign Offers can be ranked and also targeted to Placements
    - Standalone Offers do NOT gain these new capabilities
  - **Offer Ranking - updated for m-18**
    - Offers are ordered by Campaign Rank and then Offer Rank
  - ~~Offer Scoring - removed in m-18~~
    - ~~Offers can have rules for offer scoring, and scores are used across all offers.~~
    - ~~Campaigns can be used to easily configure offer scoring rules and ranking across offers within the campaign, which sets the scoring rules and ranking for those offers.~~
    - ~~Offers also have Ranking, which is a forced rank across all offers. This is only used as a tie-breaker for two Offers that have the same exact Score.~~
  - **Offer Targeting**
    - Campaigns can target Offers into Placements.
    - Offer Sets are obsoleted by Placements and will be retired in a future release.

Offer Ranking

Offers are ranked so that the best offer is displayed to the member. Offers are ordered first by Campaign Rank and then by Offer Rank within the campaign.

Each Campaign and Offer has a Rank setting, with 1 being the best. Ranks are "force ranked", so a single Campaign can be in Rank 1, Rank 2, etc. Offers work similarly within each Campaign, so only a single Offer can be in Rank 1 for its campaign.

Part 4: Campaign Messages

Using Placements in Messages

Messages can use Placements to deliver content from multiple concurrent Campaigns.

Using Placements inside scheduled or triggered Drip Messages creates an offer delivery channel across Campaigns. This means the marketer does not need to design a new email for every offer Campaign, and the message can potentially include content from multiple campaigns. This can also help prevent the problem of sending too many emails to members since fewer campaigns will need to send emails.
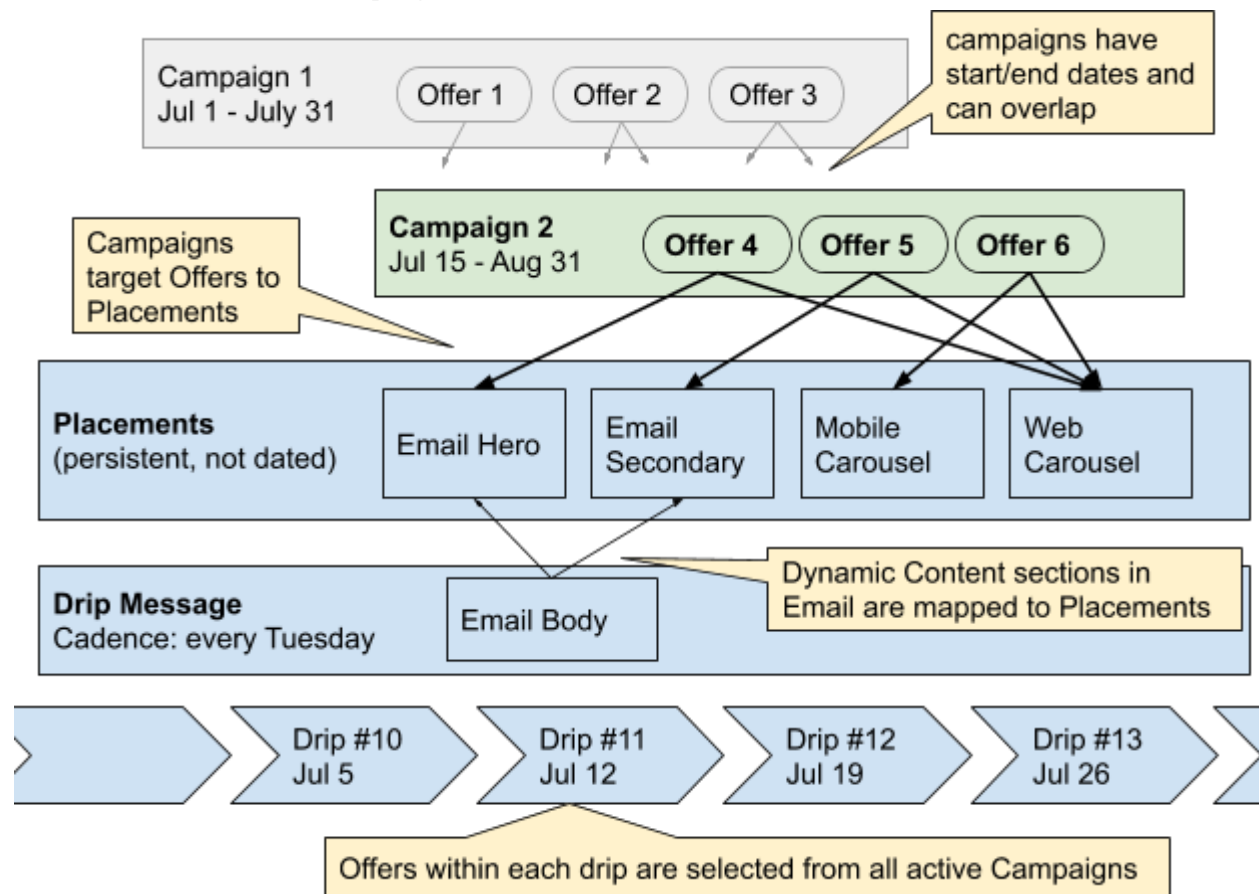
Part 5: Campaign Objectives

Marketers use Campaigns as a means to *influence consumer behavior*, such as incentivizing dormant customers to make a purchase.

Marketing teams normally create marketing objectives this as a matter of course, but Cheetah Loyalty wants them to be able to model their normal business processes in the marketing console. Cheetah Loyalty lets the marketer to create a marketing objective for each campaign, which is called a **Campaign Objective**. Customers should create a separate Campaign for each marketing objective.

Each **Campaign Objective** has a **Success Metric** such as "Members who make a Purchase" and an **Objective Target** such as "at least 1000 members". Progress towards the Objective is automatically measured and displayed on the Campaign Dashboard.

Example: Win-Back Campaign

A marketing team decides to run a "win-back campaign", and writes the following description on a piece of paper or whiteboard. Everything is just free-form words, in "business pseudocode".

Win-Back Fall 2016

- The objective of this campaign is to reach out to 100,000 members who previously made a purchase--but not in the last six months--and entice at least 10% of them to make at least one purchase.
- Runs October 1 - November 15
- Audience and Target: 100,000 members start and at least 10% (10,000) finish
- Budget $4200

Next, the marketing team creates their campaign in the marketing console. Each of the parts above needs to be modeled in the campaign.

- The **Objective** is just free-text that can go into the description, or we can add a separate field
- "Runs October 1 - November 15" are **Effectivity** dates for the Campaign
- **Audience:** segmentation rules for "members who have made a purchase in the past, but not within the last six months"
- "to make at least one purchase" defines the **Success Metric** for each member.
- **"**at least 10,000 finish**"** describe the **Objective Target**.
- **Control Group:** The campaign will reserve 10% of the Audience as a Control Group

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Measuring Objectives

Each **Campaign Objective** has a definition including **Success Metric** such as "Members who make a Purchase" and an **Objective Target** such as "at least 1000 members". Members who meet the Success Metric are "successful" and count towards the the Objective Target. Progress towards the Objective is automatically measured and displayed on the Campaign Dashboard. The customer can also describe value and costs, in order to better understand the benefits of the campaign.

"Objective" Subpanel

Show a form for defining the Objective as a new subpanel named "Objective".

- **Objective Description**: Textarea for user to write a description of the objective, with placeholder text "What is the objective of this campaign?"
    - Future: provide suggestions. The user can click prev/next to cycle through a carousel of prewritten objective descriptions, which can then be customized.
        - "Suggestions: < prev | next >"
- **Success Metric:** field group
    - intro: "Audience members who meet this criteria are "successful" and count as progress toward the Campaign Target."
    - **Objective Type:** Objective types are "Activity" or "Metric". This is a hidden field without a label, using a radio group.
        - ◉ **Activity Type(s)**: Multiple-pick list of activity types. The marketer wants the members to take these kinds of activities.
            - "Activity Type(s): [Select Activity Types...   ] "
        - ◉ **Metric(s):** Multiple-pick list of Metrics. The marketer wants the members to take these kinds of activities.
            - "Metric(s): [Select Metrics...   ] "
    - **Period:** Specify the time frame for the activities. This is based on the Campaign Effectivity, plus a number of days after the campaign ends.
        - "Period: campaign effectivity plus [0] [days]"
    - (future) **Comparison Period:** Specify a timeframe *prior* to campaign effectivity dates for comparison.
        - "Comparison Period: [30] [days] prior to campaign start"
    - (*deferrable*) **Filter:** Optional / advanced for the user to enter an expression to filter activities.
        - "Filter: [Optionally enter an expression...   ]"
- **Campaign Target:** Number field for the user to specify the number of members that should meet the metric objective.
    - "Campaign Target: [1000] audience members"
- **Value:** optional field group

- ○ **Value per Member:** (currency field)
  - ■ "Value: [50.00] per member"
- ○ **Costs:** Two currency fields for **Fixed Costs** and **Cost per Member**.
  - ■ "Costs: [0.00] fixed costs plus [0.00] per member
- ○ **Projected Value:** Calculation of total value less costs, shown as tip text under the Value per Member field. This is to help the user quantify the benefit of the campaign.
  - ■ "Projected Value: 140,000.00"
  - ■ calculation = Member Target x (Value per Member - Cost per Member) - Fixed Costs
  - ■ Note: this is *projected* so only use the numbers from the form above, not actuals.
- ● Validation: user must select at least one Activity Type or Metric.

Campaign Objective Dashboard

Show the status of the campaign objective "Dashboard" subpanel. The main concept to show is progress towards the objective, which is defined as **Successful Members compared with the Campaign Target.** These "successes" are analogous to opportunities "won" in a sales cycle.

Dashboard Components:

1. **Objective:** "objective description in friendly looking blockquote"
2. **Progress Indicator:** Progress bar of Success vs Target. For example, with an Campaign Target of 10,000 the thermometer would be 12% full if 1,200 members had met the Member Success Criteria.
3. **Successes:** count of successes, with percent of audience
4. **Target:** objective target number, with percent of audience
5. **Audience:** count of members in audience, with percent of all members

6. **Successes (over-time chart):** Show an area chart over time, showing the growing aggregate of members with the objective activity. This section also illustrates "campaign buzz" to "non-campaign buzz".

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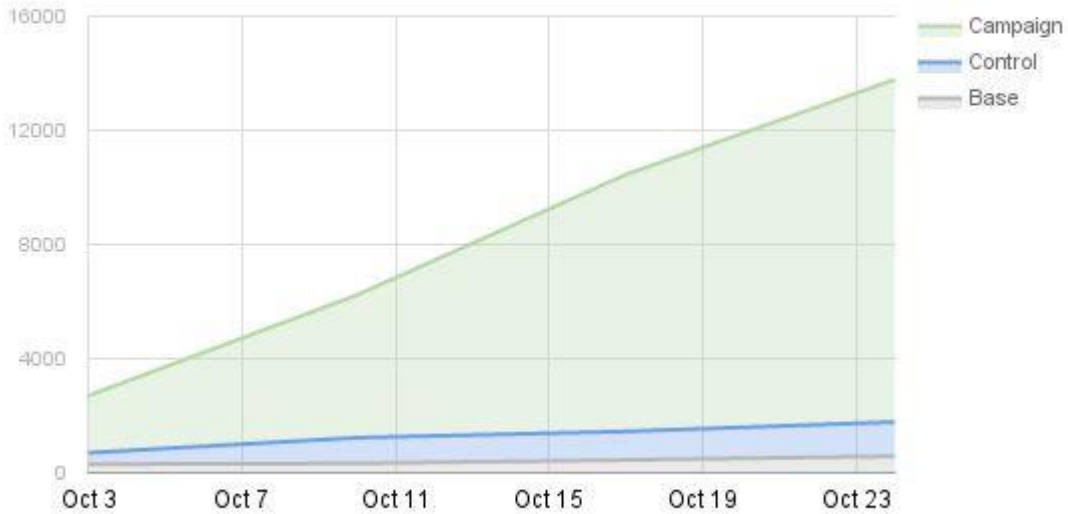
Success

7. **Successes (Table):** Show aggregate data similar to the chart above, but not over time. The key insight from the dummy data below is that members who were touched by this campaign were 20x more likely to purchase than those who were not in the campaign, and 10x more likely to purchase than members in the same segment who were not touched by the campaign (control group).

	Successes	Members
Campaign	20,000 (20%)	100,000
Base	10,000 (1%)	1,000,000
Control	20 (2%)	1,000

8. **Value:** Show projected vs actual value vs cost.

	Actual	Projected
Value	$180,000	$150,000
Cost	($20,000)	($10,000)
Total Value	**$160,000**	**$140,000**

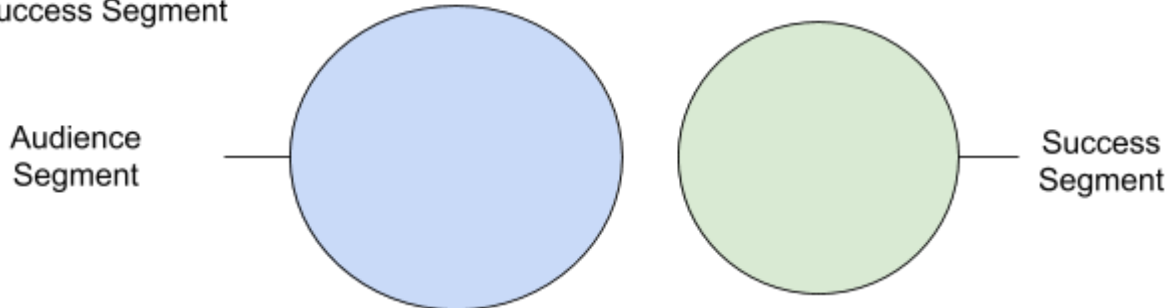Cheetah Loyalty Campaigns - Config Guide   14

(future) Segment-Based Campaign Objectives

The desired end state would be defined as a Segment, such as "members who have made a purchase in the past month". This segment is called a "Success Segment".

Before Campaign

Audience members are not in Success Segment

Before the campaign, none of the members in the Audience should be part of the Success Segment. None of the **Audience** should have made a purchase in the past month, although there may be other members outside the audience who have made a purchase and are already in the Success Segment.

After Campaign

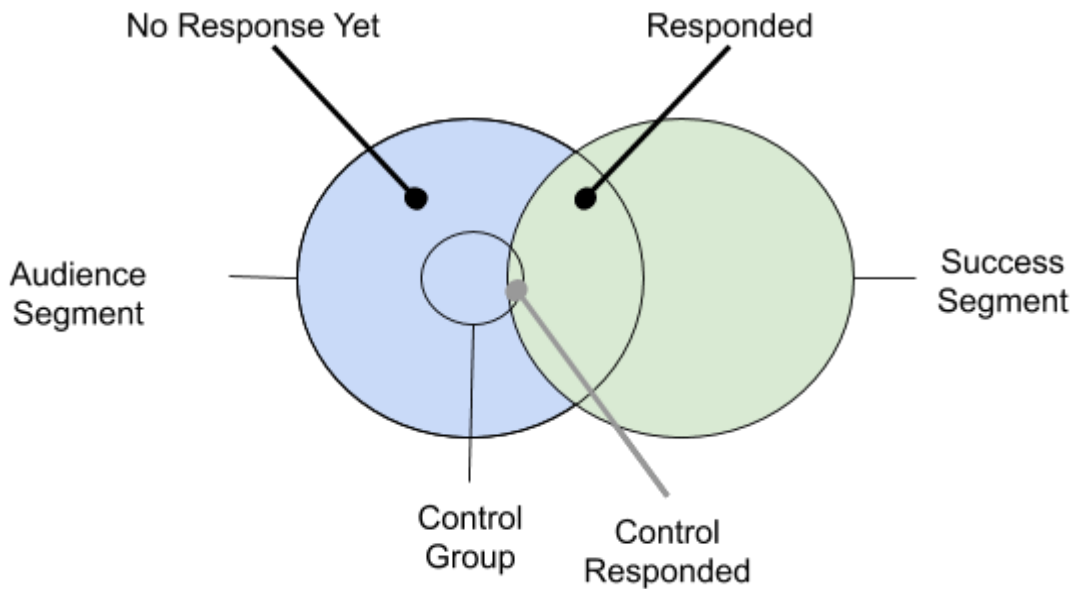Audience shrinks and Success Segment grows
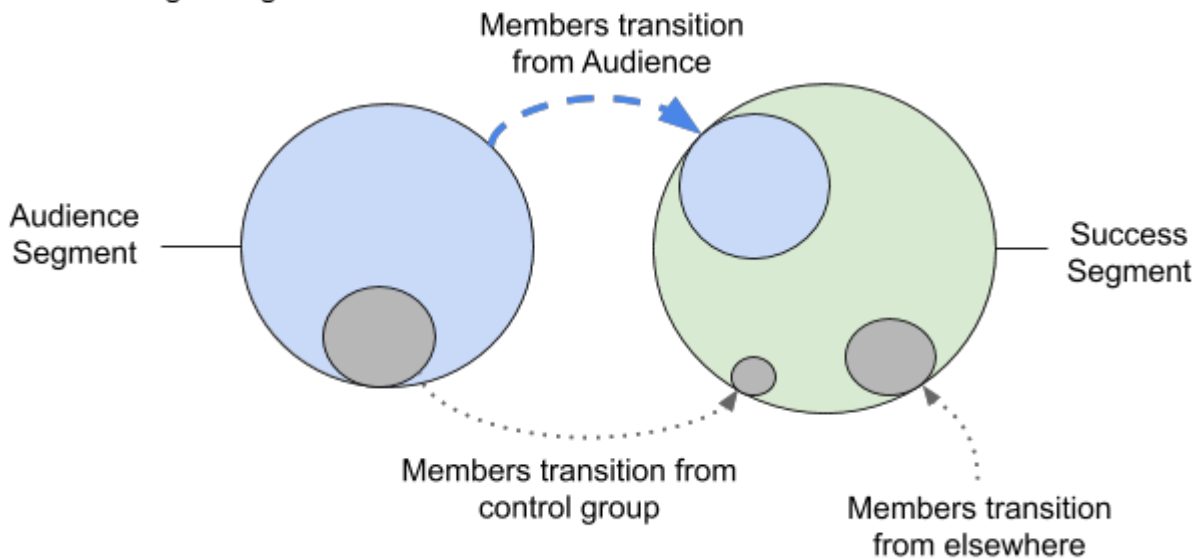
After the campaign (or possibly mid-way) some of the Audience has (hopefully) crossed over to the Success Segment. These are the members who responded to the campaign,

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and for whom the campaign was successful. The marketer needs to define goals in terms of this transition, successfully crossing from the starting Audience into the Success Segment. In addition, we can provide a control group to make numeric comparisons (e.g. lift, ROI) easy and defensible.

Here is an alternative representation.

After Campaign

Appendix A: Setup Details

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