Dialog Insight

Test your campaigns with Dialog Insight

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Introduction

Creating original and well-thought-out marketing campaigns requires several success factors. One of these factors that should not be overlooked is the ability to test your campaigns before putting them online or sending them to your contacts. Fortunately, the Dialog Insight application offers several features that allow you to test your communications.

In this white paper, you will get an overview of the different tests available, for each channel, with some application examples. We will also discuss the benefits of each of these tests as well as best practices and tips for successful testing with Dialog Insight.

Enjoy your reading!

Optimizely

Barack Obama's digital marketing team used A/B testing to increase their newsletter subscriptions by 161% and donation conversions by 49%.
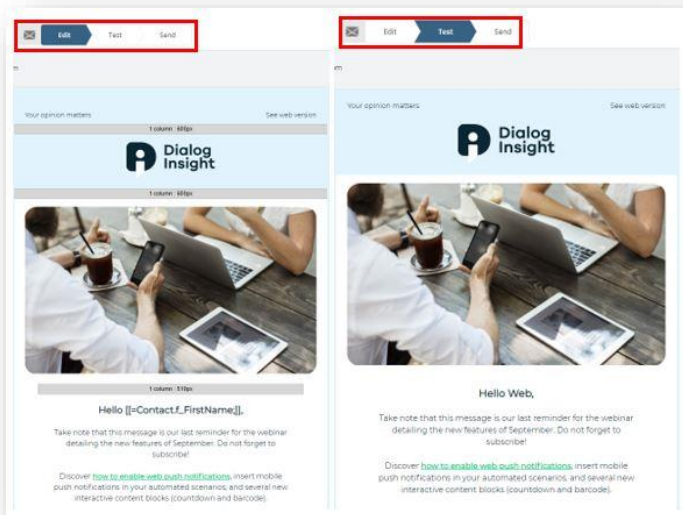
Emails

The basic test: the preview

The most basic way to test an email is to validate its visual aspects. This will remove the editing elements as shown in the image below.

This preview allows you to see what your email will actually look like so you can get a quick preview. This makes the work easier and speeds up the preparation between the editing area versus the preview area.
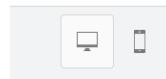
Caution! Never send an email just by looking at the rendering of this version. It is not guaranteed that once in the inbox, it will arrive in this visual, since the email undergoes adjustments according to the rules of suppliers such as Outlook and Google.

Mobile preview
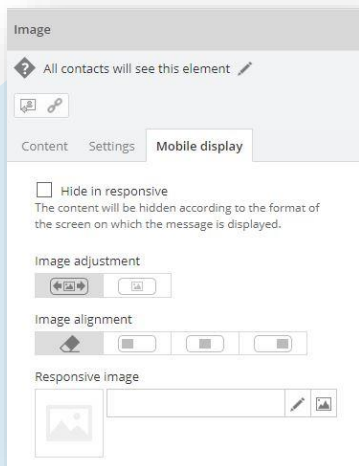
The option to preview the mobile mode can be found at the top right of your screen:

In addition, if you have changes to make on mobile only such as margins, text size and alignment, it is possible to do so in the edition of your message. Simply choose the *Mobile Display* tab to make the necessary changes without affecting your computer rendering.

If you have custom templates that were created before January 2020, this option will not be available. The same applies to emails based on old email templates available in the application. You will not be able to see this feature.

This is normal since it was launched at the beginning of the year 2020. If you wish to obtain this feature, you must use the new templates or update your custom templates.

Why this? By modifying existing templates, we may accidentally affect other portions of your email, which we want to avoid. That's why this kind of change has to be done individually. In addition, this kind of optimization work keeps your templates up to date by always incorporating the most advanced features and best practices that are constantly evolving.
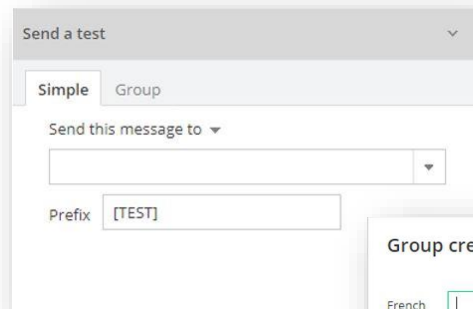
Send a single test version or to a group

Once your email is well advanced, you can test it in a mailbox by sending it to a unique email address. It is also possible to send it to several people at the same time, as long as they are part of a test group.
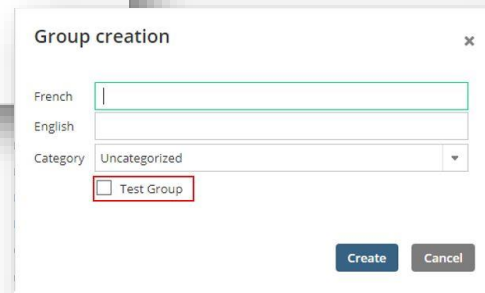
In the test tab, go to the left column, in the Send a test section. This is divided by Simple and Group. Simple test is aimed at a specific address, whether it's yours or for a colleague. Group tests are also an excellent option to reach several people at the same time.

* A test group will only appear in the list if it is checked Test group in the Contact zone of the application.

The default prefix is [TEST] and will be added just before the subject line. You can change this prefix to suit your organization's nomenclature. A mailing of this kind takes only a few seconds to arrive in the inboxes of the addresses concerned.

Simple test sending

For a simple test mailing, it is important to understand that the test is sent to the name of the contact selected in the *Preview with a contact* section at the time the test is sent, and not to the contact selected in the *Send a test* area (you for example).

This means that if your email includes personalization (display conditions or customizable variables), the sending will be done to meet the criteria that correspond to this contact.

Tip: in an email to encourage re-subscription, the email contains a conditional block that must be displayed to all contacts whose subscription ends in 2 months.

It is important to validate a contact that meets, or does not meet, this criterion. To do so, browse through the list of available emails in Preview with a contact to select the right email before sending a simple email, or better yet, select a group test which contains those different types of contact.
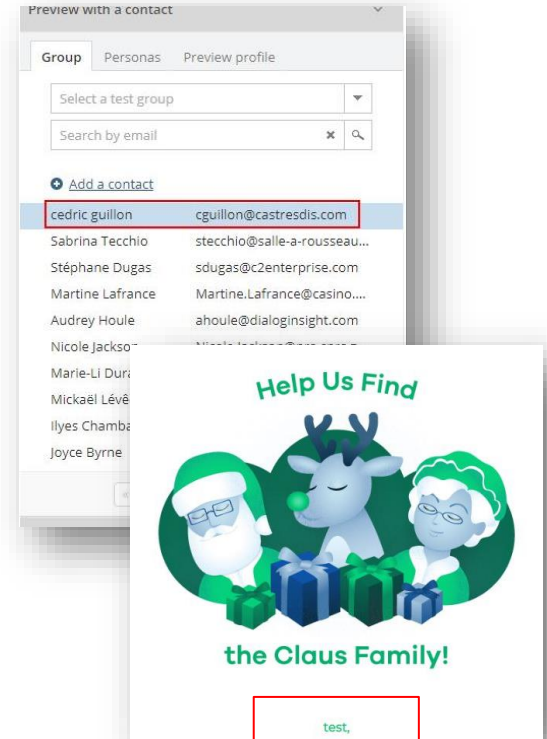
It is the same principle if you have inserted personalizable variables in your email. Let's take as an example the simplest form of personalization, which is to start your email with Hello [First name variable]. The first name that will appear in your test email will also be the first name of the contact selected in the *Preview with a contact section*, as you can see below.
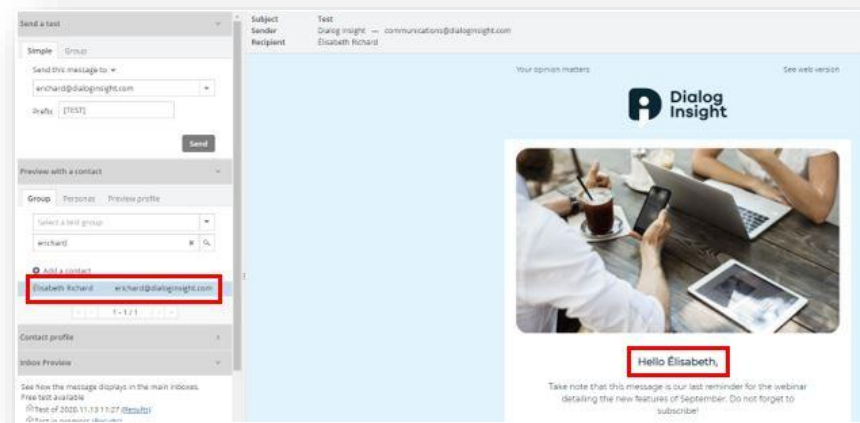
In addition, all links that will be inserted in your message will also be tested in the name of the contact selected for this purpose.

Important! This can have a non-negligible impact, especially in the case of a test email that includes the unsubscribe zone required by law. If you test this portion by clicking on the unsubscribe link, you will permanently unsubscribe the selected contact from your communications.

In fact, all actions performed during the test will be performed in the name of the selected contact. This is why we recommend that you create a bank of test contacts that will be used to test these types of elements in your emails without necessarily harming your real contacts. These test contacts will have to be linked to your various personalized elements. For example, if you have gender personalization (male or female), it would be good to create a male contact, a female contact and an undetermined one to see the result in each situation. If you have personalization in relation to the contact's city, create contacts so that you can test each display possibility according to the city.

If it is a message without personalization, you can simply use your own contact without the risk of breaking the information of one of your contacts during the test.

It is therefore very important to make the difference between the email address inserted in the *Send a test* section and the one selected in the *Preview with a contact section*. In fact, the first will be the recipient of the email test, while the second one is the base on which the information will populate the different area of your test email.
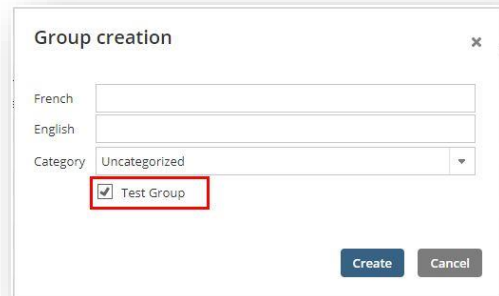
Sending copies

In this section, you also have the option to send copies of your test to the same recipient. This option allows you to send the desired number of copies to the same number of contacts in your list to test the email in different names. For example, you want to send yourself 4 copies of your test; the system selects the first 4 contacts from your group test and you will receive the same message on behalf of 4 different contacts. Thus, you can view the elements of your message according to 4 different contacts and see if there is any variant problem.

Group sending

Then, for the Group Test option, the difference lies in the recipient: instead of sending your test email to only one person at a time, you will send it to a group of contacts.

As mentioned before, you must have created your test group beforehand. Simply go to the Contacts tab on the left menu, then Group and by creating a new group you will have the option to categorize it as a Test Group as you can see below.

Seedlist

Inbox preview

The test sendings we have covered so far all have one thing in common: they are viewed in a single inbox (probably the one associated with your company). But each email reader, such as Outlook, Gmail, Apple Mail, etc., formats emails according to their own rules. That's why the inbox preview is a perfect tool to get the preview no matter which provider will send the message.

* This option is not included in the basic package with the purchase of Dialog Insight. You can still get a sample of this feature so you can give it a try and see if there is any added value for you. It is also an option that can easily be added after your free trial. Here is an example of what you will get:
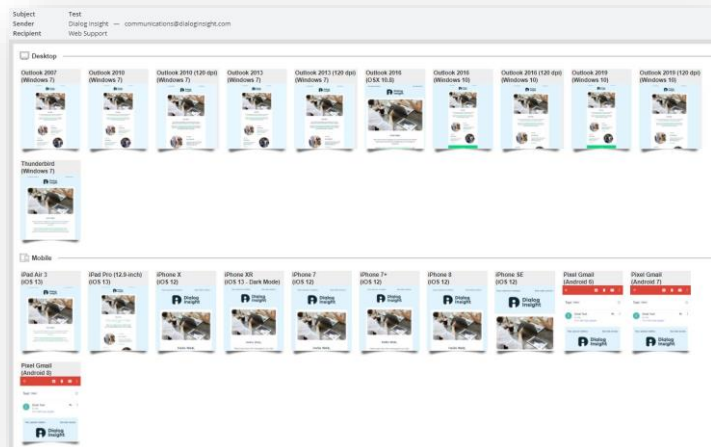
When you have this view, simply click on one of the versions to see a complete preview of what your email will look like on that particular platform.

This way of testing allows you to see if your email displays the way you want on all platforms (mobile and desktop), and to correct it if there is a glitch in one of the versions.

Note that the process can take up to 10 minutes, but by experience, it doesn't take that long. Simply refresh your browser page or return to the email test area a few minutes later.

Sending simulation

The Sending simulation option is the most accurate way to see what your email will look like when you receive it. This is the most accurate test you can get with the Dialog Insight platform.

This is very useful when you have a sending with a lot of personalization creating several versions of your message, either by inserting queries, relational tables etc. Your message becomes very difficult, if not almost impossible, to test in a conventional way. Sending simulation therefore becomes your best option at this level.

On the other hand, it is important to know that each simulation you make will be counted and billed as a normal sending. It is thus to be taken into account when using this feature, and especially when you choose the number of recipients. Indeed, if your email has 30 versions and you decide to send it in simulation to 1000 contacts, you are paying for a potential 30 000 sending. Despite the cost per use, an error in an email can sometimes be much more costly if you don't test it properly.

In addition, many companies use the sending simulation during a first campaign to ensure that everything is in place and that nothing has been missed. It can also be used to test personalized email templates to ensure that they meet expectations and can be used worry-free for future emails.

Review notes

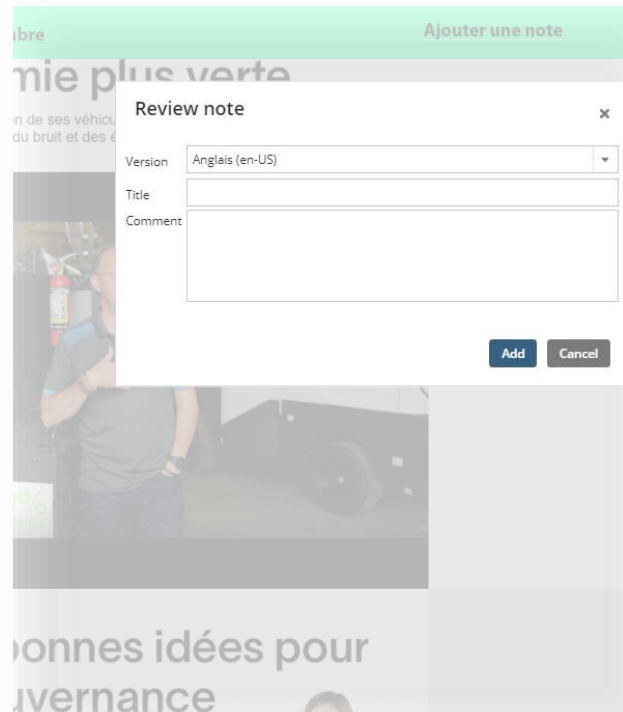Several very interesting collaboration options are also available in the application, yet unknown to most of our customers. One of them is the review note. When editing your email, if you go to the additional options icon,

in the top right corner, you have the *Review tab* that you can use to give comments, suggestions, reminders… in short, anything you want to write to other users about your email.

Review notes

What is interesting with this option is that if you go to the menu *Configuration - Communication types*, you can create a notification in order to alert, by email, the desired users when you add a review note for a certain message type.

If you don't do this step, your team will have no way of knowing that you have added a note, or at least will have to go directly to the message. This is not very convenient. In addition, your collaborators can set a status to your review note such as Approved or Pending for better follow-up.

Sometimes it is not necessary to send an alert to all users. Thus, you can choose to whom you want to send the notification in question, so that only those concerned are notified.

This option is available for all your message types so you can do it for all or only some of them depending on your needs.

In addition, our team is currently working on a way to take this feature even further. Soon, when you send a test to certain members of your team, they will have the option of adding a review note from the test email you sent them, without connecting to the platform. This will be available via a button inserted in the test email and you will receive all these review notes by email afterwards. You will then be able to modify what you want and better track third party comments in this way.
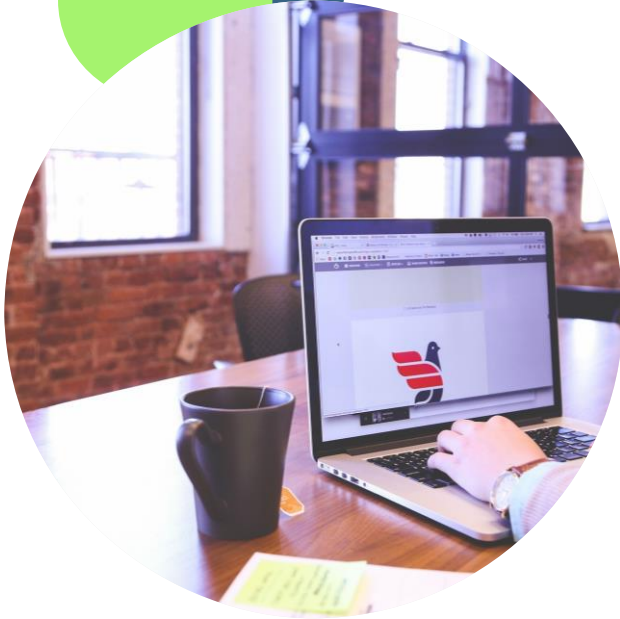
Display personalization data in script

Another option available when you test your emails is to get a script that will be visible in the email header, once it is received in the inbox, in test mode. This script displays the various personalization information found in your email.

This is useful when you have a high amount of personalized element, such as display conditions for multiple items, or items from relational tables. This allows you to view all these conditions in one place, as well as keep track of the contacts used to perform your tests on their behalf. This option is only available when programming custom email templates.

In other words, it will not be possible to get this script unless your template has passed through our integration team, as this is a more advanced testing feature. To move forward with this, you can ask your Customer Solutions Manager to coordinate the project.

Ce bloc ne s'affiche qu'en mode de **test** ainsi que pour le **domaine** @dialoginsight.co   n.

Champs de la table relationnelle Personnalisation   Champs de projet

- GUID : FCD-TEST-045
- Prénom : JEAN
- Nom : ECHANTILLON

- Sexe : M

Check List

Now that your message has been created and you have done all the necessary tests... it's time to send your message!

When you are preparing to send a message, and before confirming everything, a pop-up appears to remind you to check a few essential elements to send an email. These elements relate to different law that regulates promotional communications, which must include an unsubscribe link while also having explicit or implicit consent from the targeted contacts selected.

This is a very important step, because if you forget one of these elements, you might regret it later. Indeed, a spam complaint is probably not on your wishlist and a loss of reputation as a sender either!

The best part is that you can add your own verification elements. Yes, you can modify this pop-up in order to add your own verification process if needed. Of course, the basic elements will stay in the same place, you will only be adding points on top of the existing ones.
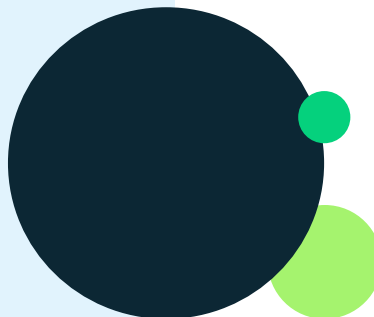
Example: Suppose that before sending an email, you need to send a test to your superior, have it corrected by a proofreader, have it translated by a translator, and finally have it validated by your team... you could indicate these elements here to inform users, for each sending. This avoids missing important steps.

To do this, you must go to the same place as in the previous point: *Configuration - Communication Types*, in the Checklist section. Here you will be able to modify the basic list to add your own elements. Again, this is done by type of communication, so you will have to do it for all the types of communication you want.

It is also a good collaboration tool, because this list will be visible to all users who want to send communications in this type of message. This is a good way to conform the sending process for each user.

Now that we've covered the methods for testing your emails, let's move on to SMS messaging and available tests. A channel more and more used by companies, it is a great way to communicate with your contacts... only if they are well done!

SMS

Preview with a contact

This feature works in the same way as it was presented in the previous section. Indeed, you can send your test to a single person or you can make a test group to send it to several people at the same time.

In addition, if there is one or more personalized elements in your SMS, it will be made in the name of the contact selected in this section. On the other hand, as the law indicates, you must add a STOP notice to make it easier for your contacts to unsubscribe if they wish to do so.

This STOP mention will therefore be made in the name of the chosen contact, which means that if you decide to check the unsubscription process, you will unsubscribe your contact permanently. You should therefore pay attention to this detail when testing your SMS messages.

A best practice is to create a contact in your name, with your phone number, so you can send yourself the desired test and receive it via SMS. This way, you are not risking subscription error with real contacts.

It is also useful to test the different links included in your SMS while avoiding unwanted action on behalf of your other contacts, such as filling out a form, for example.

When you send your test, it may take about 30 seconds for the recipient to receive it.

SMS analysis

This section shows you how many messages will form your SMS. An SMS normally has a limit of 160 characters. If it exceeds this number of characters, your sending will be calculated as two messages or more.

It doesn't change anything for the contact who receives the SMS, because our smart devices do a job of assembling the messages to make our lives easier. It does have an impact on the company sending the SMS, which will be billed for 2 separate messages for each contact who receives it. Indeed, the cost of sending an SMS is variable and depends on the number of messages required to send the SMS.

SMS analysis [?]	⌄
Length:	160 characters
Format:	GSM 03.38
SMS:	1 message(s)

SMS analysis [?]	⌄
Length:	161 characters
Format:	GSM 03.38
SMS:	2 message(s) ⚠
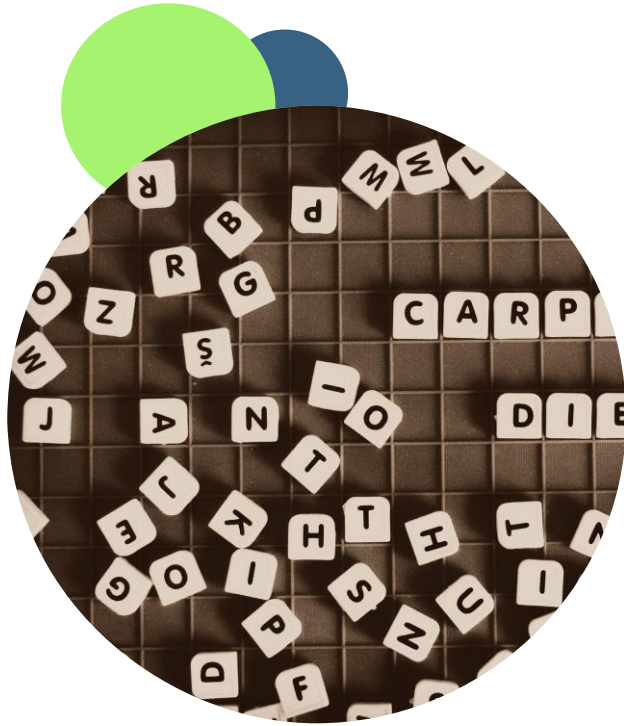
In some cases, you will see this limit of 160 characters decrease. This is done when certain special characters are used in SMS messages, as SMS messages sometimes use more than one character to properly display these symbols to your contacts.

Although the system is designed to send the SMS in the most efficient way possible, ideally, your SMS should be sent as a single message. That's why we always advise our customers to stick to the basics with SMS and get straight to the point, because it can amount very quickly when you have several hundred or even thousands of contacts.

This is even more dangerous when you insert a personalization variable such as the first name of the contact, for example. Indeed, some contacts with a longer first name will exceed the character limit, while those with a shorter first name will receive the SMS in a single message.

Here is what you will see:

Length: between 100 and 200 characters
Format: variable
SMS: between 1 and 3 messages ⚠

You should therefore pay special attention to this element when personalizing your SMS messages. And to make sure you don't miss it, you can also see it in the *Send* tab, before sending your message.

Mobile notifications

When you have finished editing your notification and go to the *Test* tab, you will see the same section as before,which is *Preview with a contact*.

The process is the same as with email and SMS, with the difference that here the subscription and unsubscription process is done in the application settings. This means that, for once, there is no unsubscribe link to test. As a result, you can test your notifications on behalf of any contact in your database and not be afraid to unsubscribe them from your communications.

There is also no character limit to look at, so you won't have to worry about the number of message fragments you will send. Everything will always be sent in one message and billed as such.

However, try to keep the notifications short, as those that are too long are less likely to be read fully (a contact's attention span is short!).

Your content is divided by language when editing your notification, so you will need to test for each language configured in your account.

Please note, however, that your test will only be received by the recipient if they have downloaded the app in question and have authorized the reception of notifications for the mobile app. If this is not the case, your test will unfortunately not work. However, it's very easy to fix this: if you don't receive your test, make sure you've downloaded the application and activated the notifications and that's it!

Web push Notifications

Regarding Web push notifications, the different tests available are quite similar to those for mobile push notifications. On the other hand, here there is a visual difference depending on the browser used. You will therefore see a different visual of your communication on Chrome and Firefox if you have, for example, added an image in your message.

Note that in the platform, it is written Firefox, but this includes all supported browsers other than Chrome (because only Chrome can support images in Web push notifications). That's why there are two visuals possible.
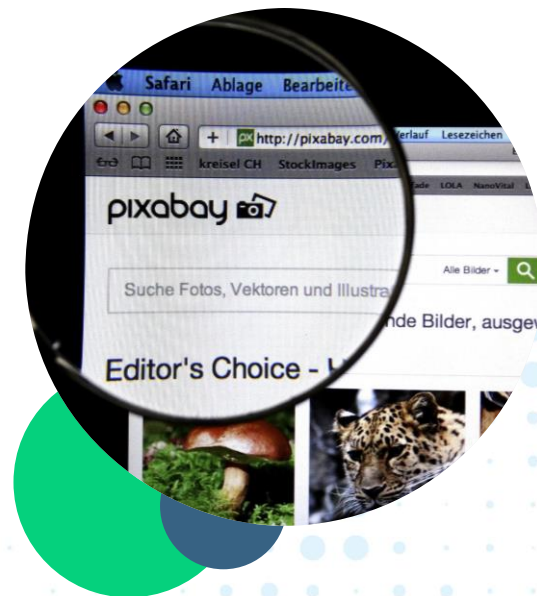
As for the browsers supported by Dialog Insight, here is the list :

Chrome

Firefox

Microsoft Edge

Opera

You can also see the rendering on each language in which you wrote your message as well as the mobile and desktop versions. Now all you have to do is test it! When you click *Test Now*, depending on the browser you are using, you will receive your notification with or without an image (as explained above).

You will also receive it in the name of the contact you selected in the *Preview with a contact* section, as explained before with each channel. You will therefore see the personalization inserted in your message according to the contact selected in this section.

As with mobile push notifications, there is no way to erroneously unsubscribe one of your contacts, as they must do so directly in their browser if they no longer wish to receive your communications. So you can select any contact in this section without any danger of modifying their profile.

A/X tests

An A/X test is a way to test a communication that could include different versions, making sure to modify only one element of it. These versions are then sent to a small sample of your customer database.

For example, in an email, several image choices are possible. To test these different choices and see which one generates the most clicks, you could create 3 versions of an email with 3 different images. You could then test those 3 emails on 20% of your database and see which image brings the best result.

It is also possible to do an A/X test on 100% of the database if you wish.

This, you do not rely on our own impressions to make the final choice, but on real data collected from customers. With the results obtained, you can make an informed choice on the best image to select and send it to your entire database (the remaining 80% of your database who did not receive your test in the example presented previously).

We often hear the term A/B test, which implies that there are only two possible versions. This means that you are limited to testing only two versions of the same item. The difference with an A/X test is that you can test as many versions as you want.

It is important, when doing an A/X test, to modify only one item at a time, and it should be the same for each version. If you test several elements at the same time, you will not know to which element the success of your communication is really attributed.

For more information on how to set up this type of test, **we recommend this blog post.**
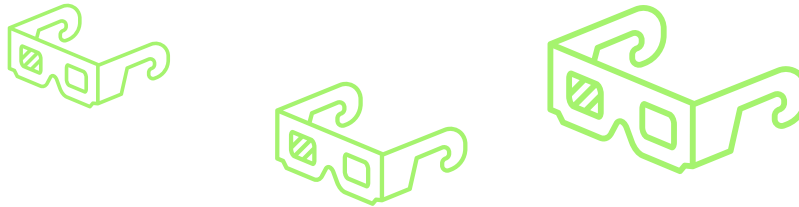
You can make A/X tests on:

- The colors;
- The time of sending;
- The call to action;
- Your header;
- Your offer;
- A content;
- The email subject;
- An image;
- The layout of the elements/structure;
- Typography;
- Etc.

In short, you have a multitude of options when it comes to testing your marketing communications.

In the Dialog Insight application, A/X tests are available for e-mails and landing pages only. They will also soon be available in the new marketing automation tool.

Set up - Emails

You must first go to the left menu and select *Campaigns - A/B Split*. For the rest, it's pretty simple. This is done in three steps, **the first one : Add the desired messages.**

When you create a new campaign, you have the option to add all the message versions you want to test. When you click on Add a message, a list of all the emails created will appear and you can select as many as you want to associate to this campaign. Ideally, all your email versions should already be created, so you will avoid having to go back to your emails to create them.

Once selected, you will see an overview of the different versions you want to test.

It is also possible to do this step from the send section when you are in the creation zone (as shown in the image below). Indeed, by going to the Send tab, you can choose to turn this email into an A/X test.
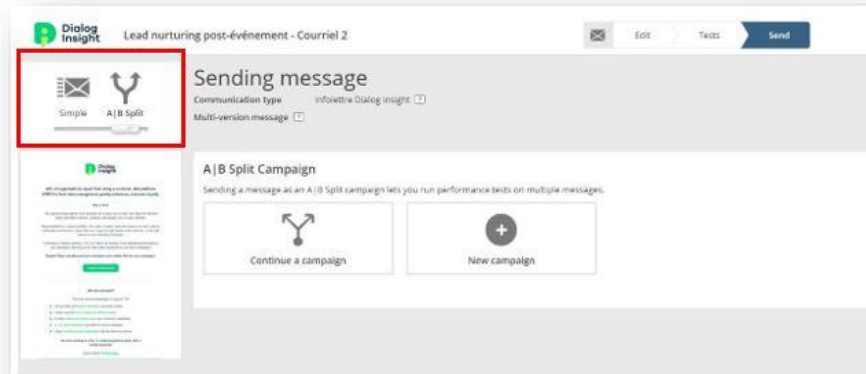
You then have the choice between adding the email you are editing to an ongoing A/X test (Continue a campaign) or creating a new A/X test (New Campaign).

The second step is to select the contacts that will be part of this A/X test. You can choose to send it to all your contacts or only to certain groups of contacts. Next, you will need to determine the proportion of your contacts who will receive your test.

By selecting only a portion of your contacts, you ensure that you can send the best performing version to all the others. If you send it to all your contacts from the start, a percentage of your contacts will always receive a lower performing version and your results will be affected.

The third step is to choose your sending time. You can send it now or choose to schedule your mailing later and according to a time zone. At this stage, it is also possible to create an alert that will notify you when the campaign is over and the winning version must be chosen to be sent to the remaining proportion of your database, according to a period of time that you determine yourself.

Finally, once your test has been prepared, confirmed and approved, you can view the results of each version afterwards, as presented below.
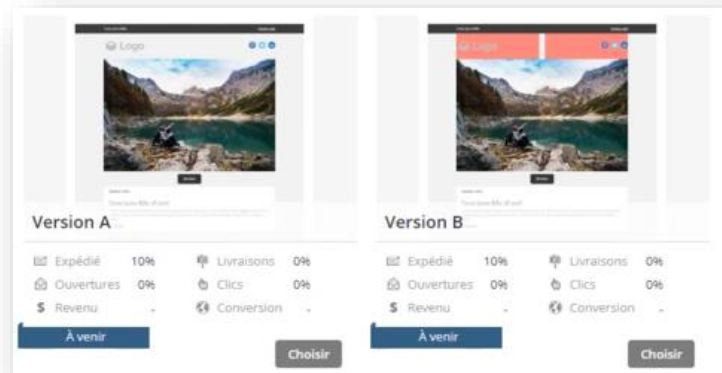
When it comes to selecting the winner, that's in your hands. You are responsible for choosing the measure that will be used as a guide to select the winner, whether by opening or clicks for example.

If you have several versions and it is difficult for you to do a proper analysis, you can always go to the filters on the right and prioritize the desired results. For example, you can prioritize the clicks, if that's what interests you the most. You can also prioritize the openings, the revenue generated or the conversion rate. These are tools to help you make your choice, but the system will not choose a winning version automatically.

You have to do this manually because there are many situations where the decision is not based on a single criterion and other factors come into play. That's why we've made sure to let you choose the final version.

Please note that in order to get conversion results, you must have made conversion funnels beforehand. On the generated revenue side, you need to have activated Dialog Insight's Journey module, in addition to having configured the e-commerce portion to track contact spend.

When you have made your choice, you will then have to make the actual sending to the remaining contacts. It is very important here to indicate 100% of the remaining contacts (and not 80% if you had chosen 20% at the beginning).

The calculation is then done so the rest of your contacts receive the winning version. Therefore, only the contacts who have not received any of the test versions will be concerned.

Setup - Landing page

It is also possible to do an A/X test for a landing page. Once you have created the first version of your page, you can decide to duplicate it by going to the Summary and *A/B/X Tests tab*.

By duplicating it, it automatically creates another version (B, C, D, etc.) of your initial page, which you can edit independently of your version A to modify what you want to test.

You must then set a weight to each version, which will determine the display percentage. For example, if you put a weight of 50% on your version A and 50% on your version B, this means that half of the contacts will see the first, and the other half will see the second.

Select the winning version

After a while, you will be able to go back to see the results and choose a winning version, just like with emails. To do so, you must go to the small roulette wheel to the right of your version and select the option *Make it the winning version*, which transfers 100% of the weight to this version. So, all your visitors will only see the version they chose afterwards, as long as the page is online.

Set up – Marketing automation

As mentioned above, A/X testing will soon be available in the new marketing automation editor. Indeed, you will be able to run tests on several branches of your automated scenario to allow you to optimize the performance of your sequence.

This will allow you to go even further in your scenarios by adding test conditions. For example, version A will be sent daily to new registrants until it reaches a conversion of 1000 people. When this version has fulfilled this condition, version A is replaced by version B, which will, in turn, be sent every day, etc.

Here is a sneak peak at what the A/X tests will look like visually.
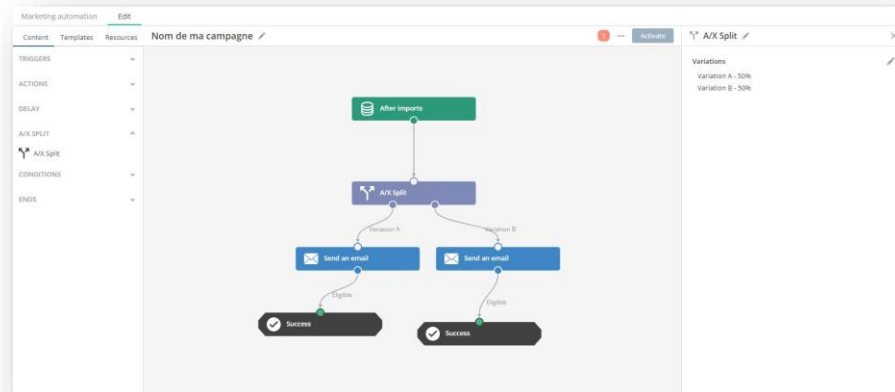
Final approval

Finally, we set up a system for final approval of your campaigns on all channels available in the Dialog Insight platform. In other words, it is an additional security that allows you not to send a message by mistake.

Briefly, when you send your communication, it will automatically go into the *For Approval* section. Your communication can only be sent if you or someone else on your team approves and confirms the sending. This is the case for all channels of the platform.

This final approval system avoids many unpleasant situations caused by a sending that is too early or unapproved.
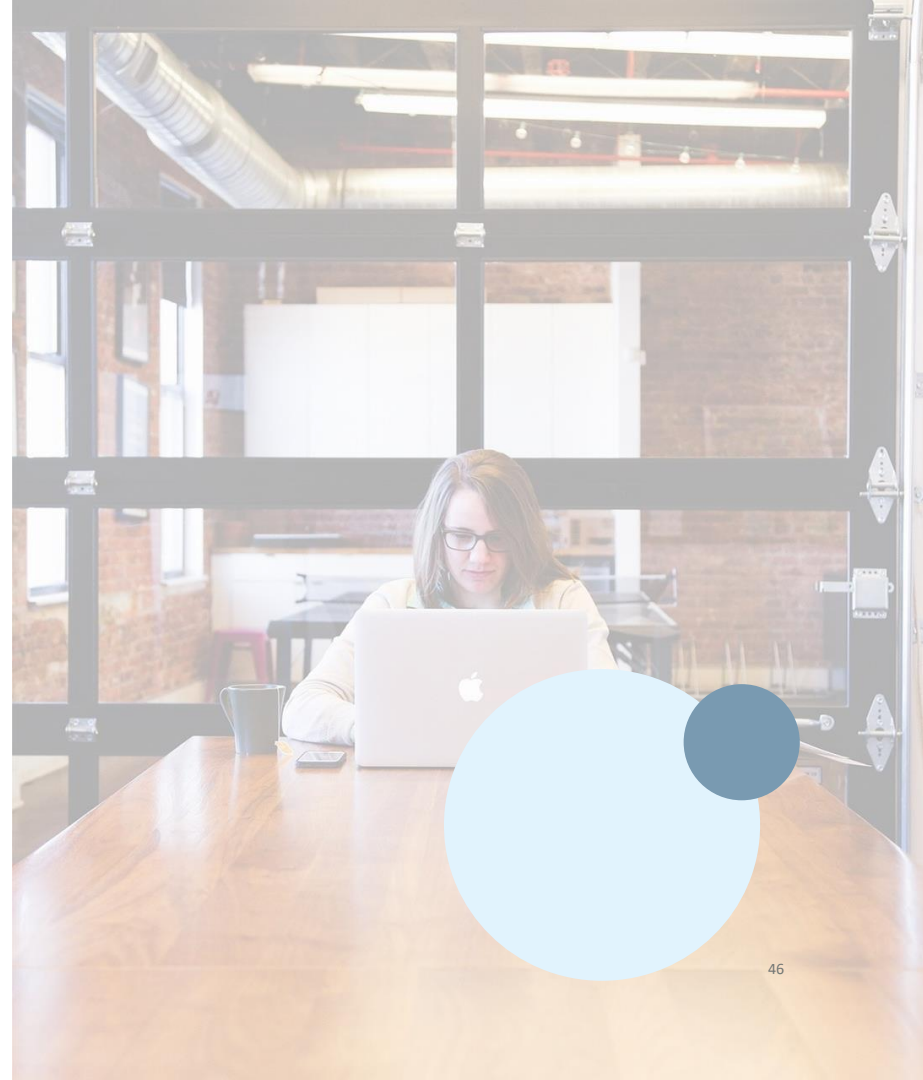
Conclusion

Over time, we have put in place several testing tools that are available for our users, because we know how important this is in terms of the quality of your marketing campaigns. Doing the right tests on your communications allows you to :

- Control the quality of your messages;

- Visualize the different elements of personalization of your messages;

- Spot any errors that may have escaped your eagle eye;

- Estimate the performance of your communications;

- Get an overview of how your communications are rendered according to inboxes;

- Compare different visuals or marketing strategies;

- Optimize your communications for better performance.

All these advantages allow you to constantly improve your messages, to better know your target and to increase your communication performance.

Harvard Business Review

Microsoft Bing's revenue per search increases by 10-25% each year through A/B testing.

À propos de Dialog Insight

One of the most effective ways to achieve your growth goals is to take control of your customer data to maximize your marketing efforts.

At Dialog Insight, we believe that each of our customers is unique and that their needs are specific. Therefore , we have developed a platform that adapts to your changing context. On the one hand, we provide you with a unified platform that centralized customer database, campaign orchestration tools, and detailed analysis of your performance. On the other, we offer strategic support services aligned to your needs.

Whether you're looking to increase sales or engage your customers, leverage customer insights you've gathered over time. You will communicate in a more relevant, coherent and personalized way than ever before. Make every point of contact an opportunity to offer your customers a brand experience beyond their expectations.

With Dialog Insight at your side, you are more than ever the master of your success.