SecurFinancial HOL (completed)

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QA Panel

SecurFinancial DV 01

Wealth Management HOL
Jan 1, 2022 - Sep 30, 2022

KPI Analysis

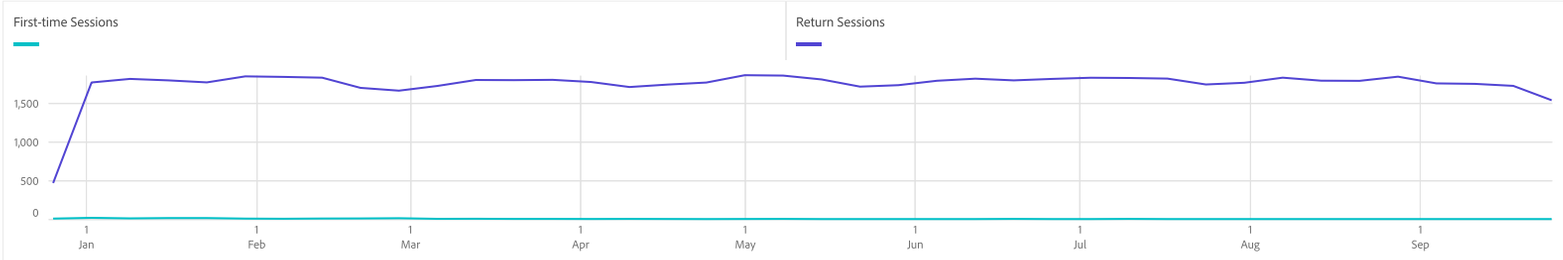
SecurFinancial DV 01

Wealth Management HOL
Jan 1, 2022 - Sep 30, 2022

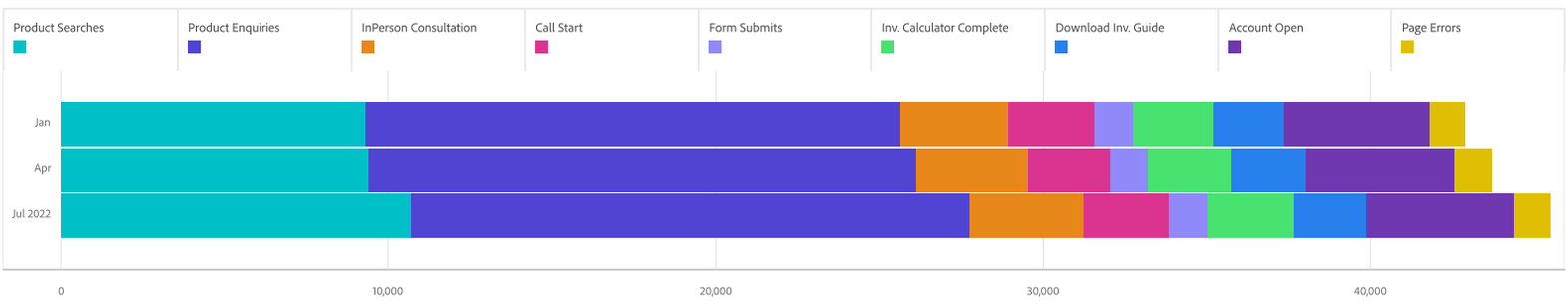
An example of how we can measure engagement across all our channels for our KPIs

Income Level	Gender	Age	creditScore	Channel	Investor Type
No filter	No filter	No filter	No filter	No filter	No filter

First Time Session vs. Return Sessions



Engagement Details (omnichannel)



KPIs by channel

Channel Page: 1 / 1 Rows: 50 1-5 of 5	Account Open Jan 1 – Sep 30 13,539 out of 13,539	Scheduled Appointment Jan 1 – Sep 30 4,642 out of 4,642	InPerson Consultation Jan 1 – Sep 30 10,168 out of 10,168	Download Inv. Guide Jan 1 – Sep 30 6,659 out of 6,659	Webinar Attended Jan 1 – Sep 30 2,763 out of 2,763	Webinar Signup Jan 1 – Sep 30 8,303 out of 8,303
1. web	6,194 45.7%	1,988 42.8%	0 0.0%	6,103 91.7%	220 8.0%	4,540 54.7%
2. mobile	3,985 29.4%	810 17.4%	0 0.0%	556 8.3%	0 0.0%	104 1.3%
3. branch	2,241 16.6%	0 0.0%	10,168 100.0%	0 0.0%	2,543 92.0%	1,585 19.1%
4. callcenter	889 6.6%	1,844 39.7%	0 0.0%	0 0.0%	0 0.0%	1,144 13.8%
5. chatbot	230 1.7%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	930 11.2%

Account Open Q/Q

▼2.0%

Account Open [Apr 1, 2021 - Dec 31, 2021] : Quarter

Account Open

13,539

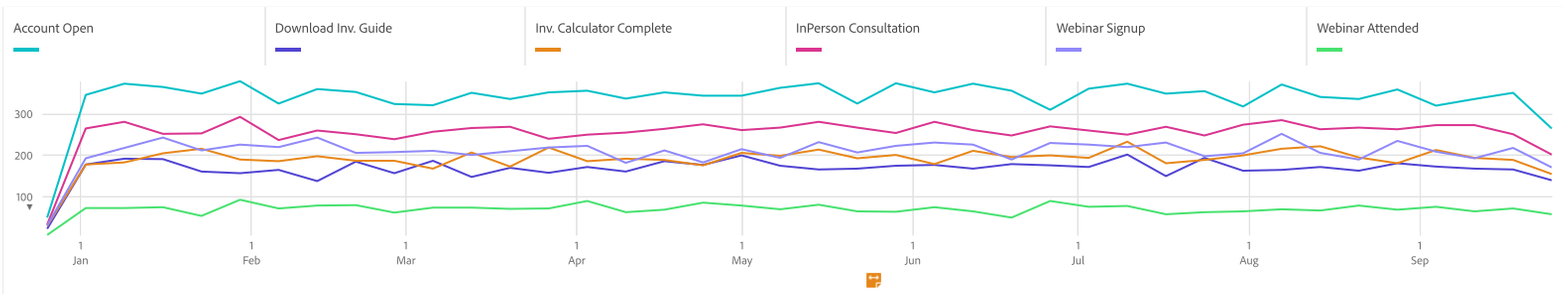
Account Open : Quarter

Webinar Signup

13,539

Account Open : Quarter

Exercise #4



Exercise #4

	Apr 1, 2021 - Dec 31, 2021 Account Open	Account Open	Download Inv. Guide	Inv. Calculator Complete	InPerson Consultation	Webinar Signup	Webinar Attended
Quarter ↑ Page: 1 / 1 Rows: 400 1-3 of 3	Apr 1 Dec 31 **13,819** out of 13,819	Jan 1 Sep 30 **13,539** out of 13,539	Jan 1 Sep 30 **6,659** out of 6,659	Jan 1 Sep 30 **7,591** out of 7,591	Jan 1 Sep 30 **10,168** out of 10,168	Jan 1 Sep 30 **8,303** out of 8,303	Jan 1 Sep 30 **2,763** out of 2,763
1. Jan 2022 - Mar 2022	4,565 33.0%	4,465 33.0%	2,148 32.3%	2,451 32.3%	3,304 32.5%	2,762 33.3%	925 33.5%
2. Apr 2022 - Jun 2022	4,667 33.8%	4,561 33.7%	2,269 34.1%	2,524 33.2%	3,410 33.5%	2,742 33.0%	928 33.6%
3. Jul 2022 - Sep 2022	4,587 33.2%	4,513 33.3%	2,242 33.7%	2,616 34.5%	3,454 34.0%	2,799 33.7%	910 32.9%

EXCERCISE 4

For our first analysis let's build a quick way to review our KPIs.

- Create new freeform
- Bring in Quarter date range
- Add KPIs (events):
  - Account Open
  - Download Inv. Guide
  - Inv. Calculator Complete
  - In Person Consultation
  - Webinar Signup
  - Webinar Attended
- Visualize totals as trended line:
  - highlight top row > right click > visualize
  - lock

If something strands out while reviewing the trend we can add a note for future reference

- Find a spot of interest on the graph
- Right click and Annotate Selection
- This will open a window where we can review and edit specific details about this annotation before saving

We have our helpful Trended line but lets call out the top most important KPIs in much more visual way within this Panel

- To do so, let's create Summary Numbers for the following events: Account Open, Webinar Signup
- Right click on the cell of interest and visualize as "summary number"
- Rename, lock and repeat

It's looking great! What would be even more helpful would be the ability to review quarter over quarter change in performance similar to what we did for our Summary numbers

- Right Click on Account Open > Add Time Period Col.
- Select time period for previous quarters
- Now highlight the new cell and the initial cell
- Right click and visualize as Summary Change
- Rename and lock

Let's re-arrange our new visualizations and tidy up this panel.

*Before saving let's add a drop down filter to our panel for the Investor Type dimension.

Exercise #5

Product Main Category

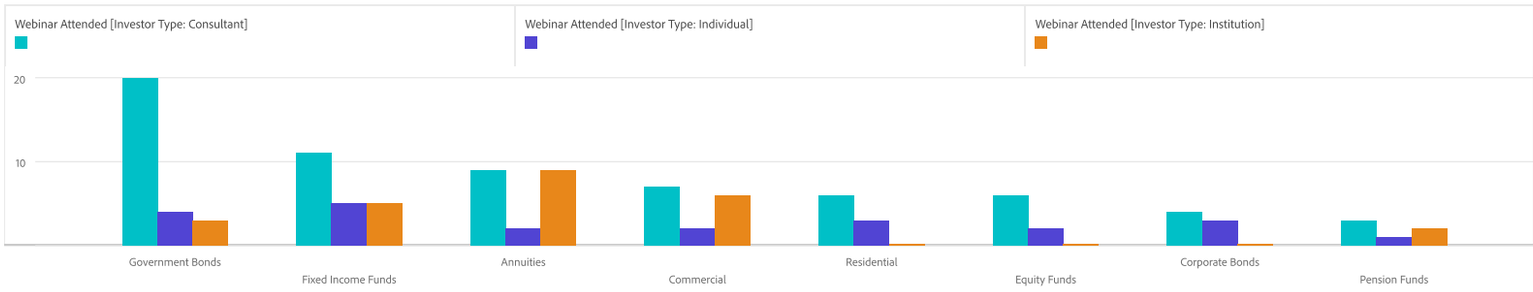
	Account Open	Webinar Attended	InPerson Consultation	Inv. Calculator Complete	Product Searches	Product Enquiries	Scheduled Appointment	Download Inv. Guide
Product Category Page: 1 / 1 Rows: 50 1-4 of 4	Jan 1 ↓ **1,634** out of 13,539	Jan 1 **113** out of 2,763	Jan 1 **10,168** out of 10,168	Jan 1 **2,711** out of 7,591	Jan 1 **7,603** out of 29,404	Jan 1 **43,152** out of 50,128	Jan 1 **1,071** out of 4,642	Jan 1 **854** out of 6,659
1. ETFs	687 42.0%	36 31.9%	3,250 32.0%	1,061 39.1%	2,408 31.7%	13,730 31.8%	336 31.4%	298 34.9%
2. Real Estate Investments	427 26.1%	40 35.4%	3,152 31.0%	735 27.1%	2,423 31.9%	13,093 30.3%	311 29.0%	232 27.2%
3. Investment Funds	326 20.0%	19 16.8%	2,053 20.2%	527 19.4%	2,146 28.2%	8,368 19.4%	244 22.8%	168 19.7%
4. Retirement Plans	194 11.9%	18 15.9%	1,713 16.8%	388 14.3%	626 8.2%	7,961 18.4%	180 16.8%	156 18.3%

EXERCISE 5

From the freeform above let's visualize our two main KPIs (Account Open and Webinar Attended) by product type

- Highlight the cells from both columns
- Right click and visualize as donut
- Rename and lock
- save

Exercise #6



Exercise #6

Product sub-category Page: 1 / 1 Rows: 50 1-8 of 8	Webinar Attended					
	Consultant		Individual		Institution	
	66 out of 1,683 (Jan 1 – Sep 30)		22 out of 543 (Jan 1 – Sep 30)		25 out of 537 (Jan 1 – Sep 30)	
1. Government Bonds	20	30.3%	4	18.2%	3	12.0%
2. Fixed Income Funds	11	16.7%	5	22.7%	5	20.0%
3. Annuities	9	13.6%	2	9.1%	9	36.0%
4. Commercial	7	10.6%	2	9.1%	6	24.0%
5. Residential	6	9.1%	3	13.6%	0	0.0%
6. Equity Funds	6	9.1%	2	9.1%	0	0.0%
7. Corporate Bonds	4	6.1%	3	13.6%	0	0.0%
8. Pension Funds	3	4.5%	1	4.5%	2	8.0%

EXERCISE 6

SecurFinancial offers educational webinars on various investment topics.
Let's create a visualization to understand which webinars are most attended for different types of investors.

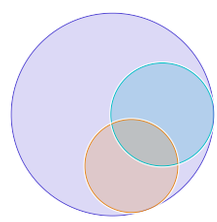
- Create a new Freeform
- Bring in the Product sub-category Dimension
- Add the Webinar Attended event
- Break down by Investor Type dimension
- Highlight all cells, right click, visualize as bar
- Limit to 5 items
- rename and lock
- save

Exercise 7

People who used the Inv. Calc. + Account Open
3,568

People who didn't attend a webinar - AF + Account Open
13.5k

People who downloaded the Inv. Guide + Account Open
2,919



EXERCISE 7

Staying with Webinar engagement let's take our analysis a bit deeper and surface some actionable insights
We are tasked to determine which customers have engaged with the Inv. Guide and Inv. Calculator tools but haven't attended a webinar yet. The marketing team would like to target these folks with a special offer:

- note: we define customers as people who have opened an account

The best visualization suited for this analysis is a Venn diagram

- Let's bring a Venn into our panel
- The metric to measure overlap will be "Account Open"
- We've built two out of the three filters needed. Drag and drop:
  - People who downloaded the Inv. Guide
  - People who used the Inv. Calc.
- We will build the last filter needed together:
  - Click + next to Filters
  - Name it as "People who didn't attend a webinar" + your initials
  - Change the "include" drop down to Person
  - Bring the "Webinar Attended" event into our container
  - Modify the function to "does not exist"
  - Save
- Bring our last filter into the Venn selection and click build

This view allows us to obtain insights into behavior overlap. By hovering over the overlap of all three filters we can see that 918 customers didn't attend a webinar yet but have engaged with our other investment tools.

From here we can easily share these insights and create an audience that our Marketing team can later activate:

- right click > create audience
- name it "Customers likely to attend a webinar" + your initials
- review additional selections
- *please don't publish* - the Presenter will Publish

This audience is now available in AEP for activation

- note: the audience publishes to the same sandbox as the Connection being used for reporting

Call Center Re-engagment

SecurFinancial DV 01

Wealth Management HOL
Jan 1, 2022 - Sep 30, 2022

Maintaining a call center is expensive. We'd like to reduce the volume of incoming calls - especially for topics that can be self-serve.

Call Volume Q/Q

▲196.5%

Call Start [Last quarter] : Week

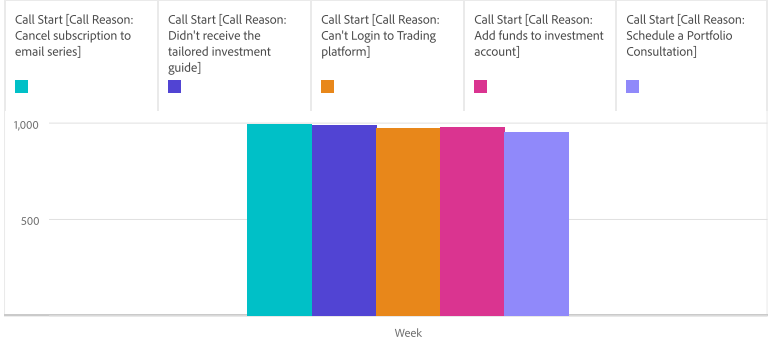
Call Time Q/Q

▼2.5%

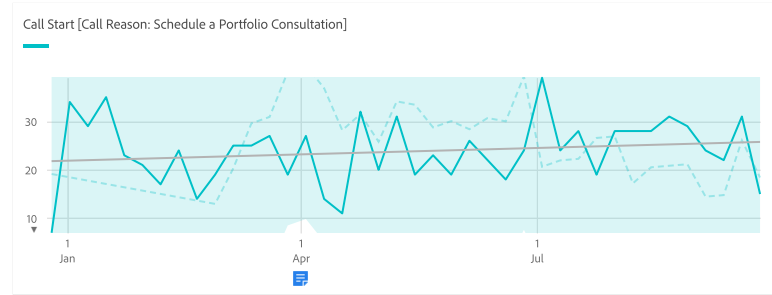
Call Time Elapsed [Apr 1, 2021 - Dec 31, 2021] : Week

Top Call Reasons

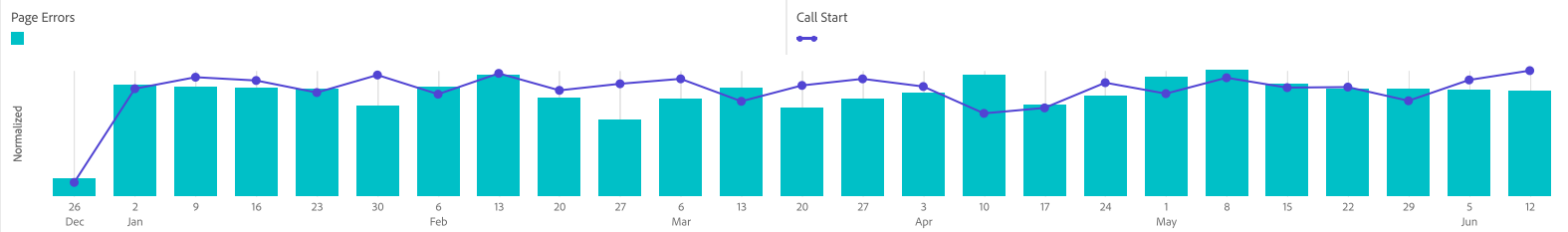
Portfolio Consultation Requests



Measuring the impact of our free consultation marketing campaign on call volume



EXCERCISE 8



EXCERCISE 8

Week ↑ Page: 1 / 2 › Rows: 25 1-25 of 40	Page Errors Jan 1 – Sep 30		Call Start Jan 1 – Sep 30	
	3,302 out of 3,302		7,745 out of 7,745	
1. Dec 26, 2021	14	0.4%	25	0.3%
2. Jan 2, 2022	90	2.7%	196	2.5%
3. Jan 9, 2022	89	2.7%	217	2.8%
4. Jan 16, 2022	88	2.7%	211	2.7%
5. Jan 23, 2022	87	2.6%	189	2.4%
6. Jan 30, 2022	73	2.2%	221	2.9%
7. Feb 6, 2022	89	2.7%	186	2.4%
8. Feb 13, 2022	98	3.0%	224	2.9%
9. Feb 20, 2022	80	2.4%	193	2.5%
10. Feb 27, 2022	62	1.9%	205	2.6%
11. Mar 6, 2022	79	2.4%	214	2.8%
12. Mar 13, 2022	88	2.7%	173	2.2%
13. Mar 20, 2022	72	2.2%	202	2.6%
14. Mar 27, 2022	79	2.4%	214	2.8%
15. Apr 3, 2022	84	2.5%	200	2.6%
16. Apr 10, 2022	98	3.0%	151	1.9%
17. Apr 17, 2022	74	2.2%	161	2.1%
18. Apr 24, 2022	81	2.5%	207	2.7%
19. May 1, 2022	97	2.9%	187	2.4%
20. May 8, 2022	102	3.1%	216	2.8%
21. May 15, 2022	91	2.8%	198	2.6%
22. May 22, 2022	87	2.6%	199	2.6%
23. May 29, 2022	87	2.6%	174	2.2%
24. Jun 5, 2022	86	2.6%	212	2.7%
25. Jun 12, 2022	85	2.6%	229	3.0%

EXCERCISE 8

Our Call Center admin suggests that there is a correlation between errors on the site and the volume of incoming calls.
Let's see if we can confirm this claim in the data.

- Create a Freefrom
- Bring in the week dimension
- Let's limit our table to 25 rows
- Drag and drop the following events:
  - Page Error
  - Call Start
- Highlight all cells > right click > visualize as Combo
- In our Combo chart let's hit the gear icon and click "normalize"

We are able to confirm that call volume generally moves in parallel with page errors.

- note: if we observe a spike/outlier on our graph we can annotate it for further review

Call Satisfaction

Call Reason Page: 1 / 1 Rows: 50 1-10 of 10	Events Less than 5 Jan 1 – Sep 30 11,029 out of 11,029		5 to 8 Jan 1 – Sep 30 8,364 out of 8,364		8 or more Jan 1 – Sep 30 8,538 out of 8,538	
1. Cancel subscription to email series	1,236	11.2%	914	10.9%	937	11.0%
2. Can't Login to Trading platform	1,213	11.0%	897	10.7%	903	10.6%
3. Didn't receive the tailored investment guide	1,201	10.9%	912	10.9%	904	10.6%
4. Add funds to investment account	1,175	10.7%	882	10.5%	906	10.6%
5. Schedule a Portfolio Consultation	1,152	10.4%	872	10.4%	932	10.9%
6. Talk with an Advisor	1,148	10.4%	862	10.3%	895	10.5%
7. Request for Portfolio Construction	1,141	10.3%	907	10.8%	880	10.3%
8. webinar coupon doesn't work	1,092	9.9%	894	10.7%	884	10.4%
9. Fixed Income	1,053	9.5%	762	9.1%	797	9.3%
10. Account Creation Issue	618	5.6%	462	5.5%	500	5.9%

EXCERCISE 9

Page Name Page: 1 / 4 Rows: 10 1-10 of 32	Page Views Jan 1 – Sep 30 38,445 out of 92,396		Call Start Jan 1 – Sep 30 0 out of 7,745		Call Start Time Decay (15 Minutes) | Person Jan 1 – Sep 30 90 out of 7,745		Call Start Time Decay (15 Minutes) | Person Schedule a Portfolio Consultation Jan 1 – Sep 30 12 out of 951		Can't Login to Trading platform Jan 1 – Sep 30 14 out of 971	
1. Equity Optima Portfolio	997	2.6%	0	0.0%	3	3.3%	0	0.0%	2	14.3%
2. Home	3,937	10.2%	0	0.0%	3	3.4%	0	0.0%	1	7.6%
3. Income Prime Solution	1,993	5.2%	0	0.0%	3	3.3%	0	0.0%	1	7.2%
4. Capital Plus Solution	1,718	4.5%	0	0.0%	5	5.6%	1	8.0%	1	7.2%
5. Global Advantage Fund	1,038	2.7%	0	0.0%	3	3.3%	1	8.0%	1	7.2%
6. Global Optima Fund	981	2.6%	0	0.0%	6	6.7%	1	11.8%	1	7.2%
7. Global Select Strategy	973	2.5%	0	0.0%	1	1.1%	0	0.0%	1	7.2%
8. Growth Select Portfolio	655	1.7%	0	0.0%	3	3.3%	0	0.0%	1	7.2%
9. Index Premier Fund	1,530	4.0%	0	0.0%	3	3.3%	0	0.0%	1	7.2%
10. Fixed Income Optima Fund	575	1.5%	0	0.0%	3	3.3%	0	0.0%	1	7.2%

EXCERCISE 9

Since all our datasets are connected in CJA we can run some analysis around call deflection.
Particularly we are interested in surfacing any pattern between Page Views and Call Volume:

- Create a new freeform
- Drag in the Page Name dimension
  - limit to 10 rows
- Bring in the following events: Page views, Call Start

We are getting all zeros because two events cannot happen at the same point in time (page view + call start).
By modifying the attribution lookback for Call Starts we will obtain a correlation with web pages:

- Duplicate the Call Start column
- right click on Call Start > Modify attribution model:
  - mode: time decay
  - half-life 15 minutes
  - lookback: person
  - apply
  - sort column descending

By modifying the lookback on Call Start to be person (or session) based we surfaced that the Fixed Income Advantage page is leading to a high volume in calls.
That said this doesn't tell us if these are good or bad calls. Let's break it down further by relevant Call Reasons:

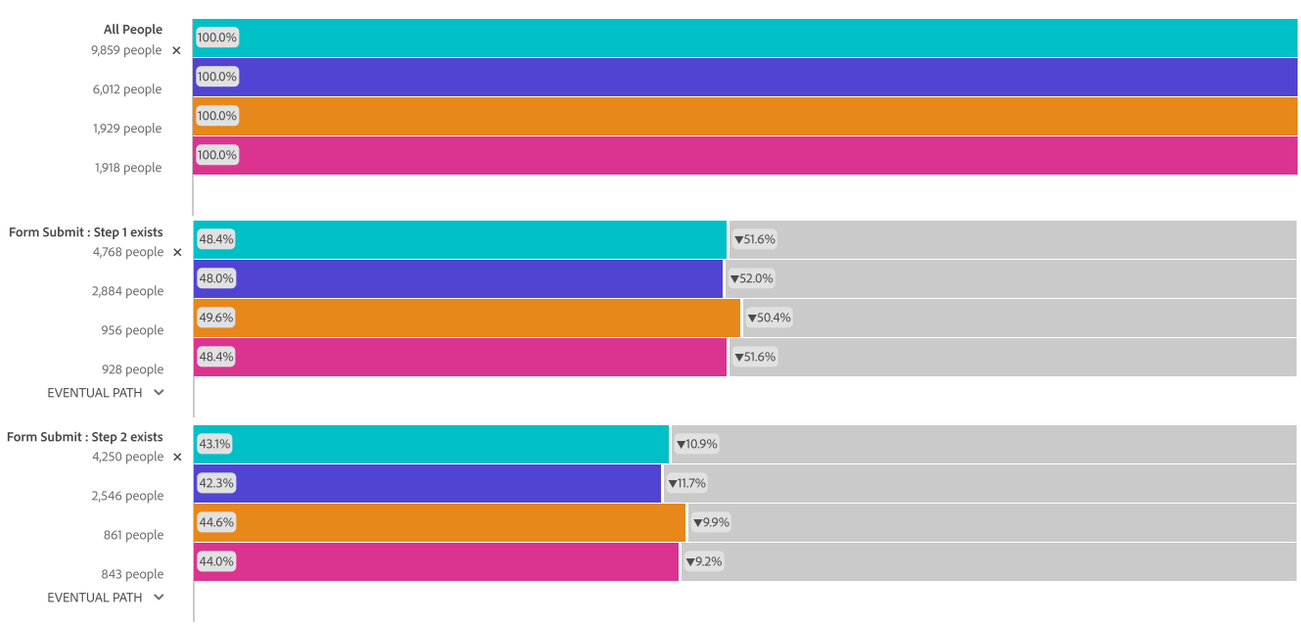
- Duplicate the Call Start col.
- Let's select the following objects from our Call Reason dimension and drag them under our new Call Start col:
  - Schedule a Portfolio Consultation
  - Can't Login to Trading Platform

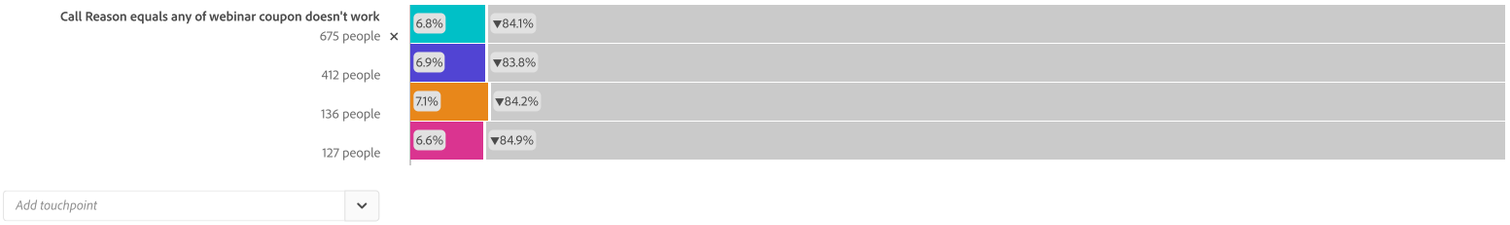
We can see that in fact most people are calling from the Inv. Calculator page to schedule a consultation which is a good thing.
Additionally, some people seem to be calling in from the Equity Optima Portfolio page to request login help.

- We could lower call volume by reviewing this page and adding a password reset functionality.

Fallout to Call Center

All people	Investor Type = Consultant	Investor Type = Individual	Investor Type = Institution
9,859	6,012	1,929	1,918





EXCERCISE 10

The Fallout visualization above shows how people who visit the site fallout of the funnel while submitting the webinar registration form.
Additionally, we can replace the last step in our fallout with a Call Start event:

- Delete the last step
- Find the "webinar coupon doesn't work" object from within the Call Reason dimension
- Add it as the final touchpoint in our fall out

We might be loosing a significant amount of sign-ups due to coupon code issues. We could reduce call volume by adding a "contact customer" support self serve option on this page. Lastly let's add the following three Investor Type objects to our fallout:

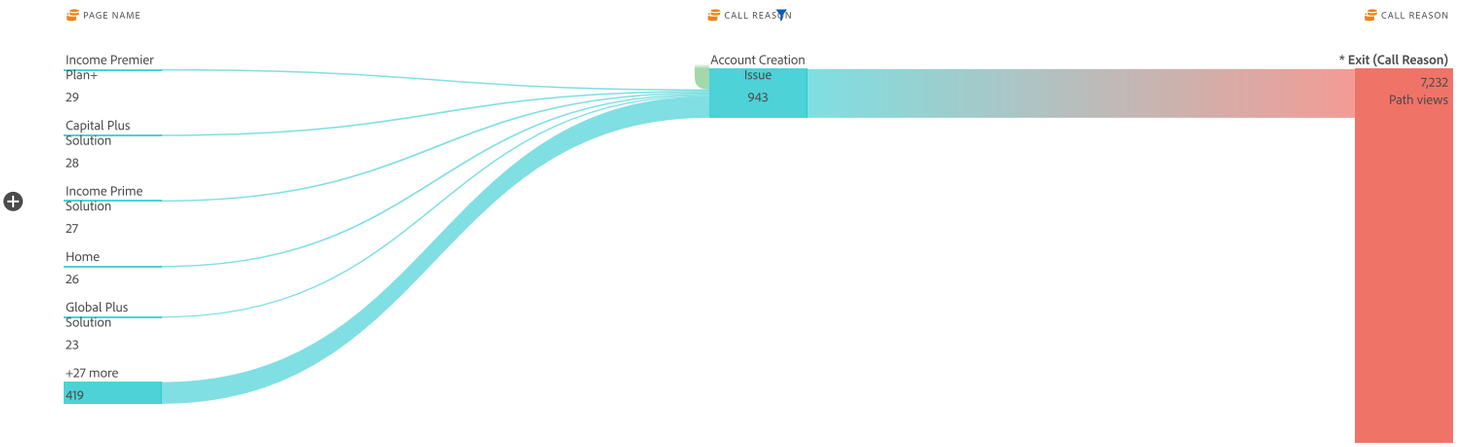
- Consultant
- Institution
- Individual

By right clicking on the fallout area of the last step we can easily create a new audience and send them a reminder to sign up

- same process covered with the Venn diagram

Flow

Ends with: Call Reason | Flow container: People | Repeats: Off | First/last occurrence limiting: On



Marketing Performance

SecurFinancial DV 01

Wealth Management HOL
Jan 1, 2022 - Sep 30, 2022

AJO Channel: No filter

Investor Type: No filter

AJO Open rate

48%

AJO Open rate : AJO Programe Name

AJO CTR

percentage of recipients who clicked on one or more links

32%

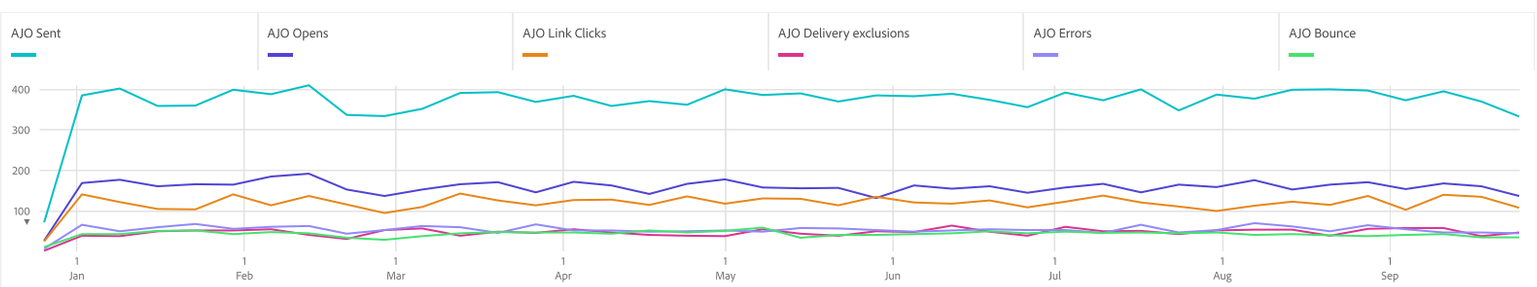
AJO CTR : AJO Programe Name

Bounce Rate Q/Q

▼3.2%

AJO Bounce Rate - AF [Apr 1, 2021 - Dec 31, 2021] : AJO Programe Name

AJO Performance Trend



AJO Performance

AJO Programe Name	AJO Sent	AJO Opens	AJO Open rate	AJO Link Clicks	AJO CTR	AJO Delivery exclusions	AJO Errors	AJO Bounce	Apr 1, 2021 - Dec 31, 2021 AJO Bounce Rate - AF	AJO Bounce Rate - AF	Percent change
Page: 1 / 2 › Rows: 25 1-25 of 30	11,548 out of 14,764	5,492 out of 6,257	48% out of 42%	3,668 out of 4,728	32% out of 32%	1,491 out of 1,833	1,778 out of 2,111	1,556 out of 1,686	14% out of 12%	13% out of 11%	-3.20% out of -1.70%
1. Portfolio Risk Analysis	873 7.6%	221 4.0%	25%	320 8.7%	37%	0 0.0%	0 0.0%	0 0.0%	0%	0%	0.00%
2. Private Banking Introduction	822 7.1%	234 4.3%	28%	322 8.8%	39%	0 0.0%	0 0.0%	0 0.0%	0%	0%	0.00%
3. Wealth Management Newsletter	822 7.1%	194 3.5%	24%	300 8.2%	36%	0 0.0%	0 0.0%	0 0.0%	0%	0%	0.00%
4. Wealth Transfer Workshop	815 7.1%	227 4.1%	28%	328 8.9%	40%	0 0.0%	0 0.0%	0 0.0%	0%	0%	0.00%
5. Financial Advisory Appointment	795 6.9%	200 3.6%	25%	320 8.7%	40%	0 0.0%	0 0.0%	0 0.0%	0%	0%	0.00%
6. Wealth Management Consultation	792 6.9%	196 3.6%	25%	324 8.8%	41%	0 0.0%	0 0.0%	0 0.0%	0%	0%	0.00%
7. Market Insights Subscription	787 6.8%	210 3.8%	27%	316 8.6%	40%	0 0.0%	0 0.0%	0 0.0%	0%	0%	0.00%
8. Sustainable Investing Options	338 2.9%	275 5.0%	81%	0 0.0%	0%	148 9.9%	163 9.2%	0 0.0%	0%	0%	0.00%
9. Investment Performance Report	322 2.8%	261 4.8%	81%	0 0.0%	0%	131 8.8%	213 12.0%	0 0.0%	0%	0%	0.00%
10. Retirement Planning Session	313 2.7%	262 4.8%	84%	0 0.0%	0%	170 11.4%	187 10.5%	0 0.0%	0%	0%	0.00%
11. Wealth Management Onboarding	312 2.7%	261 4.8%	84%	0 0.0%	0%	155 10.4%	185 10.4%	0 0.0%	0%	0%	0.00%
12. Trust Fund Setup	312 2.7%	253 4.6%	81%	0 0.0%	0%	148 9.9%	171 9.6%	0 0.0%	0%	0%	0.00%
13. Wealth Accumulation Guide	311 2.7%	254 4.6%	82%	0 0.0%	0%	147 9.9%	164 9.2%	0 0.0%	0%	0%	0.00%
14. Active Portfolio Management	307 2.7%	245 4.5%	80%	0 0.0%	0%	140 9.4%	185 10.4%	0 0.0%	0%	0%	0.00%
15. Investment Diversification Plan	306 2.6%	255 4.6%	83%	0 0.0%	0%	154 10.3%	183 10.3%	0 0.0%	0%	0%	0.00%
16. Estate Planning Introduction	306 2.6%	245 4.5%	80%	0 0.0%	0%	144 9.7%	168 9.4%	0 0.0%	0%	0%	0.00%
17. Wealth Management Webinar	300 2.6%	261 4.8%	87%	0 0.0%	0%	154 10.3%	159 8.9%	0 0.0%	0%	0%	0.00%
18. Investment Strategy Session	245 2.1%	122 2.2%	50%	122 3.3%	50%	0 0.0%	0 0.0%	122 7.8%	61%	50%	-18.41%
19. Education Fund Planning	222 1.9%	129 2.3%	58%	129 3.5%	58%	0 0.0%	0 0.0%	126 8.1%	49%	57%	16.64%
20. Financial Planning Tools	222 1.9%	128 2.3%	58%	128 3.5%	58%	0 0.0%	0 0.0%	107 6.9%	55%	48%	-12.74%
21. Personal Wealth Review	221 1.9%	111 2.0%	50%	110 3.0%	50%	0 0.0%	0 0.0%	111 7.1%	60%	50%	-16.15%
22. Investment Portfolio Review	214 1.9%	120 2.2%	56%	120 3.3%	56%	0 0.0%	0 0.0%	136 8.7%	61%	64%	4.51%
23. High Net Worth Exclusive Offer	214 1.9%	106 1.9%	50%	106 2.9%	50%	0 0.0%	0 0.0%	117 7.5%	50%	55%	8.33%
24. Wealth Protection Plan	208 1.8%	110 2.0%	53%	110 3.0%	53%	0 0.0%	0 0.0%	123 7.9%	69%	59%	-14.21%
25. Asset Allocation Update	206 1.8%	100 1.8%	49%	100 2.7%	49%	0 0.0%	0 0.0%	120 7.7%	62%	58%	-5.57%

EXCERCISE 11

Reducing bounce rates is crucial for maintaining a clean recipient list.
Let's create a custom metric to measure our AJO bounce rate

- click on "+" next to "Metrics"
- rename to "AJO bounce rate" + your initials
- set format drop down to percent
- Bring in the following metrics into our container:
  - AJO Bounce / AJO Sent
- change the "upward trend" drop down to bad.
- save
- add the new metric as a column to our table
- right click and select "compare time periods" for prior date range
- create a summary change visualization and add fit to the top of our dashboard

AJO Errors

AJO Failure Reason	Events
Page: 1 / 1 Rows: 50 1-6 of 6	3,797 out of 229,247
1. pushProviderError	2,111 55.6%
2. Invalid Recipient	572 15.1%
3. Timeout	298 7.8%
4. Mailbox Full	283 7.5%
5. Generic Bounce	268 7.1%
6. Mail Block	265 7.0%

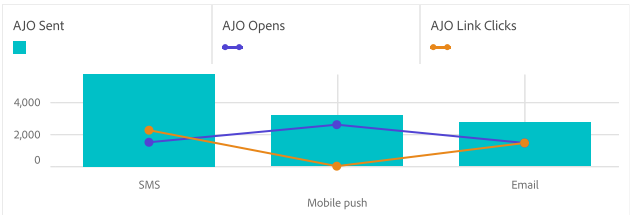
AJO Exclusions / Bounce

	AJO Bounce Type	AJO Bounce
	Page: 1 / 1 Rows: 50 1-3 of 3	1,686 out of 1,686
	1. Ignored	831 49.3%
Ignored	AJO Failure Reason Page: 1 / 1 Rows: 5 1-3 of 3	831 out of 831
Ignored	1. Timeout	298 35.9%
Ignored	2. Generic Bounce	268 32.3%
Ignored	3. Mail Block	265 31.9%
	2. Hard	572 33.9%
Hard	AJO Failure Reason Page: 1 / 1 Rows: 5 1-1 of 1	572 out of 572
Hard	1. Invalid Recipient	572 100.0%
	3. Soft	283 16.8%
Soft	AJO Failure Reason Page: 1 / 1 Rows: 5 1-1 of 1	283 out of 283
Soft	1. Mailbox Full	283 100.0%

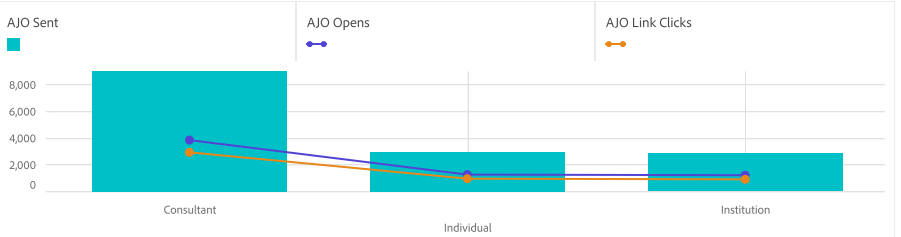
AJO Channel Performance

Hover over each channel to view delivery performance.

AJO Sent (Jan 1, 2022 - Sep 30, 2022 vs. AJO Opens vs. AJO Link Clicks) by AJO Channel



AJO Investor Engagement

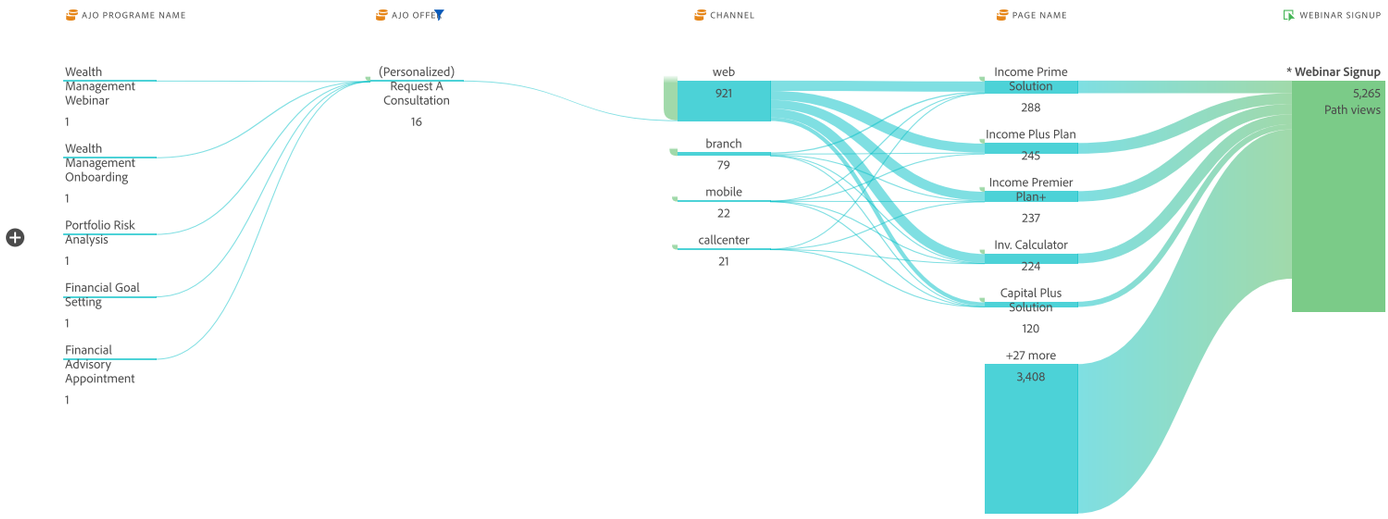


AJO Offer Analysis

AJO Offer Page: 1 / 10 › Rows: 5 1-5 of 49	Events Jan 1 – Sep 30	AJO Impressions Jan 1 – Sep 30	AJO Offer Clicks Jan 1 – Sep 30	Webinar Signup Participation | Person Jan 1 – Sep 30	Inv. Calculator Complete Participation | Person Jan 1 – Sep 30	Scheduled Appointment Participation | Person Jan 1 – Sep 30
	13,211 out of 229,247	11,867 out of 11,867	1,344 out of 1,810	3,272 out of 8,303	2,562 out of 7,591	1,468 out of 4,642
1. (Personalized) Request A Consultation	302 2.3%	273 2.3%	29 2.2%	128 3.9%	107 4.2%	67 4.6%
2. (Personalized) Marketing Lab	298 2.3%	265 2.2%	33 2.5%	97 3.0%	97 3.8%	61 4.2%
3. (Fallback) Comparison Tool	294 2.2%	270 2.3%	24 1.8%	144 4.4%	108 4.2%	60 4.1%
4. (Fallback) Holistic Strategy	294 2.2%	269 2.3%	25 1.9%	125 3.8%	91 3.6%	54 3.7%
5. xcore:fallback-offer:xys9oeckalsl2u1	294 2.2%	259 2.2%	35 2.6%	104 3.2%	104 4.1%	54 3.7%

Flow

Ends with: Webinar Signup | Pathing dimension: Page Name | Flow container: People | Repeats: Off | First/last occurrence limiting: Off



EXCERCISE 12

Let's create a Flow diagram showing the AJO Programs that lead to Webinar Signups:

- Bring in a Flow
- Add Webinar Signups to the End field
- Select Page Name as the pathing dimension
- Replace our first Page Name node with the Channel dimension
- Bring AJO Offer to the left of Channel
  - filter node by "request a consultation"
- Bring AJO Program Name to the left of Channel

note: we can easily refine this visualization by right clicking on any touchpoint and making a selection from the available options.
Once a specific path is defined we can create an audience with a simple right click.

Paid Marketing Performance

Assuming marketing campaigns orchestrated over external channels like Facebook, Display etc. carry link with UTM/tracking parameter to capture customer interaction details in Experience Platform

Marketing Campaign Channel Page: 1 / 1 Rows: 50 1-9 of 9	Apr 1, 2021 - Dec 31, 2021 Webinar Signup Participation | Person Apr 1 – Dec 31	Webinar Signup Participation | Person Jan 1 – Sep 30	Percent change Jan 1 – Sep 30
	4,517 out of 8,327	4,224 out of 8,303	-6.49% out of -0.29%
1. Facebook	2,352 52.1%	2,264 53.6%	-3.74%
2. Email	2,234 49.5%	2,069 49.0%	-7.39%
3. Paid search	548 12.1%	511 12.1%	-6.75%
4. Instagram	30 0.7%	48 1.1%	60.00%
5. Mobile push	50 1.1%	31 0.7%	-38.00%
6. Web push	29 0.6%	31 0.7%	6.90%
7. YouTube	37 0.8%	27 0.6%	-27.03%
8. Display	15 0.3%	24 0.6%	60.00%
9. Text	9 0.2%	10 0.2%	11.11%

Paid Search Analysis

Search engine Page: 1 / 1 Rows: 50 1-1 of 1	Paid Clicks Jan 1 – Sep 30	Account Open Participation | Person Jan 1 – Sep 30
	1,413 out of 4,121	783 out of 13,539
1. Google search	1,413 100.0%	783 100.0%
Google se... Keywords Page: 1 / 1 Rows: 5 1-1 of 1	1,413 out of 1,413	Participation | Person 783 out of 783
1. Tailored Investment Research	1,413 100.0%	783 100.0%

Annotation Summary

DATE RANGE	NAME	COMPONENTS	DESCRIPTION
May 22 - May 28	Noticeable drop on KPIs		review further please