

Becoming a car driver is not the same thing as learning to drive and passing the tests. It is something that happens probably months after the paperwork has been handed down. It happens unconsciously: it happens the day before you realise you are on autopilot turning right safely across a stream of traffic.

Becoming a competent user of a sophisticated software product fits into a similar mould. One day you are still clicking through the on-line user manual; the next day, you are flying the system as though it were the most natural thing to be doing.

Analogies can be dangerous, however. What happens if the motor car is clunky and difficult to get started? How much is that down to the inexperienced driver, or poor mechanical design on the part of the car manufacturer?

# Intelligent Emailing?

## Putting Infacta's GroupMail mailing system to the test over six months

Systems for managing a company's electronic marketing campaigns are inevitably going to be complex, and need careful driving. At the very least, they have to be able to handle an email message in all its incarnations from HTML with graphics down to simple plain text. How they handle mailing lists is the next point for examination. What format must the data be in before it can be handled by the system, for example, and how easy is it to personalise an email letter through the contact details stored in the mailing lists? And no less important, the system has to keep track of the email copies sent out and the occasions when an email is opened by those on the list. How easy is it to extract that information?

Testing out the Business Edition of the GroupMail system from the Irish developer Infacta Ltd was never going to be a five-minute job. With all of its optional modules and add-ons, it is a complex solution.

There is a core mailing engine which interacts with systems intended to monitor email open rates, for example, manage opt-in forms for subscribers and conduct reader surveys. If such a product were at first to appear heavy to 'drive' to achieve the desired results, how much of that could be attributed to over-familiarity with an entirely different system that simply works in a different way while delivering most of the functionality?

Before switching to GroupMail, the reviewers had been using the EShip mailing system, which had delivered a wholly workable solution for two years, but had approached the task from a different perspective. EShip operates on the vendor's host, with web access to any user authorised to access it. GroupMail, in contrast, runs on the user's PC, with only the tracking mechanisms being hosted by Infacta.

Comparisons between such products are invidious unless one supports much greater functionality or delivers a superior performance. In today's parlance of the politically correct, most mailing systems operate to a similar standard so far as their core features are concerned, but are 'differently advantaged' in the way that they handle specific aspects of an email campaign.

## Accurate product description

It would be fair to observe from the outset that GroupMail 'does exactly what it says on the tin' – it manages the delivery of email messages, in a variety of formats, to lists of email addresses created for that purpose. One hosted counterpart, GroupMetrics, monitors open rates and click-throughs, while the Subscriber add-on module to GroupMail keeps track of bounce reports and unsubscribe requests, and can be configured to maintain data lists up to date. GroupSurveys is the other web-based service module handling – not unsurprisingly – surveys sent out to recipients.

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The version of the product that The Informed Executive took on board for review was specifically the GroupMail 5 Business Edition, the third of four tiers which start with a restricted free version to which many technical features are added when customers purchase the Personal edition. (The top tier is the Marketing Pack, which comprises the Business Edition with a portfolio of email tracking, statistics and analysis modules.)

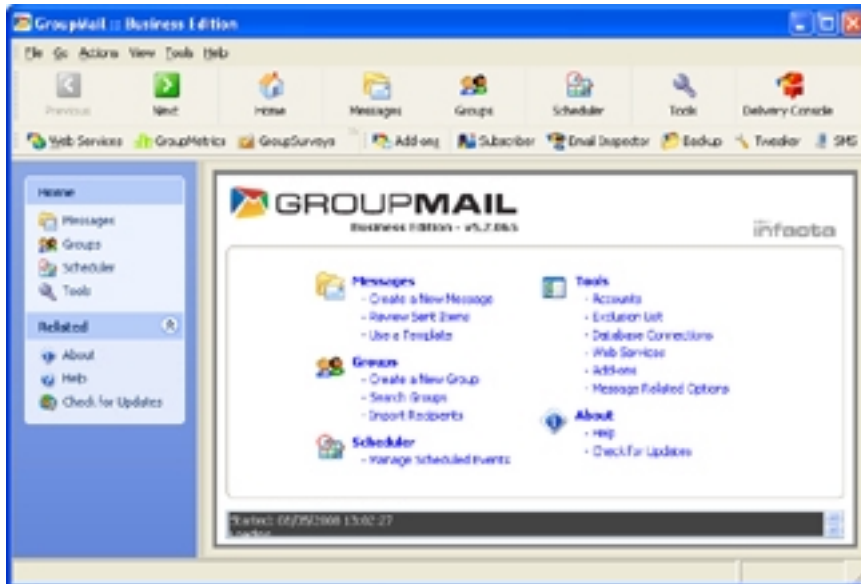
The Business Edition (BE) includes all of the features within the Personal version but provides a portfolio of features intended for the corporate environment. It is capable of interfacing, for example, with all of the popular database systems to speed up the building of the lists or groups to which the messages will be sent.

More specifically, it supports the address book formats of most of the email agents encountered on PCs today – that inevitably includes Microsoft Outlook and Exchange, along with GroupWise, Notes and other Enterprise Level email tools.

The same version of GroupMail support higher throughput rates than the Personal product. It can connect to the Internet through up to 256 connections simultaneously, though 6 to 12 such connections are likely to prove sufficient for most business applications which don't involve mailing to every business in the Yellow Pages in the space of 24 hours.

## Installation and configuration

Installing and configuring the system is relatively straightforward: once the one-off payment has been made online for the GroupMail 5 Business Edition licence, a user name and



password are issued to provide access to the customer area, from which the application is downloaded.

Whatever the technology involved, every email campaign consists of two essential steps – assembling a list of target email addresses and preparing the email message to be sent out to each of those addresses. There are other considerations not to be ignored, of course, such as configuring the email accounts which display sender details on each email and the servers through which the traffic will be directed, Those core activities and the system configurations are handled by the GroupMail product, which forms part of the GroupMail Marketing Suite. As indicated earlier, this is effectively the Business Edition with many additional statistical features added on.

How many of the outgoing emails are opened; which addressees click on to links and whether they choose to unsubscribe, all fall within GroupMetrics. Using the GroupMail Marketing Pack involves a payment based on the volume of tracking handled by the system. How these services are priced is considered later in this assessment.

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## Core components of system

The core components of GM 5 Business Edition are laid out on the Home page in a way that any user with even a vague understanding of what might be involved in an email campaign could follow.

The developers were probably relying on that intuitive process when they conceived the basic user documentation for the application: it could not be seen as the strongest feature of BE.

The 'F1 Help' file is probably less well fleshed out than for most products of this complexity, though the very elementary Getting Started help files provide the minimum amount of detail needed to get the user started.

More comprehensive information on using the product is available, however, but this is obtained through a collection of tutorials, of which there were 61 available at the time of this review. These do not form a co-ordinated manual, but are standalone documents addressing a different question that a user might raise.

They are arranged not in the order of operation or even alphabetically, but simply in the date order of being added to the site. This means that the user has to scroll through the entire list of tutorials to locate what is required. At least the titles of the tutorials are reasonably self-explanatory, as in 'How to Process Opt-Out Requests in GroupMail (Subscriber Add-On).

This has been recognised as confusing by Infacta: the company is currently reviewing its documentation and intends to streamline the material.

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Experience has shown that users tend to create broadly similar types of data list each time: GroupMail assumes that the previous group to have been created contained broadly the correct number, type and size of field and uses these as the default when a new group has to be built. It is relatively simple to add or remove whatever fields are required to match the exact structure of the source data.

## Creating mailing lists

### Intuitive layout of home page

This critical observation about the free versions of the documentation should not detract from the intuitive layout of the application on the home page. The steps needed to create a mailing are immediately obvious, through a user would have to deduce that the word 'Group' is Infacta's term for a list of recipients. 'Messages' is self explanatory, relating to the email content.

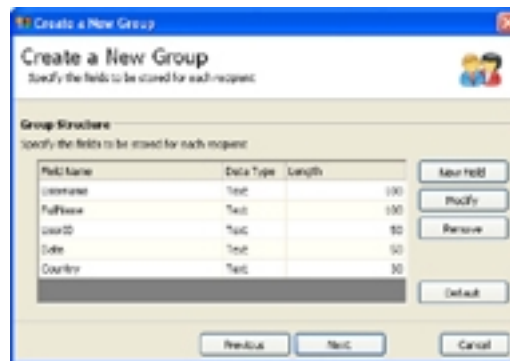
Since no two data lists are likely to contain the same number and type of data fields, it might be reasonable to assume that the user would have to construct the record structure of a group from first principles for each new mailing task.

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### Populating data groups

Designing the email shuttle is just the first stage: data has either to be keyed in or - more likely - drawn in from existing data tables of some description. Importing data files is straightforward so long as the source is held in a compatible format such as Excel or CSV text. Records can also be imported straight from the clipboard if necessary,

But GM 5 Business Edition does provide an extensive range of options for linking (rather than importing) a group directly to an external



source - an Excel spreadsheet or Access database, for example. Setting up the path to the database, however, requires careful planning and confidence in keying in the exact path: there is no browse facility here as there is with data importing.

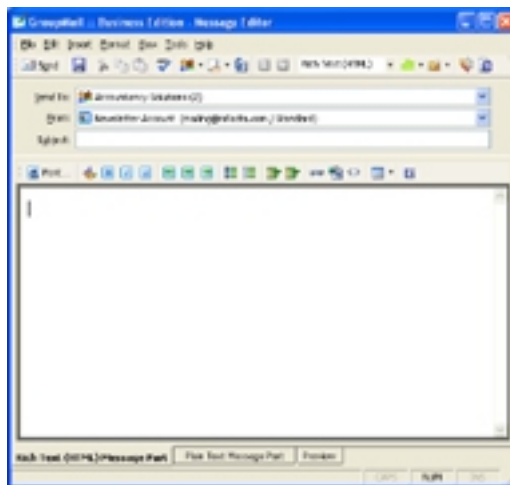
As the field names of the source file do not have to match those of the data group being populated, the process of preparing a group for a mailing is remarkably simple. At the point when the external file is about to be imported, the user simply pairs off the relevant input field for each of the fields in the group.



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Preparing a message for distribution is extremely simple. A message created in text mode or HTML is imported by browsing to the source of that file and clicking on the file name. The text appears in a new message window where it can be further edited and the modified file updated. Apart from keying in a subject line, the file is ready to be emailed.

# Creating the message



Preparing a message for unmonitored distribution is extremely simple. A message created in text mode or HTML is imported by browsing to the source of that file and clicking on the file name. The text appears in a new GroupMail message window where it can be further edited and the modified file updated. Apart from having a subject line keyed in, the file is ready to be emailed.

On the grounds that virtually every email letter needs some small adjustment before it is sent, the prepared message should be mailed out under test conditions to a test address – one which the sender can access rapidly, then make corrections. That ensures that nothing is left to chance when that single email turns into a batch run of perhaps 30,000.

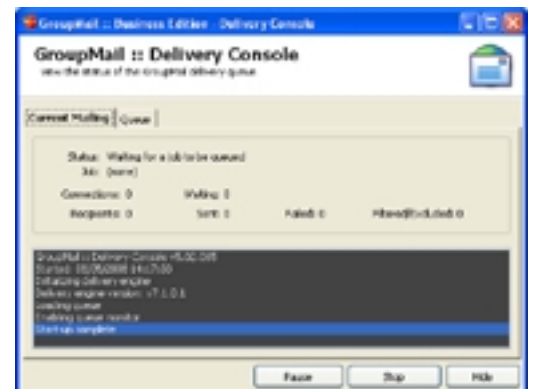
GroupMail allows the user to select any part of a data group for a mailing if the whole list is not required. The criteria can be set by reference either to the characteristics of the data record (eg Send where [fieldname from list] [is equal to, greater than etc] [a given value]) or by reference to the record number in the group. For many applications, this simple numerical selection will prove sufficient, allow-

ing a large group to be mailed out in much smaller batches that will keep the task below the radar of ISPs which monitor incoming traffic for evidence of bulk email.

On the subject of flow control, GroupMail provides a useful facility in the sender account set-up (the process by which the 'from' address is determined along with the address of the SMTP server). For each unique email account, the user can specify the number of emails to be sent out before taking a pause of a pre-determined length. A batch of mail messages could therefore be set up to be sent in short runs of 100 at a time, with an interval of 60 seconds between them. This has the effect of reducing the visibility of a mailing campaign still further.

## Delivery Console

The physical output of emails is controlled through a feature known as the Delivery Console, an unanchored window which floats over the main GroupMail page. It shows the state of play at any time – the number of messages waiting to be sent, the number that have been queued, the total sent and the number of failures. These are specifically the failures reported at the transmission stage rather than any which have left GroupMail but failed to



## Checking out addresses



be delivered. And the screen displays an approximate time to completion of the mailing.

The Delivery Console has encountered a number of irritating inconsistencies in the past, creating problems for the user when a list had to be stopped and re-started. It did not always function exactly as planned, giving rise to anomalies such as re-starting mailings at the incorrect point within a group.

The problem, which had been identified by the GroupMail development team, has now been rectified. Delivery Console now keeps track correctly of the addresses in a batch which had not been despatched (either because they failed for a technical reason or the queue had not reached them).

### Checking out email addresses

There can be few things more frustrating in running a campaign than discovering that a higher than expected proportion of the emails sent out are being returned as undeliverable either because the user is not known at the domain or the domain itself does not exist. It is wasteful of mailing time if there are large Groups to be mailed out to in a limited amount of time. But high levels of bounces in traffic can also tell the ISP that a spammer might be at work.

GroupMail 5 BE has a particularly useful facility called Email Inspector which can check out a Group in two different ways. The first is DNS checking, which establishes both that the syntax of an email address is correct and then that the domain exists. This is a much faster option than the second, which involves verifying individual recipients' email addresses. This more detailed scrutiny can be run overnight if required, and yields a detailed list of the problem emails.

A second set of tools is provided under the banner of 'Tweaker'. It handles the kind of data

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manipulation task which is slow to process by hand, and quite complex to write as a piece of code. The four components of Tweaker are name splitting (breaking a composite name into separate fields for personal title, the first name and a surname), capitalisation of text in a field, the ability to update the contents of fields against a set of user-defined rules, and formatting the data in each record against a set of rules.

As might be expected of such a product, GroupMail 5 BE allows mailings to be scheduled. Scheduling is one of the features supported in the Business Edition but not in the Personal Edition. It is invaluable to a marketing team that wants to send out emails early in the morning so that they are near the top of the recipients' inbox when they switch on for the start of the day.

### Building campaigns

Life would be very simple for marketing departments if all they had to do was write a piece of text and mail it out to everyone on a list. To be used effectively as a marketing tool, the message needs to be turned into a campaign in which every statistic can be tracked and analysed.

Building a campaign and creating the mechanism for tracking open rates and click-throughs on HTML links requires that the GroupMetrics package has been installed.

The first steps in creating a campaign are straightforward; entering a name, optional information about the number of data records and bounces (which will be used later to help generate statistics).

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## Who opens your email?

Beyond that, building a campaign in Group Metrics becomes far more complicated. It does not require programming skills, but an eye for detail. Failure to create the right link and insert it with additional parameters at the correct place in the mailing letter means that a mailing will provide very little by way of analytical data, however successful the mailing itself might have been in generating sales.

### Creating tracker links

To set up all of the trackers needed to manage a campaign letter containing perhaps HTML links would need a string of coding to be entered in the source file of the message. These links can be inserted directly into the Message before it is mailed out, but many users would prefer to work within the familiar domain of their Web development tool.

Each HTML link is converted (online by GroupMetrics) into a string that replaces it with a routing that diverts the link through the GroupMail host where it is counted before reaching the intended destination. Unlike some mailing systems which report just on the total number of 'opens', GroupMetric can



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assemble a list of opens with an event time against each one.

Each time the recipient goes back to the original message or forwards a copy of it around the organisation, for example, the relevant counter trips and the picture builds up. That gives the team sending the message a better idea of when its messages are being opened so that, for example, the timing of the mailing can be more finely tuned to recipients' opening and reading the message.

The tracking tools which GroupMetrics provides greatly increase the effectiveness of GroupMail as a marketing system. The objective might be to send out a promotional newsletter to perhaps 3,000 customers or prospects. The message might contain two links into the sender's website and two more PDF files to be downloaded.

If tracking links have been inserted correctly at each of those points, the campaign manager tool in GroupMetrics would be able to detect when the email letter was opened by each recipient, the links which were followed, and the number of times that this occurred.

Rather than attempt to follow up all 3,000 addresses with a phone call, it would be a simple task to produce a downloadable file of the recipients who had opened the email, followed by a list of those who had clicked on one or more of the links to create a high-priority hit-list to be phoned.

### Cross-referencing responses

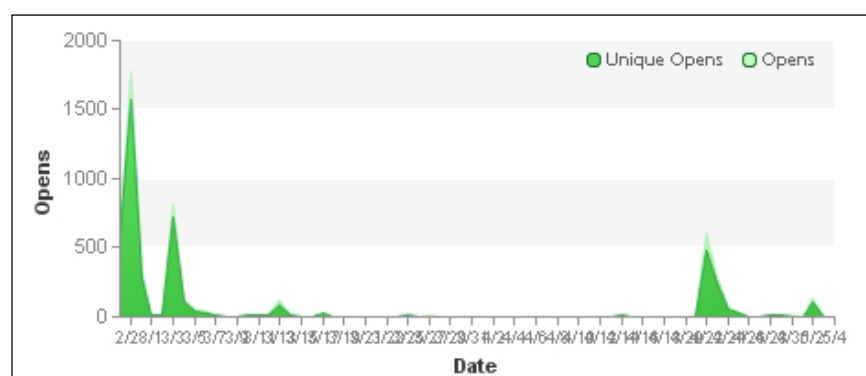
Cross-referencing of that information once it has been re-imported to the original data file would identify those recipients who had opened the letter (the first level of interest which might account for perhaps 750 recipients) but, more importantly, the individuals who had clicked through one or more of the HTML links.

GroupMetrics is now being rebuilt and will include a one-click route to inserting tracing links. This is a major step forward in what is already a very powerful piece of software.

## In conclusion

From an original mailing list of 3,000, the task now becomes one of calling the 300 to 500 people who had shown sufficient interest to secure additional information. Phone or personalised mailing to (say) 500 people is a less daunting task than picking up the phone to all 3,000.

In itself, the open rate from a mailing is of limited value given that many modern browsers can prevent the 'read' flag being passed back to the sending host. Whatever information can be obtained from the system about open rates, however, is still a broad indicator of response and its timing.



### Cost of using GroupMail 5

Infacta GroupMail 5 Business Edition is currently priced at £174.95, a figure which reflects the high level of functionality in the system. This is a one-off charge, which includes technical support (usually by email to the company's base in Sligo, Ireland).

Adding the web-based components of the Marketing Suite brings the one-off cost up to £349.95; effectively double the price.

Use of the web-based services such as GroupMetrics is charged by the 'unit' where an email recipient opening an email clocks up one unit; clicking on an HTML link takes another unit. Units are pre-paid and added to the user's account with Infacta. How those credits are purchased is more complicated: the user is given four different monthly options. Two are intended for businesses running their own email campaigns; the other two are for emailing bureaux with much higher throughputs.

The Business tariffs are \$24.95 a month (25,000 clicks) and \$49.50 a month (100,000 clicks), with the option to purchase additional clicks for virtually the same monthly rate on a one-off basis if required to top up capacity. Paying annually for the two business tariffs would save the user 20%. At the top end, a bureau could pay \$499 each month for an unlimited number of clicks.

Six months of using GroupMail 5 Business Edition should be long enough for faults and omissions to have become apparent. The question of the user manual for the core product fades into insignificance immediately a sound working knowledge of the system has been secured.

To be fair, there are features of GroupMail which come to light all the time when mailings are being produced. And there are some tasks – such as embedding the tracking links to extract campaign data - which require the same meticulous attention detail after six months as they did on Day 1 when the application was unfamiliar.

The reviewers were given access to developments at Infacta, the owners of GroupMail, during the course of this analysis. Most important, perhaps, is that GroupMetrics is now being rebuilt and will include a one-click route to inserting tracing links. Customers with a current licence will be able to upgrade. This facility will represent a major step forward in what is already a very powerful piece of software.

### Summary

GroupMail 5 Business Edition and its associated Marketing Suite taken together create an incredibly powerful tool for the marketing manager. Except on a very few counts, using the system rapidly becomes easier with experience. It really is worth having to proceed slowly along the learning curve to understand GroupMail despite its occasional foible.

Would the magazine's marketing team switch back to Eship? The answer is most certainly 'no'. Not because the hosted Eship application has major shortcomings – it doesn't – but GroupMail seems to reflect more fully the needs and aspirations of the marketing process. \$

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