

Checklist for Client Data File

Best practice tips to prepare your contact data before uploading and sending to a list...

Background

Contact lists are normally downloaded from a CRM system and provided as an excel or csv file to be uploaded/ updated into the campaign email system being used. There are a few key things businesses can do in order to ensure maximum deliverability and reduce bounce rates and domain issues when obtaining these contacts and sending campaigns.

Checklist Before Uploading

- Confirm with the client that the contact list is current and
- Check with the client if there is a previous unsubscribed/ suppression list that needs to be uploaded and unsubscribed if sending from a new system
- Sort your excel spreadsheet by email column and then highlight duplicates and move to separate tabs/ spreadsheets; or remove duplicates.
- Search for known old/ bad domains and remove all such entries.

- clear.net.nz
- ihug.co.nz
- paradise.net.nz
- pconnect.co.nz
- quik.co.nz
- vodafone.co.nz
- vodafone.net.nz
- wave.co.nz



Search for Obvious Typos

- Search for typos in the spreadsheet. The following are some common ones: @extra.co.nz, @2, @homail, @gamil
- Filter the email column for entries which do not include "@"
- Duplicate the email column row and run this function to reverse the column contents: (<https://www.extendoffice.com/documents/excel/1146-excel-reverse-string-word-order.html>), then sort so those with spaces or ending on "." are sorted to the top of the list for correction.
- Find and replace all spaces in the email column.



Internal Notes for Internal Team - Uploading to C9 Campaign

- Once you have uploaded your list the system will automatically generate a spreadsheet of invalid uploads with descriptions. Invalid uploads include invalid email addresses and contacts who have previously unsubscribed from the C9 Campaign system. Be sure to download this spreadsheet to provide back to your client as the invalid upload lists only stay in-system for 7 days.
- Next step is to check if there are any contacts in the list who have previously been deactivated. Inactive contacts are those who have had permanent bounces from previous sends. Advanced search: "Activation status is inactive". Download this list for your client also as these email addresses can't be sent to.

Internal Notes - if you are needing to do a large send in batches

- Within your excel spreadsheet (before upload): Decide on the number of groups you're wanting and add that group name next to the contact. For example, you have decide on 4 groups, the top 4 contacts would be group 1, group 2, group 3, group 4. To make it easy, copy and paste this selection to the 4 contacts below. Highlight all of the selected groups and then double click the little square in the bottom-right of the selection. This will autofill the column with the groups you require.

	A	B
1	sarina.samuel@cumulo9.com	Group 1
2	sarina.samuel@cumulo9.com	Group 2
3	sarina.samuel@cumulo9.com	Group 3
4	sarina.samuel@cumulo9.com	Group 4
5	sarina.samuel@cumulo9.com	Group 1
6	sarina.samuel@cumulo9.com	Group 2
7	sarina.samuel@cumulo9.com	Group 3
8	sarina.samuel@cumulo9.com	Group 4
9	sarina.samuel@cumulo9.com	
10	sarina.samuel@cumulo9.com	
11	sarina.samuel@cumulo9.com	
12		
13		

Internal Notes - after send

- Download list of permanent bounces from reports. This information can be passed back to your client so they can obtain new email addresses or post communications.
- You can also drill down and download any other information that may be of use to the client e.g. click reports, email client reports, device reports, open rates etc.
- You can also share the high level reports (not drillable) with any email address using the share button on the reports screen. This is a good way to provide an overview of opens and bounces.

