How to

CloseAlert

How to implement CloseAlert in your ESP; strategies for efficiency

Every email marketeer knows how much time and effort it takes to send the perfect email. We'll make life a little easier for you by making it simple to implement CloseAlert in your email templates. Follow the below steps and save time again, and again.

After reading this article, you and your team will know about CloseAlert's default use cases, how to save time implementing CloseAlert widgets in your email and compare standardized results.

CloseAlert can be used in a wide variety of situations (we call them "use cases") during which you want to collect feedback. For certain situations you may want to ask a specific question and will thus need a specific CloseAlert widget (matching that first question). Generally, composing widgets takes time whilst creating a new CloseAlert form hardly does!

Break it down; your guide to creating templates
Here's your *step-by-step approach* on how to get out of this time-consuming pickle:
1. Determine your standard use-case
2. Build standard content blocks in your ESP (we'll refer to those as "templates")
3. Once your email is ready to be send;
   - pick and choose the relevant template;
   - insert the correct CloseAlert URL.
   - If the first question doesn't change, you only need to change the *form ID code* in the URLs.

Three simple steps to minimize the implementation effort. The templates can easily be reused. Make sure the templates are kept adaptable as explained in the next section.

Design your templates: checklist
We continuously encourage you to ask the right question at the right moment. How to go about this AND make use of standardized templates?

Step 1. Determine the standard use-cases you want to use, e.g.:
- Email satisfaction
- NPS-T
- CSAT rating
- MC

Step 2. Build standard content blocks in your ESP ("templates"). Make sure every template ticks the below bullet points:
- The question text field should be changeable in order to re-formulate the first question.
- Changeable text next to the visuals (e.g. thumbs icons, text buttons, smileys, etc.) to re-formulate the answer options.
- Two (for Email sentiment) to eleven (for NPS) CloseAlert URLs under the visuals and answer text. These URLs should be adjustable in order to easily change the form's ID to be in line with the email widget.

What do you think of this e-mail? `question text`

Positive 👍 👎 Negative `visual` `visual text`
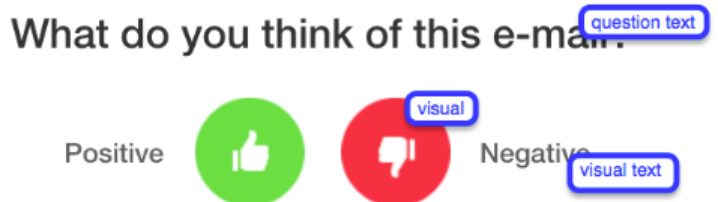
CloseAlert's standard use-cases
There are four main use cases around which we create our standard content blocks:
- Email satisfaction
- In-email content
- Customer journeys
- Customer relationships

Continue reading about these use-cases and the corresponding templates you should have in your ESP!

Email satisfaction: measure and improve your overall email sentiment
Primary goal: monitor and compare emails and campaigns. Use Email satisfaction either with the two-point sentiment question or a rating scale to ask feedback about the entire email.

Example:
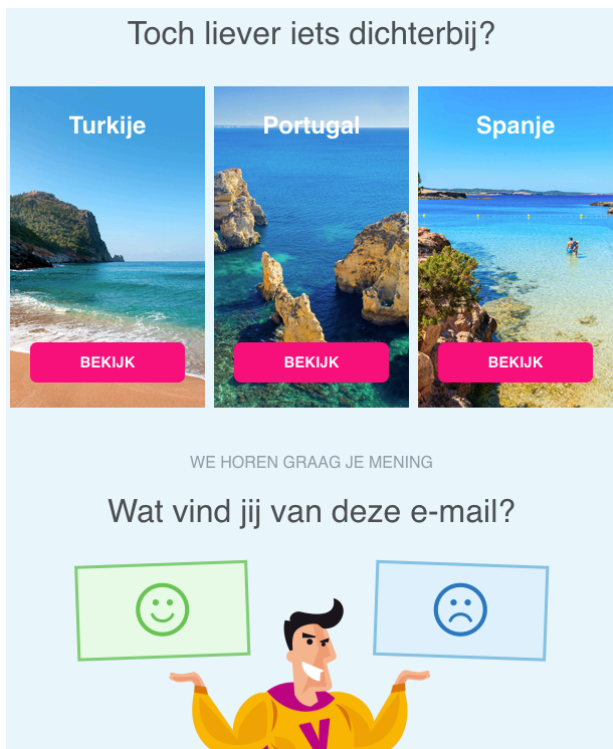
In the email, place this widget at the end but above the footer.

In-email content: measure and improve parts of the mailing
Primary goal: gather feedback about a specific part of your email.

Three examples:
In-email content relevance

In-email content clarity

In-email content purchase intention

In the email, you'll generally place this widget higher (e.g. underneath an article).

Customer journeys: measure and improve processes/journeys
Primary goal: gather feedback over a series of emails/touch points. This is useful to evaluate, monitor and optimize a journey or process.

Two examples:

Customer Effort Score (CES)*

NPS-T(ransactional)* - either as a primary CTA or at the end of the email

Customer relationships: overall relationship measurement
Primary goal: gather feedback about the general (client) relationship

Two examples:

'Are you happy' - binary question

NPS-R(elational)*

Asking about the relationship is the main purpose and only CTA in your message. Therefore make sure that the widget is located centrally.

Lastly, you can also use the MC question for segmentation purposes to get to know your customers better:

Conclusion
To conclude, here is our advise:
- Continue to make an effort to ask the right question at the right moment.
- Take time to create a templated framework in your ESP from which you can implement CloseAlert within minutes.

You (and your colleagues) will thank yourself later if you start with taking the time to think through your standard use-cases now.

If you need any assistance determining your standard use-cases and questions to ask, contact your Customer Success Manager about our journey scan.

These questions are part of our CX Premium package. Please contact your Customer Success Manager for more information.

Want to learn more?
Please contact yori@closealert.com or ring +31 (0) 20 26 118 62 to request a demo.