

How to implement CloseAlert in your ESP; strategies for efficiency

Every email marketer 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

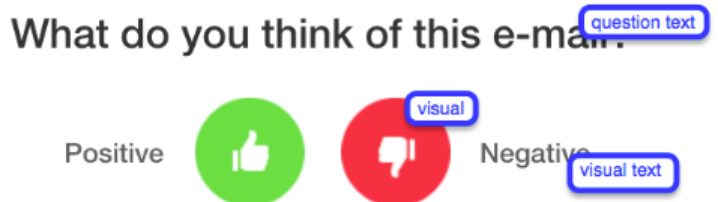
We continuously encourage you to ask the right question at the right moment. How to go about this AND make use of standardized templates?

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.



CloseAlert's standard use-cases

There are four main use cases around which we create our standard content blocks:

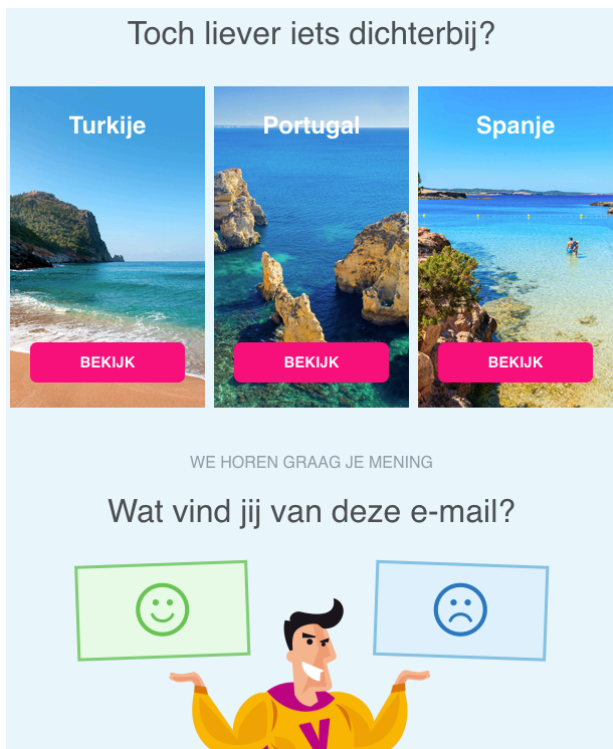
- Email satisfaction
- In-email content
- Customer journeys
- Customer relationships

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



Vindt u dit artikel relevant?

Ja ☐ Nee ☐

In-email content clarity

Mochten jullie nog vragen of opmerkingen hebben over deze aanpassing dan horen wij dat graag.

Met vriendelijke groet,

Yori Högemann
Co-founder CloseAlert

Is bovenstaande informatie duidelijk?

Ja ☐ Nee ☐

Learn more about [customer experience](#) or read [case studies](#) at [closealert.com](#)

In-email content purchase intention

Blij met prepaid?

Wat vind jij van de YOU maandbundel?

Wat je mening ook is, we horen het graag. Jouw feedback houdt ons scherp.

- ☐ Voordelig
- ☐ Makkelijk
- ☐ Zorgeloos internetten
- ☐ Fijn dat je 'm in heel Europa kunt gebruiken
- ☐ Ik betaal liever per min/sms/MB
- ☐ Ik ken de YOU maandbundel niet
- ☐ Anders, nl:

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)*



PAULA'S CHOICE SKINCARE

SHOP PRODUCTEN EXPERT ADVIES PAULA'S VISIE

BEDANKT VOOR JE BESTELLING

Binnenkort worden jouw producten bij je thuisbezorgd. In de tussentijd lees je hier meer over de twintig meest voorkomende beautymythes. We horen ook graag wat je van het bestellen op onze website vond.

Hoeveel moeite heb je moeten doen om je bestelling te plaatsen?

1	2	3	4	5
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Weinig moeite Veel moeite

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

Een paar dagen geleden heb je een aankoop gedaan bij Epplejeck Den Haag.

(Op basis van je laatste winkelbezoek)

"Hoe waarschijnlijk is het dat je Epplejeck zou aanbevelen aan vrienden/familie/stalgenoten?"

0	1	2	3	4	5	6	7	8	9	10
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Zeer onwaarschijnlijk Zeer waarschijnlijk

Customer relationships: overall relationship measurement

Primary goal: gather feedback about the general (client) relationship

Two examples:

'Are you happy' - binary question



PAULA'S CHOICE SKINCARE

SHOP PRODUCTEN EXPERT ADVIES PAULA'S VISIE

HOE GAAT HET MET JOU EN JE HUID?

Kort geleden heb je bij ons een eerste aankoop gedaan. Wij zijn erg benieuwd hoe het met jou en je huid gaat.

Hoe zou je jouw ervaringen met ons tot nu toe beoordelen?

NPS-R(elational)*

Dear Catawiki user,

We are pleased to have you as a bidder at Catawiki.

We are committed to continuously improving your experience at Catawiki and we would greatly appreciate your feedback. Please tell us about your experience at Catawiki and in which areas we can improve.

To make things quick and easy for you, we've developed a single page survey. Your feedback will be used for internal purposes only.

We would like to start off by asking:

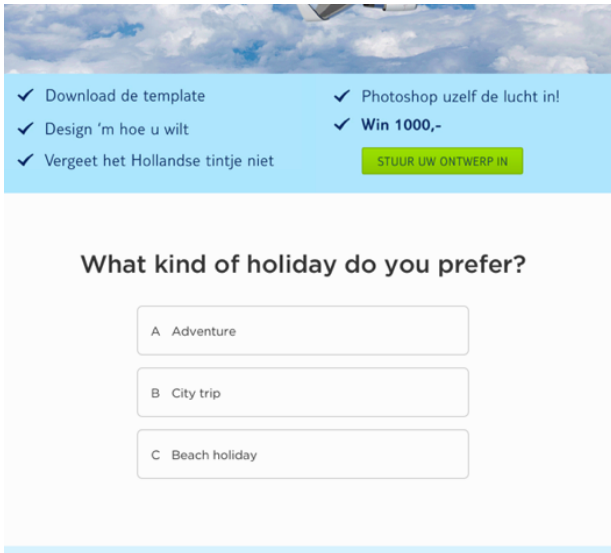
How likely is it that you would recommend Catawiki to a friend or a colleague?

0	1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	---	----

Very unlikely Very likely

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:



The screenshot shows a landing page for a design competition. At the top, there is a blue header with a white checkmark icon and three lines of text: 'Download de template', 'Design 'm hoe u wilt', and 'Vergeet het Hollandse tintje niet'. To the right of this, there is another blue header with a white checkmark icon and two lines of text: 'Photoshop uzelf de lucht in!' and 'Win 1000,-'. Below these headers is a green button with white text that says 'STUUR UW ONTWERP IN'. The main content area is white and features the question 'What kind of holiday do you prefer?' in bold. Below the question are three rounded rectangular buttons labeled 'A Adventure', 'B City trip', and 'C Beach holiday'.

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.