



# Hello and welcome!

While we wait for everyone to join, share in the chat:

**What is your comfort food?**

# Master Bloomreach Analytics: Transform Customer Data into Smarter Marketing Decisions



June 2024

 This session will be recorded

# A few things before we start:

Chat



Valentina Benaglio 11:28 AM  
I'm calling in from NYC!

Q&A



Valentina Benaglio 11:28 AM  
Does this apply to only promotional emails  
or to transactional emails as well?



1

Docs



Navigating Gmail and Yahoo's Deliver...  
Click to open



Gmail and Yahoo's New Email Sender ...  
Click to open



Email Deliverability Tips  
Click to open



The Ultimate Guide to Mastering Emai...  
Click to open

# Meet The Hosts And The Speakers



**Matej Cambal**

Sr. Business Consultant



**Richard Frno**

Business Consultant,  
Analytics SME





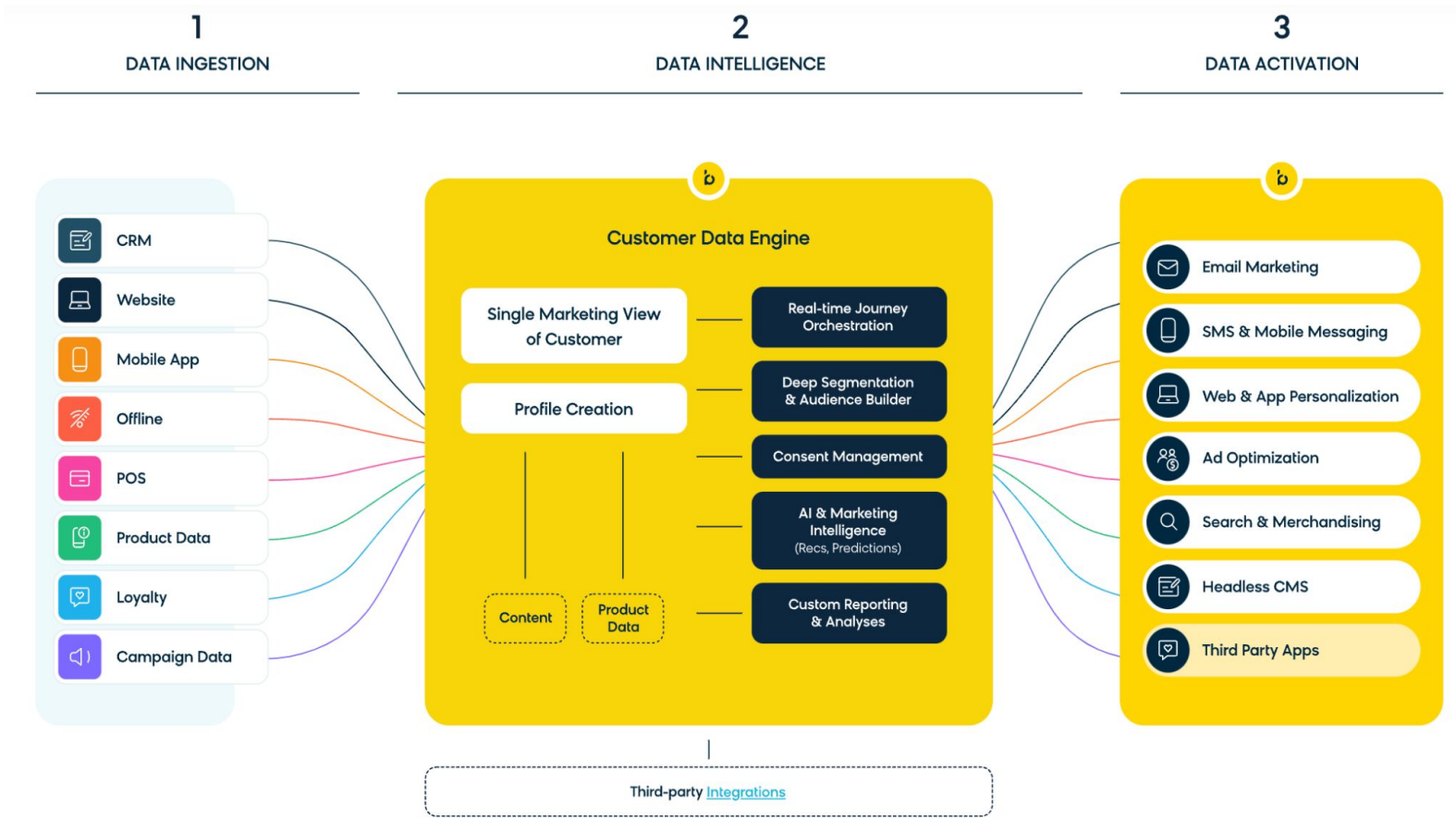
# Agenda

- 1. Analytics in Engagement - key pillars**
- 2. Bloomreach Dashboards - how to start**
- 3. Building dashboards**
- 4. Examples of existing dashboards**
- 5. Feature highlights**

# **Analytics as a part of Bloomreach Engagement**

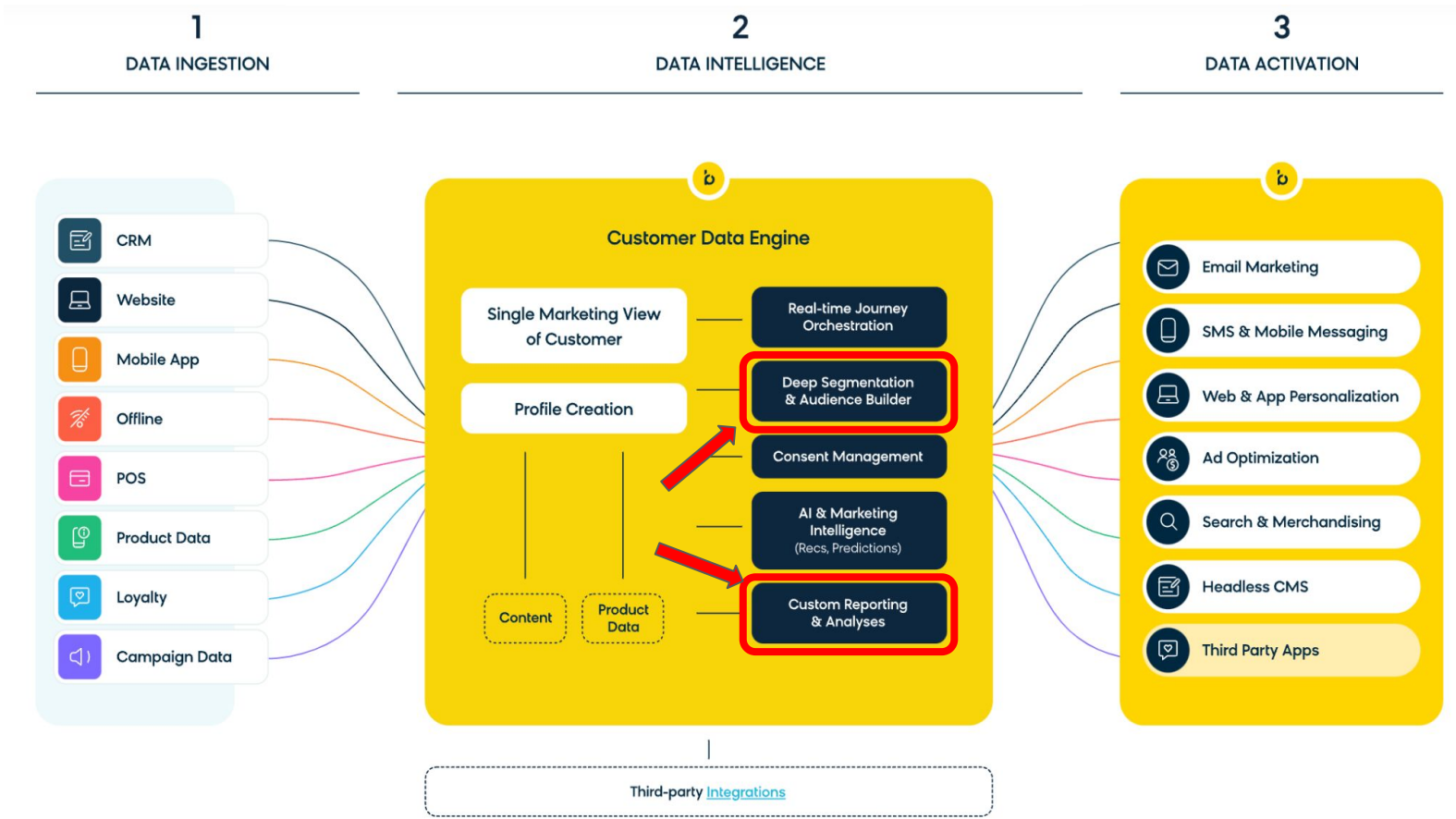


# Personalize Customer Experiences With a Customer Data Engine





# Personalize Customer Experiences With a Customer Data Engine







# Analytics Pillars of Bloomreach Engagement

## Analyses

- Comprehensive analytical tools for processing and displaying the data
- Consists of: Reports, Trends, Funnels, Flows, Segmentations, Retentions and Geo analysis



## Dashboards

- Provide you an overview of your business data
- Help you keep track of key business metrics in one place
- Usually built using Analyses, Definitions and Metrics



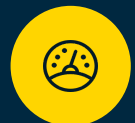
## Definitions

- Used for calculations on the level of individual customer or individual event
- Consist of: Aggregates, Running aggregates, Event seg., Expressions.



## Metrics

- Values computed according to specified criteria, such as event count or customer count, which can be used to measure various aspects of customer behavior.





# How to work with Bloomreach Dashboards?



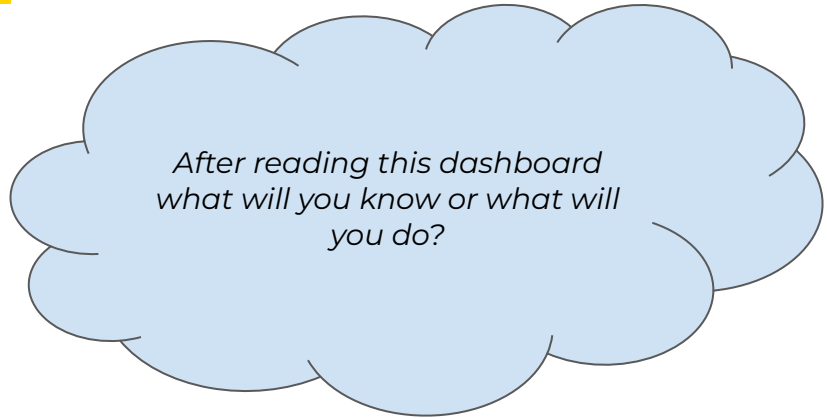
# 4 Questions to ask before starting a Dashboard



# Questions *you should ask before starting a Dashboard*

## **What is the purpose of the dashboard?**

*Why this is important:* Understanding the main objective will guide the design and functionality of the dashboard. It helps in determining what data needs to be displayed and how it should be presented.





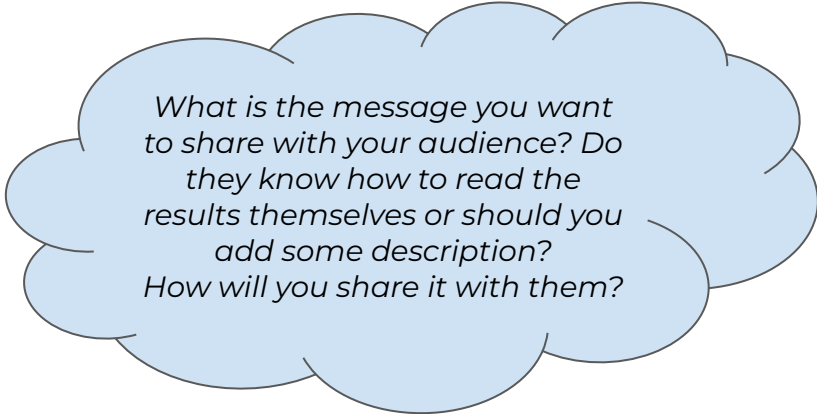
# Questions *you should ask before starting a Dashboard*

## What is the purpose of the dashboard?

*Why this is important:* Understanding the main objective will guide the design and functionality of the dashboard. It helps in determining what data needs to be displayed and how it should be presented.

## Who is the audience for the dashboard?

*Why this is important:* Simply because different stakeholders have different needs and different levels of data understanding. Make your dashboard user-friendly and relevant to those who will be using it.



*What is the message you want to share with your audience? Do they know how to read the results themselves or should you add some description? How will you share it with them?*



# Questions you should ask before starting a Dashboard

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## Who is the audience for the dashboard?

*Why this is important:* Simply because different stakeholders have different needs and different levels of data understanding. Make your dashboard user-friendly and relevant to those who will be using it.

## What key metrics and KPIs need to be included in the Dashboard?

*Why this is important:* Identifying the most important metrics ensures that the dashboard provides valuable insights and supports decision-making processes.

Do you want to use TOP-DOWN (key metrics first then the details) or BOTTOM-UP (insights and analyses first then summarized observations)?  
How is the metric built? What is the goal?



# Questions you should ask before starting a Dashboard

## What is the purpose of the dashboard?

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*Why this is important:* Simply because different stakeholders have different needs and different levels of data understanding. Make your dashboard user-friendly and relevant to those who will be using it.

## What key elements need to be included in dashboard?

*Why this is important:* Identifying the most important KPIs, metrics, reports or funnels ensures that the dashboard provides valuable insights and supports decision-making processes.

## What is the desired timeframe of the dashboard?

*Why is this important:* Specifying the timeframe for the data ensures that the dashboard provides relevant information. Also think about how often will you revisit the dashboard.



I answered the questions above,  
what now?






# ...Always try to remember if someone has already created it before you #1

Create new dashboard Cancel

Find template...



Create new dashboard

**[Banner] Performance Evaluation ...**

Easily assess your banner performance with our intuitive dashboard. Access detailed reports, metrics, and funnels for in-depth analysis. Effortlessly switch between banne...

**[Email] Campaign Performance Ev...**

Effortlessly gauge the effectiveness of your email campaigns through our intuitive dashboard. Explore comprehensive reports, metrics, and funnel analyses to gain valuabl...

**[Email] Deliverability Investigation**

Elevate the effectiveness of your email campaigns with the Email Deliverability Dashboard, where strategic focus on key metrics becomes the cornerstone for...

**[Email] Channel Performance Eval...**

Efficiently assess the performance of your entire email channel with our user-friendly dashboard. Dive into detailed reports, metrics, and funnel analyses to gain valuabl...

**[Evaluation] Contextual personali...**

Evaluate your Contextual Personalization in scenarios with a simple dashboard.

**[Project] Conversion Dashboard**

Utilize real-time insights to optimize conversion rates, drive product page conversions, and increase overall Revenue Per Visitor (RPV). Elevate your business...

**[Project] Product Analytics**

Uncover your top-selling, high-converting, and trending products and categories for a nuanced understanding of your business landscape. Use these insights to refine sale...

**[Project] Retention Dashboard**

Visualize the loyalty and retention of your customer base with our advanced analytics tool. Gain insights into customer behaviors, identify loyal patrons, and make informed...

**[Project] Traffic Dashboard**

Elevate the performance of your website by strategically honing in on key metrics that have the potential to significantly increase visitor engagement. By focusing on these...

**[SMS] Campaign Revenue Evaluat...**

Effortlessly gauge the effectiveness of your sms campaigns through our intuitive dashboard. Explore comprehensive reports, metrics, and funnel analyses to gain valuabl...

**[SMS] Channel Performance Eval...**

Efficiently assess the performance of your entire sms channel with our user-friendly dashboard. Dive into detailed reports, metrics, and funnel analyses to gain valuabl...

**Missing a template?**

Briefly describe your suggestion





**Send suggestion**

## Dashboard templates





...Always try to remember if someone has already created it before you #2

 <p><b>RFM Segmentation</b></p> <p>Insights Basic</p>	 <p><b>Key Customer Segments &amp; Insights Dashboard</b></p> <p>Insights Basic</p>
 <p><b>Conversion Dashboard</b></p> <p>Retention Basic</p>	 <p><b>Customer Lifetime Value Dashboard</b></p> <p>Insights Basic</p>

**Use Case Center**





...Always try to remember if someone has already created it before you #3



**Ask your CSM:**  
**P&P Use Cases** - to be transformed into UC center soon!





# Do you want to analyze specific Use Case?

All Campaigns such as Welcome Flow, or Birthday campaign has its own Evaluation dashboard in the Use Case Center - you can use it as inspiration

Use Case Center > Use Case Center > Abandoned Browse Banner

Abandoned Browse Banner

### Use case setup

Hurray 🎉! This is your Abandoned Browse Banner Use Case template. Open the campaign and make just a couple of tweaks e.g. design & copy for quick deployment.  
Explore the items listed below to understand more about this Use Case.

**Banner** SHOW ▾

---

**Evaluation Dashboard** HIDE ▲

After launching the campaign, you can return to this evaluation dashboard to see the real-time campaign performance results. Make sure to fill in the parameters inside the dashboard e.g. banner\_name.

Name	Owner	Last changed
Revenue Banner E... Dashboard <span style="margin-left: 20px;"> Abandoned Browse B...</span>	Richard Frno	16 Jun 2024, 18:58 Richard Frno

[Open Evaluation Dashboard](#)

**Displayed Product in the Campaign [optional]** SHOW ▾





# Practical Dashboards examples



# Let's look at an example



# Additional Features in Bloomreach Dashboards



# Advanced Features of the Dashboards

## Home Dashboard & Sharing

If you have one dashboard summarizing all data you need for that day, you can set a Home Dashboard, which will display always after you log into Bloomreach.

It's also possible to share dashboards with people not working with Bloomreach (e.g. management) via email or via link.





# Advanced Features of the Dashboards

## Home Dashboard

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## Descriptions

You can add images, links and texts to the dashboard, which will help with explanations, or gives you a step-by-step guide how to work with or read data in that Dashboard.



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## Time filters

You can apply Time filter at the top of the Dashboard that will recalculate all parts of dashboard in set time period.



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## Parameters

You can add parameters to your reports, funnels or metrics which are included in the Dashboard and apply that parameters on the top of dashboard.

Typical example is Campaign Evaluation dashboard, where the parameter is `campaign_name`.



# Analytics Capabilities Overview



# Get Answers First

5 questions to ask before



## What are the 3 most important metrics?

1. Number of customers
2. Revenue
3. Click rate

*\*Determine the goals and target KPIs*

## Who?

- Me
- Operational teams
- Executives

*\*How savvy are your audiences?*

## How often?

- Once
- Every week
- Every year

*\*Is this a reporting exercise or seeking insights?*

## What actions should it inform?

- Determining strategy
- Continuous improvement
- Investigation
- etc.

*\*Ask these questions: How will you use the dashboard? What is the purpose of it? After reading the dashboard what will you do?*

## What is the perimeter?

- Lifetime
- Last 2 years
- Only U.S.

*\*Consider your data & business history and structure to help determine best limits*



# Feature Highlights

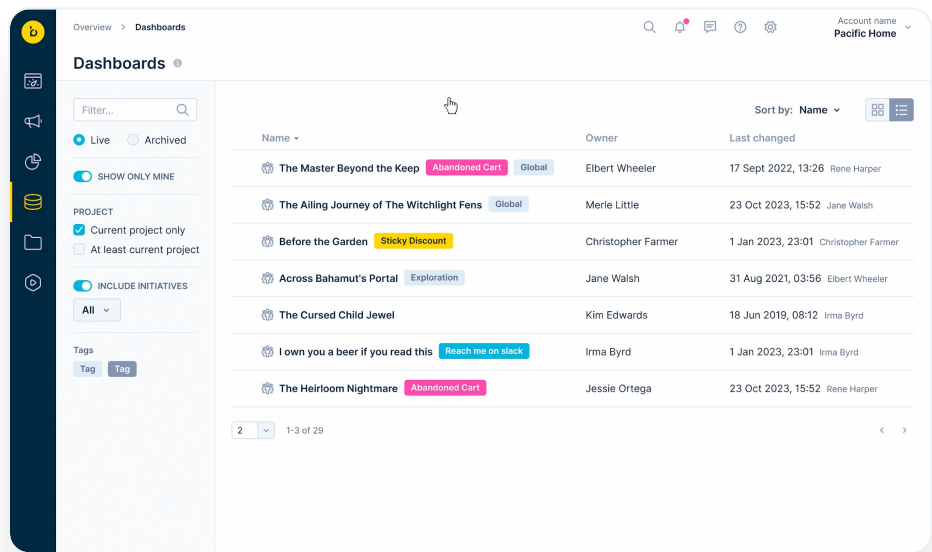


# Analytics Notifications

Stay on top of your data and resolve issues before they become critical.

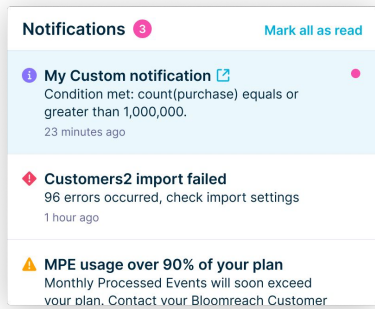
Unlock the power of **real-time monitoring** and proactive alerts with Analytics Notifications, designed to boost efficiency, and ensure better control over your campaigns and data.

Make informed decisions, optimize your marketing efforts, and drive superior results with ease!





# Analytics Notifications: Benefits & Use Cases



## BENEFITS

- **Real-time Monitoring:** Stay informed about campaign performance in real-time.
- **Proactive Alerts:** Address issues promptly and capitalize on opportunities.
- **Efficiency:** Streamline monitoring processes and focus on critical metrics.
- **Data-Driven Decisions:** Make informed decisions promptly based on data insights.
- **Control:** Maintain better control over campaigns and data to achieve goals effectively.

## USE CASES

- Notifications for a desired goal (e.g., setting up a notification for 1,000,000 purchases)
- Notification for Purchases (e.g., signaling potential issues if fewer than 300 purchases occur daily)
- Notification for Sign-ups (e.g., identifying issues if fewer than 100 sign-ups are recorded daily)
- Notification for Campaigns delivered (e.g., alerting if fewer than 'X' Campaigns with an action event status are delivered)





# Analytics Notifications: Demo

The screenshot displays the 'Dashboards' section of the Bloomreach analytics platform. The interface includes a sidebar with navigation icons, a top navigation bar with search and account information, and a main content area with a table of notifications. The table columns are 'Name', 'Owner', and 'Last changed'. Each notification entry includes a project name, a status tag (e.g., 'Abandoned Cart', 'Sticky Discount'), a project tag (e.g., 'Global', 'Exploration'), the owner's name, and the last update time and user.

Name	Owner	Last changed
<b>The Master Beyond the Keep</b> <span>Abandoned Cart</span> <span>Global</span>	Elbert Wheeler	17 Sept 2022, 13:26 Rene Harper
<b>The Ailing Journey of The Witchlight Fens</b> <span>Global</span>	Merle Little	23 Oct 2023, 15:52 Jane Walsh
<b>Before the Garden</b> <span>Sticky Discount</span>	Christopher Farmer	1 Jan 2023, 23:01 Christopher Farmer
<b>Across Bahamut's Portal</b> <span>Exploration</span>	Jane Walsh	31 Aug 2021, 03:56 Elbert Wheeler
<b>The Cursed Child Jewel</b>	Kim Edwards	18 Jun 2019, 08:12 Irma Byrd
<b>I own you a beer if you read this</b> <span>Reach me on slack</span>	Irma Byrd	1 Jan 2023, 23:01 Irma Byrd
<b>The Heirloom Nightmare</b> <span>Abandoned Cart</span>	Jessie Ortega	23 Oct 2023, 15:52 Rene Harper



# Loomi Analytics Assistant

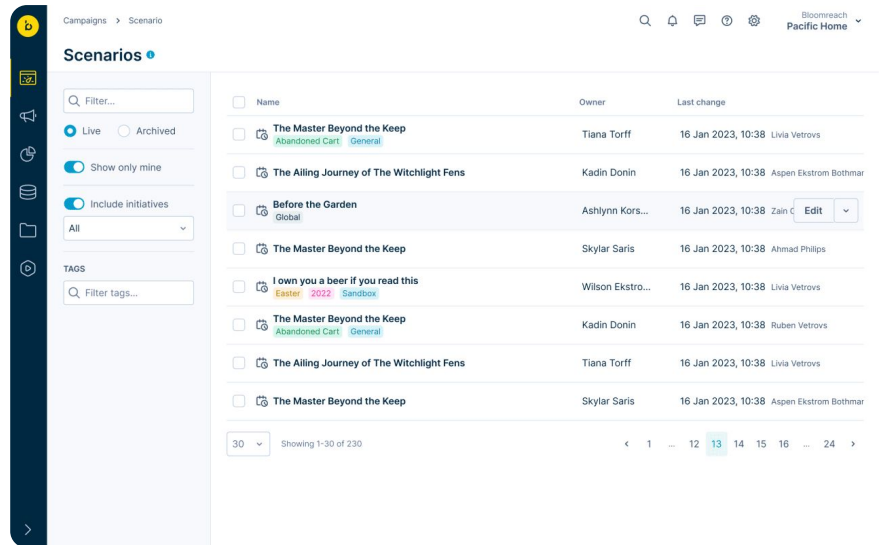
Uncover insights to make data-driven decisions in seconds



**Loomi Analytics Assistant** makes generating and gaining insights from Bloomreach a breeze.

All you have to do is ask Loomi to create a report, funnel, segmentation, trend, metric, expression, aggregate, etc. in natural language.

In seconds, you'll get the analytics you need and uncover actionable insights — all without depending on data/IT teams!





# Loomi Analytics Assistant: Benefits & Use Cases



## BENEFITS

- **Increased efficiency/productivity & saved time:** 15 minutes per task — That's your marketing time-saver with Loomi.
- **Quicker time-to-market:** 5 seconds to gain insights — That's all it takes Loomi to transform your marketing. Double your productivity while validating, testing, iterating, and executing like never before.
- **Improved data accessibility & ownership:** Loomi empowers marketers to build analyses independently, reducing reliance on IT or data teams.

## USE CASES

- Show all users that visited the website in the past 7 days and drill them down by region
- Build a report with all SMS campaigns from the past 30 days alongside their metrics
- Create a segmentation by loyalty level by grouping customers by AOV or LTV
- Create an aggregates that will be stored in each customer's profile showing their total spend
- Build a report showing the most purchased categories during Black Friday
- Create a funnel from page visit to conversion in the past 90 days



# Loomi Analytics Assistant: Demo



Demo [\[video\]](#): Identifying lapsed customers to re-engage them

Campaigns > Scenario

Search, Notifications, Messages, Refresh, Settings, Bloomreach Pacific Home

### Scenarios

Filter...

Live  Archived

Show only mine

Include initiatives

All

TAGS

Filter tags...

<input type="checkbox"/>	Name	Owner	Last change
<input type="checkbox"/>	<b>The Master Beyond the Keep</b> <small>Abandoned Cart General</small>	Tiana Torff	16 Jan 2023, 10:38 Livia Vetrovs
<input type="checkbox"/>	<b>The Ailing Journey of The Witchlight Fens</b>	Kadin Donin	16 Jan 2023, 10:38 Aspen Ekstrom Bothmar
<input type="checkbox"/>	<b>Before the Garden</b> <small>Global</small>	Ashlynn Kors...	16 Jan 2023, 10:38 Zain C <span>Edit</span>
<input type="checkbox"/>	<b>The Master Beyond the Keep</b>	Skylar Saris	16 Jan 2023, 10:38 Ahmad Philips
<input type="checkbox"/>	<b>I own you a beer if you read this</b> <small>Easter 2022 Sandbox</small>	Wilson Ekstro...	16 Jan 2023, 10:38 Livia Vetrovs
<input type="checkbox"/>	<b>The Master Beyond the Keep</b> <small>Abandoned Cart General</small>	Kadin Donin	16 Jan 2023, 10:38 Ruben Vetrovs
<input type="checkbox"/>	<b>The Ailing Journey of The Witchlight Fens</b>	Tiana Torff	16 Jan 2023, 10:38 Livia Vetrovs
<input type="checkbox"/>	<b>The Master Beyond the Keep</b>	Skylar Saris	16 Jan 2023, 10:38 Aspen Ekstrom Bothmar

30 Showing 1-30 of 230

< 1 ... 12 13 14 15 16 ... 24 >



# OOTB Dashboards

Get all the insights you need in one place.

It can be time consuming to change frequently used assets such as company address or logo across Bloomreach projects/accounts.

We are creating a network of multi-layer dashboards for Project-level, Channel-level and Campaign-level performance!

## BENEFITS

- Faster time-to-value
- Increased productivity and efficiency
- Consistent & accurate results
- Flexible attribution settings





# OOTB Dashboards: Demo





# Main takeaways

1. Think about why you are building the dashboard and **what story should it tell**
2. Ask yourself 5 important questions - **what actions, what metrics, who, how often and perimeter**
3. Use dashboards from **Use Case Center** to get a head start
4. Utilize **Loomi AI Analytics Assistant** if unsure or if you are exploring new type of analytics
5. Build, test in real life and **iterate!**

# We're innovating

Join us on June 26 to see **new AI features**  
and product updates.

Join our CEO, Raj De Datta, and Bloomreach product leaders for **The Innovation Fest: Summer of AI** – an exclusive livestream event where we'll show how you can leverage AI in e-commerce with the latest advancements in Loomi AI across Bloomreach Discovery & Engagement.

*(Hint: Personalization is taking center stage!)*

**June 26, 8am PDT | 11am EDT | 4pm BST | 5pm CEST**

[Register](#)





# Q&As

# Thank you!