



Canopy Labs

Funnel Guide



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SLIDE 2 – INTRO GUIDE TO CANOPY LABS FUNNELS

The first guide in our introductory series to the Canopy Labs Platform, this deck delves into the Funnel feature. Funnels allow you & your organization to identify groups of customers based on granular but commonly shared journeys.

SLIDE 3 – FUNNEL BUILDING PROCESS

The Funnel feature is truly a *learning by doing* tool. That being said, we break down how to build these funnels to help provide insight in the types of questions they can answer for your organization.

SLIDE 11 – SAMPLE FUNNELS

To help get you started, we provide examples of identifiable customer journeys that may be of interest to you. These examples are based on the industry-agnostic needs we've solved with our partners.

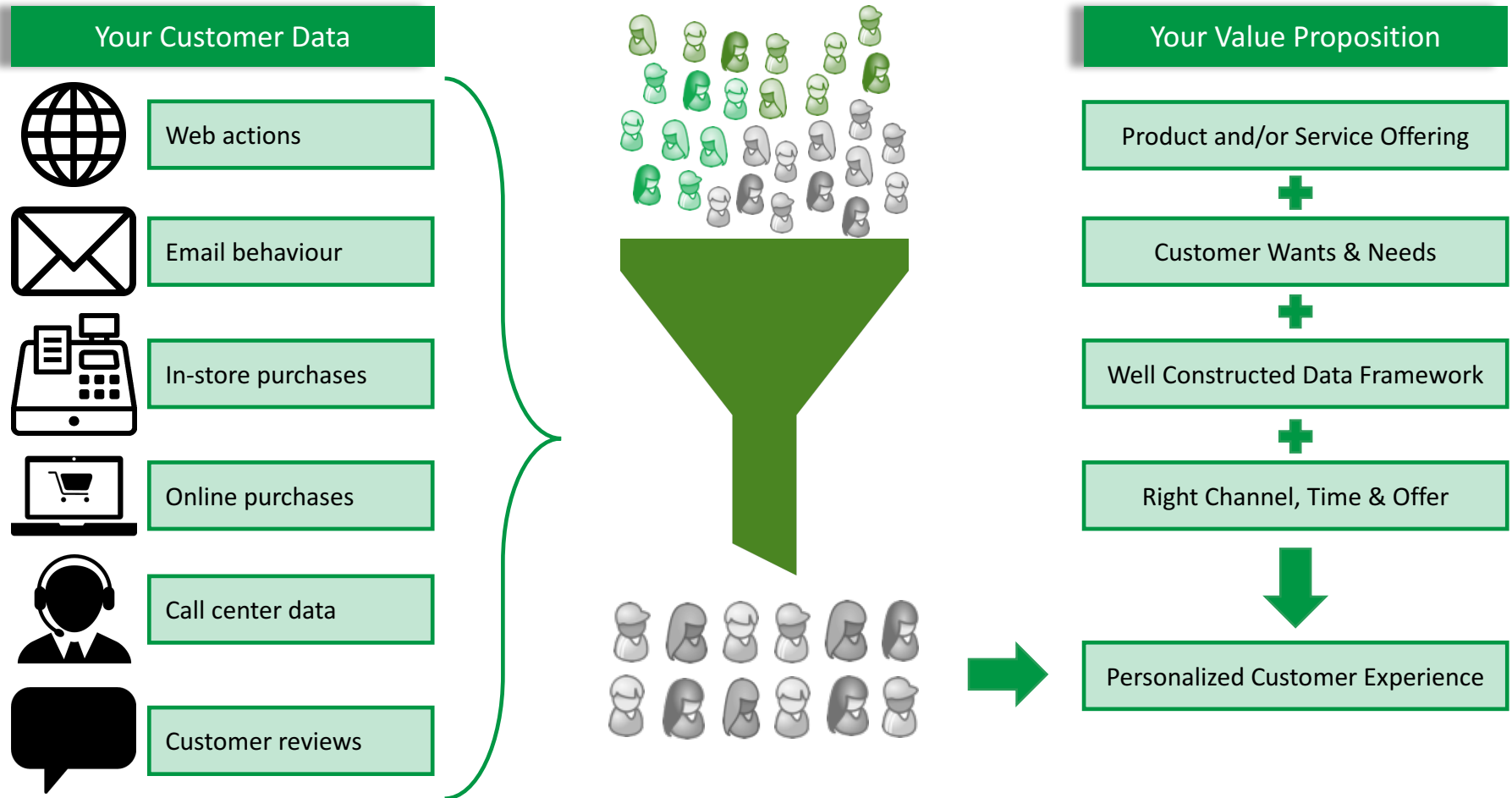
SLIDE 16 – ACTIONING ON CUSTOMER FUNNELS

Great, you've created your first funnel ... now what? Here we describe four common uses of this customer list. If you're still unsure how to action on this information, please contact support@canopylabs.com. If you're an existing partner, kindly reach out to your dedicated Account Manager.

Introductory Guide to Canopy Labs Funnels

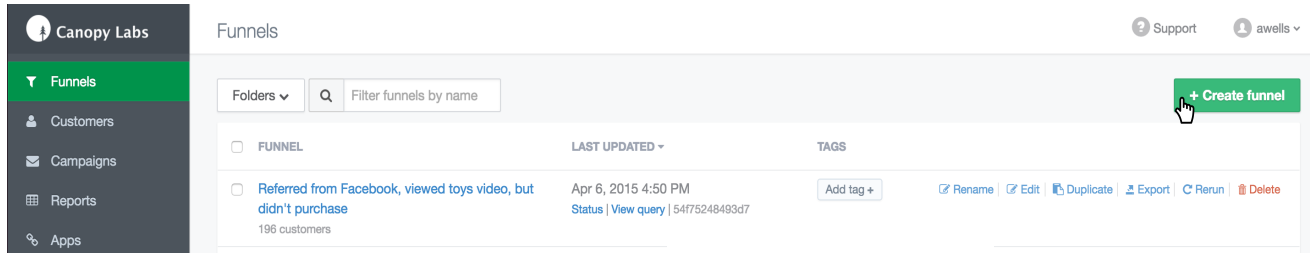
Value of a Data Driven Customer Journey

Canopy Labs funnels enable your organization to reap the benefits of aggregating disparate sources of data



Funnel Building Process

Steps in Using the Journey Builder



Define the action items that you want incorporated in the funnel. Examples include:

- Purchase actions
- Web actions
- Comments
- Custom actions (e.g. call center data, subscribe actions, etc.)
- Email receives
- Email opens
- Email clicks

Actions

Apply filters to the customer list output, examples include:

- Anonymity: include or exclude anonymous web visitors
- Tags: limit customer list to those who possess a specific custom tag
- Demographics: only male or female customers
- Custom (email address *contains* @canopylabs.com, *current_member equals* 1, etc.)

Customers

Funnel
Output

- View a summary of the funnel criteria
- Provide a funnel name and describe the funnel to make it easily identifiable

Note: you can sort funnels into folders (see right) on the funnel homepage

Folders	Filter
All	39
Unorganized	28

Review

Funnel Building Process

Actions

1

Set the Global Timestamp

The global timestamp is the limit placed across **the entire funnel** to only include actions within that range. You can use (a) no timestamp, (b) fixed timestamps – 2016/01/01, or (c) relative timestamps – 7 days

2

Select Action Items

Click and drag *Available Actions* to the sequence screen to define the required customer behaviours

3

Determine Attribution Window









Define the window of time following one action that the subsequent action must occur

Actions

[? Help](#)

1 **DATE RANGE:** Use timestamps Use relative dates | to

2 AVAILABLE ACTIONS

-  Made a purchase
-  Received an email
-  Opened an email
-  Sent an email
-  Clicked in an email
-  Web action
-  Made a comment
-  Custom action

Sequence 1 Add +

 Web action ↓ ↑ ×
 Show settings ▾

Then anytime after previous action ▾

3

Then anytime later ↓ ↑ ×

Then within __ of previous action

Then after __ of previous action

 Made a purchase ↓ ↑ ×
 Show settings ▾

Funnel Building Process

Purchase Actions



Made a purchase ▾

Hide settings ^

Negative purchase action: click the drop down arrow to specify negative actions (i.e. *Did not make a purchase*)

Date:

Use timestamps Use relative dates

to

Local timestamps: similar to the “global timestamp”, but only impacts this specific action

Line Items:

Product Name:	<input type="text"/>	Name of a specific product as it appears in your dataset		
Product ID:	<input type="text"/>	Identifier of a specific product as it appears in your dataset		
Quantity:	<input type="text" value="Min"/>	to	<input type="text" value="Max"/>	Number of units purchased for a specific line item
Unit Price:	<input type="text" value="\$ Min"/>	to	<input type="text" value="\$ Max"/>	Unit price for a specific line item
Total Price:	<input type="text" value="\$ Min"/>	to	<input type="text" value="\$ Max"/>	Total price for a specific line item
Custom Field:	<input type="text" value="+ Add custom field"/>		Additional fields living at the line item level for purchases – e.g. category	

[+ Add another line item](#)

Total Amount:

to

Sum of all line items with a given transaction ID

Custom Field:

Additional fields living within your purchase data – e.g. *source: Magento* for online purchases

Funnel Building Process

Web Actions



Web action ▼
Hide settings ▲

Negative web action: click the drop down arrow to specify negative actions (i.e. *Did not make a web action*)

Date:

Use timestamps Use relative dates

to

Local timestamps: similar to the “global timestamp”, but only impacts this specific action

Page:

e.g. /signup

URL for a specific web visitor (value after the “.com”)

Host Name:

e.g. www.canopylabs.com

Host for a specific web action (based on the sites where you’ve installed our web tracking)

Referrer URL:

e.g. https://www.canopylabs.com

Referral site for a web visitor (e.g. google, facebook, etc.)

Parameters:

Type then press enter

+ Add parameter

Query string contained within the URL (UTM_campaign, vote, etc.)

Custom Field:

=

Additional fields living within your web data (e.g. user operating system)

Funnel Building Process

Email Actions



Opened an email ▾

Hide settings ▲

Negative email action: click the drop down arrow to specify negative actions (i.e. *Did not open an email*)

Date:

Use timestamps Use relative dates

to

Local timestamps: similar to the “global timestamp”, but only impacts this specific action

Email ID:

Campaign identifier for a specific mail out

Custom Field:

Additional fields living within your email data (e.g. link URL)

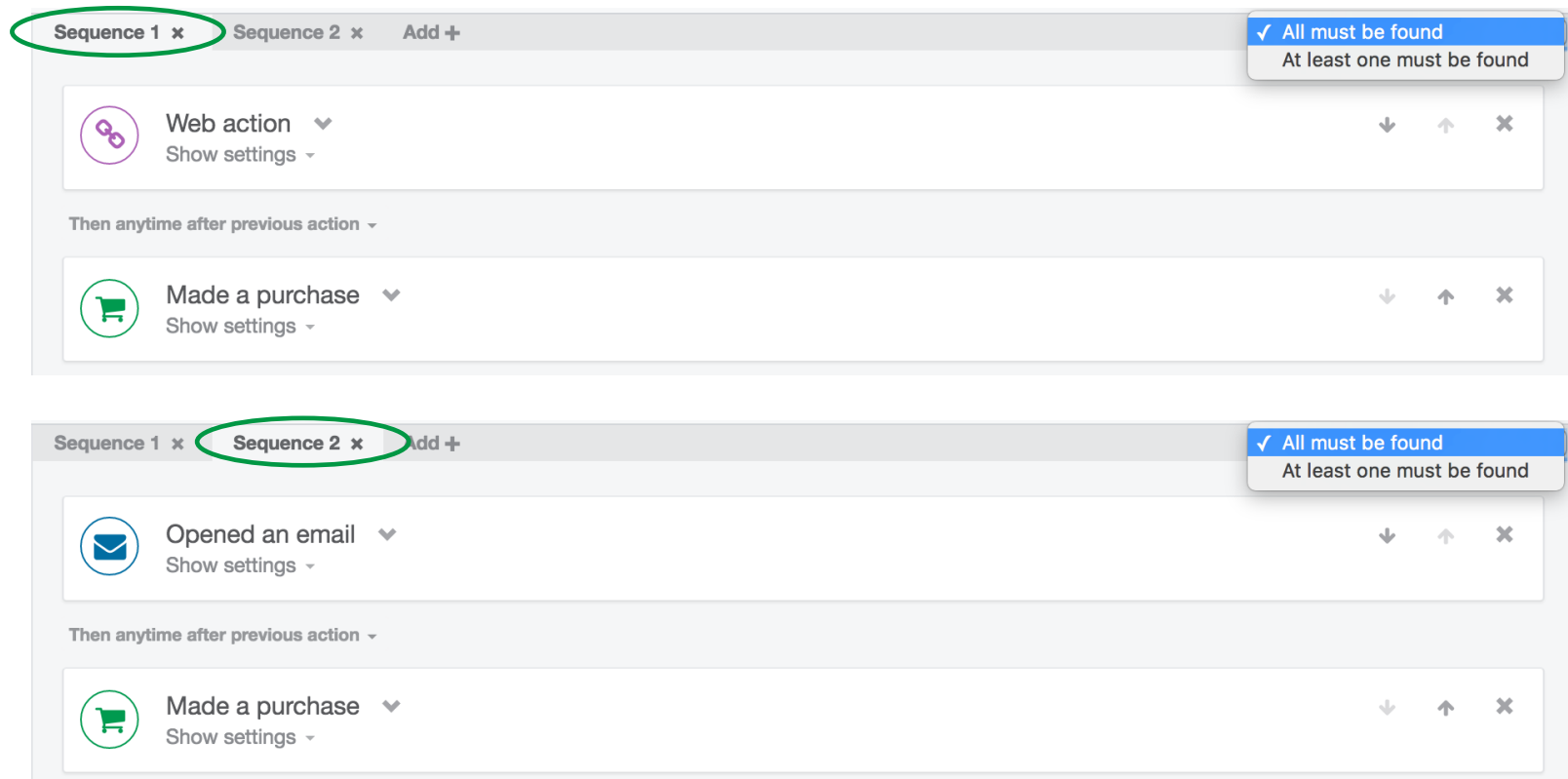
Funnel Building Process

Sequences

If you'd like a funnel to return customers who have multiple groupings of actions, or one of a selection of sequences, you can build a funnel with multiple sequences (up to four).

All must be found: all of the action items and specified criteria must be found

At least one must be found: one of the sequences must match a customer's behaviour



The screenshot displays two examples of sequence configurations in a funnel builder interface. Each configuration is shown in a separate panel with a header bar containing sequence names and an 'Add +' button. A dropdown menu is open on the right of each panel, showing 'All must be found' (checked) and 'At least one must be found'.

Top Configuration:

- Sequence 1 x (circled in green)
- Sequence 2 x
- Add +
- Action 1: Web action (icon: two interlocking rings) with 'Show settings' link and controls (down, up, close).
- Then anytime after previous action
- Action 2: Made a purchase (icon: shopping cart) with 'Show settings' link and controls (down, up, close).

Bottom Configuration:

- Sequence 1 x
- Sequence 2 x (circled in green)
- Add +
- Action 1: Opened an email (icon: envelope) with 'Show settings' link and controls (down, up, close).
- Then anytime after previous action
- Action 2: Made a purchase (icon: shopping cart) with 'Show settings' link and controls (down, up, close).

Funnel Building Process

Customers








Funnel Generator

 Support

 awells ▾

Customers

 Help

 Anonymity	Include or exclude anonymous web visitors	▾
 Tags	Only include customers with a tag (see Slide 10 for tagging details)	▾
 Products & Spending	Limit customer list to those who have specific purchase history	▾
 Engagements	Limit customer list to those who have specific engagement (web or email)	▾
 Time Metrics	Limit customer list to those whose last purchase and/or engagement occurred between specified dates	▾
 Demographics	Filter out customers who do not have demographic requirements	▾
 Custom	Filter based on additional data fields provided during integration (e.g. first name, loyalty status, etc.)	▾

◀ Prev

①
Actions

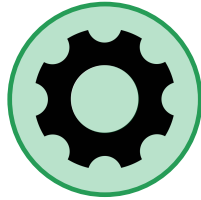
②
Customers

③
Review

Next ▶

Funnel Building Process

Default Settings, Querying Values & Funnel Optimization




Default Settings

1. Global timestamp set to the last six months
2. Anonymous web visitors excluded
3. “Then Anytime Later” for pairs of actions
4. “Exact” when querying a specific value



Tagging

- You can apply tags to funnels on the funnel homepage 
- By applying tags across funnels, you’re able to export larger segments of customers in the *Customers* tab



Querying Values

- Exact:** Value equals a specific value
Contains: Value contains a specific value
Regex: Pipe-delimited query against multiple values – a `.*` represents a contains + regex
- Example: `(.*facebook.*|. *twitter.*)`
 - This looks for all Facebook & Twitter referrers
- Not:** Does not match a specified value(s)




Funnel Optimization

- To help funnels run as quickly as possible, please bear in mind the below tips:
1. Minimize date range in the global timestamp
 2. If possible, spread out funnels over multiple sequences instead of multiple action pairs
 3. Avoid using anonymous customers unless necessary

Sample Funnels

Email & Web Attribution

Email Open to Purchase Attribution


 **Opened an email** ▾
Hide settings ▾

Date: Use timestamps Use relative dates
Any to Any

Email ID: **Campaign 1** Exact Contains Regex Exists Not

Custom Field:

Then anytime after previous action ▾

 **Made a purchase** ▾
Hide settings ▾


Date: Use timestamps Use relative dates
Any to Any

Line Items:

Product Name: Exact Contains Regex Not

Product ID:

Web Action to Purchase Attribution

 **Web action** ▾
Hide settings ▾

Date: Use timestamps Use relative dates
Any to Any

Page: Exact Contains Regex Exists Not


Host Name:
e.g. www.canopylabs.com

Referrer URL: Exact Contains Regex Exists Not

Parameters:
Type then press enter

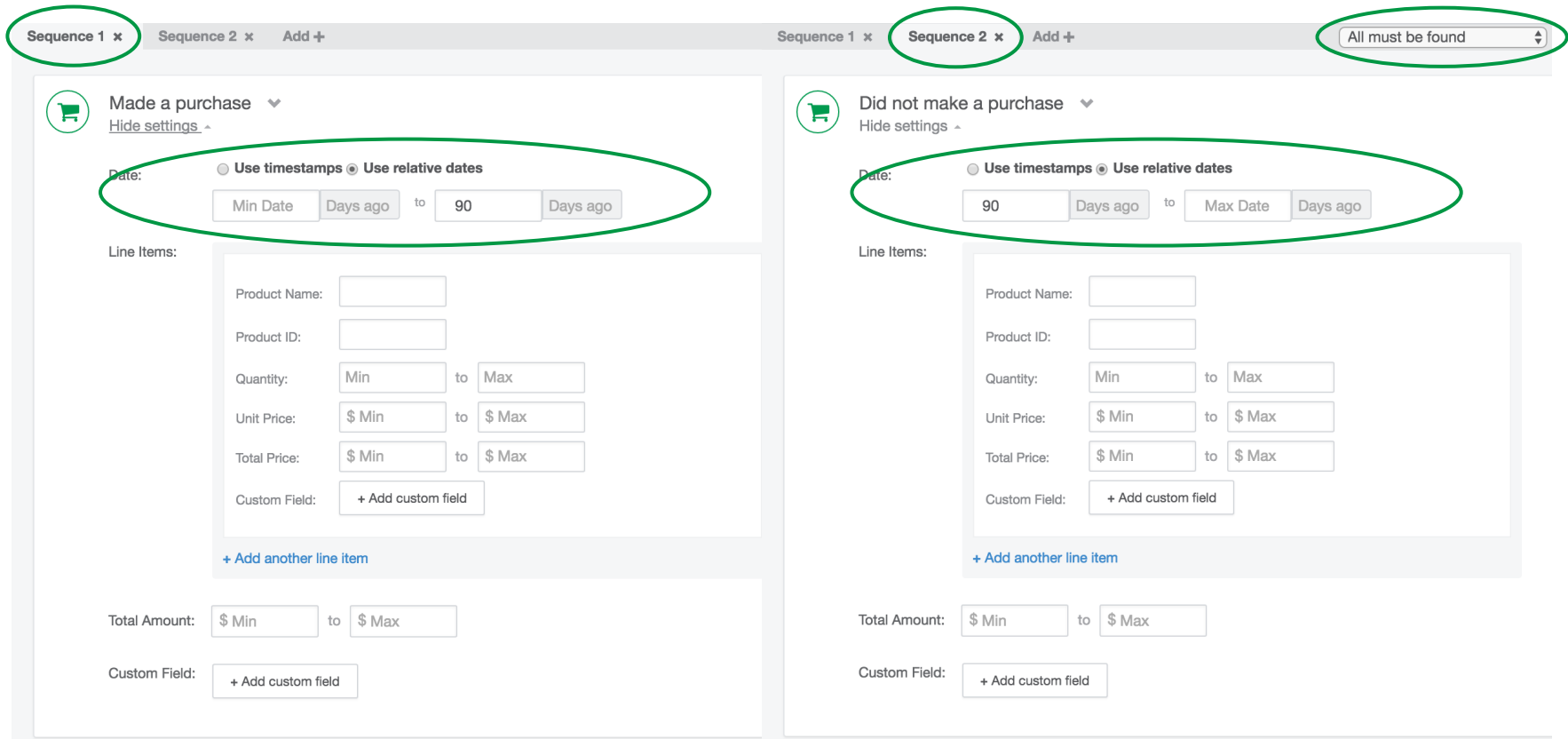
Custom Field:

Then within

 **Made a purchase** ▾
Show settings ▾

Sample Funnels

Customer Winback



The screenshot displays a marketing funnel builder interface with two funnel steps. The top navigation bar shows two sequences: "Sequence 1" and "Sequence 2". A dropdown menu on the right is set to "All must be found".

Funnel Step 1: Made a purchase

- Date:** Use timestamps Use relative dates. The filter is set to "Min Date" Days ago to 90 Days ago.
- Line Items:**
 - Product Name:
 - Product ID:
 - Quantity: Min to Max
 - Unit Price: \$ Min to \$ Max
 - Total Price: \$ Min to \$ Max
 - Custom Field:
- [+ Add another line item](#)
- Total Amount: \$ Min to \$ Max
- Custom Field:

Funnel Step 2: Did not make a purchase

- Date:** Use timestamps Use relative dates. The filter is set to 90 Days ago to Max Date Days ago.
- Line Items:**
 - Product Name:
 - Product ID:
 - Quantity: Min to Max
 - Unit Price: \$ Min to \$ Max
 - Total Price: \$ Min to \$ Max
 - Custom Field:
- [+ Add another line item](#)
- Total Amount: \$ Min to \$ Max
- Custom Field:

Sample Funnels

Abandoned Site

DATE RANGE: Use timestamps Use relative dates | Days ago to Days ago

AVAILABLE ACTIONS

- Made a purchase
- Received an email
- Opened an email
- Sent an email
- Clicked in an email
- Web action
- Made a comment
- Custom action

Sequence 1 **Add +**

Web action Hide settings -

Date: Use timestamps Use relative dates
 to

Page: **Exact** Contains Regex Exists Not
e.g. /signup

Host Name:
e.g. www.canopylabs.com

Referrer URL:
e.g. https://www.canopylabs.com

Parameters:
Type then press enter

Custom Field:

Then anytime after previous action -

Did not make a purchase Show settings -

Actioning on Customer Funnels

Funnel Homepage Post-Generation

Canopy Labs

Support
awells

- Funnels
- Customers
- Campaigns
- Reports
- Apps
- ADMIN ONLY
- Notebook
- Scheduler
- Job History
- Users
- Campaigns
- Triggers
- Stream File Editor
- Import Flat File
- Kue
- Hot Leads

Got a question?

Funnel

Purchased twice within 30 days before October 2014 and then never again

Apr 6, 2015 4:49:39 PM | [Add new tag +](#)

Funnel Actions

Actions Filter

Made a purchase

Average Time: 11.28 days

Made a purchase

- Date :
 - Greater than or equal to : 2014/09/01 00:00
 - Less than or equal to: 2014/09/30 23:59
- Within 30 Days of last action

Dashboard

+ Add chart

Click here to add charts for your funnel data.

Did not make a purchase

Customers

First 10 Results:

See all customers >

- lance.boehm47@gmail.com
- isaiah_cummings@inbox.com
- jamilia-marvin58@me.com
- bret.murray@yahoo.com

Filters:

Include anonymous customers

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Sample Funnels

Category Promotion

DATE RANGE: Use timestamps Use relative dates to

AVAILABLE ACTIONS

- Made a purchase
- Received an email
- Opened an email
- Sent an email
- Clicked in an email
- Web action
- Made a comment
- Custom action

Made a purchase

Date: Use timestamps Use relative dates to

Line Items:

Product Name:

Product ID:

Quantity: to

Unit Price: to

Total Price: to

Custom Field:

=

[+ Add another line item](#)

Total Amount: to

Custom Field:

Then anytime after previous action

Did not make a purchase

Date: Use timestamps Use relative dates to

Line Items:

Product Name:

Product ID:

Quantity: to

Unit Price: to

Total Price: to

Custom Field:

=

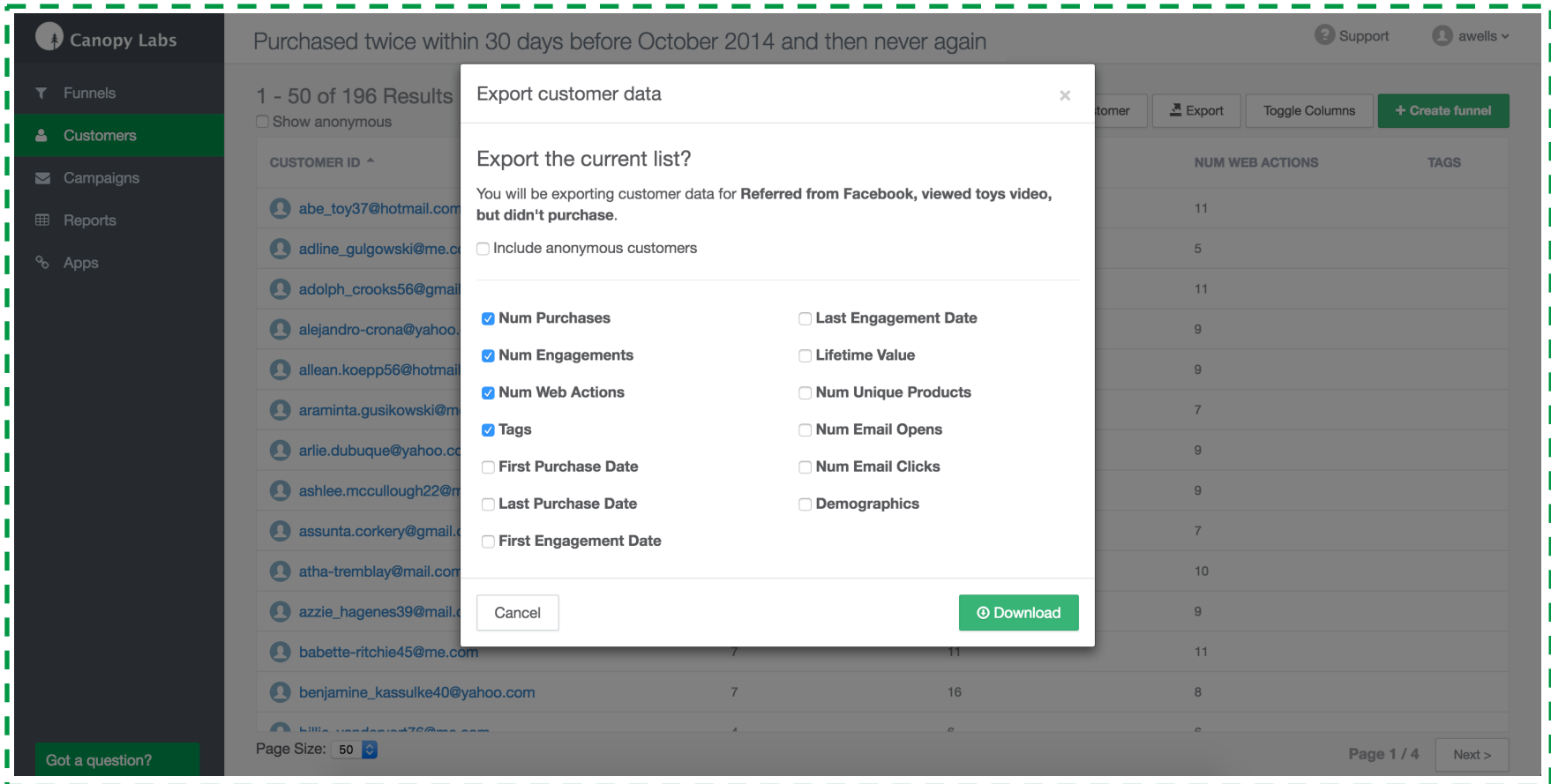
[+ Add another line item](#)

Total Amount: to

Custom Field:

Actioning on Customer Funnels

Funnel Homepage Post-Generation



The screenshot shows the Canopy Labs interface with a modal dialog for exporting customer data. The background shows a table of customer data with columns for 'CUSTOMER ID', 'NUM WEB ACTIONS', and 'TAGS'. The dialog box is titled 'Export customer data' and asks 'Export the current list?'. It provides a summary of the data to be exported: 'Referred from Facebook, viewed toys video, but didn't purchase.' and offers various selection options for the data to be included in the export.

Export customer data

Export the current list?

You will be exporting customer data for **Referred from Facebook, viewed toys video, but didn't purchase.**

Include anonymous customers

Num Purchases
 Num Engagements
 Num Web Actions
 Tags

Last Engagement Date
 Lifetime Value
 Num Unique Products
 Num Email Opens
 Num Email Clicks
 Demographics

Select the columns that you would like to view and/or export to a flat file csv

Actioning on Customer Funnels

Four Common Use Cases

Methodology

There are four primary use cases for funnel outputs

- (1) Move the customer list into Canopy Labs' *Reports* feature
- (2) Power triggered emails through Canopy
- (3) Input the customer list into your ESP to supplement your marketing efforts
- (4) Use for internal reporting, forecasting & investigative purposes

1 Move into Reports

- This Canopy Labs feature allows you to add customer information, display tags and aggregate action behaviour on a 1:1 level to discover further insights
- **Example:** RFM reporting, cost of acquisition analysis, A/B testing performance of campaigns based on granular criteria

2 Canopy Labs Triggered Emails

- Funnels often serve as the backbone in our triggered emails and are set up to automatically regenerate on a daily basis
- Some of our favourites are: *Abandoned Carts*, *Abandoned Sites*, *Drip Welcome Series* and *Personalized Replenishments*
- If you're interested in triggered emails, please contact support@canopylabs.com or your Account Manager!

3 Input into your ESP

- Export the customer list and upload into your email service provider's platform to send segmented email campaigns
- **Example:** a wine retailer wants to send emails based on their customers preferred varietals, so they created the funnel displayed on Slide 15

4 Internal Reporting, Forecasting & Investigation

- **Attribution A/B Testing:** compare the performance of campaigns based on the # of purchasers
- **Optimize marketing spend:** based on performance, reprioritize marketing efforts
- **Validate Hypotheses:** Gauge the success of action sequences based on preconceived biases



Thank You

