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*Unica Architect and
Product Manager*

How to Automate your Quality Assurance and Data Validation for IBM Campaign and IBM Interact



Upcoming Webinar | Utilizing Hadoop Big Data with IBM Campaign and IBM Interact

Agenda

- Introductions
- Challenges of IBM Campaign & Interact Quality Assurance
- Importance of Quality Assurance
- What is campaignQA?
- Questions

An aerial photograph of a city skyline, likely Pittsburgh, featuring several prominent skyscrapers and a river in the background. A large blue rectangular box is overlaid on the right side of the image, containing the text "Who am I?".

Who am I?

Brad Penwarden

- Product Development Manager
- 30+ Unica Engagements
- 8-years of EMM Experience:
 - Solutions Consultant
 - System Architect
 - Software Developer



An aerial photograph of a city skyline, likely New York City, featuring numerous skyscrapers and a river in the background. A large blue rectangular overlay is positioned on the right side of the image, containing the title text in white.

IBM Campaign & Interact QA Challenges

Common EMM QA Challenges

1. IBM Campaign Abstraction

- *The devil is in the details....*

2. Event Driven Campaigns

- *On demand QA*

3. Inbound Marketing

- *“Always on” QA*
- *Volume*

IBM Campaign Abstractions – Table Mappings

New table definition: Specify fields for the new table

Source table
DBO.INDIVSM_RETAIL

Source table fields

Field name	Field type
INDIV_ID	Numeric
HHOLD_ID	Numeric
SEGMENT	Text
RFM_DECILE	Numeric
STORE_TRADE_A...	Text
MODEL_SCORE1	Numeric
MODEL_SCORE2	Numeric
MODEL_SCORE3	Numeric
FLAG1	Text
FLAG2	Text
FLAG3	Text

New table definition: Specify the selected table's audience level and assign ID field(s) to it.

Audience level
Individual

Audience fields

INDIV_ID (Numeric)

☒ This audience level is normalized in this table

New table definition: Specify the dimension table's key field(s).

Key field(s)

SEGMENTID (Numeric)

< Click here to add new item >

☐ Key field(s) are normalized in this table

Table join method
Auto

Back

Next

Cancel

Help

Abstractions – Template Library

The screenshot displays the IBM Campaign Q&A interface. A 'Stored templates' dialog box is open, showing a list of templates. The 'SetUserVars' template is selected. The background shows the main interface with a table mapping view.

Stored templates

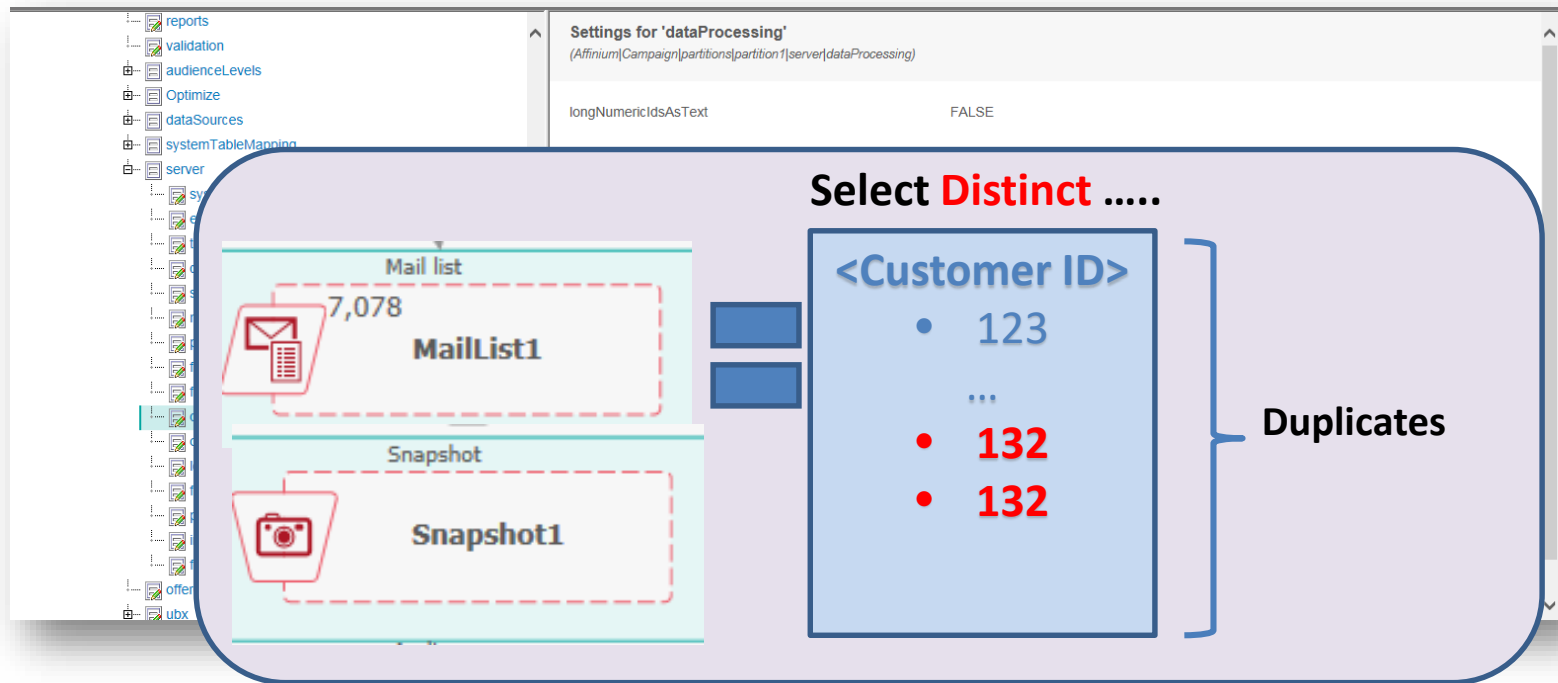
Full name:
Items list

- CHRHTESTING
- SetUserVars

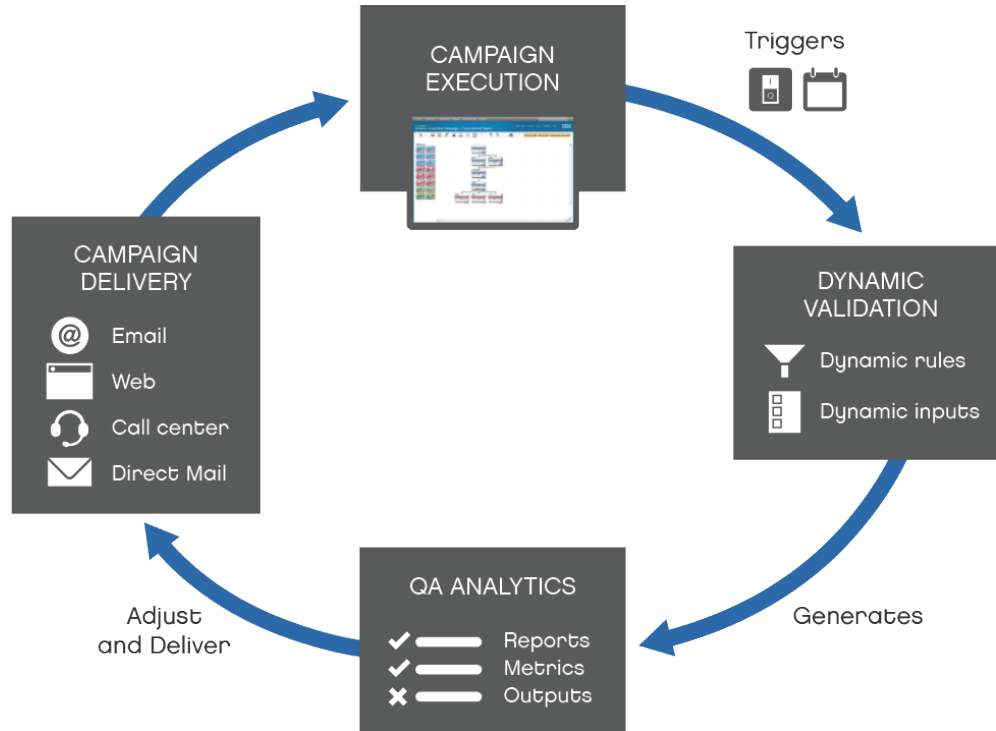
Table mappings

User table name	Type	Audience	ID field(s)	# Records	Data source
BAS_DBO_INDIV	Base Record Table	Individual	INDIV_ID	60725	[DBO] DBO INDIV
CAMPAIGN_UA_...	Base Record Table	Subscription	SUBSCRIPTION_ID	5	[UA_SYSTABLES]
CAMPAIGN_UA_...	Base Record Table	Subscription	SUBSCRIPTIONID	2	[UA_SYSTABLES]
UA_ACTIONSUS...	Base Record Table	Subscription	SUBSCRIPTIONID	14	[UA_SYSTABLES]
UA_SUBACTION...	Base Record Table	Subscription	SUBSCRIPTIONID	1	[UA_SYSTABLES]
DBO_INDIV_DEM...	Dimension Table		INDIV_ID		[DBO] DBO INDIV...
DBO_DBO_ACCT	Dimension Table		INDIV_ID		[DBO] DBO ACCT

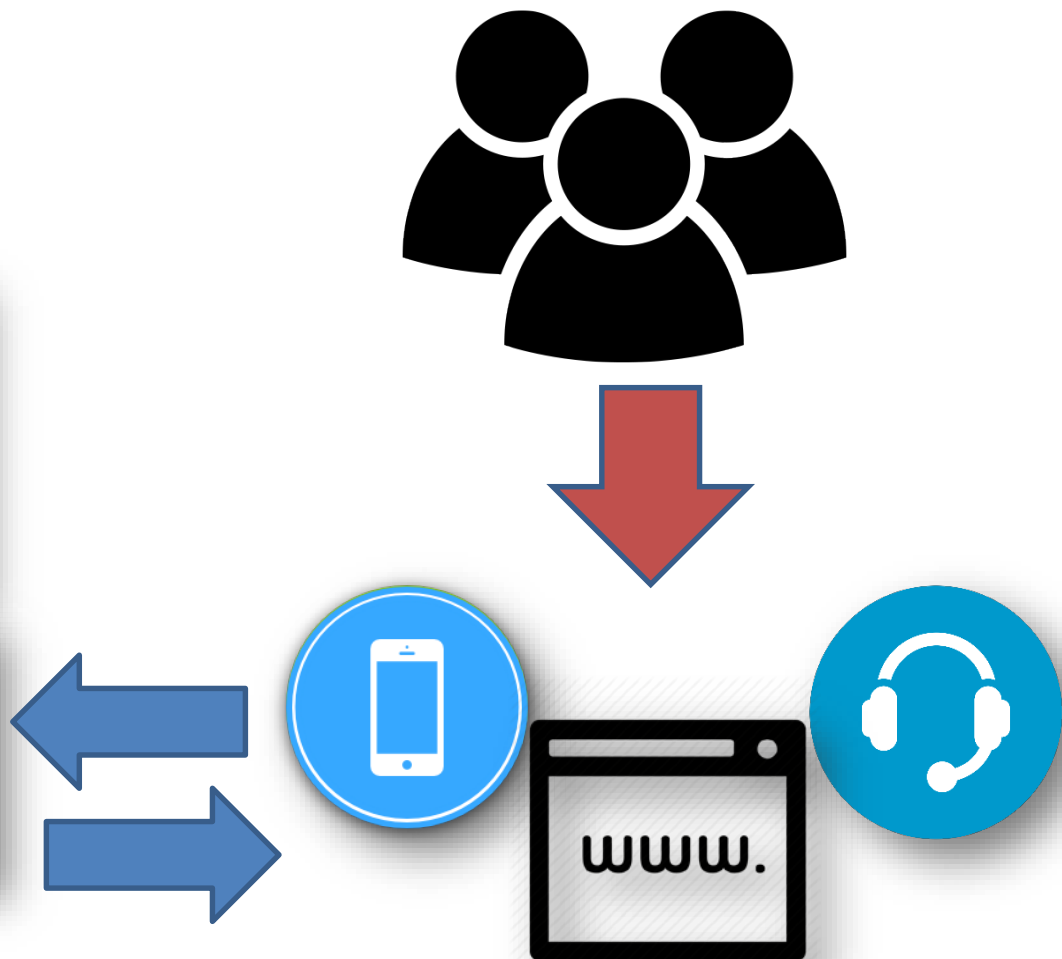
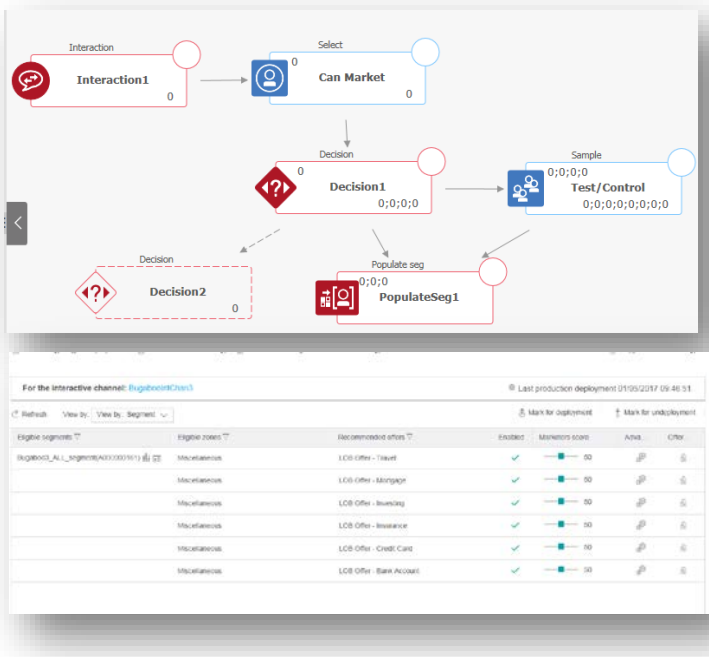
Abstractions – SQL Assumptions



Event Driven Campaigns



Inbound Marketing

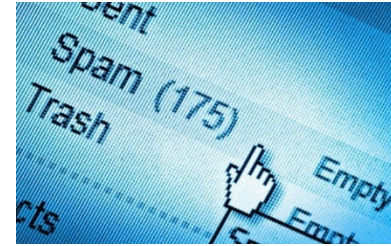


An aerial photograph of a city skyline, likely Pittsburgh, featuring several prominent skyscrapers and a river in the background. A large blue rectangular overlay is positioned in the center-right of the image, containing the text 'Why is QA important?' in white. The bottom of the image shows a dense area of trees and lower-rise buildings.

Why is QA important?

Business Impacts

- Customer Perception
 - Reputation Degradation
 - Customer Confusion
- Financial Implications
 - Fines
 - Time to Market
- QA Management Complexity
 - More systems
 - More/varied data and sources
 - New sources of error
 - Campaign Production Stress



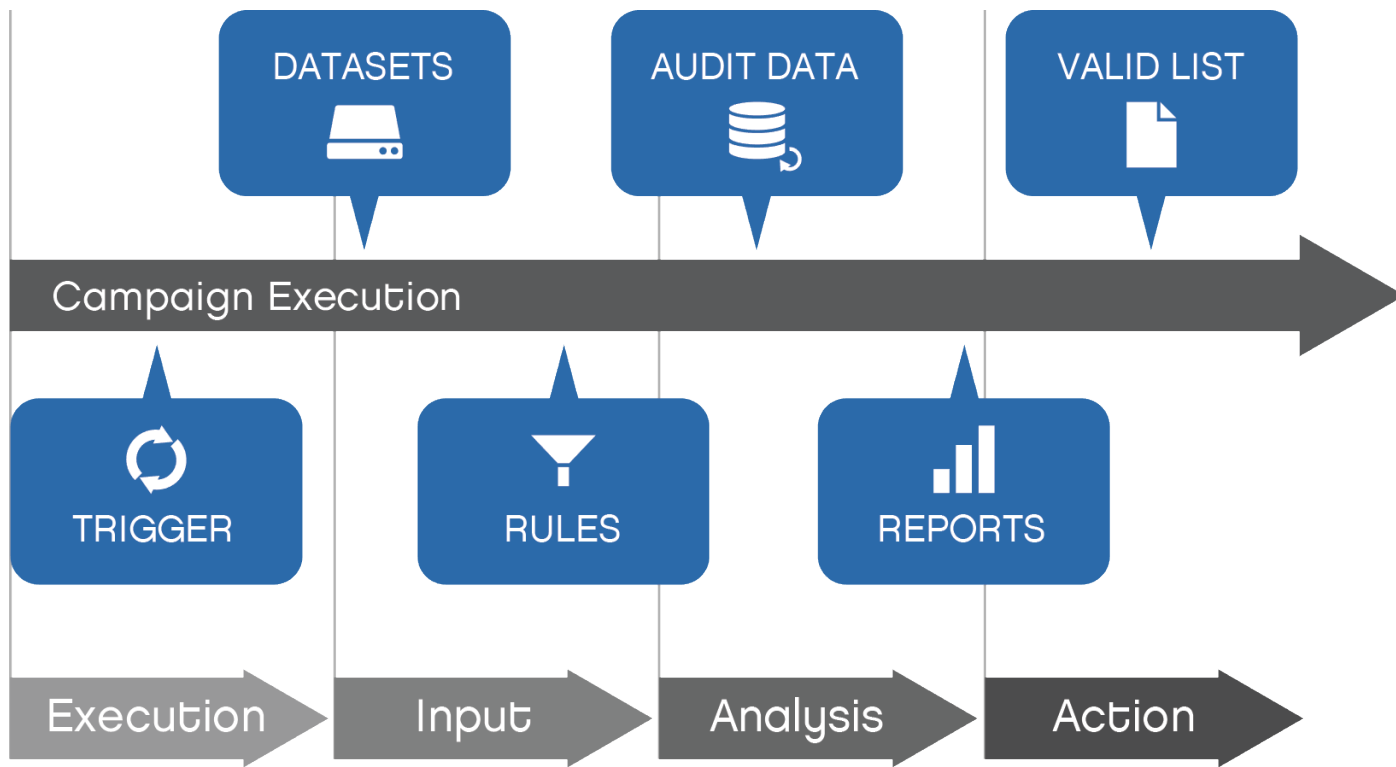
An aerial photograph of a city skyline, likely Pittsburgh, featuring numerous skyscrapers and a river in the background. A large blue rectangular box is overlaid on the right side of the image, containing the text 'What is campaignQA'.

What is campaignQA

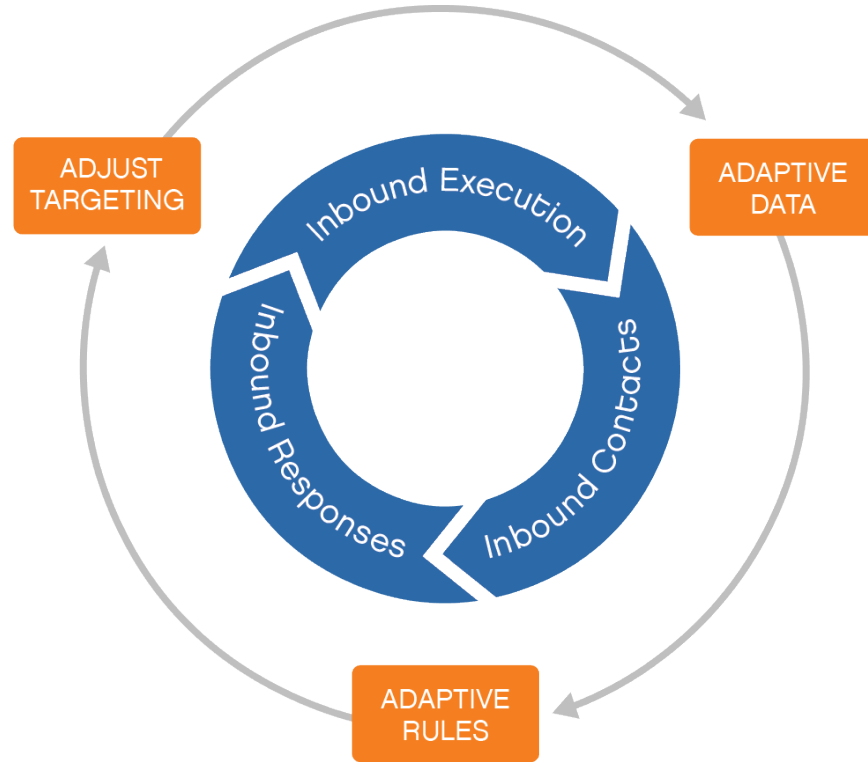
Client Spectrum campaignQA

- Validates data against user-defined rules.
- Corrects lists based on rules.
- Reports on QA results for investigation and analysis.

How does it execute with Outbound?



What about Inbound?



An aerial photograph of a city skyline, likely Pittsburgh, featuring several prominent skyscrapers and a dense urban landscape. A large, semi-transparent blue rectangular box is overlaid on the right side of the image, containing the word "Demonstration" in white text.

Demonstration

campaignQA

1. Using campaignQA from with your Outbound flowcharts
2. Using campaignQA with your Inbound flowcharts

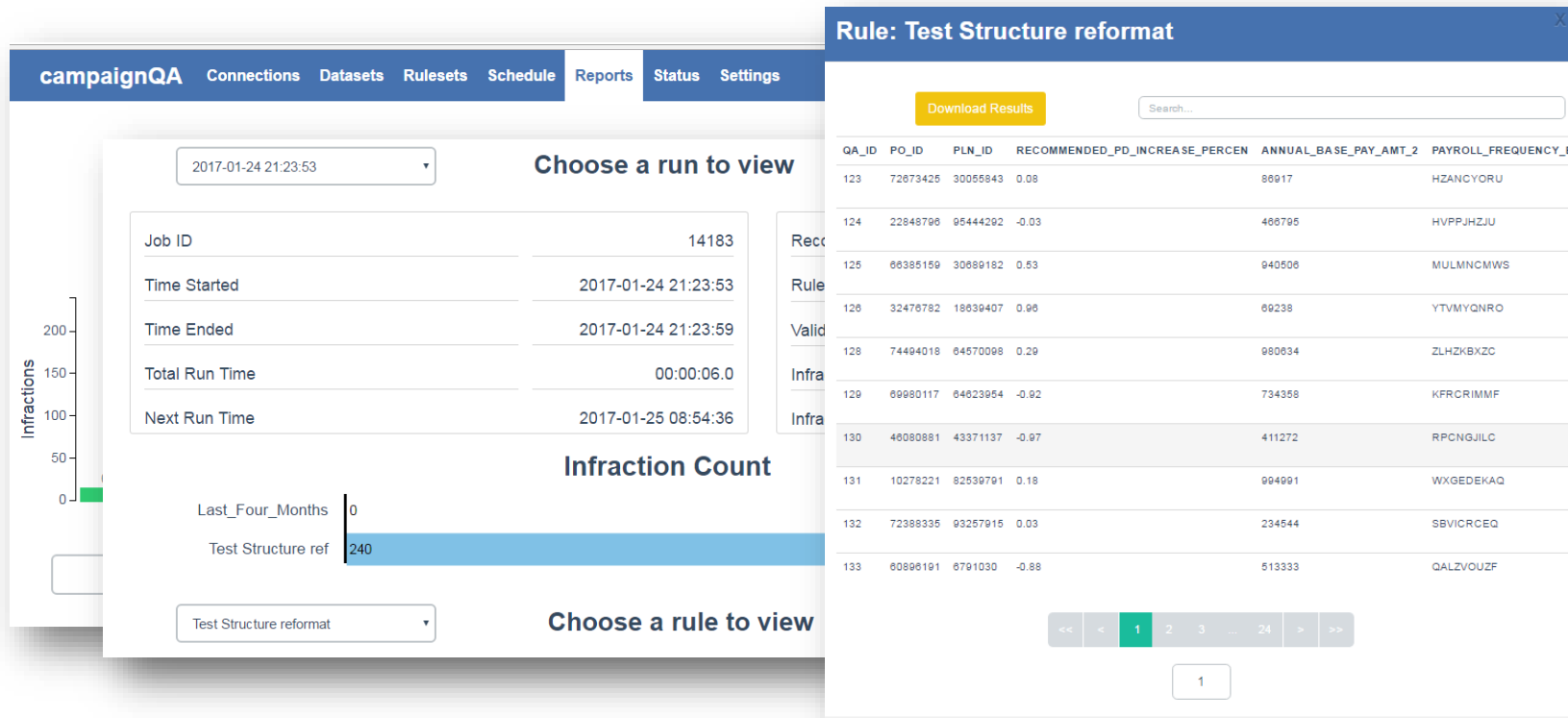
Automating QA Process - campaignQA

The image displays a collage of the campaignQA software interface. On the left, a sidebar menu lists various actions: Select, Sample, Snapshot, CreateSeg, Merge, Audience, Schedule, and Mail list. In the center, a 'Dataset wizard' dialog is shown with fields for 'Dataset Name' (Video_list), 'Dataset Type', 'Connection', 'Source Name', 'Cache Data', and 'Cache Duration'. Below these fields is a 'Columns' section. On the right, a 'Ruleset wizard' dialog is shown with fields for 'Name' (Allowed_Contacts) and 'Dataset' (Video_list). Below these fields is a 'Rules' table.

Name	Rule Type
Emailable	value
Global_Opt_Out_Check	value

At the bottom of the 'Ruleset wizard' dialog are buttons for 'Add Rule', 'Delete', 'Save Changes', and 'Cancel'. The 'Dataset wizard' dialog has buttons for 'Test Dataset' and 'Find Columns'.

campaignQA – Data Analysis



A black and white photograph of the Toronto skyline. The CN Tower is the central focus, surrounded by various skyscrapers and buildings. The image is used as a background for the slide.

Inbound campaignQA

campaignQA – Inbound Data

The screenshot displays the campaignQA interface with several overlapping windows and a main dashboard.

Dataset wizard

- Use Regex ☐
- Columns
- Test Dataset
- Find Co
- View SQL

Statistics Rule

- Rule Name: Single-Office Customer Segment
- Column: IN
- Group By: SE, ST, HE, HH
- Statistic: co
- Operator: les
- Value: 1
- Not
- Severity: Se
- View Details

Schedule wizard

- Name: Interact Profile Test
- Ruleset: Profile_Table_Con
- Dataset: Sample_Interact_F
- Start Date: 2016-12-12 13:00:00
- End Date: 2020-06-10 03:55:00
- Frequency: DAILY
- Use Cached Data ☐ Use Cron ☐
- Cron
- View Details

REPORTS

- Select a Dataset: Sample_Interact
- Select a Ruleset: Profile_Table_Cc
- Last 10 Runs
- Severity Totals
- Choose a run to view: 2017-01-25 13:00:00

Severity Totals

Severity	Count	Percentage
low	0	0%
med	0	0%
high	0	0%

Choose a run to view

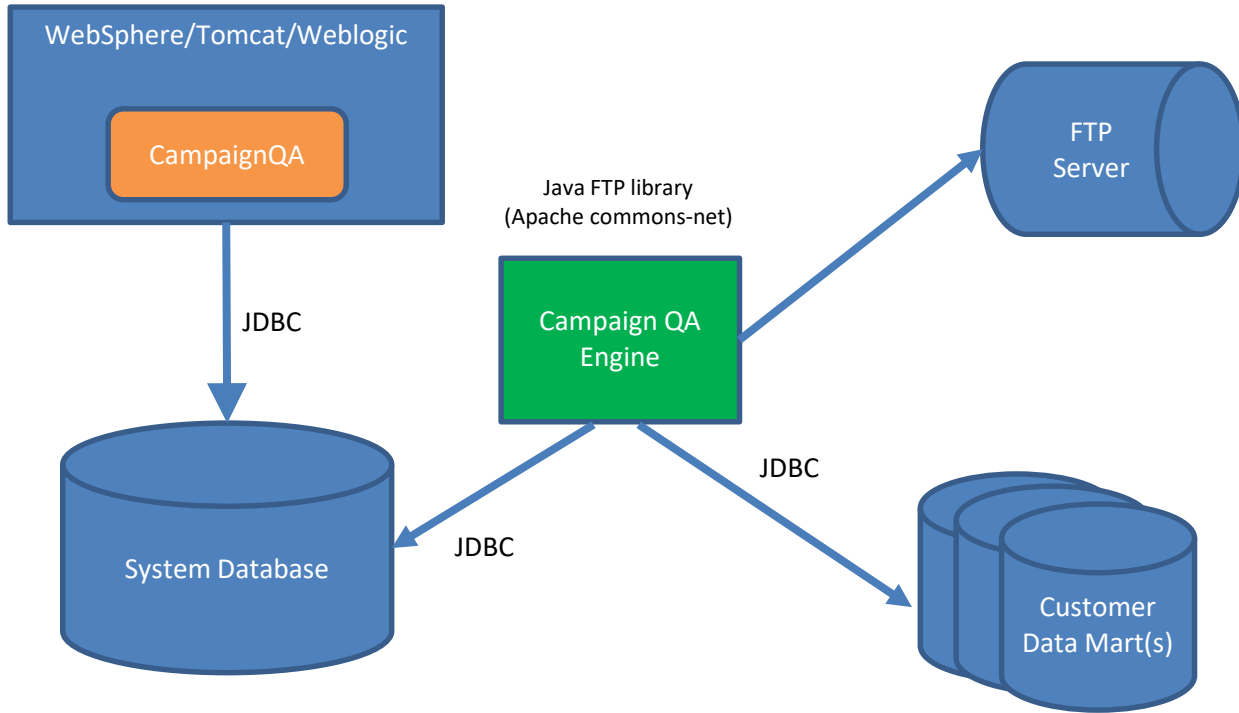
Job ID	14195
Time Started	2017-01-25 13:00:00
Time Ended	2017-01-25 13:00:24
Total Run Time	00:00:24.0
Next Run Time	2017-01-26 13:00:00

Records	20k
Rules	x 3
Validations	60k
Infractions	0
Infraction Rate	0.00%

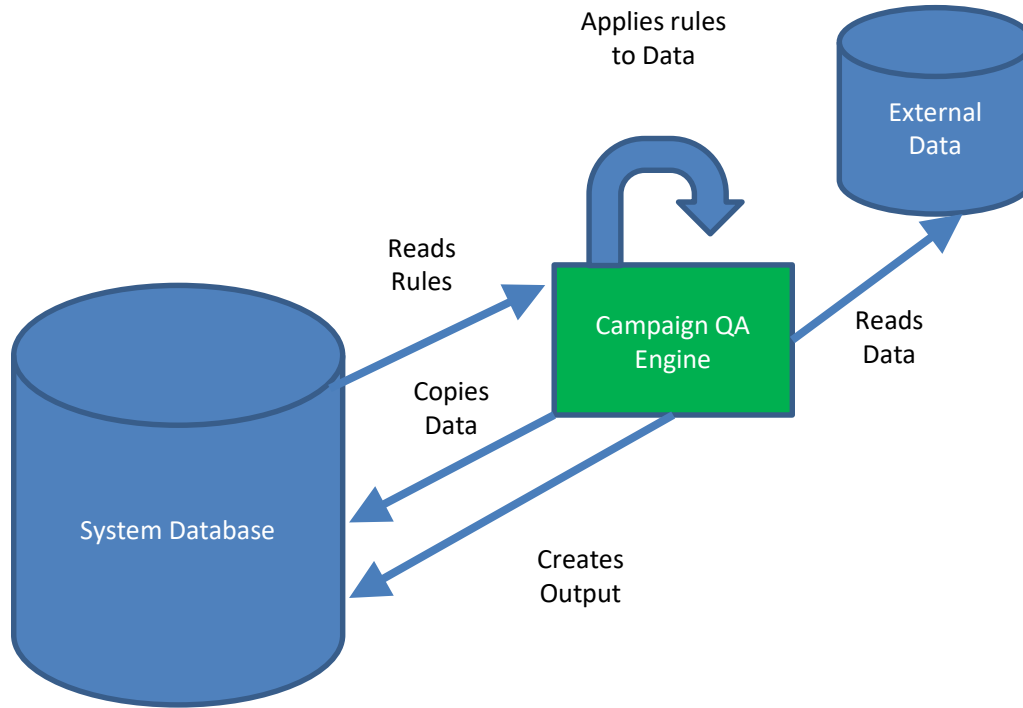
A black and white photograph of the Toronto skyline. The CN Tower is the central focus, surrounded by various skyscrapers and buildings. A blue rectangular overlay is positioned on the right side of the image, containing the text "Back End Architecture".

Back End Architecture

Architecture



Architecture



Thank You!

Any Questions?



More Questions?

- We will be providing a follow up email 😊
- If you have any questions feel free to email us at Marketing@ClientSpectrum.com



Who is Client Spectrum?

Client Spectrum Profile

EMM CLIENTS PER INDUSTRY



NUMBER OF EMM PROJECTS PER LOCATION

