

# ROI Goalsetter®

GETTING  
STARTED  
GUIDE

**FulcrumTech™**  
Email Marketing Results You Can Measure

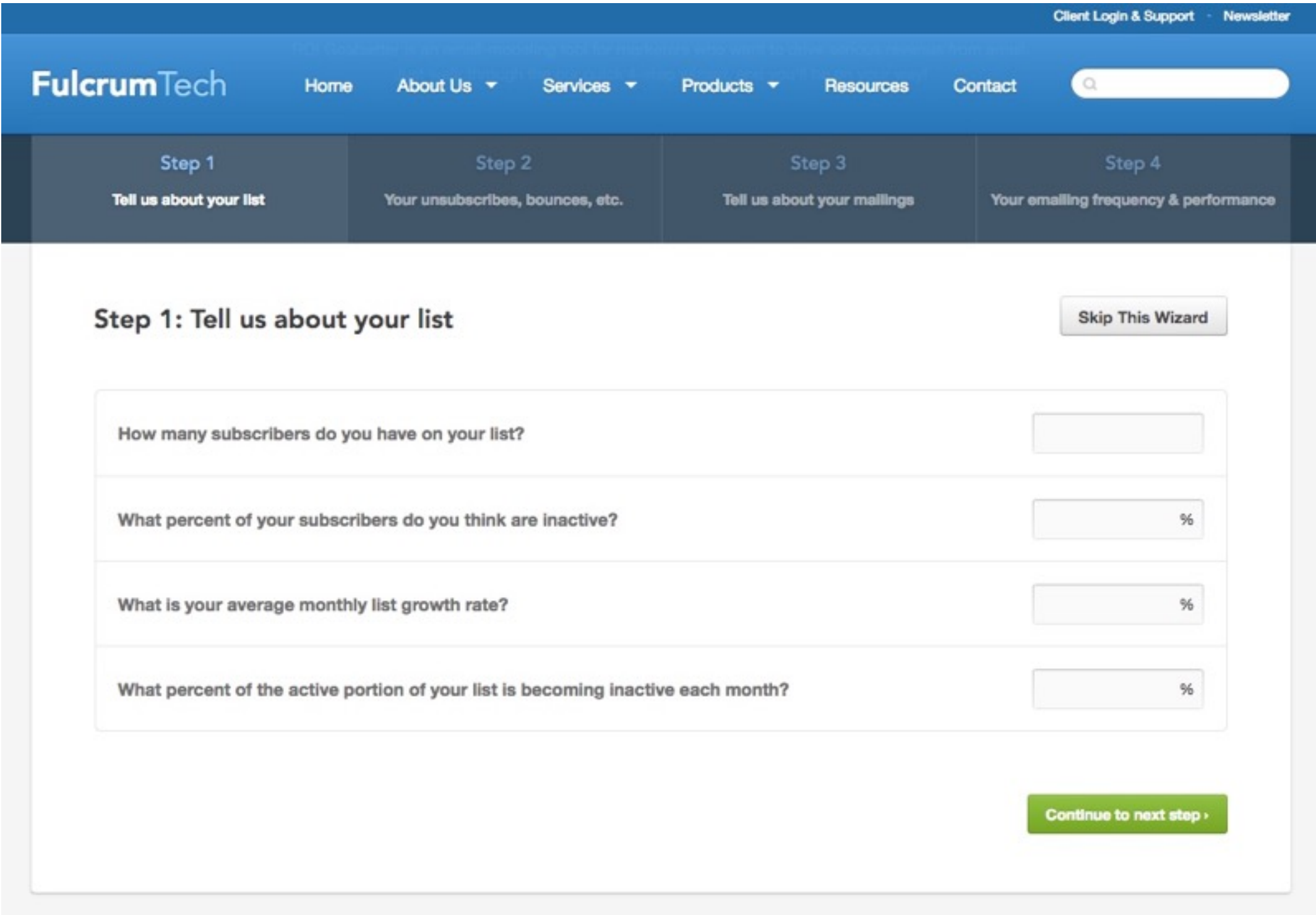
# Welcome to your Getting Started guide!

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The ROI Goalsetter tool is an easy-to-use yet powerful planning tool for email-marketing professionals. Email marketers have struggled for years to quantify the return on investment (ROI) of their email campaigns, and even more challenging has been calculating the measurable impact of various improvements to those campaigns. For example, how much more revenue, profit, and ROI will you achieve by improving your open rates, click-through rates, and list growth by an average of 1% each? The ROI Goalsetter tool lets you figure that out quickly and easily.

This guide walks you through how to use the ROI Goalsetter tool—from creating your initial scenario to the fun part of playing “what ifs” with your base scenario. You’ll be amazed at how easy it is to justify even the simplest email improvement efforts!

Get started now by logging in to the ROI Goalsetter tool [here!](#)



# STEP 1: Enter historical details about your email campaigns

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## What you need to know:

The ROI Goalsetter tool is driven, initially, by your historical performance, including your list size, list growth, average unique open rates, average click-through rates, and so on.

You'll need to enter this historical information so we can create a base case scenario for you. If you do not have all of the information readily available, you can enter an educated guess (changing the initial parameters later is easy)!

The screenshot shows the FulcrumTech website interface. At the top, there is a navigation bar with the FulcrumTech logo and links for Home, About Us, Services, Products, Resources, and Contact. A search bar is also present. Below the navigation bar, a progress indicator shows four steps: Step 1 (Tell us about your list), Step 2 (Your unsubscribes, bounces, etc.), Step 3 (Tell us about your mailings), and Step 4 (Your emailing frequency & performance). The main content area is titled 'Step 1: Tell us about your list' and includes a 'Skip This Wizard' button. The form contains four questions with input fields:

- How many subscribers do you have on your list?
- What percent of your subscribers do you think are inactive?  %
- What is your average monthly list growth rate?  %
- What percent of the active portion of your list is becoming inactive each month?  %

At the bottom right of the form, there is a green button labeled 'Continue to next step >'. The top right corner of the page has links for 'Client Login & Support' and 'Newsletter'.

# STEP 1:

## Enter historical details about your email campaigns

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### How to enter data:

The ROI Goalsetter tool provides two very easy ways to enter your data

**Wizard:** Log in on the home page of the ROI Goalsetter tool to get to Step 1 of the wizard, and simply complete each of the four steps. If you're not sure what data to enter, just click within any of the boxes for a description of what's being asked. Don't have an exact number? That's okay—simply enter a ballpark number. You can easily edit your data once you see the completed model, and you can always [contact FulcrumTech](#) for assistance.

**Manual Entry:** If you're already comfortable using the ROI Goalsetter tool, you may want to jump right to the model and enter data directly.

1. Log in on the ROI Goalsetter home page to get to Step 1 of the wizard.
2. At the top of that page, click **"Skip This Wizard."** You are now on the Results screen of the ROI Goalsetter tool, where you'll see values pre-populated into the fields: this is a sample scenario, designed for you to use as a guide.
3. Create a new scenario by clicking the "+" sign next to your sample Scenario. Click **"Skip This Wizard,"** then enter your data into each tab. When you get to the **"Email Overview & Performance"** tab, enter the same values for Historical and Future. We'll explain why in the next section!

Give your scenario a name by double clicking on the tab text, **"Scenario 1."** You can delete unwanted scenarios by clicking **"Delete"** on the appropriate tab.

The ROI Goalsetter tool will allow you to **create and save up to four scenarios.**

The screenshot shows the FulcrumTech website interface. At the top, there is a navigation bar with 'Home', 'About Us', and 'Contact' links. A search bar is on the right. Below the navigation bar, there is a 'Scenario 1' tab with a '+' sign next to it. A red arrow points from a callout box 'Add a new sample scenario by clicking the "+" symbol here!' to the '+' sign. Below the tabs, there are five tabs: 'List Size & Growth', 'List Attrition', 'Costs', 'Email Overview & Performance', and 'Advanced Settings'. A red oval highlights these tabs, with a callout box 'Click on each tab and enter data' pointing to them. To the right of the tabs, there are three buttons: 'Clear Inputs', 'Duplicate Scenario', and 'Delete'. A red arrow points from a callout box 'Delete unwanted scenarios here' to the 'Delete' button. The main content area shows input fields for 'Initial total list size' (150000), 'List monthly growth rate (%)' (1.5%), 'Portion of list inactive (%)' (20%), and 'Inactive monthly growth rate (%)' (1%).

# DON'T FORGET TO SAVE!

If you haven't saved your scenarios, be sure to click the **Save** button.

**Congratulations!** You have now created your base case scenario. You can see the projected 12-month performance of your email campaigns if you continue to have similar open rates, click-through rates, and so on, that you've had in the past.

In the **Results** section of the model, click on the **Data** button to see your results in a spreadsheet format.

Finally, you can download the data by clicking on the “**Download Data**” button from the Data view.

The screenshot shows the FulcrumTech website's 'Results' section. At the top, there is a navigation bar with the FulcrumTech logo and links for Home, About Us, Services, Products, Resources, and Contact. A search bar is also present. Below the navigation bar, the 'Results' section displays key performance indicators: Annual Revenue: \$441,276.25, Annual Gross Profit: \$407,521.23, Annual Cost: \$33,755.02, and Annual ROI: 1,207.29%. There are two tabs: 'Graphs' and 'Data'. The 'Data' tab is active, showing a table of monthly data. A red box highlights the text 'Download data into spreadsheet format here' with a red arrow pointing to a 'Download Data' button.

	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
<b>Total List Size</b>	150,000	150,750	151,504	152,261	153,023	153,788	154,557	155,329	156,106	156,887	157,671	158,459
<b>Active List Size</b>	120,000	119,550	119,109	118,675	118,251	117,834	117,425	117,023	116,630	116,245	115,867	115,497
<b>Total Increase in List</b>	2,250	2,261	2,273	2,284	2,295	2,307	2,318	2,330	2,342	2,353	2,365	2,377
<b>Net Increase in List</b>	-450	-441	-433	-425	-417	-409	-401	-393	-385	-378	-370	-362
<b>Gross Revenue</b>	\$37,500	\$37,359	\$37,221	\$37,085	\$36,953	\$36,823	\$36,695	\$36,569	\$36,446	\$36,326	\$36,208	\$36,093

## STEP 2:

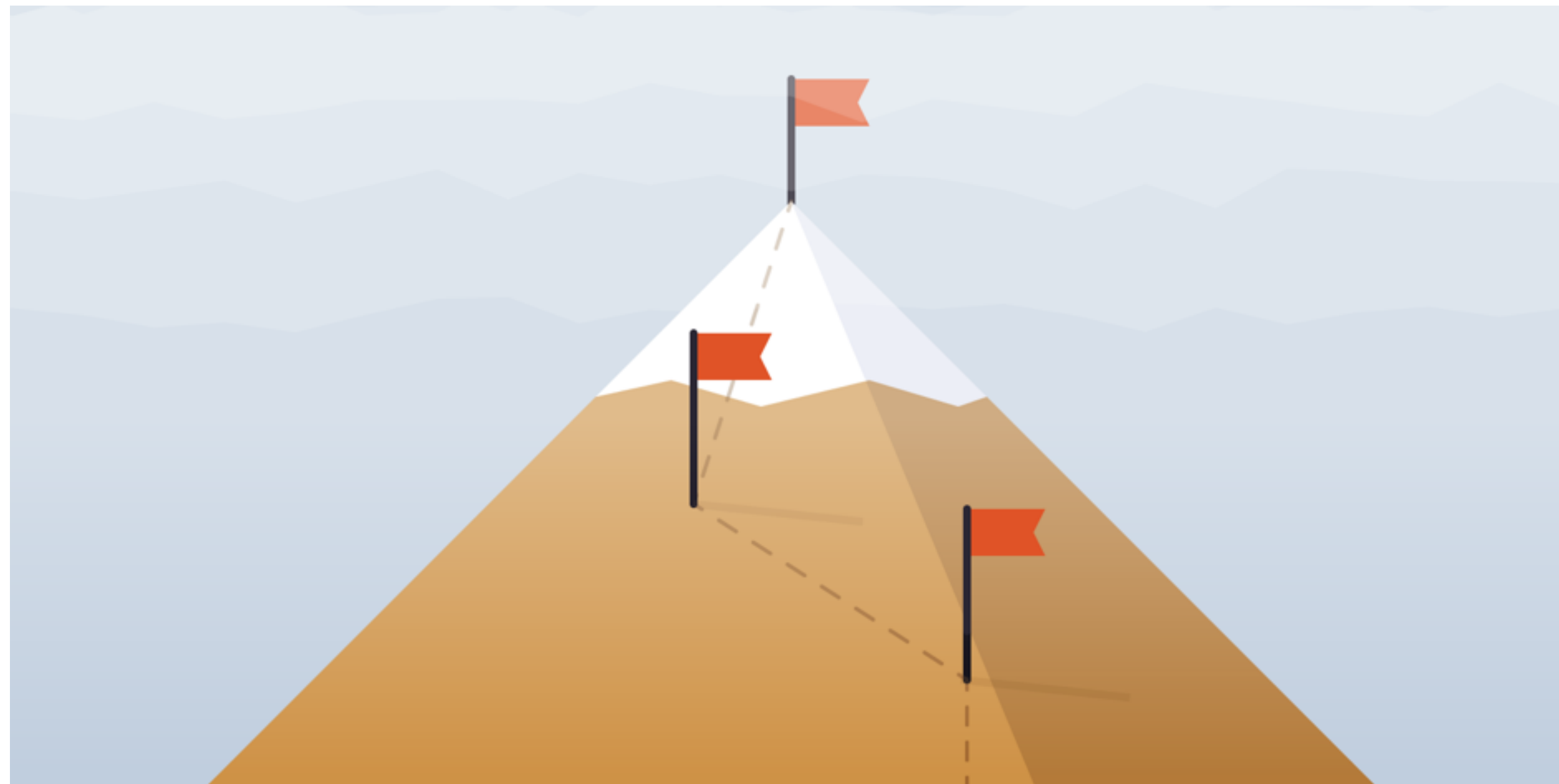
# Create variations of your base case scenario

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In Step 1, you created your base case. Now it's time to create a scenario for improvement that you'll be able to share with your colleagues and executives. This is the real power of the ROI Goalsetter tool!

### What you need to know:

The ROI Goalsetter tool has robust algorithms built into the calculations. As you play with future scenarios, you'll notice that changing some variables doesn't result in a direct, linear improvement in your results—that's intentional, as that's how it works in the real world. You will want to be careful as you begin to adjust your variables. Think about the impact of changing some items, such as mailings per month, as modifying these variables may also increase your unsubscribe rate. You'll want to consider how you may need to adjust other variables as well to make things as realistic as possible for you.



# STEP 2:

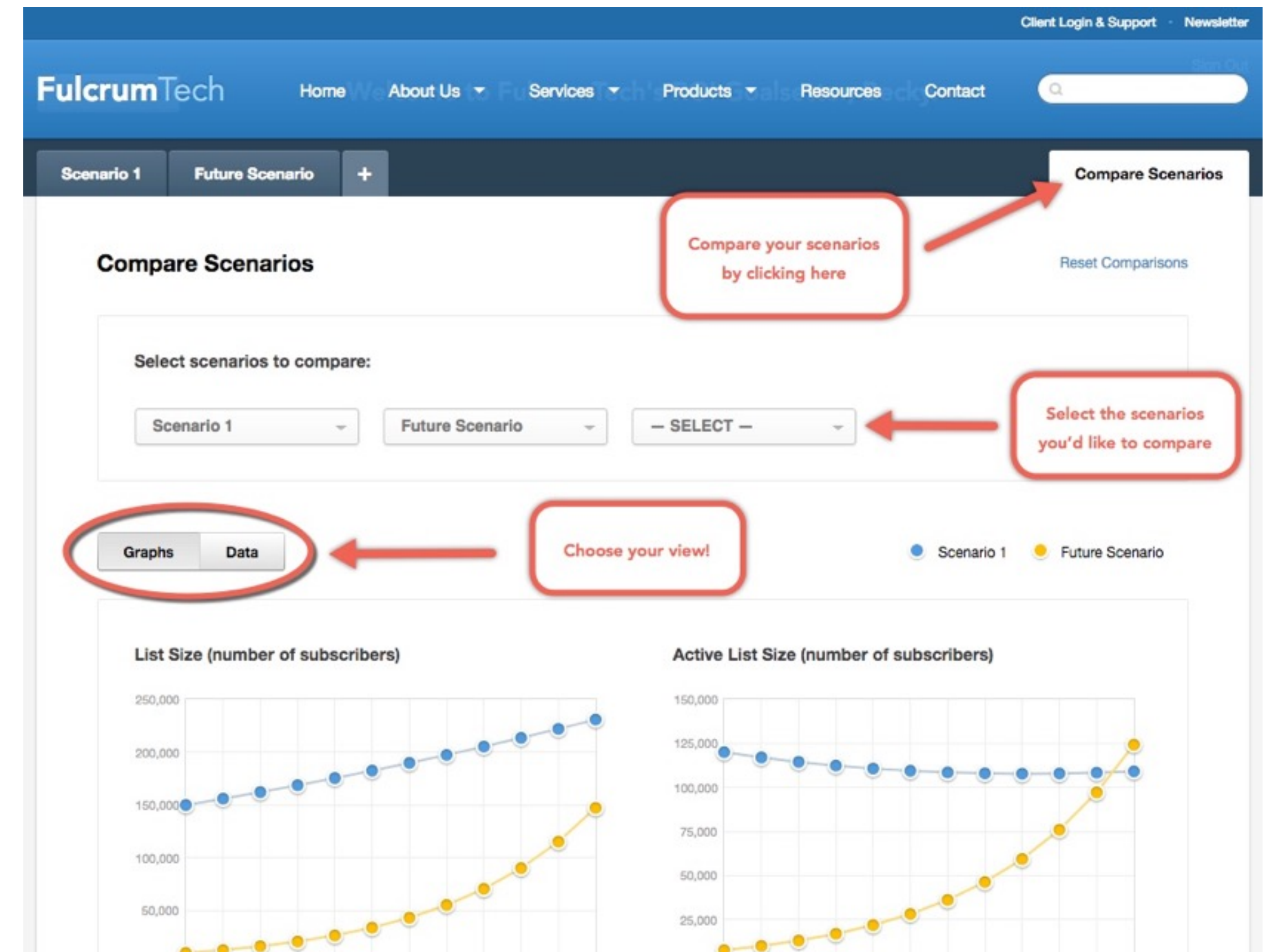
## Create variations of your base case scenario

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### Create a future scenario:

Creating a future scenario is easy with the ROI Goalsetter tool

1. **Duplicate your base case scenario:** Make your base case scenario active by clicking on its tab name. Click the Duplicate button. Then, double-click the tab name of the new scenario to give it a name (e.g., Future Scenario).
2. **Modify variables:** One of the quickest ways to see the impact of each change is to change to the Data view in the results section. You'll see Average Revenue clearly presented at the top of that section.
  - a. Beginning with **"List Size & Growth,"** click on each tab of variables to begin entering new variables. For example, you may want to increase your monthly list growth from 1% to 2%.
  - b. In the **"Email Overview & Performance"** tab, you should change only the future values for those items that have Historical and Future data. Your historical values should not be changed unless you made an error in your base case and had entered values that don't reflect your true historical performance.
3. **Compare to your base case:** Click **"Compare Scenarios"** on the right side of the screen.
  - a. Select the scenarios you'd like to compare (e.g., Scenario 1 and Future Scenario) from the drop-down lists.
  - b. See the comparison in either the Graph or Data view. You can also download the data by clicking on the Data view and selecting **"Download Data."**



# LET'S SUM IT UP!

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There are numerous strategies for improving your email-marketing performance, and FulcrumTech can help you in a number of ways:

- Email optimization
- Email newsletters
- Landing-page optimization
- Promotional email
- Selecting an email service provider (ESP)
- Email-marketing assessments
- Migrating to a new ESP
- Deliverability analysis and improvement

## NOW, MAKE IT HAPPEN!

Once you have modeled the possibilities for your email-marketing program and you know what changes you need to make, let us help! Whether you need to reduce unsubscribes, increase open rates, contend with inactives, or build your list, FulcrumTech's team of email-marketing experts can get you there.

*Contact us for help bringing your email-marketing results to the next level!*



ONLINE

[www.fulcrumtech.net](http://www.fulcrumtech.net)



BY PHONE

215.489.9336



# FulcrumTech™

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