Introduction

Hello, and welcome to the wonderful world of improving email deliverability! Seventh Sense is an incredible tool that allows us to personalize the time in which emails are sent to our contacts, therefore increasing the likelihood that our marketing and sales emails get opens and clicks. In addition, Seventh Sense tracks how engaged with our email marketing efforts our contacts are (email fatigue), so that we'll be able to tell which contacts are oversaturated with emails and are less likely to open emails we send those contacts.

In this guide, you will learn 7 important tactics involving the Seventh Sense and Hubspot Email and Workflow tools, ranging from setting up your account, to tracking email fatigue, to personalizing send times for an entire lead nurture campaign. Let's get started!

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Setting Up a Seventh Sense Account

1. Start by clicking here to go to the registration page.
    a. Input your first and last name in the appropriate fields.
    b. Input client_name@imaginellc.com in the “Email” field
    c. Input En@bl3m3nt in the “Create a password” field and verify it in the subsequent field
    d. Accept the terms of service by clicking the check-box
    e. Click “Sign Up”
    f.
2. Select the “Professional (Monthly)” plan.
3. You will now be taken to the payment page
    a. Input your first and last name in the appropriate fields
    b. Input the name of the client in the “Company/Organization Name” field
    c. Input any valid credit card information into the appropriate fields including your billing addres (your card will not be charged)
    d. Input “imaginellc” into the coupon code field.
        i. This code will cover the entirety of the cost of the subscription.
    e. Click the check-box to accept the privacy policy and terms of service
    f. Click Subscribe

Congratulations, you have set up a client account in Seventh Sense!

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Connecting a Seventh Sense Account to HubSpot

1. Login to the appropriate Seventh Sense Account
2. In the left hand menu, click “Settings”
3. Underneath “Add Connector”, Click on the “HubSpot” logo
4. Input the appropriate client’s hubspot id
    a. The name does not matter, generally use “Client Name Hubspot”
5. You will then be redirected to HubSpot to authorize Seventh Sense access to the client’s HubSpot portal. Click Authorize.
    a. Potential issue: Permissions
        i. If HubSpot does not allow you to authorize the connection, check to see if you have high enough permissions on your HubSpot account in that particular client’s HubSpot portal. If not, ask the appropriate person to raise your permissions.
6. You will then be redirected back to Seventh Sense after successful authorization and analysis will begin in the background.

Congratulations, you have connected a Seventh Sense account to HubSpot!

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Creating a Webhook

1. Log in to client's 7th sense account
2. Select the "Marketing" menu item on the left sidebar menu
3. Select the "Webhooks" menu item on the left sidebar menu
4. Select the "Create" menu item on the left sidebar menu
5. Enter the webhook name
    - Should be related to workflow name (Ex: Email Marketing Fatigue Updater for the Fatigue engine workflow)
6. Ensure the connector is correct in the "Connector" dropdown
7. Select the proper workflow in the "Workflow" dropdown
8. Select Webhook Type
    - "NEXT_24_HOURS" for email workflows
    - "NEXT_WEEK" for fatigue engine workflows
9. Create Webhook
10. Refresh the page and the webhook will appear

- Webhook URL, Username, and Password are in the "details" link on the Webhooks list-table in 7th sense.

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Creating a Fatigue Engine

1. Log into the client's Hubspot Portal
2. Click on "Contacts" in the Menu Bar and go to "Contacts Settings"
3. Create a new property group by clicking on "Create a property group"
    a. Name the new property group "Seventh Sense Information"
    b. Click "Create"
4. Create a new property by clicking on "Create a property"
    a. In the "Label" field, input "Email Marketing Fatigue"
    b. Use the default internal name
    c. In the "Description" field, input "Individual contact fatigue to email marketing. Low = Highly Engaged, Medium = Moderately Engaged, High = Unengaged, Very High = Completely Unengaged"
    d. In the "Group" field drop down menu, select "Seventh Sense Information"
    e. In the "Field Type" field drop down menu, select "Dropdown select"
    f. Create four options by clicking on the "Add an option" link. The four options are:
        i. Low
        ii. Medium
        iii. High
        iv. Very High
    g. Turn the "Show in forms" option off
    h. Click "Create"
5. Create another new property by clicking on "Create a property"
    a. In the "Label" field, input "Fatigue Analysis Date"
    b. Use the default internal name
    c. In the "Description" field, input "Last Email Marketing Fatigue Analysis Date"
    d. In the "Group" field drop down menu, select "Seventh Sense Information"
    e. In the "Field type" drop down menu, select "Date picker"
    f. Turn the "Show in forms" option off
    g. Click "Create"
6. Click on "Contacts" in the menu bar and then click on the "Workflows" option
7. Click "Create Workflow"
    a. Name the workflow "Client Name - Email Marketing Fatigue Updater"
    b. Select the "Standard" workflow type
    c. Click "Create Workflow"
8. Click on "Set Enrollment Criteria"
    a. Keep enrollment set to "Automatically"
    b. Click on "Contact Property" to add a contact property criteria
        i. Select "Email" in the drop down menu
        ii. Select the "is known" option
        iii. Click the "Done" button
    c. Click the "AND" button to add another criteria
    d. Click on "Contact Property" to add a contact property criteria

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            i. Select “Opted out of all email” in the drop down menu
            ii. Click on the “not equal to” option
            iii. Select “Yes” in the drop down menu under the “not equal to” option
    e. Click on “Change re-enrollment options”
        i. Select the first checkbox that says “Allow contacts who meet the trigger criteria to re-enroll when any one of the following occurs.”
        ii. The “They are manually enrolled” option will be selected automatically
        iii. Click the “Done” button
    f. Click the checkbox which states “Enroll contacts that already meet these criteria”
    g. Click the “Save” button
9. Start building the workflow by clicking on the “Add an action” button.
10. Click on the “+” sign and select “add if/then branch” in the right-side menu
    a. Select “Contact property”.
    b. In the dropdown select “Sends Since Last Engagement”
        i. Click the “is less than or equal to” option
        ii. Input the number 5 in the underlying field
11. Underneath the “YES” branch, click the “+” sign and select “Set contact property value” in the right-side menu
        i. In the drop down menu underneath “Contact Property”, select “Email Marketing Fatigue”
        ii. In the drop down menu underneath “New property value”, select “Low”
        iii. Click “Save”
    b. Click the “+” sign underneath the property value you just set and select the “Set contact property value” in the right-side menu
        i. In the drop down menu underneath contact property, select “Fatigue Analysis Date”
        ii. Under “New Property Value” select “Date of Step”
        iii. Click “Save”
    c. Click the “+” sign under the property value you just set and select “Add Delay” in the right side menu
        i. Underneath “Days”, input 30
    d. Create a webhook in Seventh Sense name “Email Marketing Fatigue Updater”
    e. Click the “+” sign underneath the delay you just added and select “Trigger a Webhook”
        i. Underneath Method, in the drop down menu, select “POST”
        ii. Copy the webhook URL from the “Email Marketing Fatigue Updater” and paste it in the field under “Webhook URL”
        iii. Click on the checkbox next to “Use Authentication”
        iv. Input the username, found by clicking the “Details” link for the “Email Marketing Fatigue Updater” webhook, in the field under “Username”
        v. Input the password, found by clicking the Details link for the “Email Marketing Fatigue Updater” webhook, in the field under “Password”
            - **TIP: Wait until you’ve created all of the webhook branches for the entire workflow to input username and password, and input them all at the same time for each workflow branch**

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12. Underneath the “NO” branch, click the “+” sign and select an “if/then” branch in the right side menu.
    a. After clicking on the link to add an “if/then” branch, select “contact property”
    b. Select “Sends Since Last Engagement, in the drop down menu
        i. Select the “is greater than or equal to” option
        ii. Input the number “6” in the field underneath the “is greater than or equal to” option
        iii. Click the “Done” button
    c. Click the “AND” button to add a second criteria
        i. Select “Contact property”
        ii. Select “Sends Since Last Engagement” in the drop down menu
        iii. Select the “is less than or equal to” option
        iv. In the field underneath the “is less than or equal to” option input “10”
13. Under the “Yes” branch, repeat step 11, using the “Medium” property value for the “Email Marketing Fatigue” contact property
14. Under the “No” branch, repeat step 12 using “11” for the first criteria in the field underneath the “is greater than or equal to” option, and using “15” for the second criteria in the field underneath the “is less than or equal to” option
15. Under the “Yes” branch for the “if/then” branch created in step 14, repeat step 11 using the “High” property value for the “Email Marketing Fatigue” contact property
16. Under the “No” branch for the “if/then” branch created in step 14, repeat step 12 using “16 for the first criteria in the field underneath the “is greater than or equal to”, there is no second criteria in this step
17. Under the “Yes” branch for the “if then” branch created in step 16, repeat step 11 using the “Very High” property value for the “Email Marketing Fatigue” contact property
18. Click the switch in the top right of the page next to the words “Workflow is off” to turn on the workflow
19. In the dialogue box, make sure the proper options from step 8 are enabled
20. Once the options are verified, click “Turn Workflow On”

Congratulations, you have built a Seventh Sense Fatigue Engine in Hubspot!

Hooking up Seventh Sense to Databox

Creating an API Key for Databox

1. Login to Seventh Sense
2. Click the gear icon in the upper right corner
3. Click Settings
4. Click the “Add API Key” button
5. In the field next to “API Key Name” input, “Client Name Databox Connector”
    a. You will then see an API key and an account number in the top left of the screen. These are the inputs for the Seventh Sense & Databox Connector

Connecting Seventh Sense to Databox

1. Login to Databox
2. Navigate to the proper client account
3. Click “Data Manager” in the main navigation
4. Click the “New Connection” button
5. Enter “Seventh Sense” into the search field on the right
6. Click the Seventh Sense box
7. Input the Account ID you got from Seventh Sense when creating your API key into the “Account ID” field
8. Input the API Key you got from Seventh Sense when creating your API Key into the “API Key”
9. Click Activate

Congratulations, you’ve successfully connected Seventh Sense to Databox. You can add Seventh Sense dashboards by clicking “Templates” in the main navigation, and selecting “Seventh Sense” in the “Used data sources” drop down menu.

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Creating a Lead Nurture with Send Time Personalization

1. Create a New Workflow
    a. Name it “(Company Name) Nurture Campaign (#)”
    b. Select Workflow Type: Standard (Recommended)
2. Set Enrollment Criteria
    a. Enrollment Criteria will generally be defined in the Lead Nurture Strategy
3. Change Re-enrollment options
    a. Click Check-box: “Allow contacts who meet the enrollment criteria to re-enroll when any one of the following occurs.”
    b. Click Check-box: “They are manually enrolled”
4. Add If-Then Branch, with criteria being “Contact was sent (Nurture Campaign Title) Email 1”
    a. Steps for No:
        i. Add first delay action (if necessary)
        ii. Add “Send (Nurture Campaign Title) Email 1” Action
        iii. Add second delay action
        iv. Add “Trigger a webhook action
            1. Input 7th Sense webhook
            2. Set Method to “POST”
            3. Click check-box “Use Authentication”
            4. Input given username and password
        v. End Workflow Branch
    b. Steps for Yes
        i. Add if/then Branch, with criteria being “Sent (Nurture Campaign Title) Email 2”
5. Repeat Step 4.a. for current email
6. Repeat step 4.b. for next email
7. Repeat step 4 until all emails are entered in the workflow.
8. Test the workflow with creator’s email as the test contact
9. Upon test success and at the client’s discretion, click the switch next to “Workflow is off” to turn on the workflow

Congratulations, you have programmed a lead nurture workflow with Seventh Sense send time personalization!

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Creating a Single Email with Send Time Personalization

1. Create a new Workflow
    a. Name the workflow the same as the email you're sending out.
2. Click the "Set enrollment triggers" button
    a. Select the "Manually" option
3. Click the "+" above "Add an action"
4. Select the "Send email" action from the right side menu
5. Select the email you will be sending using send time personalization
6. Click the switch next to "Workflow is OFF" to turn on the workflow
7. Login to the proper client's Seventh Sense account
8. Click "Marketing" on the left side menu
9. Click "Lists" on the left side menu
10. In the search bar, type in the name of the list to which you will be sending the email.
11. Click "Personalize Delivery" underneath the "Actions" heading in the row with the desired list
12. Fill in the information requested by the dialogue box
    a. In the field under "Campaign Name" input the name of the email
    b. In the drop down under "Connector" ensure that the proper connector is selected (usually the hubspot connector)
    c. In the drop down under "Workflow" find the name of the workflow you created in steps 1-6.
        i. If you do not see the workflow, exit out of the dialogue box and refresh your page.
    d. In the field under "Campaign Start" select the date that the email is supposed to go out
    e. In the field under "Campaign End" select the date one week from the date you selected in step 12.d.
    f. Click "Submit"

Congratulations, you have created a single email with send time personalization!

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