

Targeted Audience Setup Guide

for GuideSpark Communicate Cloud

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GuideSpark uses **Targeted Audiences** to send emails and text directly to employees. Targeted audiences unlock powerful capabilities of GuideSpark Communicate Cloud:

- Reduce the complexity of forwarding emails manually by sending email directly to your employees.
- Reach deskless employees by sending text messages to their mobile phones.
- Create segmented target audiences (for example, by office location or type of employee) based on a master or all-employees audience list.
- Segment analytics results and understand how different parts of your audience engages with content, to more effectively sponsor cultural change or identify follow-up action.

Ready to begin? Read on...

Quick summary: what you need to know

- To create a Targeted Audience, upload a CSV file containing employee names, email addresses and/or mobile phone numbers. If you are not familiar with exporting contacts to a CSV file, work with your IT organization to get this list.
- Audience Lists can be updated at any time by uploading a new CSV file.
- All info provided to GuideSpark remains encrypted and is only used to send your transactional emails or text messages to your company's employees. We don't share this info or use it for any other communication purpose.

 *CSV stands for "Comma-Separated Values"—this simple text file format is commonly used to exchange information between systems. Many systems can export a CSV files directly. Excel can also save worksheets as a CSV file.*

Create a CSV File for Your Audience

To create an Audience List, you will first need to create a CSV file with all of the necessary employee information. You may need to work with your IT team to obtain CSV files and GuideSpark is happy to help during this process. Here are some important things to consider when creating Audience List CSV files:

Know who your audience is:

- Make sure that your list includes all of the employees that you need to communicate with.
- If you only need to communicate to a small portion of your employee population, then you can upload a list of just those employees or you can upload a full employee list and define rules in Communicate Cloud to only select the employees you need to communicate to.
- You can create as many Audience Lists as you need, and use any mix of CSV files as data sources.

i *TIP: We recommend uploading a CSV file of the entire company and then creating different Audiences using that one list. This makes updating a breeze and running many campaigns more efficient.*

Ensure your CSV is properly formatted

We only have a few rules about how your CSV needs to be formatted:

- Your column must have headers
- There must be at least 1 row of data below the column headers
- A column containing at least one of the following must be included: email addresses or mobile phone numbers

i *Do not include group mailing lists in your CSV (e.g. "all_managers@yourcompany.com"). Group list email may not get delivered (depending on whether people outside your company are able to send email to those lists), and you will be unable to properly segment the analytics data.*

Include additional columns for filtering and segmentation

	A	B	C	D
1	Name	Email	Phone	Office Location
2	Ralph Carr	rcarr@company.com	415-555-0100	San Francisco
3	Mary Johansson	mjohansson@company.com	650.555.0122	New York
4	Pat Hamm	phamm@company.com	800 555 1299	Chicago

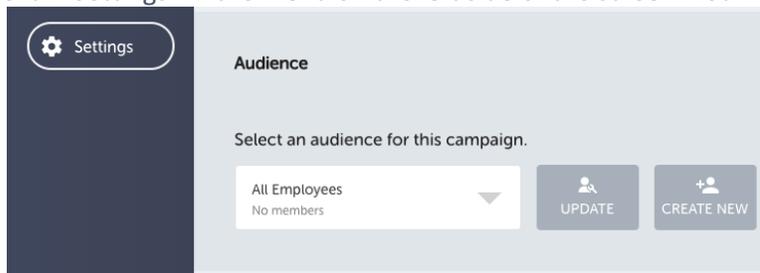
Adding additional columns of information provides a lot of power to your campaigns. We don't limit how many columns you can include. The information in these different columns allows you to *segment* your audiences using rules in the audience creation process. For example, if your CSV contains office locations, then you can use this information to target messages to employees in specific offices. This same information will make it easy to answer common questions like, "How do my campaign results differ from one office to another?" Useful and common additional columns might include employee name, office location, geographic location, division, and job role.

You can include additional columns of data in later updates to the CSV file. GuideSpark Communicate Cloud will attempt to intelligently match the data.

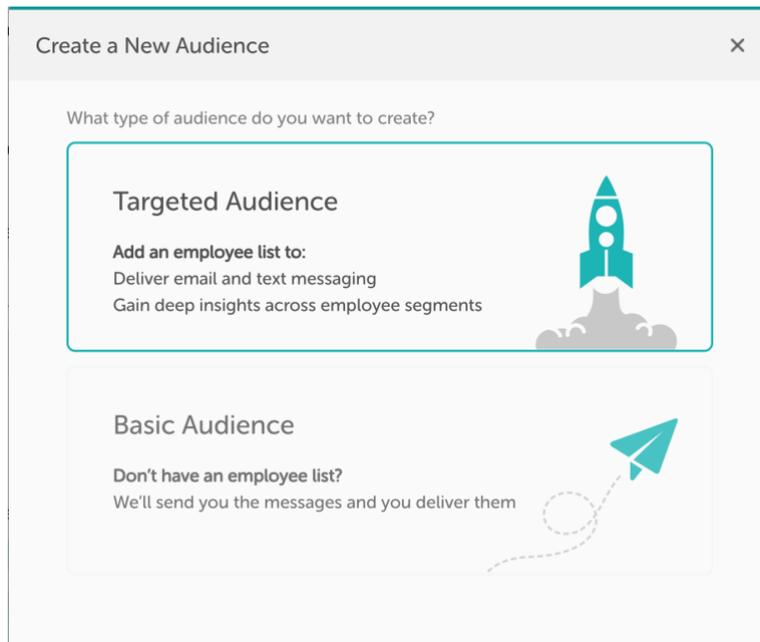
Upload the CSV file to Communicate Cloud to create a new Audience

Once you have created your CSV file, you will be ready to upload it into your Communicate Cloud account. Your Customer Success Manager can help guide you through this process, but here is a summary:

1. Login to your Communicate Cloud account and navigate to the campaign that you want to assign an audience to.
2. Click “Settings” in the menu on the left side of the screen. You will then see a section titled “Audience.”

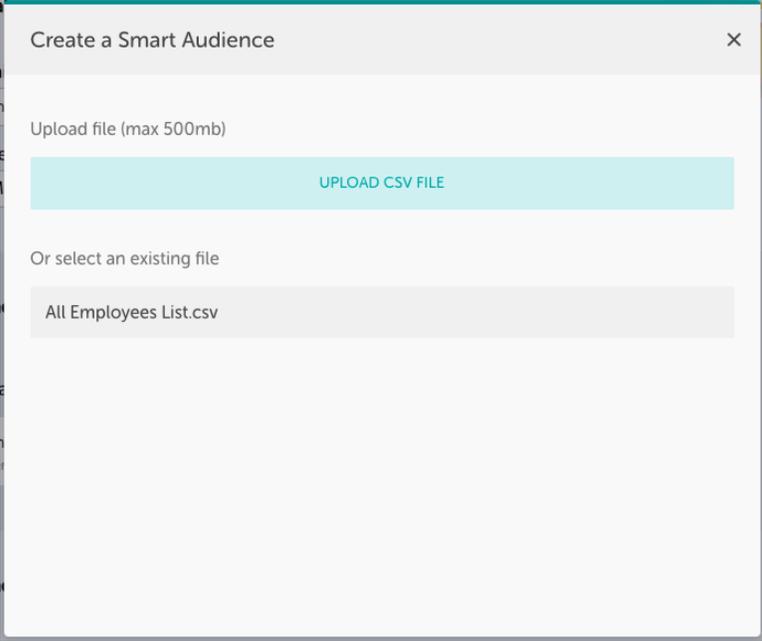


3. Click “Create New”
4. In the Create New Audience dialog, Choose **Targeted Audience**:



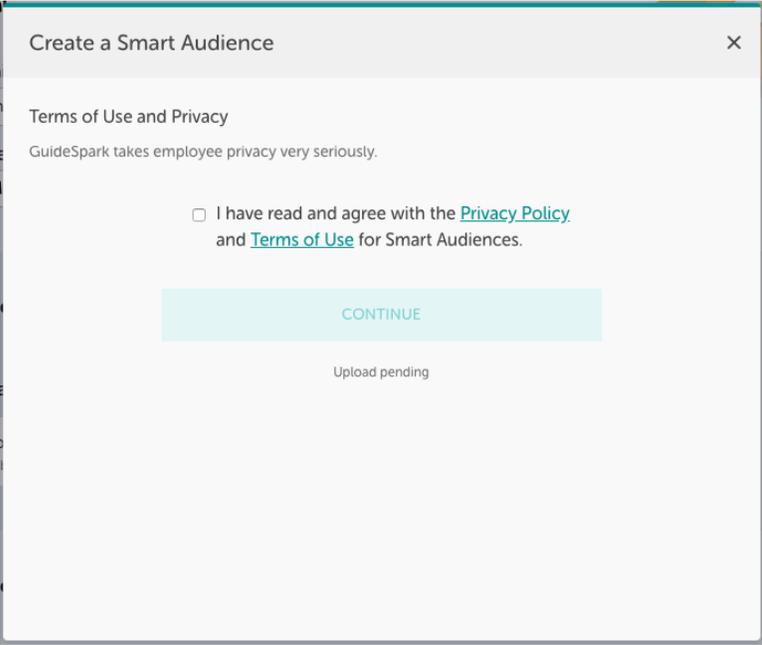
i A Basic Audience contains only a number representing the employees in that audience, and is used for reference in the Results analytics panel. A Targeted Audience contains contact information and is used to send messages directly to employees.

5. Click “Upload CSV File” and choose the CSV file on your computer (or, to segment an existing audience list, you can select a file you uploaded previously):



The screenshot shows a dialog box titled "Create a Smart Audience" with a close button (X) in the top right corner. Below the title, it says "Upload file (max 500mb)". There is a teal button labeled "UPLOAD CSV FILE". Below that, it says "Or select an existing file" and there is a grey button labeled "All Employees List.csv".

6. Read and accept the Privacy Policy and Terms of Use:



The screenshot shows the same dialog box, but now it displays the "Terms of Use and Privacy" section. It says "GuideSpark takes employee privacy very seriously." Below that, there is a checkbox that is currently unchecked, followed by the text "I have read and agree with the [Privacy Policy](#) and [Terms of Use](#) for Smart Audiences." Below this text is a teal button labeled "CONTINUE". At the bottom of the dialog, it says "Upload pending".

7. Then choose or confirm the columns that contain email addresses and/or phone numbers:

Create a Smart Audience ×

Help us identify contact information for your audience.

Which column contains email addresses?

Email ▾

Which column contains phone numbers?

Phone ▾

Showing the first 3 out of 3

Name	Email	Phone	Office Location
Ralph Carr	rcarr@company.com	415-555-0100	San Francisco
Mary Johansson	mjohansson@company.com	650.555.0122	New York
Pat Hamm	phamm@company.com	800 555 1299	Chicago

NEXT

- i** You must identify an email column or a mobile phone column. However, **you do not have to identify both**, even if your CSV contains the information. Just choose “Not Applicable” for the column you do not want to use.

8. Next, give the audience a memorable name, add optional filters, and save your results. You’re done!

Create a Smart Audience ×

Name this audience

Enter a short descriptive name

Add filters to narrow down this audience (this is optional)

Add a filter

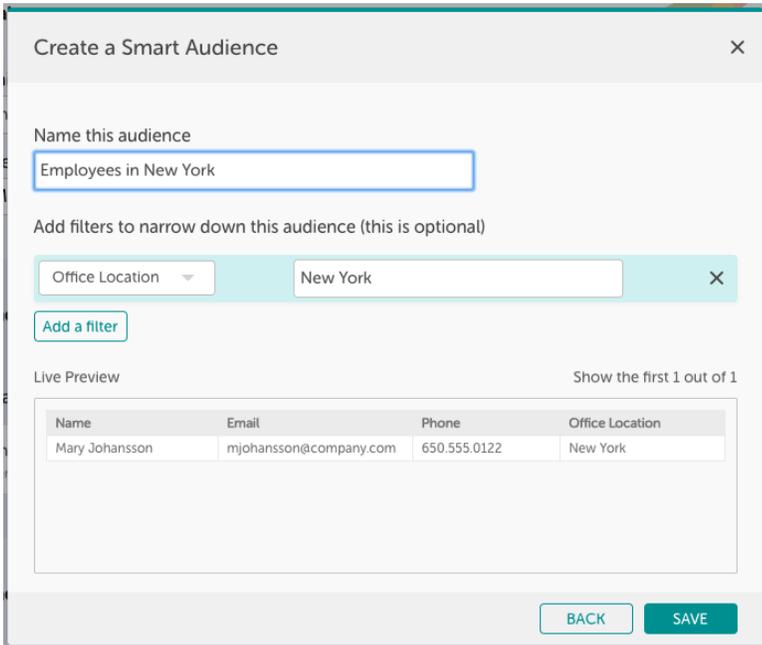
Live Preview Show the first 3 out of 3

Name	Email	Phone	Office Location
Ralph Carr	rcarr@company.com	415-555-0100	San Francisco
Mary Johansson	mjohansson@company.com	650.555.0122	New York
Pat Hamm	phamm@company.com	800 555 1299	Chicago

BACK **SAVE**

Optional Step: Use filters to target a subset of a larger audience

If your CSV contains All Employees, you may want to create a Targeted Audience that targets a specific set of those employees. You do this by creating one or more optional filters. Here, we have chosen to filter by Office Location and entered “New York” as the filter term:



Create a Smart Audience

Name this audience

Add filters to narrow down this audience (this is optional)

Office Location

[Add a filter](#)

Live Preview Show the first 1 out of 1

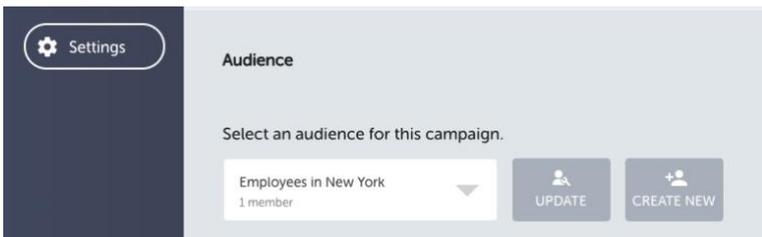
Name	Email	Phone	Office Location
Mary Johansson	mjohansson@company.com	650.555.0122	New York

[BACK](#) [SAVE](#)

i You can create an advanced “OR” search by using the vertical bar | character. In the previous example, the search term “New York | Chicago” would include the employees in either office.

Updating an Audience

In the campaign Settings, you can see the current Audience for this campaign. Click **Update** if you want to make changes to an existing Audience:



Settings

Audience

Select an audience for this campaign.

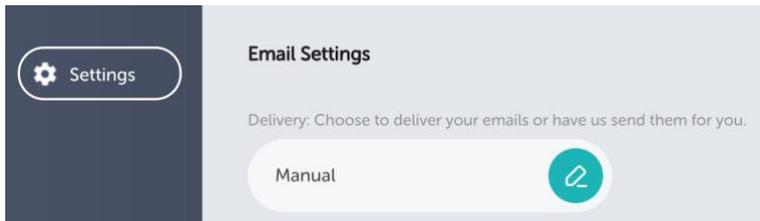
Employees in New York
 1 member

[UPDATE](#) [CREATE NEW](#)

The resulting prompts are similar to creating a new audience.

Access to Automatic Delivery for email

An Audience List with email addresses unlocks the ability to send email on your company's behalf directly to employees. After creating your Audience, go to **Settings > Email Settings**: and set up Automatic Delivery:

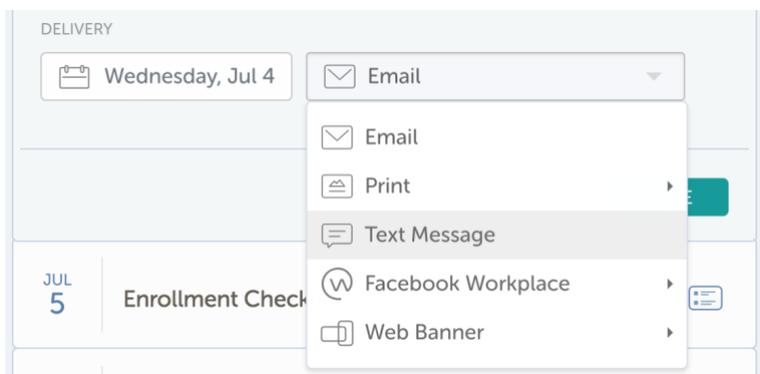


Automatic Delivery of email requires additional steps so that your employees will see the email as coming from you (or a sender in your company). Please see the [Automatic Email Delivery Setup Guide](#) for more info.

Once you have chosen an audience and enabled Automatic Delivery for email, scheduled emails will be delivered directly to your audience. You and other notification recipients will receive a reminder to approve or hold the emails, so don't worry: we won't send email out to an audience unless the message has been approved.

Access to Text Messaging

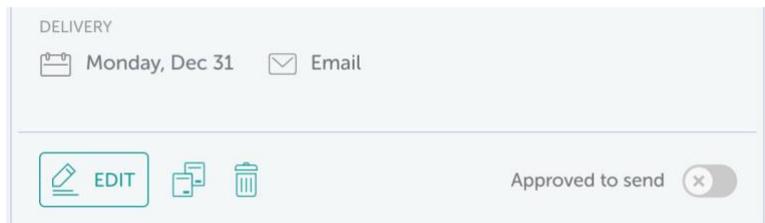
An Audience List with mobile phone numbers unlocks the ability to send text messages directly to employees. You will be able to select **Text Message** as a message type in the Timeline and then save your changes:



Scheduled text messages will be delivered directly to your audience. You and other notification recipients will receive a reminder to approve or hold the messages, so don't worry: we won't send text messages out to an audience unless the message has been approved.

Approving individual messages for automatic delivery

For messages set for automatic delivery to a Targeted Audience (either direct emails, or text messages), the Timeline will show an **Approved to send** toggle at the bottom of the message:



The message will only be sent if **Approved to send** is enabled, but it's a flexible system: You or your CSM can approve messages at any time before the delivery date.

Approving or Holding messages via email

Several days before your direct message is scheduled to be delivered, you will receive a reminder email. With a single click, you or other notification recipients will be able to Approve or Hold the message, without needing to log into Communicate Cloud.

If you **Hold** the message, the Approved to send toggle will be turned off, and the message will not be sent. You can edit the message at any time, approve it, and reschedule it for a future date.

Frequently Asked Questions

- How secure is the information I upload?**
 GuideSpark takes privacy and security extremely seriously. Any data that you upload will be encrypted and at no point will any of your data be shared with a third party (except where absolutely necessary in order to actually send a text or email). In short, we only want you to use it in ways that are helpful to your employees. See our Privacy Policies and Terms of Use for additional information.
- Is an Excel file the same as a CSV file?**
 No. Files must be in CSV format. Excel can save files as CSV and those can be uploaded.
- Can I upload any information to an audience list?**
 Yes. This is one of the most powerful elements of how our campaigns work. Any information can be used to segment campaigns. However, GuideSpark strongly advises that sensitive information should not be used (such as salary or social security numbers).
- If I have multiple audiences created off of a single file, what happens when I update that file?**
 Updating a file that is the source of multiple audiences will automatically update all related audiences. Communicate Cloud checks that the uploaded file still contains the columns that are being used by the related audiences.