

1. Introduction

1.1. Welcome to DESelect

DESelect is a segmentation solution for Salesforce Marketing Cloud. With DESelect you can save time and improve the quality of your campaigns without depending on SQL experts. With the numerous features it provides, it makes segmentation easy for all users.

DESelect offers intuitive drag-and-drop segmentation that allows you, amongst others, to combine your Data Extensions the way you want, apply complex filters on them, and auto-create Data Extensions to store results. For more advanced segmentations you could take advantage of features like deduplication to handle duplicates and custom values for advanced personalization.

This guide is designed to help understand and build a Saturation Control tool that will help you maximize your engagement with your customers, making sure you get the most out of every interaction with them.

1.2. How to get help

In case you have any questions regarding the features or the guide itself, feel free to contact us. There are two ways of reaching out to us. You can either send us an email to support@deselect.com or visit our support portal¹ and click on Submit a Request.

The support team will look into your case as soon as possible.

1.3. DESelect Segment Editions

To demonstrate how to build a saturation control tool we are going to use various functionalities available in DESelect Segment. Depending on the edition you are on, you might have no access to all the features needed.

¹ [DESelect Support Portal](#)

Implementing this guide in your own instance is possible if you are on either DESelect Segment Plus or DESelect Segment Advanced. If you are on DESelect Segment Enable, you do not have access to some of the most fundamental functionalities and therefore you will not be able to recreate the presented example. Still, do not hesitate to continue with the guide. You will learn many interesting ways to measure the engagement of your customers, even if you cannot get hands-on experience!

For users on DESelect Segment Plus, the only thing you will not be able to do is the use of Waterfall Selections to orchestrate the different steps. Even though that's the recommended approach, a workaround is provided with similar results.

2. Saturation Control

2.1. Introduction

In a world where omnichannel strategies are extending in every industry, email marketing is still the biggest and most important channel to reach your audience. With **3.8 billion daily active users**², email still is the fastest and cheapest way to engage your customers.

As with great power comes great responsibility, **it's also the easiest way to lose a customer if you don't make sure to use it properly**³ - customers expect from brands one to one marketing, a relation built over their needs and interests: the days of massive emails are over.

Saturation control is the first solution that every company needs to start thinking about when they want to get their strategy to the next level; combined with an **Engagement Score Model**⁴ and other behavioral analytics solutions, you are ready to face the **new trends of the industry**⁵.

2.2. What is Saturation?

You can see saturation as the maximum number of communications that you can send to your customers in a period of time before they decide to unsubscribe.

There is no exact definition of where is this limit and it can depend on many different factors: the **industry**⁶, type of product, B2C or B2B customers, demographic of the audience, and even the opt-in process: if customers signed up for daily emails, then 7 emails per week is fine, while if they choose monthly emails, it would be a completely different scenario.

If we take a look at the **Hubspot State of Marketing of 2021**⁷, we can see that, on average, marketers prefer a weekly approach, being 0-2 emails per week the standard.

² [Email Statistics Report, 2018-2022](#), Radicati Group

³ [Email Is Not Free: Here's What Email Saturation Can Cost You](#), PCMA

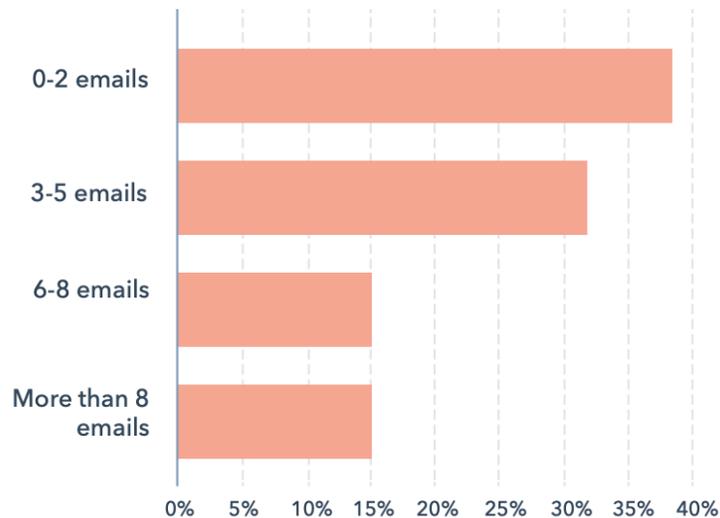
⁴ [Engagement Scoring Model Implementation Guide](#), DESelect

⁵ [Top 4 SFMC Email Marketing Trends to look for in 2022](#), Uplers

⁶ [Email Statistics by Industry](#), Mailchimp

⁷ [State of Marketing 2021](#), Hubspot

On average, how many emails do you send to customers per week?



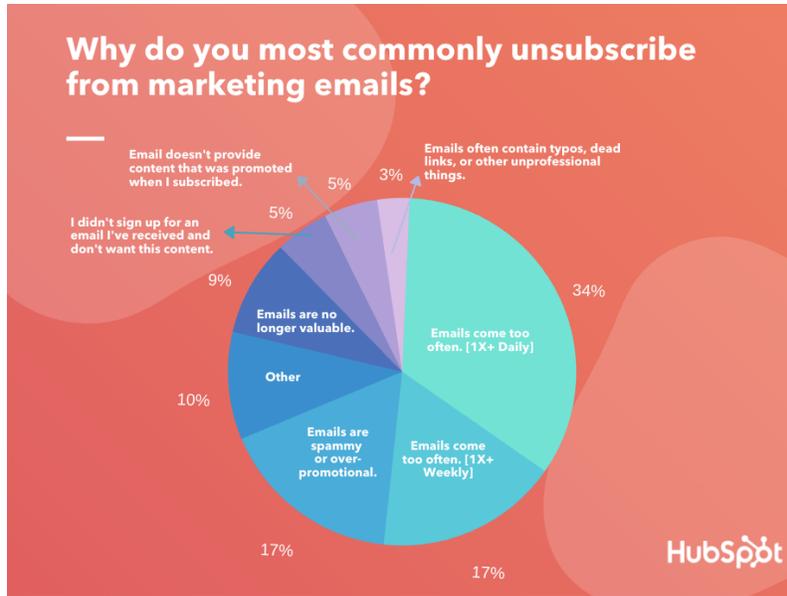
Source: Hubspot

2.3. Why is it important?

The challenge for marketers is how to balance the content that is important for your company and the content that is important for the customer. The first step of that process is understanding that we have a limited amount of opportunities to reach our audience before they burn out and we lose them for good: as we discussed in the introduction, it is not only about what you can win with the right email frequency strategy, but about what you can lose if you don't control the pressure you are making on your audience.

A study by Hubspot⁸ showed that almost 51% of the unsubscribes are related to a bad email frequency.

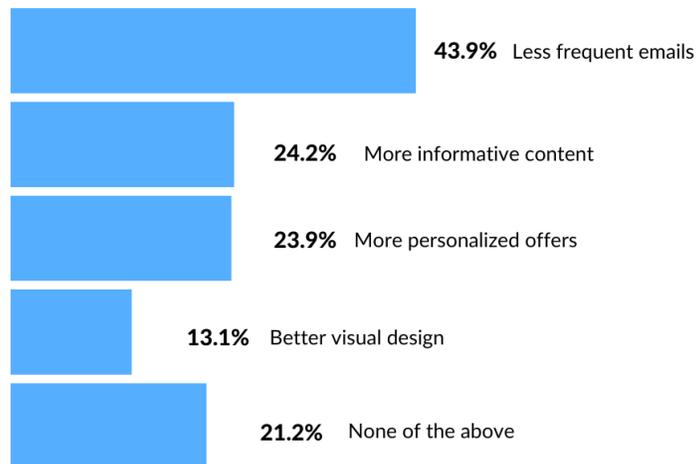
⁸ [Why Customers Subscribe and Unsubscribe from Email](#), Hubspot



Source: Hubspot

Additionally, in a similar **CampaignMonitor** survey, 43.9%⁹ of the respondents said that businesses could improve their email efforts by sending fewer email campaigns.

How businesses could improve their email efforts



Source: campaignmonitor.com

Are you ready to start the journey? :)

⁹ [The Surprising Data on How Often to Send Promotional Emails](#), CampaignMonitor

3. Building a Saturation Control solution in SFMC

3.1. Defining your saturation limits

When defining your email frequency, you have to take into account 2 factors:

3.1.1 What are you trying to achieve with your email strategy?

The goals that you want to achieve can drastically affect the frequency strategy of your campaigns. Are you using email to build loyalty? To generate traffic into your eCommerce? Get feedback? All of them?

Depending on your answer to this question, you may decide to risk a higher unsubscribe rate in exchange for higher conversion rates or to keep it easier if you are trying to build a long-term relationship. The problem comes when you want to achieve more than one of these goals at the same time with the same audience: in that case, you need to find the balance, and define which goal is more important for your strategy and focus on it.

3.1.2 Email frequency is not a one-time definition metric

You certainly want to test out your audience until you find a frequency that is giving you both good open rates and low unsubscribes.

You can start by setting 1-2 weekly emails (based on what we've seen before, it is the most extended practice) or something that makes sense for your business, and do the testing from there. Split the Audience into three groups: 80% with the standard saturation limit (n), 10% with a lower limit (n-1), 10% with a higher limit (n+1), and compare the open rate, unsubscribe rate, and CTR for each group. Adjust your frequency based on the result and perform a similar test again.

You can do this process from time to time until you find your **email frequency sweet spot**¹⁰.

If you are looking for a general recommendation, our approach will be to start by setting a limit of **2 emails every 10 days** and work from there as explained before.

You can start by creating three Master Data Extensions to manage your email frequency:

- **Contact Interaction Report:** count the number of emails sent to each customer in the timespan you defined (in our case, 10 days).

Contact_Id	Emails_Sent	Emails_Opened	Emails_Clicked
------------	-------------	---------------	----------------

¹⁰ [Email Frequency Sweet Spot](#), ZettaSphere

You can also set conditions to exclude certain emails from the count, like transactional emails or some specific campaign that you don't want to take into account, to make sure you only count what you can control.

This report, will already enable you to start looking at what you have been doing in the past (check last month, last 3 months, ...) and get an insight of what's the average pressure you are applying to your customers.

- **Contact Available Slots:** you can see the email frequency as some slots that you will be occupying every time you send an email to each customer. As we have explained, you can try different configurations at the same time to compare the results afterward.

With that in mind, you should create a Data Extension with the number of slots that you are going to configure for each group, so you can later compare the number of slots with the number of emails sent and determine if the contact is saturated or not.

Contact_Id	Slots
------------	-------

At this point, you can also configure different portions of your audience to have different configurations to see where your optimum point is. If you want to set the same limit for all your audience, you can skip this step (as the Slots is going to be a fixed number for everyone).

- **Master Contact Saturation:** with the previous information, you can compare Emails_Sent (from Contact Interaction Report) with Slots (from Contact Available Slots) and determine if the contact is saturated ($\text{Emails_Sent} \geq \text{Slots}$) or not ($\text{Emails_Sent} < \text{Slots}$).

This is the Data Extension you'll use inside your campaigns, and it will contain the Contact Id and a True or False as a saturation indicator.

Contact_Id	Saturated
------------	-----------

- **Configure it inside your campaigns:** whenever you create a new campaign, make sure to include the previous Data Extension and only get the available customers (Saturated = False)

3.2. Working with Data Views

The behavioral data inside Salesforce Marketing Cloud is stored in Data Views. In them, you will find all the emails sent to your audience and other valuable information like which of them were opened or which contents were clicked. As it can be a little bit tricky to start working with this information, you can find an article on our site explaining **all you need to know to work with Data Views**¹¹ and some cool use cases that you may want to build as well.

The Data Views that we will take into account for this guide are _Sent, and _Open.

¹¹ [What do you need to know to work with Data Views in SFMC?](#), DESelect

4. DESelect it!

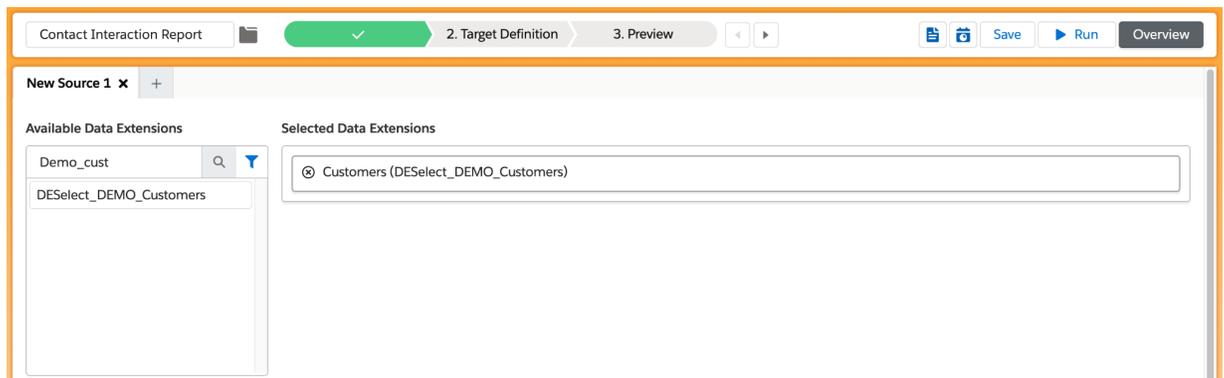
Now we are going to see the step-by-step process on how to build the solution explained in the previous sections. You can open your DESelect Segment environment and do it with us!

4.1. Contact Interaction Report

Our first step will be to create a Contact Interaction Report where we can see the emails that we are sending right now to our audience together with their responses. The structure of the Data Extension will be the following:

Contact_Id	Emails_Sent	Emails_Opened	Emails_Clicked
------------	-------------	---------------	----------------

1. **Open DESelect Segment and create a New Selection.** In our case, we will name it *Contact Interaction Report*. We are going to store it in the folder we have created for the whole solution.
2. In the **Selection Criteria step**, drag and drop your **Master Data Extension of Customers** (in our case, *DESelect_Demo_Customers*) into the Selected Data Extensions section without any other filter. Proceed to the Target Definition step.



3. In the **Target Definition step**, click on **Create Data Extension**.
4. Configure the new Data Extension as shown below (note that you can choose the location of your preference):

Create New Data Extension

* Name
DE_Contact_Interaction_Report

Description

Location
■ Deselect [Change Location](#)

Is Sendable?
 Is Testable?

Data Retention Policy
OFF [Change Policy](#)

[Cancel](#) [Save](#)

5. Click on **Save** and add the ID of the Customer DE into the Target Data Extension.
6. Scroll down to the Custom Values section and click on **Add New Value**.
7. Name it Emails_Sent, choose **Aggregation** and click **Next**.

Custom Value

* Name Emails_Sent

What type do you want to add?

Fixed Value
Choose a fixed value, like a fixed text, number, date, boolean. All records will have the same fixed value.

Dynamic Value
Select a value based on logic. Different records can have different values based on the logic you define.

Apply formula to a field
Modify the value of a field by applying a formula to it.

Aggregation
Apply aggregate functions like Count, Sum, and more on values of a data extension/data view.

[Cancel](#) [Next](#)

8. In the new window, inform the following:
 - **Aggregation Function:** Count
 - **Field to apply the aggregation:** JobID of _Sent
 - **Relation to results:** SubscriberKey
 - **Matches with:** the ID of your Master Data Extension of Customers

Aggregation

Basic **Advanced**

Aggregation function What do you want to calculate?
 Count number of records

Field Which field do you want to apply the aggregation function to?
 _Sent
 JobID

Relation to results
 How does the data set we apply the aggregation function on relate to the main selection?
 Field SubscriberKey
 of _Sent
 matches with Customers Id

Filters Optionally, filter the results of _Sent further.
 No filter selected. [Edit Filters](#)

Back Cancel **Save**

Note: to simplify this process, you can **set Predefined Relations**¹² between your Contacts Data Extension and the _Sent / _Open Data Views, so you'll have access to a simplified screen when creating the Aggregation.

9. Click on **Edit Filters** and choose the timespan that you want to check. In our case, we will set 10 days (as we want to start by limiting to 2 emails every 10 days), but feel free to configure whatever you prefer!

Filters

Available Fields

Search fields (Sent)
 AccountID
 BatchID
 Domain
 EventDate
 JobID
 ListID

Filters

EventDate is in previous 10 days

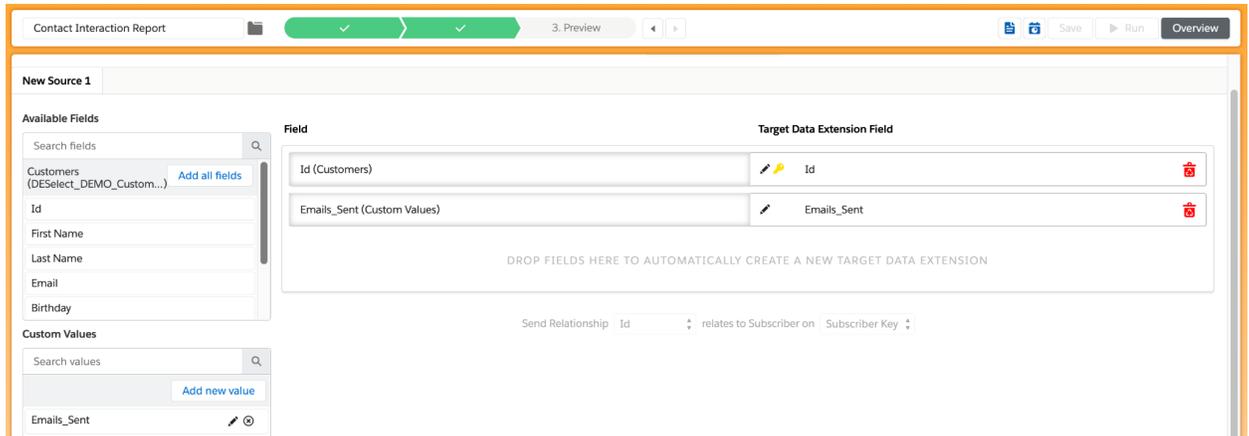
EventDate is In Previous 10 Days

DRAG - AND - DROP AVAILABLE FIELDS HERE TO FILTER

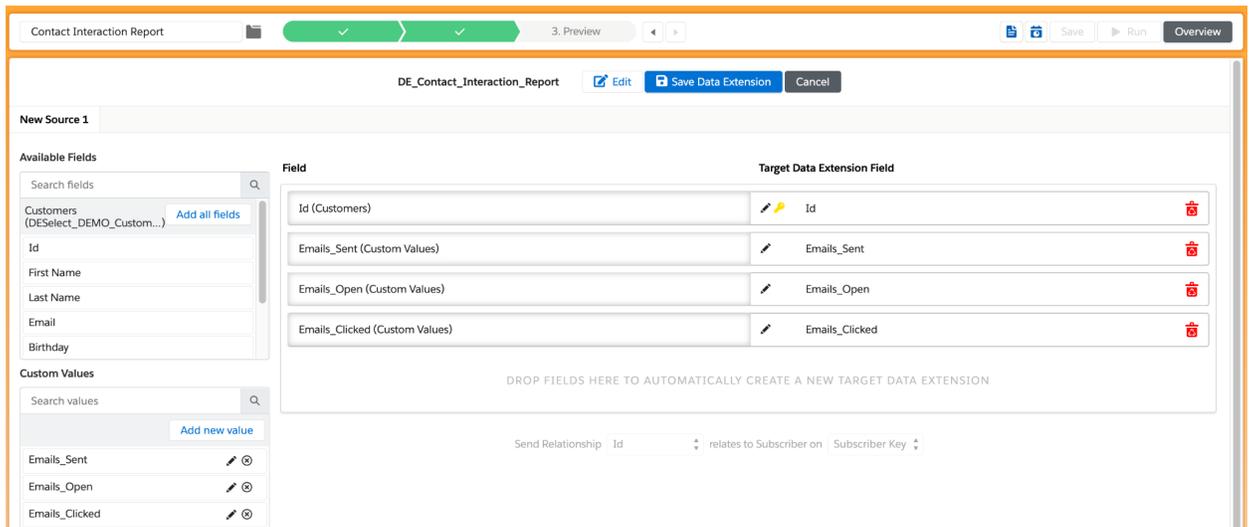
Note: If you want to exclude emails from counting (transactional emails or specific campaigns), make sure to add the specific filters you need to exclude them here.

10. **Save** your Custom Value and drag and drop it into the Target Data Extension.

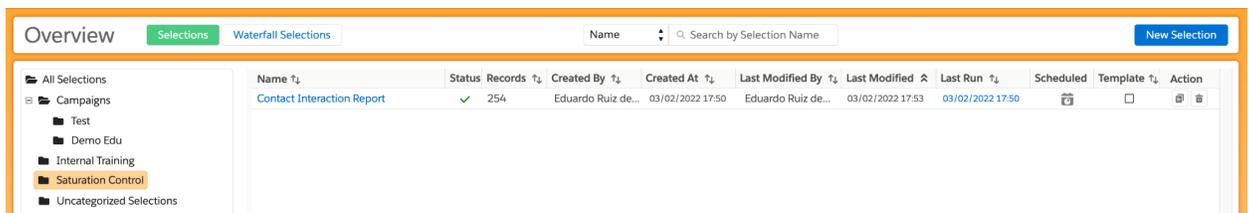
¹² [Can I predefine relations between Data Extensions?](#), DESelect



11. Repeat steps 6-10 doing the same, only changing the field to apply the aggregation (step 8) to `_Open` and `_Click`, and the name of the custom values respectively.
12. Once you've done it, you should have something like below.



13. Click on **Save Data Extension > Create**.
14. **Save** your Selection and Run it!



Apart from building the Saturation Control tool of this guide, you can use the previous selection to review the current pressure you are doing over your audience, and much more.

You can create a copy of the Selection, change the time frame you are reviewing (step 9) to 3 months, and get insights like

- Rank users by engagement (higher Emails_Open/Emails_Clicked rate).
- Get the AVG email frequency you have, and review if the OR is higher with different Emails_Sent values.
- Get the inactive users to trigger retrieve campaigns or exclude them from email sends and try other channels.

4.2. Contact Available Slots

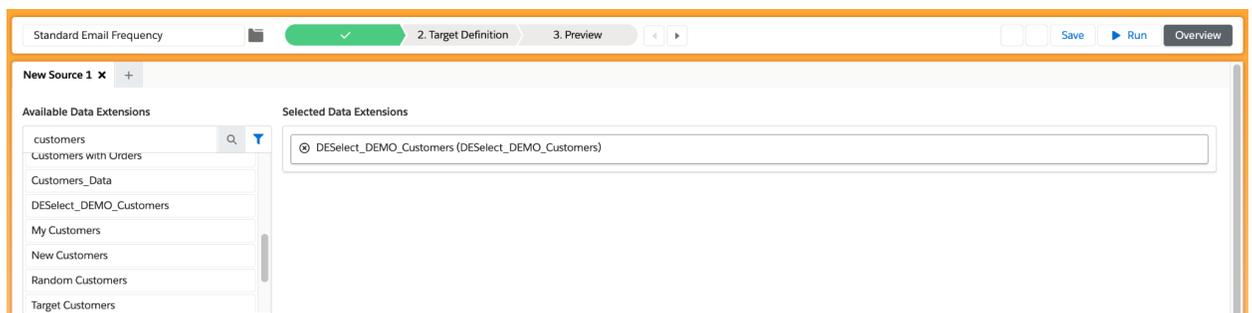
The second step of the process will be to calculate the available slots we have for each customer in the current period. Remember we are going to define a limit of 2 emails in 10 days, but we also want to test different configurations, so we are going to:

- Keep a 10% of our audience with 1 email in 10 days (n-1)
- Keep a 10% of our audience with 3 emails in 10 days (n+1)

For doing that, we are going to need 3 Selections that are going to update the Contact Available Slots that we have defined. How? Let's look into it!

Contact_Id	Slots
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1. First, we are going to create the "standard" email frequency that will affect 80% of our audience. Let's create a **New Selection** and name it "Standard Email Frequency".
2. In the **Selection Criteria step** drag and drop your **Master Data Extension of Customers** (in our case, *DESelect_Demo_Customers*) into the **Selected Data Extensions section** without any other filter. Proceed to the Target Definition step.



3. In the **Target Definition step**, click on **Create Data Extension**.
4. Configure the new Data Extension like bellow (note that you can choose the location of your preference):

Create New Data Extension

* Name
Contact_Available_Slots

Description

Location
Edu [Change Location](#)

Is Sendable?
 Is Testable?

Data Retention Policy
OFF [Change Policy](#)

[Cancel](#) [Save](#)

5. Click on **Save** and add the ID of the Customer DE into the Target Data Extension.
6. Scroll down to the Custom Values section and click on **Add New Value**.
7. Call it Slots, choose **Fixed**, and click **Next**.
8. Choose the number text field and configure the value that you want to be the standard.

Custom Value

Which value do you want to add?

Field Type: Number

Value: 2

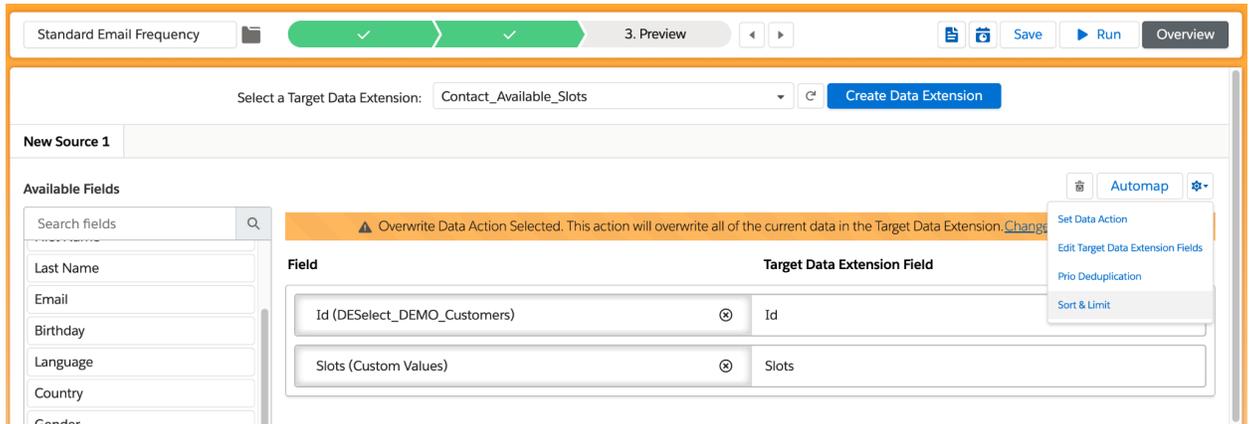
[Back](#) [Cancel](#) [Save](#)

9. **Save** your Custom Value and drag and drop it into the Target Data Extension.

The screenshot shows the 'Contact_Available_Slots' configuration page. At the top, there are navigation buttons: 'Standard Email Frequency', a folder icon, a green checkmark, a green arrow, '3. Preview', and 'Overview'. Below this, there are buttons for 'Edit', 'Save Data Extension', and 'Cancel'. The main area is divided into 'New Source 1' and 'Target Data Extension Field'. Under 'New Source 1', there is a search bar and a list of available fields: Last Name, Email, Birthday, Language, and Country. The 'Target Data Extension Field' section shows two fields: 'Id (DESelect_DEMO_Customers)' and 'Slots (Custom Values)'. Below this, there is a prompt: 'DROP FIELDS HERE TO AUTOMATICALLY CREATE A NEW TARGET DATA EXTENSION'.

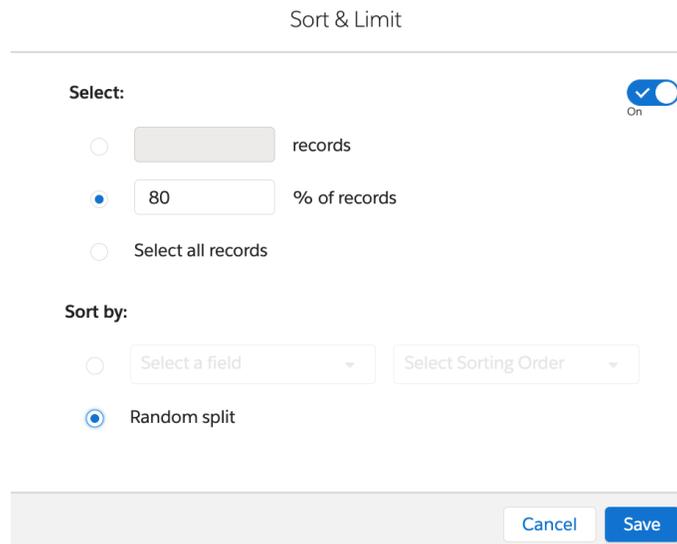
10. Click on **Save Data Extension > Create**.

11. On the Gear Icon next to Automap, click on **Sort & Limit**.

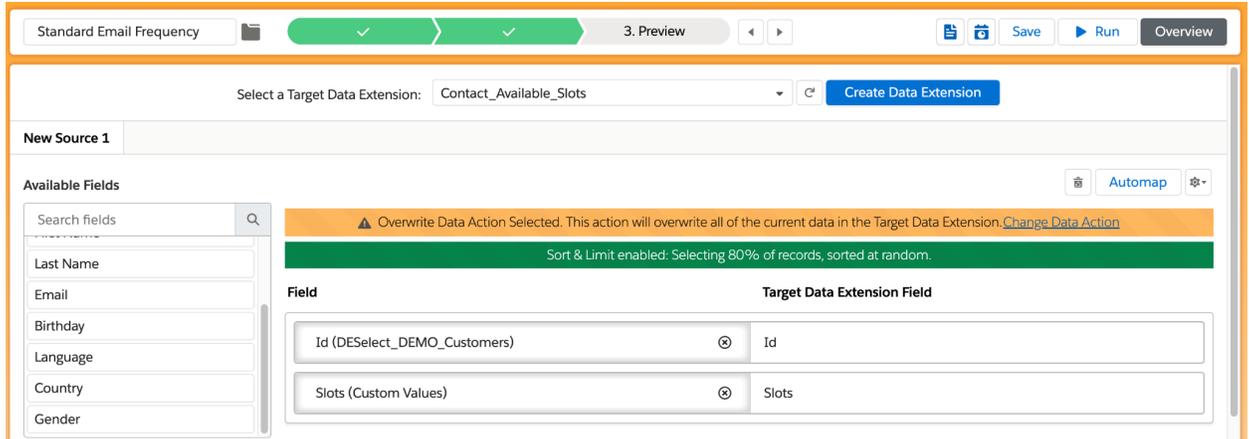


12. In the pop-up, enable the feature and choose

- **Select:** 80% of records
- **Limit:** Random split

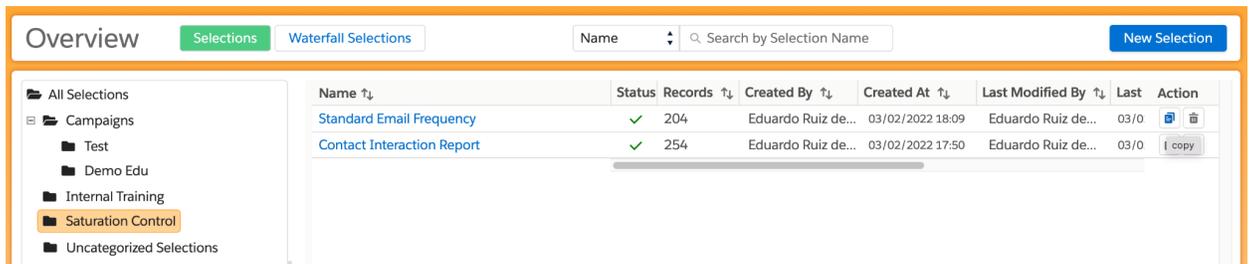


13. Click **Save** and **Run**.

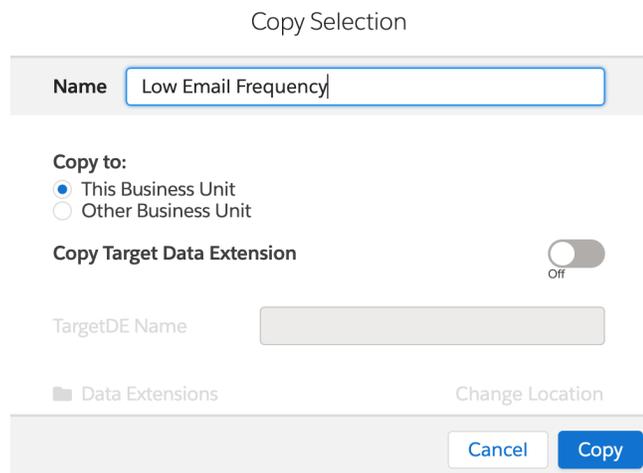


Once this Selection is created, we need to copy it and create the other 2 Selections: Low Email Frequency and High Email Frequency. Let's see the step-by-step of both of them.

1. In the Overview of Selections, go to the previous Selection and click Copy.



2. In the pop-up, change the name of the new Selection and keep disabled the option of Copy Target Data Extension.



3. Click on **Copy** and open the Selection.
4. In the **Selection Criteria** step, add the Contact_Available_Slots to the Selected Data Extension, with the following Match configuration.

Create Relationship



DESelect_DEMO_Customers (DESelect_DEMO_Customers) Contact_Available_Slots (Contact_Available_Slots)

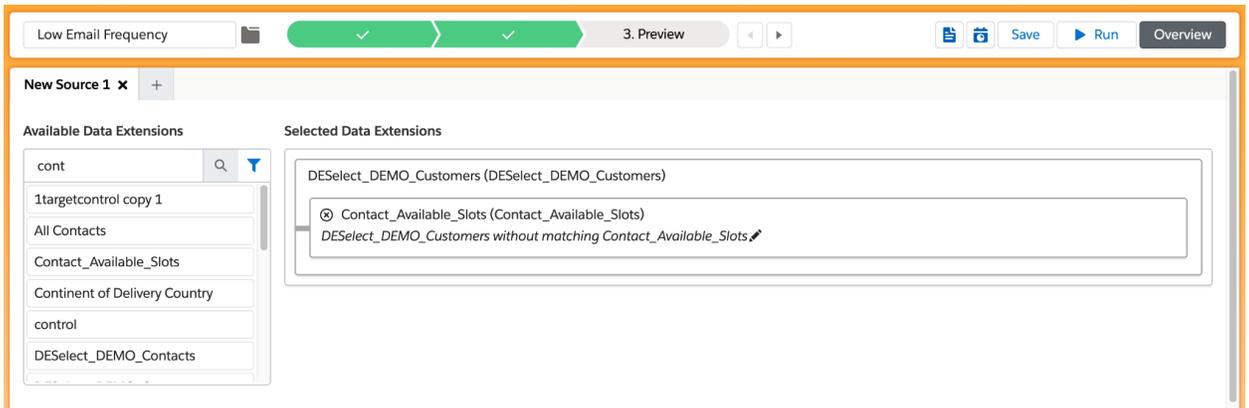
Id DESelect_DEMO_Cus... WITHOUT MATCHING Contact_Available... Id

+ Add Relationship

Cancel Save

As we already have the audience with the Standard Email Frequency in the Contact_Available_Slots DE, we want to exclude those to configure the Low-Frequency group.

5. Click **Save** and go to the next step.



Low Email Frequency 3. Preview Save Run Overview

New Source 1 x +

Available Data Extensions

- cont
- 1targetcontrol copy 1
- All Contacts
- Contact_Available_Slots
- Continent of Delivery Country
- control
- DESelect_DEMO_Contacts

Selected Data Extensions

- DESelect_DEMO_Customers (DESelect_DEMO_Customers)
- ⊗ Contact_Available_Slots (Contact_Available_Slots)
- DESelect_DEMO_Customers without matching Contact_Available_Slots ✎

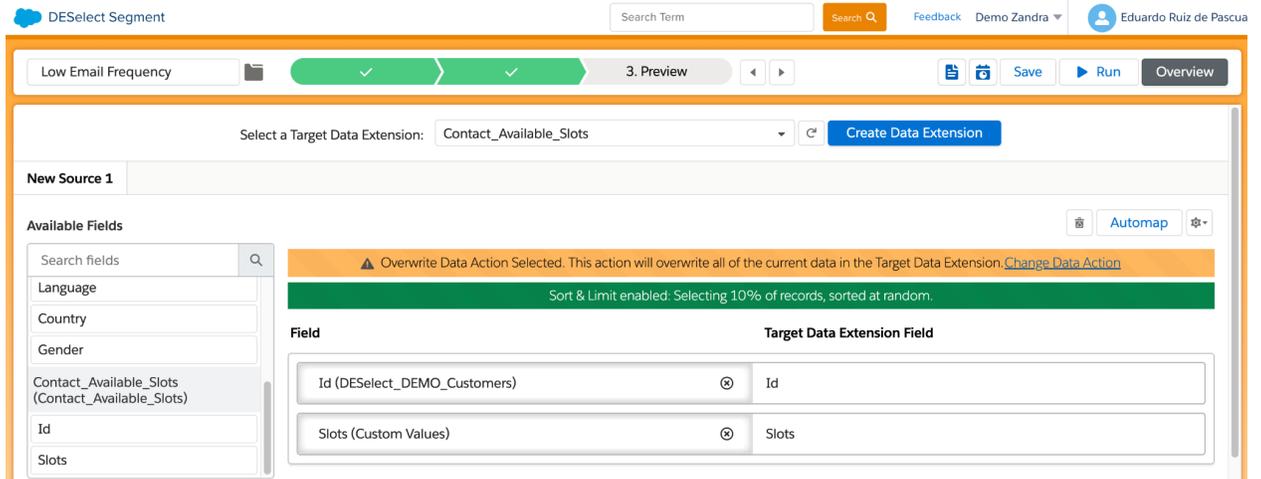
6. Remove the mapping of the current custom value from the Target Data Extension, as we need to change it to the low-frequency value.

Field	Target Data Extension Field
Id (DESelect_DEMO_Customers) ⊗	Id
	Slots

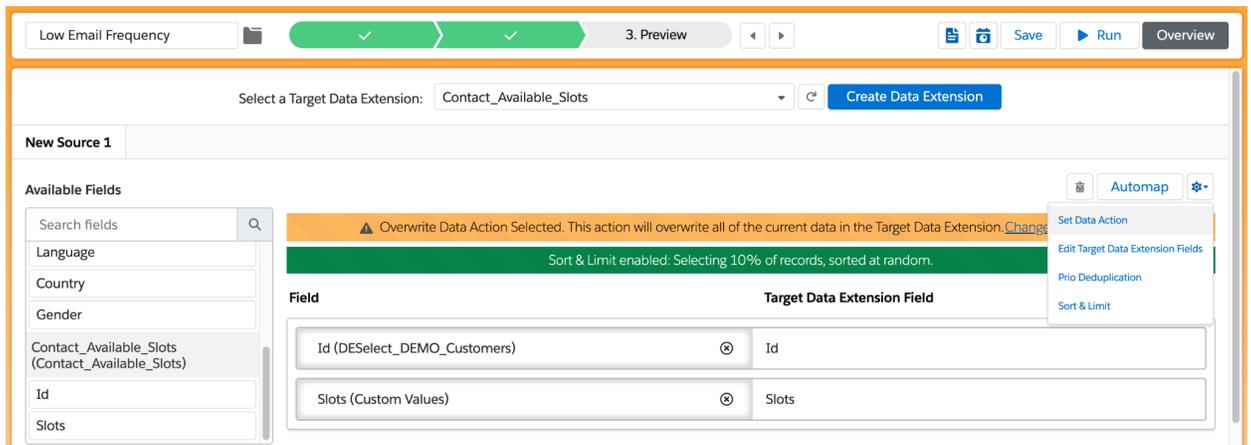
7. Scroll down to the Custom Values section and click on the Pencil to edit the existing Slots value.
8. In the pop-up, change the value to the low email frequency you want to try (in our case, 1).

Note: the % of records that we keep is calculated over the resulting records, therefore, we will only have 20% of our audience here (as the other 80% will be excluded). From that 20%, we want to keep a 50%, which is equivalent to 10% of the full audience.

- Click **Save**. You will see that the green banner above the Data Extension now says that you are selecting 10% of records randomly, and we are also excluding the previous 80% of the customers with our configuration in the Selection Criteria.



- Click again on the Gear Icon and choose **Set Data Action**.



- Select **Append** and click **Select**.

Data Action

- Overwrite**
Overwrite the current data in the target data extension.
- Append**
Add results as new data to the target data extension.
- Update**
Update existing records and add new records to the target data extension.

15. Save and run your Selection.

All we need to do now is get the rest of the audience in the Contact_Available_Slots DE with the High-Frequency Limit.

1. Copy the Low Frequency Email Data Extension, with the same configuration as before.

Copy Selection

Name

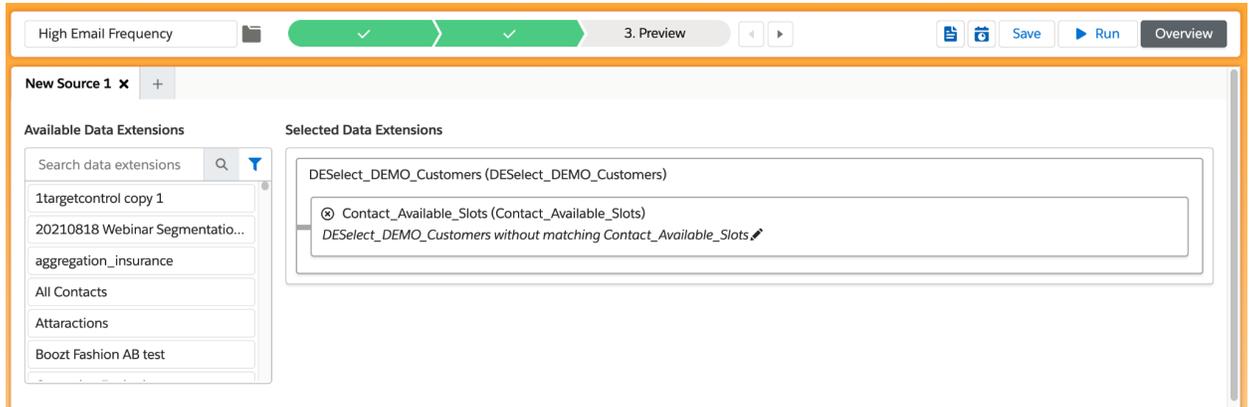
Copy to:

- This Business Unit
- Other Business Unit

Copy Target Data Extension Off

TargetDE Name

2. Leave the Selection Criteria step as is, to exclude all the people from Standard and Low groups.



- On the **Target Definition step**, remove the mapping of the current custom value from the Target Data Extension, as we need to change it to the high-frequency value.

Field	Target Data Extension Field
Id (DESelect_DEMO_Customers) <input type="checkbox"/>	Id
<input type="checkbox"/>	Slots

- Scroll down to the Custom Values section and click on the Pencil to edit the existing Slots value.
- In the pop-up, change the value to the high email frequency you want to try (in our case, 3).

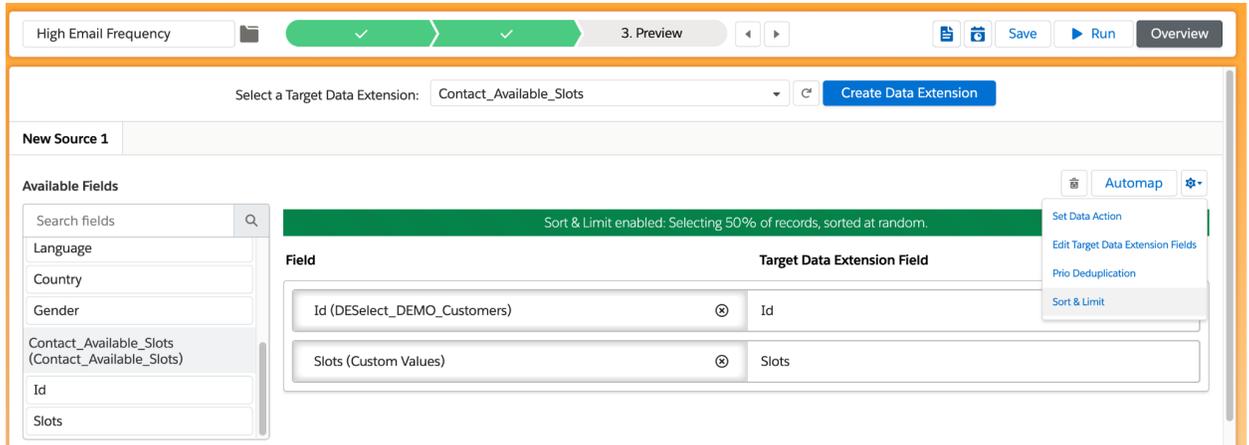
Custom Value

Which value do you want to add?

Field Type:

Value:

- Click **Save** and map again the custom value to the Target Data Extension.
- Go now to the Gear Icon next to Automap and click on **Sort & Limit**.



9. Disable **Sort & Limit**, as we now need all the remaining records.

Sort & Limit

Select: On Off

records
 % of records
 Select all records

Sort by:

Random split

10. Click **Save** and **Run** your Selection.

Beware that we need to execute the Selection in the exact order we created them: Standard > Low > High, as we need to exclude the audience from the previous groups.

To simplify this task, we can now create a Waterfall Selection that contains these three Selections as consecutive steps, and Deselect Segment will take care of running them in order.

Note: If you don't have Waterfall Selections in your edition, you can also achieve this by scheduling the Selections independently, 30 minutes apart from each other.

Waterfall Selection

Contact Available Slots

2. Run Details

Save Overview

Available Selections

- All Selections
 - Campaigns
 - Test
 - Demo Edu
 - Internal Training
 - Saturation Control
 - Uncategorized Selections

Search Selections

- Contact Interaction Report
- High Email Frequency
- Low Email Frequency
- Standard Email Frequency

Step 1: Selection (Standard Email Frequency) → Target DE (Contact_Available_Slots)

Step 2: Selection (Low Email Frequency) → Target DE (Contact_Available_Slots)

Step 3: Selection (High Email Frequency) → Target DE (Contact_Available_Slots)

If you run it, you are going to see that the Target Data Extensions is going to be populated adding the different groups until we get to the whole audience.

Waterfall Selection

Contact Available Slots

Save Run Overview

Step 1: Selection (Standard Email Frequency) → Target DE (Contact_Available_Slots)

Step 2: Selection (Low Email Frequency) → Target DE (Contact_Available_Slots)

Step 3: Selection (High Email Frequency) → Target DE (Contact_Available_Slots)

Step 1: 204

Step 2: 229

Step 3: 254

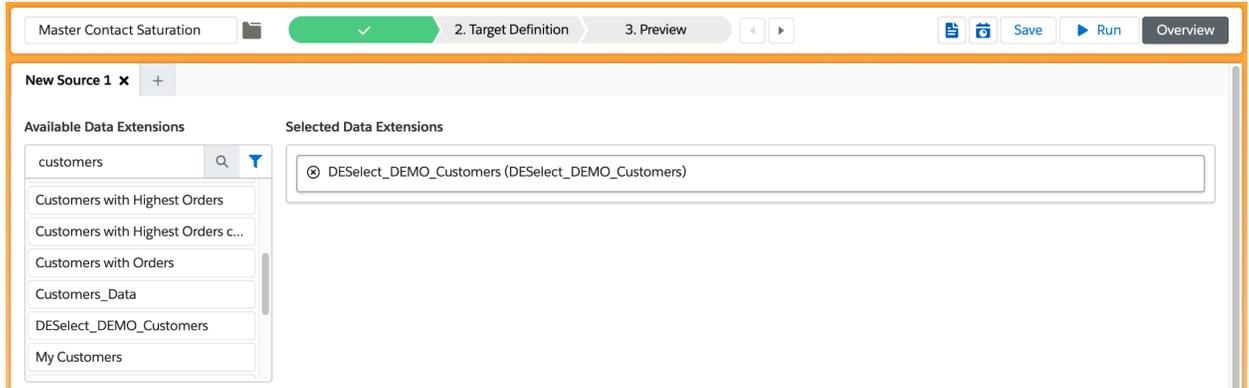
Also, you can change the limits of the different groups from time to time after comparing the results to test different configurations just by changing the custom value Slots in each Selection.

4.3. Master Contact Saturation

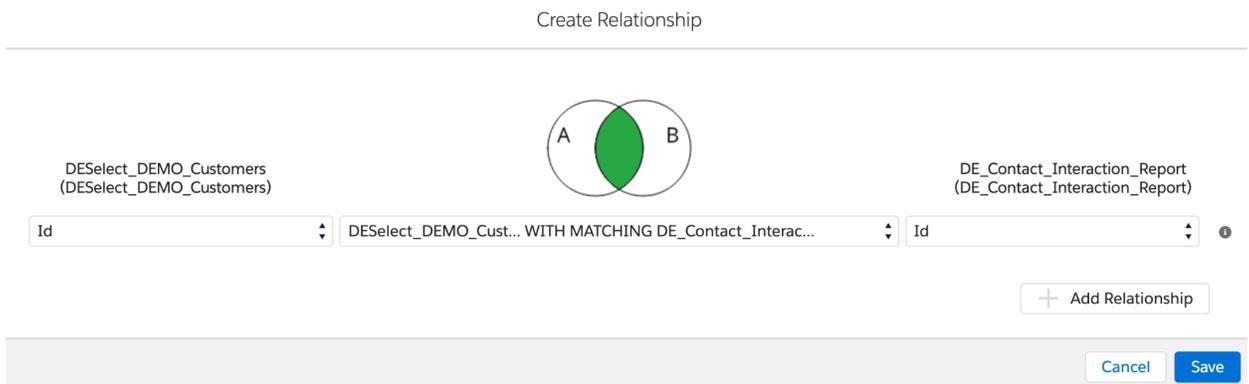
As a final step, we are going to create a Data Extension that is going to tell us if each customer is saturated or not, and therefore if we can send them emails.

Contact_Id	Saturated
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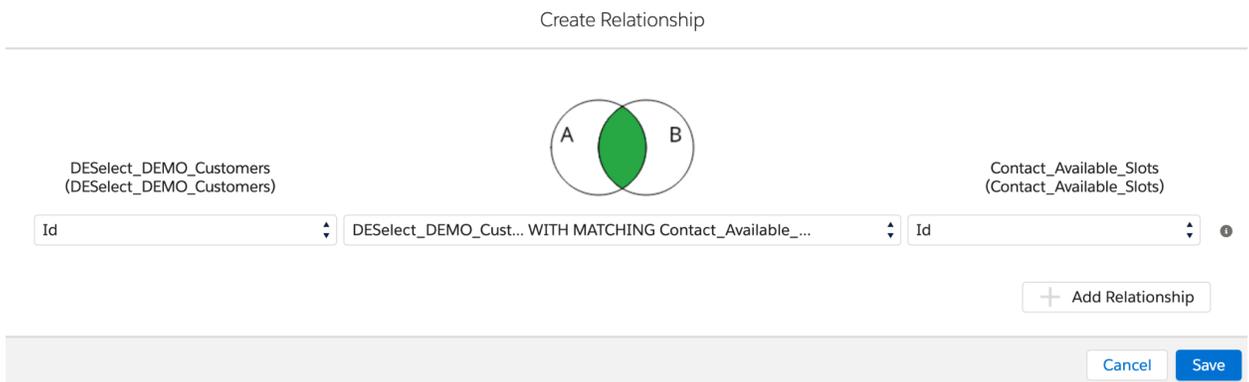
1. Create a new Selection and call it Master Contact Saturation.
2. In the **Selection Criteria step**, add the Master Data Extension of your Contacts.



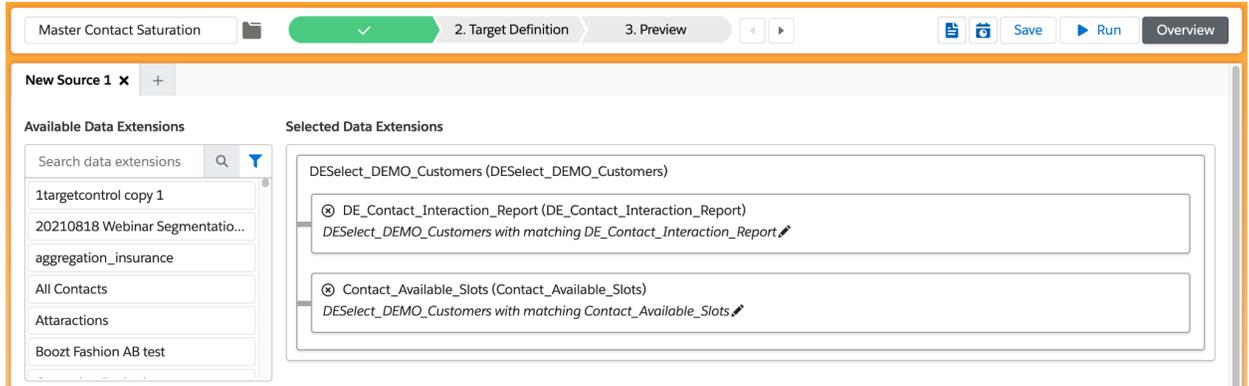
3. Drag & drop the Contact_Interaction_Report with the following Match configuration.



4. Drag and drop the Contact_Available_Slots on top of the Master of Contacts, with the following Match configuration.



5. Move to the Target Definition step.



6. In the **Target Definition step**, click on **Create Data Extension**.
7. Configure the new Data Extension like this (note that you can choose the location of your preference):

Create New Data Extension

*** Name**

Description

Location
 Edu [Change Location](#)

Is Sendable?
 Is Testable?

Data Retention Policy
 OFF [Change Policy](#)

8. Click on **Save** and add the ID of the Customer DE into the Target Data Extension.
9. Scroll down to the Custom Values section and click on **Add New Value**.
10. Call it Saturated, choose **Dynamic Value** and click **Next**.

Available Fields

DE_Contact_Interaction_Report
 (DE_Contact_Interaction_Report)

Emails_Sent

Filters

⊕ **Emails_Sent** Smaller than A Contact_Available_Slots Slots

DRAG - AND - DROP AVAILABLE FIELDS HERE TO FILTER

Emails_Sent smaller than Slots (Contact_Available_Slots)

Cancel Save

15. Click **Save**.

16. In the current sprint, make sure the value under the condition we have created is False and change the Default value to True.

Custom Value

Which value do you want to add?

Field Type: Boolean

Value:

When: Emails_Sent (DE_Contact_Interaction_Report) s
smaller than Slots (Contact_Available_Slots) ✎

Then: ⊞ False ✎

Null

Add Criteria

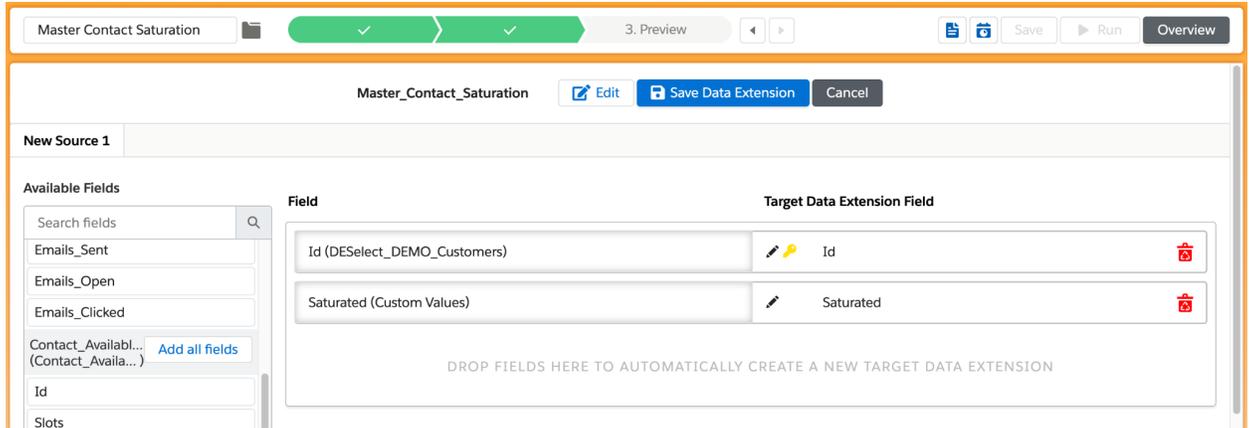
Default: ⊞ True

Null

✓
Back
Cancel
Save

This means that if Emails_Sent is smaller than the number of Slots, the user is not saturated (we can keep sending emails); otherwise, it is saturated (we need to stop sending emails for a while).

17. **Save** the custom value and add it to the Target Data Extension.



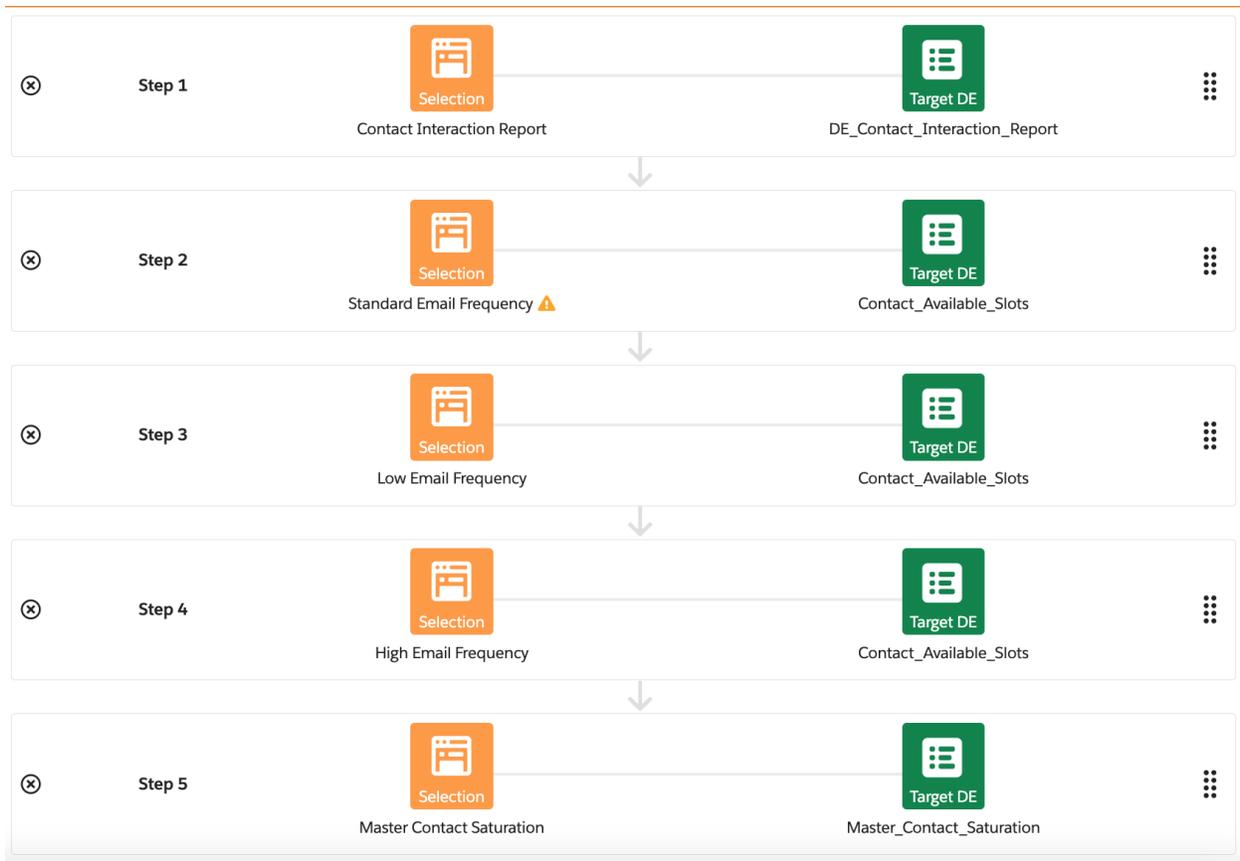
18. Click on **Save Data Extension** and **Run** the Selection.

4.4. Working with your new Saturation Control process

Now you have all the Data Extensions you need to control the Email Frequency, the first thing you need to do is make sure it is up to date every day.

As the order of the execution of the steps is important, we can do it by configuring a Waterfall Selection that contains:

1. Contact Interaction Report
2. Contact Available Slots
 - a. Standard Email Frequency
 - b. Low Email Frequency
 - c. High Email Frequency
3. Master Saturation Control



Once you do so, you'll be able to schedule this Waterfall Selection to run daily at night (so it doesn't happen during your working hours).

Again, if you don't have Waterfall Selections, you can schedule each Selection independently leaving 30 minutes between each other, but make sure that all of them run successfully, as they are not going to wait for the result of the previous one.

To use these Selections in your day-to-day segmentation, simply drag and drop the Master_Contact_Saturation to the Selected Data Extensions and add a filter getting only Saturated = false.

Thank you for reading along. We hope this guide provides a good introduction to understanding Saturation control. Now it is your turn to start building your own instance!