IXC

CRM campaign measurement and experiment workbook

A template for aligning goals, audience and observation windows to decide the next campaign

A practical IXC resource for adoption decisions and delivery

Published 2026.09 · English edition · PDF + Excel worksheets

Using this resource

Separates message responses from business outcomes, and records comparison groups, observation windows and missing data to interpret the results.

CRM marketers, data analysts and campaign leads

Contents

01 Define clicks and completed work as separate metrics 3

02 Set the audience, assignment unit and period before launch 4

03 Specify the comparison group's experience 5

04 Read the example's calculation and interpretation together 6

05 Log missing, late and duplicate data beside the results table 7

06 Separate observation from judgment when setting the next action 8

How to complete and reuse it

Read the criteria in this PDF, then fill the blank fields with your actual conditions and anything still unconfirmed. The Excel file for the same practice area has a worksheet for each resource. Keep the worked examples separate from real customer cases and confirmed quotes.

With attribution, you may quote and adapt this material for internal review and your own work. The latest files are at www.ixc.co.kr/en/assets.

Define clicks and completed work as separate metrics

Performance metrics start from the behavior you want from customers. First decide the source of each number, from the send request through to completed work.

In fictional example IXC-DEMO-01, the goal is for a user who accepted a team invitation to complete shared work in the same workspace. The example uses invitation_accepted as the start condition and shared_task_completed as the goal event. Message clicks and shared-work completions are counted separately. The example channel is web push, with one active invitation per user. Records of the same piece of work are linked by campaign_id, user_id, workspace_id and invitation_id.

Metric	Counting unit	Data source
Audience assignment	Units assigned to the experiment	Assignment records
Message response	Observed opens and clicks	Channel reports and events
Goal completion	First completion within the observation window	Server-side business events
Opt-outs and inquiries	Status changes and related inquiries	Channel status and operations records

> **Fix the denominator first**
>
> The completion rate among people who clicked and the completion rate across everyone assigned answer different questions. Do not compare rates with different denominators as if they were the same performance metric.

Set the audience, assignment unit and period before launch

If members of the same team influence one another in your service, review whether comparing individuals is appropriate. Record how the assignment unit relates to the analysis unit, and interpret results in line with that relationship.

Experiment design record

Item	Entry guidance	Actual decision
Hypothesis and goal	The condition to change and the target behavior	
Audience and exclusions	Entry timing and exclusion conditions	
Assignment and analysis unit	User or workspace	
Observation window	Start basis, end and late-data handling	
Primary metric and adverse outcomes	Completion rate; opt-outs, duplicates, etc.	

Keep the period during which new participants are assigned separate from each participant's observation window. If the example sets the observation window at 7 days after acceptance, a participant who enters on the last day is also observed for 7 days before the comparison. The 7-day window is an assumption of this worked example; set it according to your service's usage cycle. If the group changes on re-entry, fix how that is handled in advance as well.

Specify the comparison group's experience

Define what the comparison group does not receive and what it continues to receive. Mark out the campaign's scope so that required communications unrelated to the experiment are not stopped along with it.

Setup	Question to test	Interpretation caveat
A/B copy	Which copy performs differently with the same audience?	Check differences in timing and conditions other than the copy
Reminder / no reminder	Does an additional reminder affect the target behavior?	Record required communications and exposure to other campaigns
Before/after	What was observed after the change?	Check seasonality, product changes and shifts in acquisition

Split Branch in OneSignal Journeys is a feature for dividing paths. Confirm in the actual configuration and data whether assignment stays consistent on re-entry and across multiple Journeys. Where teammates on shared work influence one another, consider assignment and analysis at the workspace level. Also check whether product settings alone can satisfy the assignment rules you need.

> **Sample and stopping conditions**
>
> Set the sample and duration according to the difference you want to observe, the baseline variation and the assignment unit. Do not arbitrarily end the test on the day a favorable number appears; keep the conditions for stopping over operational problems separate from the statistical decision criteria.

Read the example's calculation and interpretation together

The values below are synthetic, for calculation practice. They can be read as a real campaign's results only once group size, assignment method and completeness of observation are confirmed.

Practice item	Reminder group	Comparison group
Assigned units with complete observation	200	200
Units completing the goal in the window	54	42
Goal completion rate	27%	21%
Observed difference	6 pp	Reference group

54÷200=27% and 42÷200=21%, a difference of 6 percentage points. This calculation describes the observed difference between rates. Without checking that random assignment held and reviewing cross-team influence, missing data and sampling uncertainty, do not conclude that the campaign produced an improvement of 6 percentage points. If the target behavior is not revenue, do not convert the completion rate into revenue or ROI.

> **When a value is blank**
>
> If the numerator or denominator is not entered, the result is also unconfirmed. Calculate a completion count of 0 only when 0 is an actual entered value. If the denominator is 0 or completions exceed the denominator, recheck the counting scope.

Log missing, late and duplicate data beside the results table

If the measurement criteria and the source data differ, do not just edit the numbers in the results table. Record which group's observation is incomplete and why.

Count and observation record

Item	Reminder group	Comparison group	Basis and conditions
Assigned units			
Units with complete observation			
Units completing the goal			
Missing, duplicate or late data			

Measurement rules

Applies to	Rule or question to confirm	Decision and owner
Completion event	Is this the unit's first completion?	
Correlation keys	Do user, workspace and invitation match?	
Corrections and delays	When are counts finalized and corrected?	

In the actual analysis, keep the assigned audience and denominators defined in advance. Do not arbitrarily drop people still under observation from one group only. If any observation is incomplete, note the cause and how it is handled, and confirm the same observation conditions are met before finalizing the result.

Separate observation from judgment when setting the next action

A results report links actual observations, the conditions needed to interpret them and the next action. Rather than judging whether the result was good, decide which conditions to keep or change.

Result interpretation and next experiment

Category	What to record	Actual record
Observation	Values by metric, window and group	
Limits and further checks	Missing data, other exposure, assignment issues	
Decision	Keep, change or stop, and why	
Next action	Variable, owner and review point	

If opt-outs or duplicate reminders rose, review audience, timing and frequency together, even when the completion rate is higher. If the difference is small or uncertain, decide whether to observe further or change the hypothesis. Link the configuration version to the results table so the same conditions can be reproduced in the next campaign.

> **Operating scope to decide with IXC**
>
> Starting from your goal events, current reports and unconfirmed data items, we discuss event integration, campaign experiments, result analysis and subsequent operations.

Publication and use

Based on your current goals, assignment method and the missing data in your reports, we set the next steps across instrumentation, experiments, analysis and campaign operations.

IXC Corp.

CEO Nam Kichul | Business registration no. 109-86-56732
4F 408, Chuncheon ICT Venture Center
7 Huseok-ro 462beon-gil, Chuncheon-si, Gangwon-do, Republic of Korea
+82-33-242-0210 | info@ixc.co.kr

www.ixc.co.kr

www.ixc.co.kr/en/services/crm-campaign-operations

www.ixc.co.kr/en/assets/crm-campaign-measurement

References

OneSignal: Analytics overview

https://documentation.onesignal.com/docs/en/analytics-overview

OneSignal: Journey actions

https://documentation.onesignal.com/docs/en/journeys-actions

OneSignal: Event-driven Journeys

https://documentation.onesignal.com/docs/en/event-driven-journeys

IXC Managed CRM Campaign Operations

https://www.ixc.co.kr/en/services/crm-campaign-operations