

How to use Marketing Agent

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Marketing Agent is an AI-powered analytics assistant that helps you learn from your Bluecore data through natural conversations.

This guide will walk you through how to access the agent, structure your questions for optimal results, and verify the insights it provides.

User Role	View	Edit
Client Admin	Yes	No
Data Manager	Yes	No
Viewer	Yes	No

Before you begin

While the Marketing Agent is a powerful analytics tool, it's important to maintain a "trust but verify" approach when using AI-generated insights.

The agent analyzes large amounts of data and can identify patterns and trends quickly, but like any AI system, it may occasionally misinterpret queries, present data in unexpected ways, or hallucinate (make up) responses.

Always cross-reference the agent's responses with your analytics dashboard to ensure accuracy before making strategic decisions based on its recommendations.

You shouldn't have to pore over every number to check its validity, just get a sense to ensure the numbers' accuracy.

This verification step is especially important when:

- Making budget decisions based on performance data
- Reporting metrics to stakeholders or leadership teams
- Identifying significant changes in campaign strategy.

Use Marketing Agent as a starting point and gut check for analysis, not as the final word.

How to ask Marketing Agent

Access the Marketing Agent by navigating to `{{agent.snippet}}` anywhere in the Bluecore dashboard. Ask questions about your brand analytics in the text box, or click a pregenerated question.

Because it's a conversational large language model, the Marketing Agent should understand the questions you ask, no matter how they're phrased. But there are a few tips to formatting and phrasing

your questions to save you some time and get the information you need right away.

In your prompt, you should:

- Specify the channel: email, SMS/MMS, or both.
- Provide a specific timeframe: last 30 days, last full week (Monday-Sunday), last quarter (October 1-December 31), etc.
- Clarify your request: a journey (welcome, abandon cart, post-purchase), a campaign keyword ("holiday"), or a goal (reduce unsubscribes, lift CTR).

For example:

"For email over the last 30 days, rank all campaigns by revenue and show unique CTR, conversion rate, and halt rate for each. Call out any with high revenue."

If you aren't getting the answers you're looking for, ask clarifying questions based on the initial results.

Below is a table of example prompts you could ask the Marketing Agent, as well as a less effective prompt with the same goal.

Effective prompt	Less effective prompt
"Compare email performance for the last 60 days between campaigns tagged 'holiday' vs 'non-promotional'. Show attributed revenue, unique open rate, unique CTR, conversion rate, and unsubscribe rate for each group."	"Show me how my campaigns compare"
"Show email list growth trends over the last 90 days, including new subscribers, unsubscribes, and net growth by week. Highlight any weeks with unusual unsubscribe rates."	"How's my list doing?"
"For the last 30 days, show performance of all abandoned cart email campaigns, including attributed revenue, unique delivered, unique CTR, conversion rate, and revenue per email. Compare to my overall email average."	"Check my cart emails"
"Break down attributed revenue for the last quarter by channel (email vs SMS/MMS) and by campaign type. Show the percentage contribution of each to total revenue."	"Where is my revenue coming from?"
"For email over the last 90 days, group performance by day of week (Monday-Sunday). Show attributed revenue, unique delivered, unique open rate, and unique CTR for each day. Which days perform best?"	"What trends do you see?"

Effective prompt	Less effective prompt
<p>"Create a summary for November 2025 showing email and SMS performance. Include attributed revenue, unique delivered, unique open rate, unique CTR, conversion rate, and revenue per message for each channel."</p>	<p>"I need a report for my boss"</p>
<p>"For the last 30 days, show all email campaigns with attributed revenue below \$1,000. Include unique delivered, unique open rate, unique CTR, conversion rate, and halt rate. Are there any common patterns?"</p>	<p>"Why aren't my campaigns working?"</p>
<p>"Show overall email and SMS performance for the last full month. Include attributed revenue, unique delivered, unique open rate, unique CTR, conversion rate, revenue per message, and year-over-year comparison if available."</p>	<p>"Give me an overview"</p>
<p>"For campaign ID 54165165165135, pull the email campaign configuration summary including: campaign name, status (live/paused), campaign type (triggered/promotional), associated journey (name + ID if available), target audiences and exclusions (include audience names + IDs), send schedule (cadence, timezone, and whether Send Time Optimization is enabled), and product logic (recommendation source rules, filters, fallbacks, and deduping)."</p>	<p>"What's going on with campaign 54165165165135?"</p>
<p>"Show a campaign-level breakdown of halt rate for last week (Monday–Sunday). Include halt rate, total halts, unique halts, and unique delivered, sorted by highest halt rate."</p>	<p>"Give a breakdown of halt rate over the last week"</p>
<p>"How do I set up an A/B test for an email campaign?"</p>	<p>"What's new with Bluecore?"</p>
<p>For campaign ID 54165165165135, list all configuration changes in the last 30 days in chronological order. For each entry include timestamp (with timezone), what changed (audience/exclusions/template/schedule/frequency & eligibility rules/product logic/STO/holdout), and the before and after values.</p>	<p>"Did anything change on campaign 54165165165135 recently?"</p>
<p>"For campaign ID 54165165165135, show halt reasons for the last 30 days with the exact halt-reason labels, total halts, and halt rate and state the denominator used for the rate. Also provide a weekly trend showing halts by reason so it's easy to spot any spikes."</p>	<p>"How many halts did campaign 54165165165135 have?"</p>