

The background of the slide is a collage of torn paper and patterns. It includes sections of brown paper with small dark dots, solid brown paper, and brown paper with concentric circular lines. A large, irregular piece of light blue paper is at the bottom. The Oracle logo is in the top left, and a red square with a white 'O' is in the bottom right.

ORACLE

ORACLE MARKETING CONSULTING

---

# Holiday Marketing Quarterly: First Quarter 2021 Checklist

The holiday season doesn't have an off-season. Having a successful holiday season means executing a successful four-quarter strategy. Oracle Consulting's Holiday Marketing Quarterly gives you a quarter-by-quarter plan for how to achieve more during the critical holiday season with your digital marketing efforts.

The first quarter is focused on seizing opportunities, mitigating risks, learning from the just-passed holiday season, and starting to make the larger structural and programmatic changes necessary to succeed during the next holiday season. In this Holiday Marketing Quarterly, we'll cover:

- ☐ Holiday Post-Mortems
- ☐ Seasonal Buyer Reactivations
- ☐ Email Deliverability Recoveries
- ☐ Automated Email Optimization & Growth
- ☐ Creative Refreshes
- ☐ Upgrades & Expansions of Your Tech Stack

Our goal is to always be thinking at least 3 months out with our clients so they can avoid stalling out. We hope this quarterly checklist helps you stay on track with your planning so you achieve your goals. And, of course, if you'd like assistance, we're always here to help. Reach out to us at any time at [CXMconsulting\\_ww@Oracle.com](mailto:CXMconsulting_ww@Oracle.com).



**Clint Kaiser**

Head of Analytic & Strategic Services

**Oracle Marketing Consulting**

# Holiday Post-Mortems

The holiday season is a whirlwind—2020's more than usual. Come January, most B2C marketers would love nothing more than to put the holiday season behind them and look ahead to Valentine's Day and the spring season. Resist the temptation. Even after a unique holiday season like this one, ensure that you learn the lessons of your Holiday Past so your Holiday Future is brighter. Here's a checklist of items to document in your post-mortem, which you can review going into the next holiday season planning cycle:

---

☐ **Analyze the performance of your digital marketing campaigns.** Ask yourself:

- ☐ How did my brand perform overall during the holiday season?
- ☐ How did each of my digital marketing channels perform compared to the others?
- ☐ How did each of my digital marketing channels perform versus the previous holiday season?
- ☐ How did each of my digital marketing channels perform versus our forecast?
- ☐ How did my digital marketing strategy affect the health of my program?

- 
- ☐ **Identify your successful campaigns.** Take note of your promotions that outperformed. Can you tell which campaign elements contributed most to their success? Was it the offer, design, subject line, theme, personalization, or something else? Look for ways to repurpose those campaigns or reuse the winning elements in future campaigns—both in the months ahead as well as next holiday season.

“

*Because your audience and their behaviors change, applying seasonal learnings to the same season next year can always be difficult. That will be the case even more so this year. Your data and your test results shouldn't be held as truth for next year, but they should be the foundation for planning and developing a solid test plan that gives you a jumpstart on optimizing your campaigns and programs next holiday season.*



**Doug Sundahl**

Senior Director of Analytic & Strategic Services,  
Oracle CX Marketing Consulting

“

*Reusing any elements that were successful in previous campaigns is a win-win. It means your customers get more of what they loved from the original campaign and it means less work for you. With many digital marketing programs running lean and looking for time-savings, this is one not to overlook.*



**Lizette Resendez**

Associate Director, Oracle Consulting Services

- 
- **Identify your unsuccessful campaigns.** Similarly, determine which promotions underperformed. Can you identify the campaign elements that led to the lackluster performance? If so, make a note to avoid them in the future. Was there a fatal flaw that could be fixed to make this campaign a success in the future? Are there any good ideas that can be salvaged from these subpar campaigns?

- 
- **Map the performance of your digital marketing campaigns by day.** While **Cyber Monday** and **Black Friday** are likely to be your No. 1 and 2, the rest of your top performing days may be a bit of a surprise, and subject to change from year to year. Where Thanksgiving falls on the calendar can have a significant impact on early November and early December performance. And where Christmas falls during the week can affect online and in-store performance in the waning days of the season. Take note of how performance changes with the calendar from year to year, then use this to help plan your campaigns for the upcoming holiday season.

- 
- **Document any workflow issues that impacted email production.** Were you unable to create all of the emails that you'd planned because of inadequate resources? Did you have to simplify any of your emails—abandoning plans to include personalization, A/B tests, or interactivity, for example—due to a lack of resources? If so, consider investing in better workflow tools such as **modular email architecture**, investing in better training so your designers and coders are more efficient, and investing in agency services that can help you scale during peak seasons like the holidays.

“

*There is one recurring theme that you almost always see in successful campaigns and never see in those that are unsuccessful: simplicity. Campaigns that include too much information and too many details get lost in the inbox clutter, whereas campaigns that have clear and concise messages and offers tend to be the most effective. This is true year-round, but is amplified during the holidays as inbox volume rises and retailers are fighting for attention.*



**Chris Wilson**

Strategic Director of Analytic & Strategic Services,  
Oracle Marketing Consulting

“

*Even though 2020 had its unique challenges, we can still glean valuable insights to plan for next year's holiday campaigns by analyzing revenue and engagement trends by day and identifying where spending increased the most. For example, one of my retail clients drove high revenue beyond Black Friday and Cyber Monday during their 'Cyber Week' promotions (11/30–12/4) and surpassed the prior year's revenue that week by 60%. Brands like them may permanently shift to extending their promotional periods beyond the traditional two days.*



**Katie More**

Strategic Analyst for Analytic & Strategic Services,  
Oracle Marketing Consulting

“

*Every holiday season, email marketers have grand plans to create something really special. But if you don't invest in the processes, training, and resources you need to bring it to life beforehand—like months beforehand—it won't happen, and you'll have to wait a whole other year for your chance to shine.*



**Lizette Resendez**

Associate Director, Oracle Consulting Services



- 
- ☐ **Document any quality control and PR issues.** During the 2020 holiday season, many marketing departments were running very lean due to staff cuts, and some suffered temporary staff shortages due to illnesses. Did these issues affect your team? Did any of your campaigns get sent with significant errors in them that impacted performance or hurt your brand image? Did you have to send any **corrections or apology emails for email marketing mistakes**? Did you have any non-email issues that led to corrections or apologies? Keep a year-round log of errors, when they occurred, the cause of the error, any remediation that happened, and any negative effects from them. Learn from your mistakes—particularly recurring ones—and, when possible, change your processes and tools to minimize the possibility of the mistake happening again.

“

*2020 was obviously a unique year. It was incredibly important to look at the language in our emails from a new perspective. With Black Lives Matter protests, the pandemic, highly contentious elections, and more as a backdrop for our messages, we caught a number of instances where our clients' copy could have been taken differently than intended. Marketers will need to continue to be hyper-aware about the language they use in 2021.*



**Nick Cantu**

Senior Art Director for Creative Services, Oracle Marketing Consulting

**Need help measuring and documenting your holiday marketing performance?**

Oracle Marketing Consulting can help with analytics and analysis, as well as evaluate and help optimize your email workflow. Want to discuss your needs?

Reach out to us at [CXMconsulting\\_ww@Oracle.com](mailto:CXMconsulting_ww@Oracle.com)

# Seasonal Buyer Reactivation

The holiday season brings in lots of new customers, many of whom sign up for your emails to get the best holiday deals and stay on top of order-by deadlines. However, only some of those end up becoming loyal year-round customers. Many become once-a-year gift buyers or, even worse, one-time buyers who never return. Turn more one-time and seasonal buyers into year-round buyers by launching a seasonal buyer reactivation program that has one or more of the following components:

- **A lower introductory email frequency.** Shoppers who sign up for your emails during the holiday season may only be interested in shopping with you during the holidays. Consider treating these new subscribers differently by sending them emails at a lower frequency—at least until they make their first non-holiday purchase. If you already have a **reengagement program** that sends emails at a considerably lower cadence, consider diverting any new subscribers into that as soon as the holiday season ends. But the ideal solution is to create a special seasonal buyer reengagement program with a lower cadence that includes emails designed specifically to convert these shoppers into year-round customers, like the progressive profiling and first-time non-holiday buyer campaigns discussed below.

“

*We generally see subscriber opt-outs climb in January, after one-time and seasonal buyers have finished their holiday shopping. While the tolerance for email has been higher during the pandemic, we still expect to see an increase in unsubscribes early in 2021. The best way to combat this trend is to treat seasonal shoppers differently by implementing a separate program.*



**Clea Moore**

Director of Strategy for Email  
Deliverability Services, Oracle Marketing  
Consulting





---

☐ **Progressive profiling emails.** Use these emails to ask your subscribers questions so you can better understand them, and in doing so improve your email segmentation and personalization. Progressive profiling can be especially critical to understanding your subscribers' needs and desires outside of the holiday season, when they're often buying for others and not themselves. These campaigns can take a number of approaches, including:

☐ **Asking your subscribers to update their preferences.** If you have a **preference center**, ask your subscribers to visit it and indicate the product categories they're interested in hearing about, the newsletters or email streams they'd like to receive, and how often they'd like to receive your emails, for example.

☐ **Asking your subscribers to complete a survey—or, better yet, a lifestyle or personality quiz.** To better understand your subscribers, ask them about their favorite activities, their goals, their fashion choices, or whatever else is appropriate for your brand and gives you information you can use to send more relevant emails. You'll get better completion rates if you can make it fun, show survey-takers how they compare to others, or deliver some kind of useful, insightful, or delightful conclusion.

☐ **Asking your subscribers about their near-term goals.** Long-term interests and desires, like those expressed in preference centers, are highly valuable. However, learning about your subscribers' short-term interests can be equally valuable. For instance, knowing their spring cleaning plans, spring yard and gardening plans, or spring activity plans can all inform near-term message content. Those plans are also likely to change every year, so this kind of seasonal progressive profiling should really be an annual campaign.

“

*Your subscribers' shopping behaviors will likely look fundamentally different in November and December than in January and February. The pandemic will likely amplify these changes. Progressive profiling is a great way to stay in tune with your subscribers' interests, especially during seasonal pivots and times of rapid change.*



**Peter Briggs**

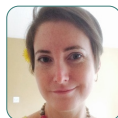
Director of Analytic & Strategic Services,  
Oracle Marketing Consulting



- 
- **A first-time non-holiday buyer campaign.** Many brands have first-time buyer campaigns that greatly incentivize non-customer subscribers to make their first purchase. Similarly, many brands have win-back campaigns that target lapsed customers with their best offer to get them buying and experiencing their brand again. First-time non-holiday buyer campaigns are a combination of those two concepts, delivering your best deal to subscribers who haven't bought outside of the holiday season yet.

“

*If you have strong link and website tagging in place, be sure to leverage that data when trying to turn one-time holiday buyers into year-round customers. A solid visitor behavior tracking program will give you rich behavior data on what products worked best for retargeting campaigns and accelerate your learning curve to discover what to suggest for these customers to get them to convert again outside of the holiday season.*



**Virginia Carcavallo**

Managing Principal Consultant for  
Implementation Services, Oracle  
Marketing Consulting

**Want to grow your active email audience?** Oracle Marketing Consulting's List Growth & Demand Generation Services experts can help you better understand your audience, analyze your subscriber acquisition sources, reengage inactive subscribers, and convert seasonal shoppers into year-round shoppers. Want to discuss your needs? Reach out to us at [CXMconsulting\\_ww@oracle.com](mailto:CXMconsulting_ww@oracle.com)



# Email Deliverability Recoveries

The opportunities and pressures of the holiday season often cause brands to increase email frequencies dramatically as well as to expand their mailable audience to chronically inactive and other high-risk subscribers. At the same time, inbox providers often increase the sensitivity of their spam filters and become more likely to block senders. As a result, the holiday season can be rough on your sender reputation and have consequences for your email program well into the New Year. Revitalize your sender reputation with this to-do list:

- 
- **Assess your email engagement rate across inbox providers.** Email engagement is a critical component of inbox providers' deliverability algorithms. However, your overall open and click rates can hide potential problems, so look at your engagement rates by inbox provider. Gmail, Outlook.com, and other inbox providers not only have different tolerances around email engagement, they also attract different kinds of email users with different behaviors and risk profiles. Do a full breakdown and see if any anomalies jump out at you.

- 
- **Move your inactive subscribers over to a reengagement program.** Low engagement is a major contributor to poor inbox placement, so boost yours quickly by moving your inactive subscribers into a reengagement program. These programs send subscribers who haven't opened or clicked an email in a while significantly fewer emails, which helps minimize the damage that these inactive subscribers do to your engagement rates and therefore your deliverability. These programs also often include progressive profiling, preference update, and other emails that are explicitly aimed at addressing the root causes of inactivity, which are receiving too many emails and receiving emails that aren't relevant.

- **Check to make sure you're not on any blocklists.** If you're listed on a major blocklist like Spamhaus, you'll know it right away. However, there are many smaller blacklists that may be causing a small percentage of your email to be blocked. Over time, these blocklists can erode your email marketing performance in subtle, but impactful ways. Learn how to [check email blocklists and how to stay off them](#).

“

*It's crucial to look closely at unique open rates by receiver domain day to day, as well as across campaigns and IPs. That's because an overall rate of 15%, for example, can easily conceal a 2% open rate at Hotmail, which would indicate that your mail is in the junk folder. With audience share shrinking for most senders at Hotmail, and Microsoft domains being tight with their spam filtering in recent years, it's easy to miss junking when looking only at overall open rates.*



**Brian Sullivan**

Strategy Director of Email Deliverability Services,  
Oracle Marketing Consulting

“

*It's not uncommon to run a check and see a listing or two for a very small blocklist that will have little impact on your mail. However, these smaller listings may be an important signal that you should review your list hygiene practices before you get into trouble with more impactful blocklists.*



**Clea Moore**

Director of Strategy for Email Deliverability  
Services, Oracle Marketing Consulting

- 
- **Re-permission your chronically inactive subscribers.**  
The chances are that during the holidays you probably sent promotional emails to at least some of your subscribers who haven't opened or clicked one of your emails in a long time. Now that the holidays have passed, it's time to remove the temptation to email these high-risk, low-reward subscribers by sending them one or more re-permission emails asking them to reaffirm that they'd like to receive promotional emails from you. These are very similar to **double opt-in confirmation request emails**. If they don't click the link in the email reaffirming permission, then you suppress them from your active mailing list. This helps protect your engagement rates, protect you from spam complaints, and protect you from an abandoned email address being converted into **recycled spam traps**.

- 
- **Re-permission your never-active subscribers.**  
Sometimes you get a new subscriber who simply doesn't engage at all—not with your welcome email(s) and not with any of the subsequent emails that you send them. These **never-actives represent a particularly high risk to your deliverability** for two reasons: (1) because the person may have unintentionally signed up or regrets signing up, and in either case is more likely to report your emails as spam; or (2) because the email address is actually a spam trap that was subscribed by mistake through a typo or on purpose maliciously. Because of this risk, we recommend that most brands re-permission never-actives after 30 days of no activity.

“

*If you're considering re-permissioning your long-term inactives, don't wait. Start now, do it slowly to minimize the hit to your deliverability, and wrap up your re-permission efforts well ahead of the upcoming holiday season so your sender reputation has time to recover.*



**Daniel Deneweth**

Head of Email Deliverability Services,  
Oracle Marketing Consulting

“

*New subscribers are typically your most active subscribers. So, when a new subscriber doesn't engage at all, marketers should interpret that as highly suspicious. It could mean the address belongs to an **email bot** or **spam trap**.*



**Chad S. White**

Head of Research, Oracle Marketing Consulting

**Not sure if your emails are reaching your subscribers' inboxes?** Oracle Marketing Consulting's Email Deliverability Services team can conduct a deliverability health audit to pinpoint areas of concern and deliver clear remedies to maximize your inbox placement rate. Want to discuss your needs? Reach out to us at **CXMconsulting\_ww@oracle.com**

# Automated Email Optimization & Growth

Chances are that your automated emails were the silent heroes of your holiday season. While much is made of the big increases in broadcast and segment emails during the fourth quarter, triggered emails like cart abandonments, browse abandonments, and back-in-stock notifications are generating a lot—perhaps even most—of your email marketing revenue. The first half of the year is a great time to grow your automated email program so your next holiday season is even more successful. Here's our to-do list:

- ☐ **Take an inventory of all of your existing automated email programs.** Unfortunately, some brands still believe that triggered emails are “set it and forget it” emails when these high-ROI messages are really “review and improve” emails that deserve regular QA, updates, and optimizations. For each one, here are some key questions to ask yourself:
  - ☐ **When was the email launched?** When was the last time it was redesigned? Are the links, messaging, and content up to date? Is the current look and feel in line with the designs of your broadcast email templates?
  - ☐ **What is the goal of the email?** Which metric(s) best align with that goal? How is it performing?
  - ☐ **What triggers the email (i.e., an action, inaction, a date, Internet of Things response)?** How long after the trigger is the email sent? Could that timing be refined? Are some or all broadcast or segmented email sends suppressed to subscribers who receive this email? If so, for how long?
  - ☐ **Is this email part of a series? If not, could it be? If so, should it be?** If it is part of a series, what determines when the next email is sent? Are there actions or events that cause one or more emails in this series to be skipped and not sent? Are there actions or events that cause this series to be terminated?
  - ☐ **Does it contain personalization?** Are there opportunities for more personalization to be added or for the existing personalization to be enhanced? Is there a role for artificial intelligence in determining personalization, such as powering content or product recommendations?



“

*Roughly 15% of brands generate the majority of their email marketing revenue from automated and transactional emails. This is an attainable goal for most brands and demonstrates that you're focused on addressing the needs of your subscribers in the moments that truly matter. Start by optimizing the triggered emails you already have, then look for expansion opportunities.*



**Chad S. White**

Head of Research, Oracle Marketing Consulting

- 
- ☐ **Identify the automated emails and email elements that need attention most.** Based on the discovery that you did above, which emails or email elements are most in need of attention? Create a 3x3 impact-effort matrix, where you rank potential fixes and improvements as low, medium, or high effort with a low, medium, or high impact. Prioritize projects that have a higher impact than effort, and consider projects where the impact and effort are balanced.

- 
- ☐ **Identify some A/B testing opportunities for your existing triggered emails.** Marketers routinely A/B test their broadcast emails, but only rarely—if ever—A/B test their automated and transactional emails. Considering that triggered emails generate much higher ROIs, this is a missed opportunity because the A/B testing wins can be much bigger. Keep in mind these **A/B testing pitfalls** and then consider testing these email elements:

- ☐ **Subject lines and preview text.** Contextuality is key with automated emails. Make it clear in the subject line that they're receiving this email because of something they did, didn't do, or requested. Test different subject line lengths, words and phrases, and tones and styles. Be aware that **subject line writing has changed** significantly in recent years.
- ☐ **Calls-to-action.** Test the CTA's words, its placement, and button styling.
- ☐ **Hero images.** Test the size and placement of the main image of your email. Also, test the image's content, such as a lifestyle vs. product image, and the image's style, such as a photo vs. an illustration.
- ☐ **Friendly From.** Augmenting your sender name can help differentiate your emails and strengthen your message. You want to be instantly recognizable in the inbox, so we always recommend that you lead with your brand name, but you can follow that with additional qualifiers as part of an **email from name extension strategy**. For instance, your product review request emails could use the sender name "YourBrand Reviews"; your receipt emails "YourBrand Order"; and your shipping notification emails "YourBrand Notification."

“

*Don't assume that because a particular automation is among your top three best performing that it's fully optimized. In fact, your top performing automated emails are **one of the BEST candidates for optimization** because any percentage improvement is multiplied by an already large base of performance.*



**Clint Kaiser**

Head of Analytic & Strategic Services,  
Oracle Marketing Consulting

“

*Don't forget to document your test learnings in order to ensure they are understood and applied to future tests. Also, remember learnings from your tests can be applicable outside of just your channel and can be shared across the marketing organization. This is a great way to showcase your channel's efforts and increase visibility within your organization.*



**Peter Briggs**

Director of Analytic & Strategic Services,  
Oracle Marketing Consulting

- ☐ **Copy.** The amount of copy and its arrangement in emails has been evolving quickly, as marketers seek to do a better job of engaging time-pressed consumers with short attention spans. Can you cut 25% of the copy from your email? 50%? Are there opportunities to use bulleted text or subheads instead of full sentences? Can a screenshot, image, or animation allow you to reduce the number of words you're using?
- ☐ **Send Time.** Some triggered campaigns should be sent immediately, such as order confirmation, password reset, and welcome emails. However, others should be delayed, including shopping cart abandonment emails, while the emails in a series should be spaced out. Test to determine the optimal delays and spacings.



- 
- **Make your automated emails seasonally relevant.** Many brands made their triggered emails seasonally relevant during the holiday season by adding seasonal imagery, links, and messaging. Use these same tactics to make your automated campaigns more relevant to Valentine's Day, Mother's Day, Father's Day, and back-to-school shoppers. Look for opportunities to add secondary messaging that speaks to shoppers' needs during these seasons, whether it's promoting buyer's guides, order-by deadlines, or other helpful content.

“

*If you've created seasonal messaging, imagery, and navigation bars in past years, pay extra attention to what's new and different this year. For example, some brands have introduced curbside pickup, same-day delivery, and new financing options over the past year and the pandemic has potentially affected your store hours, return policies, and more. Be sure all of those changes are accurately reflected in your automated campaigns and stay updated throughout the season.*



**Jennifer Lancaster Dana**  
Vice President, Oracle Marketing Consulting

- 
- **Expand or break up existing automated campaigns into email series.** Sometimes one email isn't enough, especially given diminishing attention spans and the trend toward much tighter copy and fewer content blocks. Look for opportunities to add a second or even third email to an automated campaign. For instance, an initial shopping cart abandonment email might simply remind a subscriber of what they left in their cart, whereas a second email might recommend alternative products, making the assumption that they haven't purchased because they're considering other products. Relatedly, look to break up emails that are overly packed with information and multiple CTAs. This is a common problem with welcome emails, many of which would benefit from having their various content blocks split out into separate emails as part of a welcome series.

“

*When creating an email series, the timing of those additional touches is important to test. The goal is to create a classic Goldilocks experience—with that next email not arriving too soon nor too late, but at just the right time.*



**Clint Kaiser**  
Head of Analytic & Strategic Services,  
Oracle Marketing Consulting

- 
- ☐ **Launch new triggered campaigns.** Are there gaps in your triggered email program? Consider the following triggered emails:
    - ☐ **Welcome email**, which is sent in response to people signing up for your emails or for your service
    - ☐ **Shopping cart abandonment email**, which is sent in response to subscribers placing items in their shopping carts, but not checking out
    - ☐ **Product browse abandonment email**, which is sent in response to subscribers browsing a particular product webpage, but not buying anything
    - ☐ **Category browse abandonment email**, which is sent in response to subscribers browsing a particular product category webpage, but not buying anything
    - ☐ **Back-in-stock notification email**, which is sent when an item is in-stock again either to subscribers who requested to be notified when the item was available again or to subscribers who abandoned the product page of an item that was out of stock
    - ☐ **First-time purchase email**, which is sent to subscribers who haven't made a purchase with your brand previously and contains an incentive or a message encouraging them to convert for the first time
    - ☐ **Win-back email**, which is sent to subscribers who haven't made a purchase in a while and contains an incentive or a message encouraging them to convert again
    - ☐ **Reengagement email**, which is sent to subscribers who haven't opened or clicked any of your emails in a while
    - ☐ **Re-permission email**, which is sent to subscribers who haven't opened or clicked any of your emails in a very long time and asks them to click a link in the email to reconfirm their permission or else you'll stop sending them emails

“

*Remember that not all of these automated messaging strategies need to be a dedicated touch. For some calls-to-action, it may be appropriate to add them through personalization to an existing dynamic template within the channel communication. Or you could use a dedicated touch for the first message and use dynamic content in subsequent messages to reinforce the CTA.*



**JT Capps**

Director of Analytic & Strategic Services,  
Oracle Marketing Consulting



☐ **Milestone emails, including...**

- ☐ **Email sign-up anniversary email**, which is sent to subscribers to mark their first, second, and subsequent anniversaries on your email list
- ☐ **Birthday (or half-birthday) email**, which is sent to subscribers on or in the days leading up to their birthday (or half-birthday)
- ☐ **Wedding anniversary email**, which is sent to subscribers on or in the days leading up to their wedding anniversary to promote anniversary gifts, activities, etc.
- ☐ **Purchase anniversary email**, which is sent to subscribers to mark their first, second, and subsequent anniversaries of purchasing a product (especially durable ones with multi-year lifespans like computers, tractors, and cars) or signing up for a subscription service
- ☐ **Loyalty anniversary email**, which is sent to members of your loyalty program to mark their first, second, and subsequent anniversaries of joining the program

“

*One of our retail clients has over 75 automations in place, allowing them to respond to a wide range of customer actions and situations with just the right message at just the right time. They built up their automated program bit by bit over time, making additions while at the same time making incremental improvements to existing triggers.*



**Clint Kaiser**

Head of Analytic & Strategic Services,  
Oracle Marketing Consulting

**Need help optimizing existing triggered emails or launching new ones?** Oracle Marketing Consulting's Campaign Automation Services team can help you with everything from conception to launch to ongoing optimization. Want to discuss your needs? Reach out to us at [CXMconsulting\\_ww@Oracle.com](mailto:CXMconsulting_ww@Oracle.com)



# Creative Refreshes

With the holiday season behind you, now is the perfect time to start creative refreshes, whether it's for your website, mobile app, social media presence, or emails. Here's our checklist:

- ☐ **Reassess your brand values and how you're communicating them in your customer experiences in terms of visuals and user interfaces.** The good news is that you probably did a [messaging strategy reevaluation in the wake of the spring COVID lockdowns](#). Unfortunately, you probably need to do another serious reevaluation during the first quarter due to the winter surge in COVID cases and the resulting restrictions. Before jumping into incremental changes, consider reaffirming what your brand stands for and then brainstorm how to best convey those values in your designs. Design Thinking principles can help you avoid jumping ahead to solutions before you've fully articulated not only your problems and opportunities, but the "why" behind them.

**Want to reassess your brand values and how you're communicating them in your marketing?** Oracle Marketing Consulting's Design Thinking & Innovation Services team can help you take an inside-out approach to campaign design, starting with your brand values and working outward to arrive at design improvements. Reach out to us at [CXMconsulting\\_ww@Oracle.com](mailto:CXMconsulting_ww@Oracle.com)

- ☐ **Start or add to your swipe file.** Keep a collection of email, social media, SMS, and other digital campaigns that you find interesting or exemplary. Add them to a swipe file, which is a place where you and your team can get easy access to them. We recommend taking screenshots of the campaigns and adding them to a shared Dropbox folder or something similar. Take note of what exactly about the campaign that you like. Use these swipe file entries to help you brainstorm different design elements to potentially include in your redesigns. You could also spend 15 minutes a week discussing new additions to your swipe file to keep everyone current on trends and thinkings about changes to test.

“

*Some members of your marketing team members—and likely most of your executives—will struggle to visualize some of the changes that you might be discussing. That's when having concrete examples of what you're considering really helps sell an idea and generate momentum.*



**Chad S. White**

Head of Research, Oracle Marketing Consulting



- 
- ☐ **Mock up one or more redesigned challengers.** Put all of your ideas together into one or more fully mocked up designs, and then run an **A/B test** to see which performs better.

“

*It can be fun (and fruitful) to run a redesign contest. Have two or three design/copy/strategy teams pull together reimagined creatives to test against your legacy approach. Be open to ideas—and results—you don't expect!*



**Lisa Harmon Stephens**

VP, Creative, Oracle Marketing Consulting

- 
- ☐ **Run proof-of-concept tests via A/B testing.** Validate your ideas by doing some A/B testing with a portion of your subscriber base. When doing your testing, make sure you avoid these **A/B testing pitfalls**.

**Need help upleveling your customer experience? Not sure where to start?** Oracle Marketing Consulting's Creative Services team can guide you through the entire process, from clarifying your email brand identity to crafting a style guide to redesigning the customer experience. Our Creative Services experts can handle email, social, web, and a range of other digital marketing projects. Reach out to us at **[CXMconsulting\\_ww@Oracle.com](mailto:CXMconsulting_ww@Oracle.com)**

# Upgrades & Expansions of Your Tech Stack

Making any changes—big or small—to your marketing technology stack during the holiday season invites disaster, which is why most everyone freezes platform work during the better part of the fourth quarter. As you start the first quarter, come up with a plan for how you'll improve your martech stack over the next 9-10 months before the next holiday tech freeze hits.

- 
- ☐ **Review your marketing technology stack and ensure you are set up for success for the coming holiday season.** Take an inventory of your current tools and then ask yourself:
    - ☐ How well is it allowing you to execute on key marketing trends, such as personalization, automation, targeting, and omnichannel orchestration?
    - ☐ Does your existing stack support your goals and initiatives for the coming holiday season? To help identify gaps, define your use cases early.
    - ☐ Do all your tools work well together and support your efficiency and innovation goals? Are there other tools that have comparable features that integrate much better with your existing tech stack?

- 
- ☐ **Research the market.** Look outside your organization at what your current vendor partners offer, what other potential vendors offer, and what your peers and competitors are doing. Don't just speak to vendors. Talk with independent analysts and speak with vendor customers—not just referrals from the vendor, but also customers you identify and approach on your own. Ask yourself:
    - ☐ Does your partner roadmap support your long-term business needs? If not, is there another provider that can?
    - ☐ Are your competitors executing programs or campaigns that your technology does not support?
    - ☐ Is your technology able to keep up with the current market trends? Is your technology or partner able to integrate with third parties to support the newest marketing technologies and trends?

“

*Time management is critical even early in the year. Consider the 'Rock, Pebbles, and Sand' analogy. Be certain to get the 'big rocks' of your tech stack in first to ensure success. Target the most impactful projects and develop timelines early to guarantee a streamlined ramp up to the holiday season.*



**John Lillard**

Principal Consultant for Implementation Services, Oracle Marketing Consulting

“

*No one company does it all, especially if you have a robust set of needs across the martech ecosystem. That's why we think deciding between a best-of-breed and a single provider solution is a false choice. We see a hybrid approach as optimal, where you build the core of your program around an integrated stack and then add in niche, specialized bolt-on functionality from best-of-breed providers.*



**Clint Kaiser**

Head of Analytic & Strategic Services, Oracle Marketing Consulting

- 
- ☐ **Start the RFP process.** A request for proposal (RFP) process involves determining your needs, translating those needs into questions, sending those questions to each potential vendor, processing all of the responses, and then making a decision. That takes many months, so if you plan on sending out any RFPs, start as early in the quarter as you can—if you weren't able to at the end of the fourth quarter.
  - ☐ Do not lead with technology. The technology should support your initiative, not define it. Define success criteria based on the business use cases that add the most value to your organization.
  - ☐ Define the process timeline and ensure that it has clear milestones to keep the process streamlined.
  - ☐ Do not neglect the services requirements to support your business—include these in the RFP process. You need to ensure that your prospective partner can support your teams and your business goals.

“

*The biggest mistake I have seen clients make is focusing on technology features instead of success criteria and use cases to support their business. The technology should work for you, not vice versa.*



**Virginia Carcavallo**

Managing Principal Consultant for  
Implementation Services, Oracle Marketing  
Consulting

**Need help implementing your Oracle Marketing Cloud technology?** Oracle Marketing Consulting's Implementation Services team can help get you live quickly and smoothly. Reach out to us at [CXMconsulting\\_ww@oracle.com](mailto:CXMconsulting_ww@oracle.com)

# Planning and running a successful holiday marketing program takes year-round effort. We can help.

Oracle Marketing Consulting has more than 500 of the leading marketing minds ready to help you to achieve more with the leading marketing cloud through...

- Implementation Services
- Platform Training & Adoption Services
- Analytic & Strategic Services
- List Growth & Demand Generation Services
- Database Management & Compliance Services
- Design Thinking & Innovation Services
- Creative Services
- Coding Services
- Campaign Automation Services
- Campaign Deployment & Monitoring Services
- Email Deliverability Services
- Performance Reporting Services
- Website Optimization & Personalization Services
- Social Media Strategy & Analytics Services

**Want help?** Let's talk about how we can work together to seize your opportunities and overcome your challenges. Reach out to us at [CXMconsulting\\_ww@oracle.com](mailto:CXMconsulting_ww@oracle.com)

