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# **Holiday Marketing Quarterly:** **Third Quarter 2021** **Checklist**



The holiday season doesn't have an off-season. Having a successful holiday season means executing a successful year-round strategy. Oracle's Holiday Marketing Quarterly gives you a quarter-by-quarter plan for how to achieve more during the critical holiday season.

The third quarter is focused on the final prep for the start of the holiday season. In this Holiday Marketing Quarterly, we'll cover:

- ☐ Campaign Planning
- ☐ Workload Management
- ☐ Contingency Planning
- ☐ Audience Optimization
- ☐ Performance Monitoring Plans
- ☐ Solidifying Your MarTech Stack

Our goal is to always be thinking at least 3 months out with our clients to ensure proper planning for a successful holiday season is in place. We hope this quarterly checklist helps you stay on track with your planning so you achieve your goals. If you need assistance or support, 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\*\*](#)

# Campaign Planning

What promotions and campaigns is your brand going to run and how can your email, SMS, and push marketing support them? Which days do you want to be in your subscribers' inboxes? How can you treat different segments of your customers differently to maximize your performance and keep your risks in check? Answering all of those questions is part of building a successful holiday campaign plan. Here's a checklist to get your planning underway:

- ☐ **Revisit & review your post-mortem from the past holiday season.** In our [first quarter Holiday Marketing Quarterly](#), we provided a checklist for doing a thorough review of the performance of your last holiday season. Pull out that [holiday post-mortem](#) now!
- ☐ **Finalize the promotional calendar across departments**—merchandising, retail, customer care, supply chain, and other relevant groups within your organization. An overall promotional plan should take into account the holiday behavior of your customers, your business goals, and the merchandising and supply chain realities that you face. Your email promotion plan should then enhance that.
- ☐ **Compile a list of key dates** for all the holidays, occasions, and events throughout the season that your brand wants to be a part of. Check the days, occasions, and events that follow that you want on your campaign calendar, keeping in mind that this year's holiday season is likely to look more like 2019 than 2020:
- ☐ **Holiday hosting and decorations (September – early November).** This messaging is all about getting ready for guests, getting your holiday cards done, and getting your house decorated. Often the messaging about getting guest-ready is as much about Thanksgiving as it is the holidays.
- ☐ **Halloween (Oct. 31).** Traditionally, there's a significant jump in holiday messaging starting on the afternoon of Halloween.
- ☐ **Black November.** Holiday messaging builds considerably throughout the early weeks of November. Oracle Marketing Consulting data finds that Thursdays are particularly effective days to email, with many subscribers likely planning their weekend shopping at that time.
- ☐ **Veterans Day/Singles Day (Nov. 11).** This day appears to be the new kickoff to the holiday season, so plan accordingly. What will you message, how will you personalize it, and how will you convey your brand personality so that your campaign stands out?

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*Don't let your learnings from the past holiday season gather dust. Schedule monthly meetings to ensure you're implementing procedural changes and conducting and planning A/B and multivariate tests to maximize engagement, deliverability, and revenue. Also, while brands had to consider many more contingencies last year than they typically do, it is critical to continue to adjust and plan for new possible disruptions to your holiday plans.*



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



- ☐ **Early Thanksgiving Week (Nov. 21-24).** The strategies here are split, with some brands promoting teasers for Thanksgiving and Black Friday deals and other brands promoting “early access” and other deals that subscribers can act on immediately.
- ☐ **Thanksgiving Day (Nov. 25).** Because most retailers are closed on Thanksgiving or open late in the afternoon, this day is generally about “one-day online-only deals. [Review last year's Thanksgiving Day email trends.](#)
- ☐ **Black Friday (Nov. 26).** Black Friday is routinely the second busiest email marketing day of the year, with lots of the messaging geared toward driving in-store sales. Although coronavirus restrictions are unlikely to be a factor this holiday season, some consumers may be hesitant to participate in doorbusters at stores. For that reason, Black Friday is likely to have a strong online component again this year. [Review last year's Black Friday email trends.](#)
- ☐ **Small Business Saturday (Nov. 27).** In addition to a popular day for small business promotions, many retailers extend their Black Friday deals into Saturday.
- ☐ **Hanukkah (Nov. 28-Dec. 6).** This Jewish holiday is generally only mentioned in secondary content blocks, although a few major retailers dedicate primary content blocks to it on the first day.
- ☐ **Cyber Monday (Nov. 29).** Perennially the biggest ecommerce day of the year, Cyber Monday is also perennially the biggest email day of the year. [Review last year's Cyber Monday email trends.](#)

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*When planning your promotional campaigns, be sure to take into account how long it will take to ship and deliver certain products. For example, furniture often takes weeks to deliver. So, it probably makes more sense to send your ‘Get your home ready for holiday guests’ messaging in September and October than it does in November. Pandemic-related supply chain delays may push out delivery times for more of your products than usual, so account for that, too.*



**Chad S. White**  
Head of Research,  
Oracle Marketing Consulting

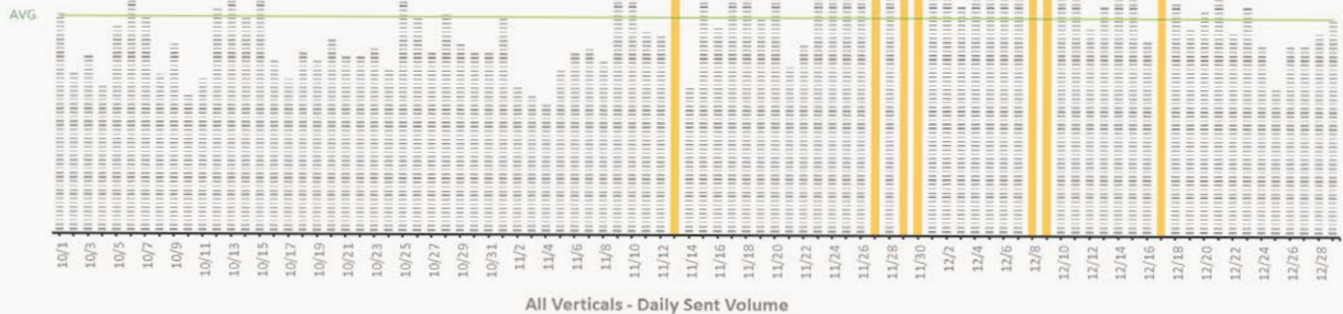
**Need help analyzing your competitors' marketing campaigns?** Oracle Marketing Consulting can help your company review your competitors' holiday campaign strategies for potential learnings to apply to your 2020 holiday strategy. Reach out to us at [CXMconsulting\\_ww@Oracle.com](mailto:CXMconsulting_ww@Oracle.com).



## The Highest Volume Email Days

Every day is competitive, but these were the most competitive in the inbox during the 2020 holiday season

Rank	Date
#1	11/30 Cyber Monday
#2	11/27 Black Friday
#3	12/9
#4	12/8
#5	12/17 Hanukkah
#6	11/13
#7	11/29

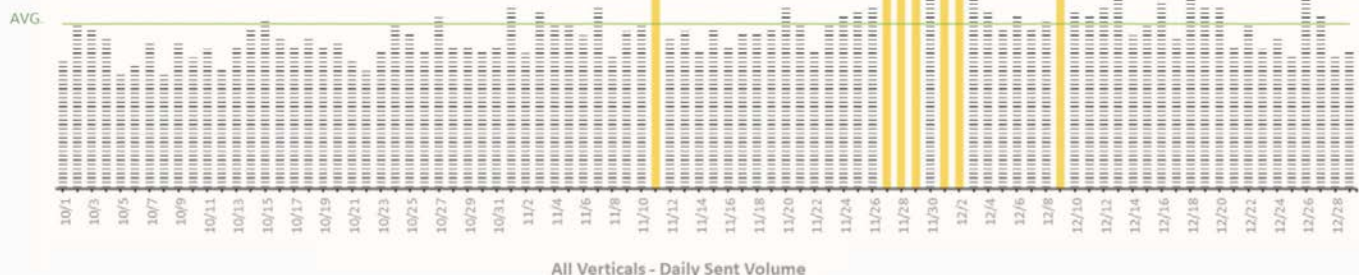


**Reverting to the Norm.** Because of a variety of unique challenges and stresses, the 2020 holiday season (above) looked quite different from the traditional email volume patterns of the fourth quarter. With coronavirus cases declining in the US and the economy reopening, we expect the 2021 holiday season to mostly revert to pre-pandemic norms, as represented by the sending patterns seen during the 2019 holiday season (below).

## The Highest Volume Email Days

Every day is competitive, but these were the most competitive in the inbox during the 2019 holiday season

Rank	Date
#1	12/2 Cyber Monday
#2	11/29 Black Friday
#3	11/28 Thanksgiving
#4	12/9 Green Monday
#5	11/27 Day Before Thanksgiving
#6	11/11 Veteran's Day / Singles
#7	12/1 Day Before Cyber Monday





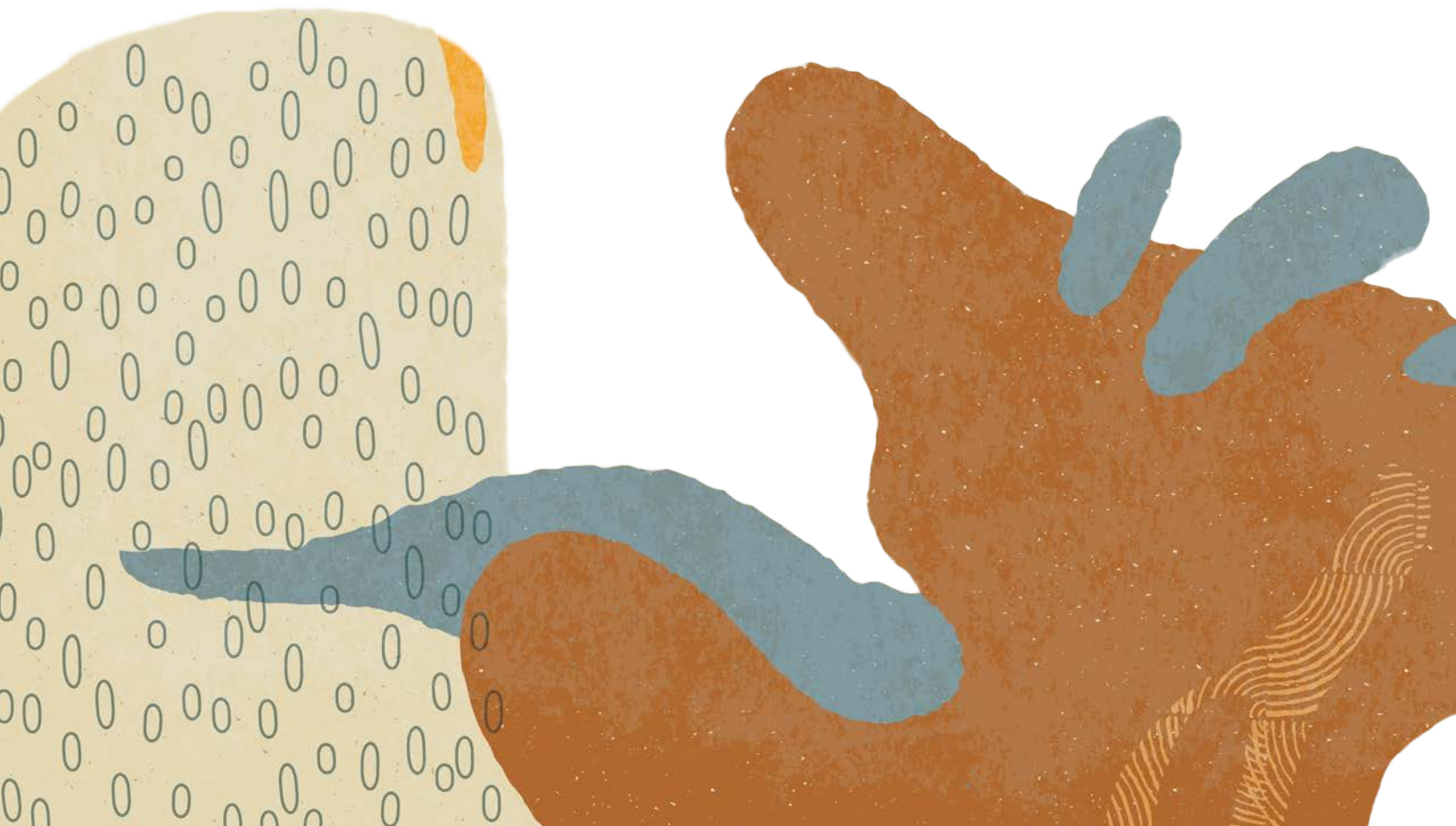
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- ☐ **Giving Tuesday (Nov. 30).** A major occasion for nonprofits, Giving Tuesday also sees many retailers extend their Cyber Monday campaigns either for another day or into “Cyber Week,” which tends to end on the next Thursday. Cyber Week campaigns were common last year as retailers looked to smooth out store traffic.
  - ☐ **“12 Days of Christmas” (early December).** Because of the calendar this year, those retailers that run this campaign of daily deals for 12 days straight will likely start their campaigns between Dec. 1 and 6.
  - ☐ **Green Monday (Dec. 13).** Even before it was branded Green Monday, this day tends to see a spike in ecommerce. Now that’s even more so the case, as consumers start to close out their online shopping.
  - ☐ **Free Shipping Day (Dec. 14).** As free shipping has become ubiquitous, this occasion has become less significant, with few brands mentioning it by name. Even so, some brands do mark the occasion by being in the inbox with a special shipping offer, such as free shipping with no minimum or free express shipping.

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*Wanting to avoid overloading stores, many retailers abandoned one-day sales in favor of week-long sales during the 2020 holiday season. For example, one of our retail clients turned their Cyber Monday sale into a ‘Cyber Week’ promotion and grew their sales by 60% that week versus the prior year. That kind of success may cause some retailers to stick with longer sales this holiday season.*



**Chad S. White**  
Head of Research,  
Oracle Marketing Consulting



☐ **Order-by deadlines for...**

- ☐ **Personalized and customized items.** Engravings, monograms, and other custom embellishments or designs take extra time.
  - ☐ **Oversized and heavy items.** These products are often drop shipped from manufacturers and also often are slower to deliver.
  - ☐ **Standard shipping.** Order-by deadlines can vary by region or state.
  - ☐ **Express and expedited shipping.** Highlight variations and exclusions.
  - ☐ **Overnight shipping.** Highlight variations and exclusions.
  - ☐ **International shipping.** Highlight variations.
- ☐ **Super Saturday (Dec. 18).** The last Saturday before Christmas is generally an occasion to drive in-store sales, but with Christmas falling on the next Saturday this year, there will still be plenty of time to ship orders.
- ☐ **Last-minute gift buying options (Dec. 20-25).** After shipping deadlines have passed, retailers promote store hours, gift cards, and e-gift cards—with the latter promoted as late as Christmas Day, in case “you forgot someone.”
- ☐ **“Happy Holidays” (Dec. 24-Jan. 1).** These holiday greetings messages are sometimes accompanied by promotional secondary messages, but most brands keep them focused on just saying thanks. Since they generally aren’t promotional, brands tend to send them on a day when sales are low—typically, Dec. 24, Dec. 25, or Jan. 1.

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*It’s important to have a compelling inbox story to tell on those critical high-volume days. Do that by front loading your subject lines and preview text with your most compelling offers and promotions. Use emojis to draw visual attention to your inbox messages, but be sure to render test! When your subscribers open your emails, your headline and primary message should seamlessly continue your inbox story for the best user experience.*



**Jason Witt**

Senior Creative Director for Creative Services,  
Oracle Marketing Consulting

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*For LEGO, we’ve created simple Happy Holiday cards. Sometimes this would just be with a message, but other times it would highlight a holiday video they produced for the web. If content is already being created, why not leverage it in email? Since the recipients of these emails have just made their holiday purchases, it may be difficult to motivate them to purchase again. However, if we can continue to give them content that they find interesting, we can stay top of mind for when they are ready to purchase again.*



**Roald Ansano**

Senior Art Director for Creative Services,  
Oracle Marketing Consulting

- ☐ **Christmas Eve (Dec. 24).** This is typically a day for promoting e-gift cards.
- ☐ **Christmas Day till the end of year (Dec. 25-31).** While there are a few promotions for e-gift cards for “people you forgot,” Christmas Day generally marks the start of after-Christmas sales and gift card redemption messaging that encourages people to “get what you really wanted.”
- ☐ **New Year’s (Jan. 1).** Although most B2C brands send messages about New Year resolutions, some send “Happy New Year” messages in lieu of a “Happy Holidays” email if they feel that the days around Christmas are too valuable to dedicate to this kind of message.
- ☐ **“Year in Review” (mid December – early January).** Dec. 31 and Jan. 1 are favorite send dates for these emails, which summarize the unique interactions of customers with your brand. When such personalization isn’t possible, brands typically highlight overall customer usage.
- ☐ **Draft an email cadence and targeting strategy.** For the days, occasions, and events you identified above—plus any others that are important to your brand—determine how many emails will be associated with each one. Also, for each email, determine whether it will be sent to your entire active mailing list or just a segment of it. For the latter, what will the targeting criteria be?
- ☐ **Balance your holiday plan with your deliverability risks.** After you formulate your email cadence and targeting strategy, go back to it and revise it with your deliverability risks in mind. How good is your sender reputation now? Can you improve it before the holidays arrive? Under your current cadence plan, is your holiday email volume ramping up too quickly?

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*Mailbox providers often tighten spam filters during the holiday season. To protect yourself, take an extra close look at your deliverability health before setting your holiday mailing calendar. Now is the time to shore up any weak areas of deliverability health, including low open rates, high bounce rates, high complaint rates, blocklistings, and any of the other factors that weigh negatively against your sender reputation.*



**Daniel Deneweth**  
Head of Email Deliverability Services,  
Oracle Marketing Consulting





- **Develop a testing plan.** Ad hoc A/B and multivariate testing isn't as powerful as having a carefully considered testing schedule. Don't wait until you're in the thick of the holiday season to come up with elements to test. Review your tests from the past holiday season or two and use that to inform a testing plan for this holiday season. High-impact elements to consider testing include **subject lines**, headlines, hero images, and calls-to-action. Our **Website Optimization Ideas to Explore** checklist has some great A/B testing suggestions for images, CTAs, and other elements that are used in both emails and on the web.

- **Work out any adjustments you'll make to your triggered emails.** Will you make **seasonal adjustments to your automated emails**, whether it's holiday-related imagery, copy, navigation links, or secondary messaging blocks? Will you adjust the timing or flow of these emails, such as triggering cart abandonment emails more quickly on Cyber Monday because of faster consideration times on the part of customers? Don't neglect your automated and transactional emails during holiday planning.

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*When reviewing test results, if one version 'wins' according to the primary KPI but loses to a KPI further down the funnel, it might be worth reconsidering the test results and deciding which matters more. Solve for the full funnel.*



**Tommy Hummel**  
Senior Strategic Analyst for  
Analytic & Strategic Services,  
Oracle Marketing Consulting

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*Retailers that have category browse abandonment triggers in place should review that campaign with a holiday lens. Pay close attention to the product categories and product assortments you plan to promote during the holidays so these triggered emails can amplify the impact of planned promotional campaigns.*



**Chris Wilson**  
Strategic Director of Analytic & Strategic Services,  
Oracle Marketing Consulting

**Need help with campaign planning?** Oracle Marketing Consulting's Analytic & Strategic Services team can help you plan an effective holiday marketing cadence, our Creative Services team can help you design and code your campaigns, and our Email Deliverability Services team can help ensure that your emails don't end up blocked by mailbox providers. Want to discuss your needs? Talk to your Oracle Marketing account manager or reach out to us at **[CXMconsulting\\_ww@Oracle.com](mailto:CXMconsulting_ww@Oracle.com)**.

# Workload Management

Now that you have a campaign plan, you need to put the resources in place to be able to execute it. Peak holiday campaign volume is generally about 50% higher than a brand's baseline non-holiday volume—and that doesn't include triggered campaigns, which also need **seasonal refreshes**. Given those increases, you likely won't be able to build all of your campaigns without help or some serious front-loading. Here are some to-dos that address both of those solutions:

☐ **Improve your campaign build process.** Look for ways to shorten the amount of time it takes to conceive, create, and launch your digital marketing campaigns. For example, to speed up production, email marketers are moving away from traditional email templates, where you have a template for every kind of email you send. Instead, they're migrating to **modular email architectures**, where they create a library of content modules that they then stack to create templates and individual emails. This approach is more flexible and adaptive, allowing a brand to swap in and out content blocks that serve specific use cases. Our clients who have adopted a modular email architecture have generally reduced email production time by 25% to 40%.

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*We often create 'holiday templates' for clients that involve streamlining modules and minimizing change to tertiary elements. This reduces our turn-around time to a day or two, allowing us to create reactionary campaigns.*



**James Wurm**  
Head of Coding Services,  
Oracle Marketing Consulting

*We include a holiday gift guide recovery in almost all of our holiday emails. Since shopping behaviors can change pretty drastically throughout the holidays, this recovery module gives additional options to our audience, as well as giving us info to retarget with follow-up emails.*



**Nick Cantu**  
Associate Creative Director for Creative Services,  
Oracle Marketing Consulting

- ☐ **Work ahead on campaign assets** that you know you'll need during the holidays. Start on them now when you have more time. Those assets might include:
- ☐ **Holiday headers.** These logo and header treatments add seasonal motifs, such as snowflakes, snowmen, evergreen trees, and stars.
  - ☐ **Seasonal navigation bars.** The category-level links in your campaign navigation bars should probably change throughout the year to reflect seasonal popularity. During the holiday season, it's fairly common to add a “Gifts” or “Holiday” link to nav bars. Often those seasonal links are stylized in some way. As you plan your nav bar strategy, be sure to look at both desktop and mobile navs, as well as any top and bottom nav structure you might have in your mobile version.
  - ☐ **Secondary holiday messaging blocks.** Do you have products or product categories that you routinely promote during the holiday season? Think about both your broadcast/segmented campaigns and your automated/transactional campaigns. If so, create promotional messaging and email content blocks for those now.
  - ☐ **Gift guide recovery module.** These content blocks go toward the bottom of your emails and typically present links to a range of product categories that are popular with your gift shoppers.
  - ☐ **Gift services footers.** These modules are also placed near the bottom of your emails and include details on or links to gift guides, order-by deadlines, gift wrapping, return policies, financing options, and other information that's more important during the holiday season.

☐ **Start designing any special or seasonal campaigns early.** Are you using a one-off design for your Thanksgiving, Black Friday, or Cyber Monday campaign? Are you doing a “12 Days of Christmas” campaign? Will any of your holiday emails involve interactive email elements, especially ones you don’t have much experience with? Start working on these campaigns now so they can be in a nearly complete state going into the holiday season. Try to get as many emails as possible 80% to 90% done.

☐ **Develop a plan for handling workload increase during the holiday season.** Even doing some work ahead of time, the increases in campaign development during the holiday season can be substantial for many B2C brands. Consider the following options to secure extra resources:

- ☐ **Shift people internally temporarily to help with campaigns,** whether it’s on a part- or full-time basis for the season. Do you have web developers that you can train up so they can help with email coding? Do you have copywriters elsewhere within marketing that can be trained up to help with SMS copywriting? Do you have designers elsewhere within marketing that can be trained up to help with push campaigns? If so, start training these people now in the nuances of these marketing channels.
- ☐ **Hire freelancers or an agency.** When you need expert help for a limited period of time, this is often the best solution.

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*We’ve developed several production efficiencies to be able to handle the 3-4X increase in email volume that we experience with some of our clients. We map out send dates, holidays, sales, etc. and have it all approved in advance. Next, we create email wireframes outlining our content plan. This provides clear messaging direction to our team members before they start work on a campaign.*



**Nick Cantu**

Associate Creative Director for Creative Services,  
Oracle Marketing Consulting

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*For one client, we built a ‘12 Deals of Christmas’ template that stuck to a format and we created the emails weeks in advance. They were easy to adjust if testing was incorporated, an offer was changed, or if inventory shifted and a product needed to be swapped. The overall goal is to have an arsenal of email content built out and ready for deployment.*



**James Wurm**

Head of Coding Services,  
Oracle Marketing Consulting

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*Having a **modular email system** can help increase efficiencies for both creative and development teams. If you’re looking to get a head start on workflow efficiencies, align your creative and development teams ahead of time to ensure your planned creative is both creatively and technically sound.*



**Jason Witt**

Senior Creative Director for Creative Services,  
Oracle Marketing Consulting

## Need help with your holiday campaign workload?

Oracle Marketing Consulting’s Creative Services and Coding Services teams can help you handle peak holiday campaign production, as well as craft seasonal designs, gift services footers, holiday headers, and other digital marketing assets. Our Campaign Deployment & Monitoring Services team can help with deployment, quality assurance, and other campaign services. Want to discuss your needs? Talk to your Oracle Marketing account manager or reach out to us at [CXMconsulting\\_ww@Oracle.com](mailto:CXMconsulting_ww@Oracle.com).



# Contingency Planning

Planning for the unexpected is an everyday practice, but during the holiday season it takes on heightened importance because so much is at stake. Get prepared with this to-do list:

- ☐ **Create or update your apology template.** In addition, [understand when you should send an apology or correction](#) and then have a clear, documented plan for how you'll handle them. Hopefully you won't need it, but the holiday season has historically been ripe for apologies and corrections due to campaign content mistakes and websites crashing under Black Friday or Cyber Monday traffic.
- ☐ **Plan for potential winter storms and other natural disasters.** What will you do if you have to close stores or your deliveries are delayed because of a storm or disaster? Be prepared to send a [geo-segmented crisis message email](#) to those affected, whether it's an update about store closures, a change in hours, or other service updates. Have a designated email template ready to go to handle these kinds of notifications to subscribers. Here are [examples of how brands have responded to past storms](#).

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*If we've learned anything from the past 18 months, it's that email is the channel businesses use to [communicate quickly and effectively during a time of crisis](#). Being proactively prepared with pre-built templates or ready-made emails is a way email teams can try to get out in front of last-minute and emergency requests. On the targeting front, having a 'contingency filter' ready with a preset target audience on file that you know you can launch quickly is a good idea.*



**Peter Briggs**

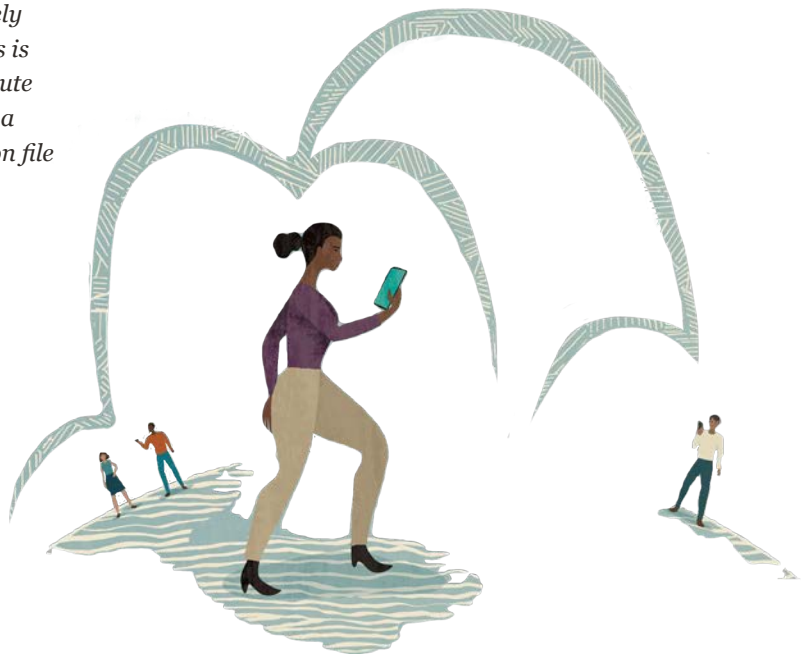
Director of Analytic & Strategic Services,  
Oracle Marketing Consulting

## Want to make sure you're prepared to respond to a crisis?

Oracle Marketing Consulting's Campaign Deployment & Monitoring Services team offers crisis and rush campaign support with 24x7 follow-the-sun coverage that can help your company get a critical message out the door in 2 hours or less.

Want to discuss your needs? Talk to your Oracle Marketing account manager or reach out to us at

[CXMconsulting\\_ww@Oracle.com](mailto:CXMconsulting_ww@Oracle.com).



# Audience Optimization

A key element of holiday marketing success is having a healthy, engaged, and growing audience going into November. All three of those elements are important because a large list doesn't mean much if subscribers aren't engaged and campaigns to them are junked or blocked. Here's our checklist for optimizing your audience going into the holidays:

- ☐ **Maximize your best audience acquisition sources.** Examine the performance of your audience acquisition sources, whether it's the signup form on your homepage, on your in-store kiosks, during checkout, or any number of other places. [Optimize your signup forms](#) and drive more traffic to the ones that are producing the most value—that is, the number of subscribers from that source multiplied by the average monetary value of those subscribers. At the same time, deemphasize or shut down sources that produce lots of subscribers who are low-value and prone to complain.
- ☐ **Reactivate inactive subscribers.** For example, 30% to 50% of an email list is typically composed of [inactive subscribers](#) who haven't opened or clicked one of your emails in many months. Getting some of those subscribers to reengage is a form of list growth because you're building your active email list. Higher subscriber engagement also helps boost deliverability. Whatever the channel, launch your reengagement efforts early in the third quarter.
- ☐ **Ask your subscribers about their holiday intentions and interests.** Because of once-a-year gift buying, subscriber behavior from earlier in the year may not be a good guide to their holiday shopping interests. Consider sending a progressive profiling campaign in the early weeks of November to find out what kinds of products your subscribers will be most interested in this holiday season.

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*Many senders wait until the holiday season to kick off reactivation programs, but these efforts will most likely cause some short-term harm to your sender reputation. So, do your reactivations early—especially of older list segments—and allow time for your reputation to recover to healthy levels before you reach holiday peak season.*



**Daniel Deneweth**

Head of Email Deliverability Services,  
Oracle Marketing Consulting

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*Sony sent a fantastic progressive profiling campaign one year where they asked subscribers in early November, 'Which of these six product categories would you like a Black Friday deal for?' Subscribers clicked the one they were most interested in and they received a deal for it on Black Friday. It was straightforward messaging that was a win-win for Sony and the customer.*



**Chad S. White**

Head of Research,  
Oracle Marketing Consulting

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☐ **Review and optimize your welcome programs.**

Typically, brands see a large influx of new subscribers during the fourth quarter. Ensure that you're making the best first impression and driving value immediately by [reviewing your welcome program](#) for your email, SMS, and push channels, especially if you haven't for a while. Specifically...

- ☐ **Audit your existing welcome programs.** If you're using [double opt-in](#), make sure that it's functioning properly and that your opt-in confirmation request is clear and doesn't have anything to distract recipients from confirming their signup. Ensure that your first welcome campaign is being triggered immediately after signup, has clear branding, and is generating value. Check the content and timing of subsequent welcome messages.
- ☐ **Seasonalize your welcome programs.** Consumers who sign up for your promotional emails, texts, and push messages during the fourth quarter are likely looking for gift ideas and discounts. [Add seasonal imagery and messaging to your welcome campaigns](#) to better serve these gift-minded subscribers. Consider adding a welcome message to your series that highlights your gift guides, gift wrapping services, and other holiday offerings and services.

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*It is important that your technology solutions are nimble enough to make updates across templates and that your team can implement strategy changes close to real-time. Be sure that any changes made are accurately reflected in both your broadcast and automated campaigns, and make sure they stay updated throughout the holiday season.*



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

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*Have a strong THANK YOU game. You can drive high re-engagement rates and build loyalty with your new customers during the holidays by sending welcome and transactional emails that show appreciation and educate them about the value of your brand and your email program. Let's face it, first impressions are everything! Start your new holiday relationships off right with sincere messages that demonstrate empathy and value to your new customers.*



**Jason Witt**  
Senior Creative Director for Creative Services,  
Oracle Marketing Consulting

**Want to grow your list and improve your onboarding?** Oracle Marketing Consulting's List Growth & Demand Generation Services team can help you audit your subscriber acquisition sources, optimize them so maximize safe list growth, and avoid problematic sources that are hurting your deliverability. And our Campaign Automation Services team can help you improve your welcome campaigns and other automated campaigns. Talk to your Oracle Marketing account manager or reach out to us at [CXMconsulting\\_ww@Oracle.com](mailto:CXMconsulting_ww@Oracle.com).



# Performance Monitoring Plans

The holiday season moves quickly, with lots of campaigns and lots of action. To ensure that your plans are on track, keep a close watch on your performance metrics. Here's our analytics and reporting checklist:

- ☐ **Identify ongoing holiday reporting needs.** What email performance data do you need, how often do you need it, and what support is needed to get it? Your strategies may need day-to-day adjustments—or morning-to-afternoon adjustments in some cases. Make sure you have timely data to drive those decisions.
- ☐ **Be prepared to review analytics and performance results quickly so it can inform upcoming campaigns.** The results of your Thanksgiving Day campaign hold insights that can improve your Cyber Monday campaign, and the results of your Cyber Monday campaign holds insights that can improve your Green Monday campaign—but only if you're set up to review your analytics in a timely fashion and translate your data into insights you have time to act on. Have a plan for how you'll do this, particularly in the run-up to launching key campaigns.
- ☐ **Pre-determine performance tolerance levels.** For each of your key performance indicators, what are your lower bounds below which corrective action is needed?
  - ☐ **Opens.** What's the minimum average **open rate** you can tolerate before needing to tighten your engagement segmentation?
  - ☐ **Revenue.** If you miss an email marketing revenue target for a week, how will you respond? Will you do additional A/B testing? Send a remarketing campaign or an additional segmented email? Will you target more broadly, risking a dip in engagement? Whatever your plan, be prepared to deal with the negative consequences, whether it's more email production costs or a hit to your deliverability.
  - ☐ **Deliverability.** What will you do if you see a decrease in your inbox placement rates? **The causes of deliverability problems** can vary widely, but you should have an action plan for adjusting targeting across inbox providers.
  - ☐ **Unsubscribes.** Pay extra attention to how your most valuable subscribers are reacting to your holiday campaigns.

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*The impact of anything you are doing is so magnified during the holiday period that any learnings or results matter so much more. You need to be almost maniacal about measuring your campaigns, programs, and audiences to drive incremental ROI at the most important time of the year.*



**Doug Sundahl**

Senior Director of Analytic & Strategic Services,  
Oracle Marketing Consulting

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*As you ramp up volume and frequency during peak holiday weeks, it is critical to monitor KPIs around file health to ensure you understand the impact of increased mailing frequency. Remember, sending more volume can 'dilute' your unsubscribe rate, so you may not see your rate spike but you could be seeing significantly more total unsubscribes from the more aggressive frequency.*



**Peter Briggs**

Director of Analytic & Strategic Services,  
Oracle Marketing Consulting

**Need ready access to key performance data?** Oracle Marketing Consulting's Performance Reporting Services team can enable you to make more data-driven decisions, helping you access important data, focus on the right KPIs, view your performance holistically, and gain critical context for your metrics. Talk to your Oracle Marketing account manager or reach out to us at [CXMconsulting\\_ww@Oracle.com](mailto:CXMconsulting_ww@Oracle.com).

# Solidify Your MarTech Stack

Adding to, updating, or making big changes to your marketing technology stack during the holiday season invites disaster. Here's our checklist for avoiding problems:

☐ **Finish implementing any new martech tools** by the end of quarter—or by mid October at the latest!

- ☐ Does your martech solution have the bandwidth and proven up-time to ensure your holiday mailings are supported?
- ☐ Do you have all the tools to support holiday messaging? For example, [Oracle Infinity Streams](#) can be implemented to support real-time out-of-stock and back-in-stock triggered emails.
- ☐ Are all your critical integrations with data and reporting systems ready to drive your messaging to your holiday audiences?
- ☐ For your email program, are any IP warmup plans set to finish before the end of October?
- ☐ Have you left enough time for your marketing team to get trained on the new solutions?
- ☐ Does the addition of new technology require any process changes?

☐ **Get new service and partnership relationships firmly established.** It's not just new tech that can trip you up. With services, make sure that responsibilities are clearly delineated, processes are solidly in place, and lines of communication are open. Understand what happens if you have an issue that needs to be escalated during the holiday season.

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*When implementing any new marketing technology, make sure you allow time for change navigation. Not only do you need to have the time to fully implement the solution, integrate it, connect all the data streams, and fully test it, but you need to train your team on the platform and institute process changes.*



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

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*For most B2C companies, Q4 will drive as much website traffic as the rest of the year combined. Ensure you have behavioral and inventory triggers in place to react to the expected traffic. Low-Inventory notifications, back-in-stock triggers, wish list alerts, and others should be at the top of your list to be ready-to-roll before Q4. If you don't have inventory-based trigger capabilities, [Oracle Infinity Streams](#) can help you respond to these critical behavior opportunities.*



**Peter Briggs**  
Director of Analytic & Strategic Services,  
Oracle Marketing Consulting

**Need help getting your Oracle technology live quickly?** Oracle Marketing Consulting's Implementation Services team can help you make sure your Oracle technology is configured to integrate seamlessly with your current infrastructure to perfectly meet your specific marketing, business, and analytics goals. Talk to your Oracle Marketing account manager or 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.

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