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# Holiday Marketing Quarterly: Fourth Quarter 2020 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.

The fourth quarter is focused on wrapping up your final prep and then taking action during the holiday season to maximize results and minimize problems. In this Holiday Marketing Quarterly, we'll cover:

- Engaging Seasonal Buyers
- Automated Campaign Adjustments
- Leveraging New Capabilities
- Cross-Channel Coordination
- Incremental A/B Testing
- Finalizing Your Plans

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. And, of course, if you'd like assistance, we're always here to help.



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

# Engaging Seasonal Buyers

Year-round shoppers are great, but once-a-year shoppers can make the difference between a great holiday season and a lousy one. Make sure that you give your seasonal customers the attention they deserve. Here's a to-do list:

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- Reengage your seasonal buyers.** Because they're buying for others instead of themselves, some of your customers only purchase from you during the holiday season. After potentially many, many months of inactivity, you may have moved these subscribers to a suppression list to protect your email engagement rates and sender reputation. As you start to kick off your holiday messaging, it's the perfect time to move these seasonal buyers back to your active list. However, this needs to be done in a methodical manner to avoid deliverability problems.

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- Do progressive profiling.** Because they're suddenly buying for others instead of themselves, a customer's buying habits from the past 9 months may be almost completely useless during the holiday season. That means that it's difficult to personalize and segment messages effectively. One solution is to do some progressive profiling, where you poll your subscribers about, for example, which products or product categories they're interested in deals on this holiday season.

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*Some of your customers are likely to be seasonal shoppers. This 'gift-givers' segment may have been inactive since the last holiday season. Testing a holiday-themed reactivation series is worth a shot while they may be starting to think about holiday gift ideas.*



**Roald Ansano**

Senior Art Director for Creative Services,  
Oracle CX Marketing Consulting

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*We often refer to progressive profiling as a 'hand-raising exercise.' Give your consumers an opportunity to raise their hand and let you know that they want to hear from you, and more specifically what they want to hear from you about, and then deliver against those expectations. The value you provide to them in this process will pay dividends to you.*



**Doug Sundahl**

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

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- **Managing seasonal shoppers post-holidays.** The flipside of reengaging seasonal shoppers is having a clear plan for retaining these shoppers after the holidays. Make it attractive for these customers to stay subscribed by giving them the option to opt-down to receive emails less frequently, as well as the option to pause their subscription for anywhere from 1 to 3 months.

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*Many seasonal buyers sign up for email during the holidays to make sure they're getting the best deals, but then unsubscribe in late December and January. To retain more of these subscribers, consider reducing frequency to less engaged recipients during this window and beyond. With many of our clients, we use a predictive analytics model to identify recipients who are likely to opt out because of fatigue and then manage them by decile.*



**Heather Goff**

Strategic Director of Email Deliverability Services,  
Oracle CX Marketing Consulting

**Need help managing your seasonal shoppers?** Oracle CX Marketing Consulting's List Growth & Demand Generation Services team can help you quickly and safely grow your audience, while also keeping an eye on maximizing retention both during and after the holidays. Want to discuss your needs? Reach out to us at [CXMconsulting\\_ww@Oracle.com](mailto:CXMconsulting_ww@Oracle.com).

# Automated Campaign Adjustments

In our **first quarter Holiday Marketing Quarterly**, we encouraged you to optimize your automated campaigns, in addition to setting up new ones. Going into the holiday season is another opportunity to optimize your triggered emails so they work their hardest for you during this pivotal time. Here are a few to-dos:

- Make your automated email content seasonally relevant.** Find ways to bring the holiday season into your triggered campaigns, particularly your welcome, shopping cart abandonment, browse abandonment, and back-in-stock emails. Keeping in mind that seasonal design changes should be coordinated with those that you plan to make in other channels, consider the following changes:
  - Seasonal messaging.** Acknowledge in your copy that your subscribers are getting these emails during the holiday season by speaking to their seasonal needs and how your company can help.
  - Seasonal imagery.** Add snowflakes, snowmen, Christmas lights, and other visual motifs to your automated campaigns.
  - Seasonal navigation bar links.** Add a “Gifts” or “Holiday” link to the nav bar in your triggered emails.
  - Secondary seasonal messaging.** Add secondary messaging that speaks to shoppers’ needs during the holiday season, whether it’s promoting gift guides, order-by deadlines, gift wrapping services, financial options, or other helpful content.

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*Automated messages perform so well that they’re often overlooked as not needing attention. However, it’s because of their high engagement and conversion rates that we should be constantly giving them extra attention and trying to make them even better. This is especially true during the holiday season, when automated campaigns should be updated to communicate curbside pick up procedures, holiday store hours, holiday return policies, order-by deadlines for Christmas delivery, and other vital information for seasonal shoppers.*



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



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**Adjust the timing of your abandonment triggers.**

Outside of the holiday season, it can make sense, for example, to delay the sending of a cart abandonment email for hours to avoid disrupting normal buying behaviors. However, during the holidays, decisions are typically made much more quickly—particularly on Thanksgiving, Black Friday, Cyber Monday, and Green Monday—so you'll likely want to adjust abandonment emails to trigger more quickly, if not immediately. Also, while you might use suppression rules to ease subscribers into your promotional message stream normally, new subscribers in November likely signed up precisely to get all of your promotional emails, so turning off suppression may be wise

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**QA your automated campaigns.** After you make those adjustments, do some quality assurance testing, because this is the time of year when you least want your automated campaigns to break. Check:

**Text.** Is it still communicating what you want? Is it still on brand? Is it free of typos? Are the fonts (and font fallbacks) correct?

**Links.** Does every button and link work? Do they take your subscribers to the most appropriate and efficient landing page? Be sure to check your navigation bars, recovery modules, and the administrative links in your footers and headers.

**Mobile version.** Mobile optimization is as important as ever. While more people have been working from home and vacationing at home, **the pandemic has not changed mobile email reading behavior.** Plus, **we expect mobile to play a bigger role this holiday season** due to store limitationst.

**Rendering.** Inbox providers change their code support periodically, and rarely announce changes. Run a thorough rendering and functionality check before heading into the holiday season.

**Any new content.** New content modules, text, images, and links should get extra QA scrutiny to ensure they are correct.

**Trigger logic.** Check the rules that govern when each of your automated campaigns will be sent. As previously mentioned, consider making tweaks.

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*Consider adding rules for ‘Last Ship Date’ to your cart and browse abandonment triggers. These rules can accelerate triggered timing or add banners or other messaging within the body copy that encourages shoppers to purchase by a certain date to ensure on-time delivery.*



**Roald Ansano**

Senior Art Director for Creative Services,  
Oracle CX Marketing Consulting

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*During the 2019 holiday season, mobile visits to retail sites comprised 58% of traffic, which was up 14% year over year, according to ADI. Given the reluctance and potential inability of many shoppers to go into stores during holiday 2020, we expect both overall traffic and the percent associated with mobile to increase, so pay extra attention to your mobile email version.*



**Clint Kaiser**

Head of Strategic & Analytic Services,  
Oracle CX Marketing Consulting

**Want to boost the performance of your triggered email campaigns?** Oracle CX Marketing Consulting's Campaign Automation Services team can help you with everything from conception to launch, and from A/B testing to seasonal optimization. Want to discuss your needs? Reach out to us at **CXMconsulting\_WW@oracle.com**.

# Leveraging New Capabilities

Chances are that you have more technological firepower at your disposal this holiday season than you did last time around. Make sure that you're familiar with it and can leverage it to increase your holiday returns. Consider this to-do list:

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**New email service provider capabilities.** Every quarter, your digital marketing platform is rolling out new improvements and new functionality. That's certainly the case here at Oracle Responsys and Eloqua. For example, we've recently released **Send Time Optimization, RFM Scoring**, Intelligent Switches, Fatigue Analysis, integration with **Oracle Infinity**, and much, much more. To see all of the new digital marketing capabilities we've released in recent quarters, check out **Responsys' New Feature Summary** and **Eloqua's New Feature Summary**.

**New third-party tools and integrations.** Have you added a new digital marketing, ecommerce, payment, or other kind of tool to your toolbox this year? If so, make sure that you've integrated it into your workflow and have your team trained on how to use it effectively. For your existing third-party tools, make sure that you're up to date on the latest improvements, enhancements, and integrations that might save you time or give you a performance boost.

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**New data.** Every piece of new data that you've gained this year means new possibilities for targeting and personalization. Have you added new data structures, merged data from other channels, or appended 3rd-party data? If so, see what's possible now that wasn't last holiday season.

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*We've noticed increased demand for mobile wallet functionality, especially among retailers investing in their loyalty programs ahead of the holidays. Responsys' seamless integration with Popwallet makes cross-channel pass distribution, real-time pass updating, and usage analysis incredibly easy.*



**Myles Libby**  
Account Director,  
Oracle CX Marketing Consulting

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*Enhancing your subscriber profile with data from **Oracle Data Cloud, Oracle DataFox**, and other sources can not only increase your personalization and segmentation opportunities, but it can also help you determine what portion of your list is safe to mail. For example, in the absence of recent opens or clicks, identifying recent purchase behavior can indicate that an address is safe. If you don't have a purchase associated with an email address, it's possible another brand might. As long as you can tie a purchase back to an email address, it drastically reduces the risk that the address is a spam trap that could land you on a blocklist.*



**Heather Goff**  
Strategic Director of Email Deliverability  
Services,  
Oracle CX Marketing Consulting

## Want to ensure that you're getting the most out of your Oracle products?

Oracle CX Marketing Consulting's Platform Training & Adoption Services team can help you with basic training, deep dives, and updates on new functionality. Want to discuss your needs? Reach out to us at [CXMconsulting\\_WW@oracle.com](mailto:CXMconsulting_WW@oracle.com).

# Cross-Channel Coordination

Even more than in past years, this holiday season is an all-hands-on-deck situation. Make sure that all of those hands know what the other hands are doing. The holiday season holds lots of opportunities for cross-channel learnings. Here are some to consider:



- Share cross-channel insights.** Go beyond coordinating and synchronizing your omnichannel campaigns. Also use insights about how your customers and prospects are behaving in one channel to inform your actions and messaging in other channels. Consider sharing and using the following insights:
  - Site search insights.** What your site visitors are searching for is a real-time barometer of consumer interest. Consider featuring the most searched-for products and categories on your homepage, as well as promoting them in your search and social ads and in your promotional emails, SMS, and push messages. Also, consider using your most popular site search terms in your email subject lines, preview text, and body copy, or featuring a list of “Top Searches” in your emails.
  - Paid search insights.** Use your more successful paid search terms in your email subject lines or body copy. Also consider using paid search to A/B test promotional language and then use the winner in your emails.
  - Social insights.** Use your popular social content to inform the products, topics, copy, and other content you use in your email, SMS, push, and other messages.

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*If you're unable to effectively share insights across business units or channels within your organization, is your digital agency better equipped to serve as that connective tissue? Can they facilitate the cross-pollination of what's working in one area and how that might be applied in another? Oftentimes they have that view across various activities and can be a valuable partner in accomplishing this.*



**Clint Kaiser**

Head of Strategic & Analytic Services,  
Oracle CX Marketing Consulting

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- **Cross-channel training.** Having a flexible marketing team is going to be extra important this holiday season because of the increased potential for staff shortages. Consider doing some basic cross-training now to prepare your team. For example, teach some of your web developers the basics of email development and help your graphic designers understand email design better.

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*Holiday has always been a time to take an Art of War approach and lay out the most fastidious plans in order to be able to gracefully adapt when they do, inevitably, change. This means both building careful calendars and cross-training multiple resources to support them.*



**Lisa Stephens**  
Vice President of Creative,  
Oracle CX Marketing Consulting

**Want to improve your cross-channel orchestration?** Oracle CX Marketing Consulting's Strategic & Analytic Services can help with cross-channel insights, our Website Optimization & Personalization Services team can help with landing page optimization, and our Social Media Strategy & Analytics Services team can help with social media insights and strategy. Want to discuss your needs? Reach out to us at [CXMconsulting\\_WW@oracle.com](mailto:CXMconsulting_WW@oracle.com).

## Incremental A/B Testing

The time for finding new global maximums has passed. Now is the time to **find new local maximums by testing small changes** to yield incremental gains. Here are some tests to consider:

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- **Subject line and preview text.** Subject lines are the most tested email element, which is justified since they have the second biggest impact on opens after your sender name. But don't forget to test your preview text, which also has a sizable impact on engagement. Be aware of these **6 trends in subject line writing**.

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*For sends early in the season, we recommend focusing your subject line testing around messaging that's warm and filled with your brand voice, employing holiday-focused language that plays into the excitement and anticipation of the season. Later, focus your testing on more urgent language around key dates like Thanksgiving and Cyber Monday, as well as when shipping deadlines start to loom.*



**Marisa Crawford**  
Senior Copywriter for Creative Services,  
Oracle CX Marketing Consulting

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**From name.** You always want to lead with your brand name so you're maximizing recognition in the inbox. However, you should consider building on that by using **from name extension strategies** to increase relevance. For example, during the holiday season, you could emphasize a limit-time seasonal offer by testing the sender name "YourBrand Black Friday" or "YourBrand - Cyber Monday" on those occasions. You can also use *from name extensions* to differentiate your high-ROI automated campaigns from your broadcast promotional campaigns.

**Headlines and subheads.** Similar to subject lines, your copy heads are a great place to test different keywords, clever vs. direct language, emotional vs. functional appeals, company- vs. customer-centric phrasings, and more.

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**Heroes and other images.** Imagery is powerful for most brand communications, which is why HTML emails almost always outperform plain-text emails. Consider testing different kinds of images in your emails: functional vs. lifestyle, company-produced vs. consumer-generated, static vs. animated images, variations on model posing and croppings, and more. During this time of social distancing, traditional model shoots are more difficult. More planning and creativity may be required.

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*Clients have seen the most success by being very selective in choosing which promotions, lifecycle triggers, and other messages to use from name extensions with. That's the best way to ensure that the impact from changing up your sender name doesn't get diluted.*



**Peter Briggs**

Director of Strategic & Analytic Services,  
Oracle CX Marketing Consulting

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*For apparel, we've found that fit on model tends to be important to female shoppers, whereas male shoppers tend to value seeing product details much more. Depending on your audience and the garment you're promoting, you can test these different product images to confirm what resonates most with your subscribers.*



**Alexander Stegall**

Strategic Analyst for Strategic & Analytic Services,  
Oracle CX Marketing Consulting

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- **Calls-to-action.** Your CTA tells your audience what you'd like them to do next. Depending on the messaging that precedes it, they'll be more receptive to taking certain actions over others. For example, consider testing high-intent vs. low-intent CTAs (i.e., "buy now" vs. "learn more"), broad vs. narrow CTA language (i.e., "shop all" vs. "shop men's"), buttons vs. links, large vs. small buttons, or displaying a hierarchy of CTAs, such as having a solid button with "Shop now" next to ghost buttons that ask people to shop certain product categories.
  - **Send time.** Work-from-home schedules, high unemployment, and disrupted social lives have all contributed to **significant shifts in open time behaviors during this pandemic**. With Thanksgiving, Black Friday, and the holiday season as a whole **much more likely to be about driving ecommerce sales than store visits this year**, testing different send times will be smart investments of your time. It also means that you can rely much more than usual on the recommendations from your **send time optimization engine**, if you use one.

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*Send Time Optimization (STO) engines improve with time as subscriber behavioral data is collected and analyzed. Many of our clients are training up their STO engines now so that they will be able to learn and adapt to subscribers' behaviors in time for the holiday season.*



**Amy McNeil**  
Account Director,  
Oracle CX Marketing Consulting

### Need help with your A/B testing?

Oracle CX Marketing Consulting has experts to help you ensure that you're doing testing right, and getting the best results across any digital marketing channel. Want to discuss your needs? Reach out to us at

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

## Finalizing Your Plans

Santa checks his list twice and so should you. In our **third quarter Holiday Marketing Quarterly**, we encouraged companies to make a variety of plans ahead of the holiday season. Now is the time to do a final review of those plans, making adjustments and filling gaps. Here are the different plans to finalize:

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- **Campaign plans.** You'll want to lock down your campaign calendar early in the quarter so everyone can get on the same page and you can maximize coordination across channels. If you're still not 100% confident in your plans, here is our advice for **choosing the best days to send email campaigns this holiday season**.

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*For holiday campaigns, we're strongly advising clients to skew early to reduce risk associated with coronavirus restrictions, staff shortages, delivery delays, and other potential problems in late December. We expect more email volume pre-Black Friday and less after Green Monday, which is Dec. 14.*



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

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**Workflow plans.** This plan should be two-fold. First, work ahead as much as possible, creating or at least drafting the messages and assets that you know you'll need this holiday season. For email marketing, those will likely include seasonal elements such as holiday headers, seasonal navigation bars, and gift services footers. And second, have a plan for how you're going to handle the increase in workload demands on your digital marketing team. In addition to cross-training your staff as we mentioned earlier, consider contracting with freelancers or agencies to get additional help. Unfortunately, this holiday season there's a higher-than-usual risk of staff shortages due to a likely second wave of coronavirus infections, so make sure you have backups in place.

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**Contingency plans.** Update your apology email template and have concrete plans for what you will do in terms of messaging if your stores or deliveries are impacted by coronavirus or a winter storm. 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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*Make sure you have a way to get a hold of your ESP, digital agency, and other partners. If you have a single point of contact, recognize that could become a single point of failure and make sure you have multiple contacts, including any 24/7 customer service centers. If you have a problem at 1am on Black Friday, you want to make sure you can reach someone.*



**Lauren Kimball**  
VP of Agency Services,  
Oracle CX Marketing Consulting

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*With a second wave of coronavirus infections widely predicted this winter and extreme weather becoming more common, brands need to make sure they're ready to react quickly with messaging that keeps their customers informed. We recommend that companies be able to send an alert message within 2 hours of deciding to do so.*



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

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- **Performance monitoring plans.** Ensure that you have access to and are regularly reviewing the performance of your digital marketing campaigns so you can make adjustments to future campaigns or to your messaging strategy overall. Consider pre-defining what you'll do if your revenue or response rates, for example, drop below a certain level. Having even a rough outline of a plan will help you avoid knee-jerk decisions that you may later regret.

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*Have a detailed plan documented ahead of time that maps out what you'll do if performance metrics look soft. That plan should include confirming who is authorized to approve changes on the fly, as well as an agreed upon definition of what requires action and what does not. Having a playbook of supplemental campaigns and even audience filters pre-built will give everyone a sense of comfort and control, and enable changes to go into effect as they're needed.*



**Heather Goff**

Strategic Director of Email Deliverability Services,  
Oracle CX Marketing Consulting

**Need backup this holiday season?** Oracle CX Marketing Consulting's experts can supplement your in-house team, helping with select tasks such as creative or coding, or taking over entire functions such as campaign deployment or performance reporting. Our Crisis & Rush Campaign Support can also ensure that your emergency messaging gets out the door in 2 hours or less with our 24x7 follow-the-sun coverage. Want to discuss your needs? 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 CX Marketing Consulting has more than 500 of the leading marketing minds ready to help you to achieve more with the leading marketing cloud through...

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**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). Or **visit us online**.