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Holiday Marketing Quarterly: Second Quarter 2020 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 B2C brands a quarter-by-quarter plan for how to achieve more during the critical holiday season with their email marketing and other digital marketing channels.

The second quarter is focused on finishing your review of the 2019 holiday season, improving your subscriber acquisition and retention practices, improving performance visibility, and experimenting with new tactics and strategies. In this Holiday Retail Marketing Quarterly, we'll cover:

- Holiday Messaging Competitive Intelligence
- Subscriber Acquisition Source Optimization
- Unsubscribe Process Optimization
- Preference Center Refreshes
- Improved Analytics & Reporting
- Experimentation & Testing

Our goal with our clients is to always be thinking 3 to 6 months out so they can avoid stalling out. We hope this quarterly checklist helps you plan ahead and stay on track 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.



Clint Kaiser
Head of Strategic Services
Oracle CX Marketing Consulting

Holiday Messaging Competitive Intelligence

In our first quarter Holiday Marketing Quarterly, we encouraged you to do a holiday post-mortem to uncover the areas where you underperformed and outperformed. Now that you've looked inward, let's next look outward at what your competitors did.

Competitive tracking: Look back at how your competitors used the email channel during the holiday season. Hopefully members of your marketing team have signed up to receive your competitors' email campaigns, so you can assemble key data points. But even if you did, we recommend using a service like **SparkPost Competitive Tracker**, which not only aggregates email campaigns, but also provides some performance data. Consider pulling together the following information:

- Number of campaigns**, keeping in mind that this should vary by subscriber or customer segment
- Send volume and projected reach**, keeping in mind that many brands loosen their audience targeting criteria during the holidays, sometimes inviting deliverability problems and the negative impact those have on sales
- Open rate**, noting when engagement is highest and lowest, as well as any patterns in engagement
- Sends per day**, including the most active send days and how they map to key days like Thanksgiving, Black Friday, Cyber Monday, Green Monday, and Super Saturday
- Most active send times**, which you can use to inform your send times, especially if you don't use **send time optimization** or it's not appropriate for a particular send
- Inbox placement**, paying attention to how volume, sends per day, and open rates affected deliverability afterward
- Subscriber/audience overlap across competitive brands**, so you understand the competitive landscape and how a competitor's messaging might impact your company's
- Promotions and messaging themes**, so you can get inspired and understand how competitive your offers are
- Commonly used words in subject lines** to inspire your subject line **A/B testing**

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Competitive intelligence provides valuable insights for brands to better understand relative measures, timing, cadence, and key performance outliers during the critical holiday season. Collectively, these insights present opportunities for segmentation and personalization optimizations or program expansion ideas that can be experimented and tested during the summer and into the fall to ensure holiday success.



JT Capps

Strategic Director of Strategic Services
Oracle CX Marketing Consulting

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SparkPost Competitive Tracker can also show you what competitors' homepages looked like on specific days, so you can see how the messaging there compares to the messaging in their emails.



Chris Wilson

Strategic Director of Strategic Services
Oracle CX Marketing Consulting

- Competitive intelligence into action:** Take what you've learned from your **holiday post-mortem** and combine it with your competitive tracking and then compile a set of...
 - Learnings that might inform your holiday planning, message cadence, email volume, etc.
 - Tactics and strategies you want to test during the upcoming holiday season
 - Email creatives and subject lines you might use to inspire your messages this holiday

Oracle CX 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.

Subscriber Acquisition Source Optimization

Selecting the right people to become subscribers is a huge predeterminer of email marketing success. Get highly interested and valuable customers to subscribe and you're golden. Get disinterested people who don't have an affinity for your brand and you're setting yourself up for hard times. Here's our checklist for how to strengthen your email list building:

- Inventory your subscriber acquisition sources.** Track down all the ways that people can sign up to receive your promotional emails. Keeping in mind that you might have multiple sources in any category, which of these sources do you use to acquire new email subscribers?
 - Signup form on homepage or mobile app
 - Lead collection at live event
 - Opt-in during online checkout, account creation, membership signup, mobile app setup process, etc.
 - Online registration form for webinar, event, etc.
 - Signup form on your social media pages
 - Lightbox, exit intent pop-up, etc. signup form on your website or mobile app
 - Signup form on other customer-facing pages of website or mobile app
 - Lead generation form for ebooks, reports, etc.
 - Sweepstakes and contest entries
 - Promotion of signup via direct mail, catalog, etc.
 - Purchased email list
 - Signups via call center scripts/interactions
 - Opt-in during in-store checkout process
 - Promotion of signup via in-store signage, menus, etc.
 - Email appends
 - Email list rental
 - Co-registration
 - Pay-per-signup via social media ads
 - Pay-per-signup via search ads
 - Sales team outreach or through partners or affiliates
 - Other source(s): _____

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Generally speaking, the subscriber acquisition sources at the top of this list are more common and more effective, because they're in places where your customers interact with your brand. The sources toward the bottom of the list tend to be farther from your brand, so they produce subscribers who are less familiar with and interested in your products and services.



Chad S. White
Head of Research
Oracle CX Marketing Consulting

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***Stay away from appends, rentals, and purchased lists.** These segments are characterized by a lack of response—very low open and low click rates. And because these users never expected to receive email from the sender, the lists can generate many spam trap hits and higher bounces, unsubscribes, and complaints. That puts the sender's deliverability reputation at risk and requires a great deal of effort to restore.*



Kevin Senne
Sr. Director of Global Deliverability Operations
Oracle

Measure the effectiveness of each of your subscriber acquisition sources. How are each of them performing in terms of the behavior of the subscribers generated by them? For the subscribers of each one, figure out the average open rate, click rate, conversion rate, spam complaint rate, unsubscribe rate, revenue generated, etc. You may find that one or more sources is so problematic that you decide to discontinue it. In particular, identify your subscriber acquisition source that generates...

- The most valuable subscribers
- The least valuable subscribers
- The most engaged subscribers
- The least engaged subscribers
- The subscribers who unsubscribe the most
- The subscribers who unsubscribe the least
- The subscribers who complain the most
- The subscribers who complain the least

Audit and optimize your subscriber acquisition sources. For the sources that you decide are working well enough to keep, look at each one and determine:

- Is the opt-in form and related copy up to date? Are the **preference choices**, if any, up to date?
- Does the opt-in form work properly, recording the data collected accurately and triggering the appropriate welcome emails?
- Are there **ways that we can optimize our opt-in forms** for each of these sources? For instance, are the benefits of signing up clear and is the form easy to complete?

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The outcome of the email subscriber acquisition source analysis should be socialized across internal demand generation teams to help maximize return-on-investment for paid media efforts and to inform look-alike model test strategies.



JT Capps

Strategic Director of Strategic Services
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Once a year, sign up for your own email program through your various email capture touchpoints. It's not uncommon to be surprised by what does or doesn't happen. I've had clients discover that welcomes aren't sent out, that old versions of welcome emails are sent, and that the delay in that first touch is days rather than the few minutes they were expecting.



Clint Kaiser

Head of Strategic Services
Oracle CX Marketing Consulting

Consider launching new subscriber acquisition sources.

Now that you've evaluated and optimized your existing subscriber acquisition sources, consider introducing new ones. Perhaps you've never tried a lightbox or exit intent pop-up before? Offline sources are often overlooked—just make sure you're doing digital sign-ups via tablets or confirming via double opt-in to protect yourself from high bounce rates and verbal transcription errors.

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Plenty of brands have gotten burned trying to attract subscribers in their stores and restaurants. The problem was usually not the venue, which is packed with customers who know your brand—it was that email addresses were collected verbally or via paper forms. Scrap those error-prone collection methods in favor of digital methods and try again.



Chad S. White
Head of Research
Oracle CX Marketing Consulting

Oracle CX Marketing Consulting's List Growth & Demand Generation Services team can help you build up your digital marketing audience with engaged, high-value customers. Want to discuss your needs? Reach out to us at CXMconsulting_WW@oracle.com.

Unsubscribe Process Optimization

Opt-ins and opt-outs are opposite sides of the same coin. Both affect your list health and list growth. Increase your list growth by reducing your churn. Here's how to make sure your unsubscribe process is working its hardest for you:

Audit and improve your unsubscribe process.

Frustrating opt-out processes drive spam complaints, hurting your deliverability as well as your brand image. To reduce this risk, ask yourself:

- Is my email opt-out link easy to find and clearly identified by using “Unsubscribe” as the link text?
- Does my unsubscribe process involve no more than two clicks—one in the email and one on the unsubscribe page? If it takes more than two clicks, it's too complicated.
- Can I offer subscribers alternatives to unsubscribing that address the pain points that are driving them to want to opt-out? For example, can they be given the option to change their email address, change topic preferences, change email frequency, or snooze their subscription for a little while?
- Can I better understand why people are opting out by using an unsubscribe survey that appears on the opt-out confirmation page? To be the most helpful, you want to ask about issues that you'll potentially act on.

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We worked with a global retailer to change their unsubscribe page to mitigate opt-outs, which typically increase slightly during and right after the holidays. By adding the options to say subscribed and to pause emails for 30 days, we found that the average unsubscribe rate on holiday campaigns dropped 82%. The approach was so successful that we left it in place year-round.



Chris Wilson
Strategic Director of Strategic Services
Oracle CX Marketing Consulting

Preference Center Refreshes

In addition to helping reduce email list churn, **preference centers** can give you valuable profile data that you can use for segmentation and personalization. Here are some to-dos:

- Review and audit your preference center.** Collecting preferences and not acting on them is actually worse than not collecting them at all, because you've now set an expectation of a better experience that you're failing to deliver. Make sure your preference center is working properly. Ask yourself:
 - Are all of the preference choices up-to-date?
 - Are preferences being collected and stored accurately?
 - Are you acting on all of the preferences you're collecting? If not, strongly consider changing that, by either acting on them or not collecting them.
- Audit your opt-in preference collection.** Relatedly, if you also collect preferences during your signup process, check that those selections are up-to-date, being recorded properly, and being acted on. Keep in mind that your welcome emails are your first opportunity to acknowledge and action on a subscriber's preferences, so you may want to review your welcome program as part of your overall preference center refresh effort.

- Optimize your preference center.** Focus on collecting preferences that will have the greatest impact on customer engagement, customer satisfaction, and customer lifetime value. Some preferences to consider collecting include...
 - Topics of interest**, whether it's preferred styles, shopping departments, gaming platforms, brands, destinations, or other subjects
 - Communication frequency preferences**, which is often presented in terms of X emails per week or month, but sometimes is presented in terms of which content they want, such "Send me only the best deals" or "Send me every deal"
 - Additional channel opt-ins**, such as getting permission to send SMS messages or directing customers to your social media pages or your mobile app download
 - Location preference**, such as favorite store, restaurant, venue, or airport location, since it's unwise to assume that your closest location is always a customer's preferred location

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I once signed up for emails from a major electronics retailer and the gaming platform preference selections were all from the previous generation of platforms. Not only could I not indicate the platform I had, but it lowered my expectations of the value I was going to get out of receiving their emails since they wouldn't be personalized to my interests. Not a great first impression.



Chad S. White
Head of Research
Oracle CX Marketing Consulting

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People know what they want and don't want to hear about, so let them help you fine-tune the content they'll be presented. A creative message with a call to update preferences will allow you to learn more about them. Send it periodically to gradually develop the relationship and trust without the risk of overwhelming them by asking for too much information at once.



Pradeep Mangalapalli
Director of Deliverability Operations
Oracle

Oracle CX Marketing Consulting can analyze your unsubscribe process and preference center to help you identify and roll out improvements that reduce email list churn and increase subscriber engagement. Want to discuss your needs? Reach out to us at CXMconsulting_WW@oracle.com.

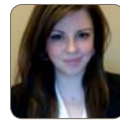
Improved Analytics & Reporting

Every organization is striving to be data-driven. But it's difficult—and somewhat dangerous—to do that when you don't have access to reliable, meaningful performance metrics. Here's our to-do list for how to improve your performance visibility:

- Desilo your data. Manually exporting data and pooling it** so you can do analytics is a solid first step. But long-term, having a central repository where you have one version of the truth is key. With the silos broken down, you have much better visibility into customer behavior and trends across your engagement touchpoints.

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Having a synchronized database that's integrated with new applications and systems provides you with access to a richer set of data. Having first-, second-, and third-party data and information from both back- and front-office sources gives your company the ability to send segmented messages to increasingly sophisticated target audiences.



Otilia Antipa

Principal B2B Consultant
Oracle CX Marketing Consulting

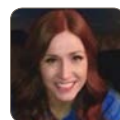
- Centralizing your data governance. Centralizing your data isn't just a technological change.** It's an organizational change. Create accountability for your data's accuracy, privacy, and governance by naming a head of data. The exact title doesn't matter—we've seen a huge range of titles!—but having someone be responsible for your data management is key.
- Build better performance dashboards and reports.** Get the deep, impactful data that you need to make wise strategic decisions. Here are some metrics that our clients are asking for:

- Conversions.** Whether it's sales conversions or any other action you're asking your customers or subscribers to take, it's important to measure this bottom-of-the-funnel event.
- Velocity.** Is engagement with your email program accelerating or decelerating? This will naturally ebb and flow over time depending on where the customer is in their lifecycle. Acceleration implies the subscriber is likely in-market. Deceleration can mean they are exiting a buying phase or are disengaging with your brand.
- Email list health.** Is your list growing or shrinking in terms of the number of subscribers and average time on list? How is your list churn trending? What percentage of your list has opened at least one of your emails in the past 30, 90, 180, and 365 days? Is your deliverability improving or declining? What are those various metrics when looked at across subscriber acquisition source or across inbox providers?

- Return on investment.** Whether for a project, your email program, or your whole marketing program, knowing the return you're getting on your marketing investments allows you to make better decisions about where to invest next. It also allows channel owners to make stronger budget arguments.
- Lifetime value.** In the age of customer-centricity, lifetime value is an increasingly important metric. If you're growing lifetime value, you're either getting customers to increase their rate of spending or keeping them engaged longer—or both. If it's falling, then customers are investing less money and time in your brand—a trend that you'll want to reverse.

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Clients are pushing the boundaries with reporting and are no longer satisfied with simple metrics like click and open engagement. Companies are working toward reports and dashboards that highlight conversion, velocity, lifetime value, and ROI in order to show value in their marketing efforts.



Ferris Boyd

Principal B2B Consultant
Oracle CX Marketing Consulting

□ **Create better customer models for targeting.** Using your analytics to better understand your audience for segmentation and targeting purposes can boost engagement, increase sales, and improve deliverability. Here are three models that we often use with our clients:

□ **Subscriber engagement models.** Keeping your email engagement rates high is critical for good deliverability, especially at inbox providers like Gmail and AOL. To avoid trouble, you will want to suppress subscribers who haven't opened or clicked recently, and send fewer emails to those people prior to suppressing them. However, "recently" will vary for every business, depending on a variety of factors such as email frequency, engagement rates, and complaint rates. Modeling can help you find the right cutoffs to protect your sender reputation.

□ **RFM modeling.** Recency, frequency, and monetary (RFM) modeling allows business to understand relative customer value based on when their last purchase was, how often they make purchases, and the value of their purchases. It has been around for a long time, but now it's easier than ever to calculate and put into action. In fact, **Oracle Responsys offers native RFM modeling for targeting.**

□ **Embrace design analytics.** If you're disappointed with the results of your analytics efforts, it may not be the execution. You might be asking analytics to solve the wrong problems. **Design analytics can help you properly identify root causes of problems**, so your analytics solutions work harder for you.

□ **Predictive activity modeling.** What are the chances that a particular subscriber will buy this product if we promote it in an email to them? Predictive activity modeling can answer that question—and many others—across your entire subscriber database so you can target only those who are likely to convert.

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Models don't have to be laborious and complex to create. The hardest part oftentimes is thinking about which data inputs to include to ensure maximize effectiveness of the model. For example, one predictive model we regularly use includes the date of the last site abandon trigger as a data value input. Seems obvious, but it's often overlooked.



Clint Kaiser

Head of Strategic Services
Oracle CX Marketing Consulting

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Once you get the hang of it, design analytics will help you come up with better solutions and avoid wasting time on misdirected solutions that address symptoms and non-problems.



Kaiti (Livermore) Gary

Director of Strategic Services
Oracle CX Marketing Consulting

Oracle CX Marketing Consulting's Strategic Services and Reporting & Analytics Services teams can help you with all of your dashboard and modeling needs, including predictive activity modeling. Want better visibility into how your digital marketing is truly performing? Want better audience insights? Reach out to us at CXMconsulting_WW@oracle.com.

Experimentation & Testing

The second and third quarters are a great time to experiment with different tactics and strategies in a lower-stakes environment. At the same time, selling seasons like Mother's Day, Memorial Day, Father's Day, Independence Day, back to school, and Labor Day offer opportunities to test seasonal messaging, designs, and tactics.

□ **Experiment with some promising email trends.** In a survey of Oracle CX Marketing Consultants, the following were all rated as **low adoption–high impact tactics and technologies**, making them competitive differentiators:

- **Dark mode–optimized emails.** Instead of the usual dark text on a light background, dark mode features the reverse: light text and a dark background. It's a major trend in user interface experiences across a wide range of apps, including email clients, where it's particularly troublesome to design around. Learn [how to optimize your emails for dark mode](#).
- **Email Annotations in Gmail.** By adding additional coding to your emails, you may have different and more compelling envelope content displayed in the inbox. The operative word here is *may*. There are both **opportunities and concerns with Email Annotations**, so it's not for everyone.
- **CSS-based email interactivity.** With the right use cases, email interactivity powered by CSS and HTML can be powerful. But it doesn't make much sense unless at least a large minority of your subscribers use Apple email clients like the iPhone's native email client.
- **Live or real-time content.** Most email content is determined at the time of send, but live content is determined at the time of open. The best use cases for live content involve content that changes rapidly, such as countdown times, sports scores, weather forecasts, and poll results.

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Dark mode for email is here to stay. Unfortunately, it's not an easy fix. Marketers have some tough work to do on the creative side to make sure that colors change as intended and their emails stay legible.



John A. Lillard

Principal Consultant for Implementation Services
Oracle CX Marketing Consulting

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Having a live-updating or location-based content in an email will appeal to the customer over static or generic messaging every time. Customers want to feel valued and a personal creative touch is always appreciated when they feel that their engagement matters.



Kass Buchholz

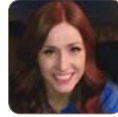
CX Marketing Senior Designer
Oracle CX Marketing Consulting

- Infuse AI into your email program.** Artificial intelligence and machine learning can help marketers identify trends in a sea of data that they otherwise wouldn't be able to see. Here are some AI implementations to consider:
 - AI-powered content recommendations.** Ideal for companies with lots of SKUs or content, AI can help you personalize your emails with product and content recommendations that are tailored to each individual subscriber.
 - Send time optimization.** Picking an email send time based on aggregate subscriber response is good, but picking send times based on individual subscriber responses is better. Learn more about [the best time to send emails](#).
 - AI-powered email copywriting tools.** Using the most effective words in your subject lines and email copy to connect with your audience can make a significant difference. AI can help you uncover better word choices, but you'll want to [avoid the risks associated with this technology](#).
 - Predictive activity modeling.** AI can help you choose better audiences for your sends, allowing you to reduce email frequency to those who are unlikely to respond and increase frequency to those who are likely to engage. Learn more about [achieving the best email frequency](#).

- Make your customer experience more seamless.** Your typical customer engages with your brand through multiple channels before making a purchase. That makes it essential that you're able to see customer activity across channels and respond across those channels to [create a seamless and smooth omnichannel customer experience](#). That's the ideal, but it's challenging. So set small goals to start to connect everything together. Here are two ways to do this:
 - Omnichannel orchestration.** Don't try to boil the ocean. How can you improve visibility across one additional channel? How can you improve your ability to react to customer behaviors in one particular channel? How can you better synchronize your message across channels while leveraging each channel's unique strengths and weaknesses?

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Sending the right message at the right time is increasingly important in order to drive engagement. Organizations across a variety of industries are extremely excited to start using send time optimization.



Ferris Boyd

Principal B2B Consultant
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AI is the buzzword in the industry—really, in the world—at the moment. Anything that can make data-driven decisions that the client can trust and not waste time on themselves is a big asset.



Jarrod Browning

Project Manager in APAC
Oracle CX Marketing Consulting

- Personalized landing pages.** Personalization in email is a massive, powerful, and well-established trend. Personalizing landing pages so that tailored experience is seamlessly continued is also powerful, but less established. [Learn about Oracle Maxymiser](#), our website personalization tool.

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We've been talking about omnichannel orchestration for years in the marketing community. However, technology has now caught up to the concept. With easier and faster integrations between various parts of the marketing tech stack, it's now easier than ever to execute on omnichannel strategies.



Kaiti (Livermore) Gary

Director of Strategic Services
Oracle CX Marketing Consulting

- **Ramp up your A/B testing.** Listening to your customers is vital, and A/B testing is just one more way that you can listen to what your customers are telling you that they prefer. Just make sure you **avoid these A/B testing pitfalls** so you don't waste your time, miss out on golden opportunities, or—worst of all—confidently come to the wrong conclusions. Some to-dos:
 - **Create an A/B testing calendar.** Avoid randomly testing things. Create a schedule so you can not only take advantage of every opportunity, but also build on past learnings and periodically confirm past findings.
 - **A/B test your triggered emails.** Most companies A/B test their promotional broadcast and segmented emails, but relatively few test their triggered emails. This is unfortunate because automated emails typically produce the biggest returns. That means that **the A/B testing opportunity for triggered emails is bigger**, too. Plus, improvements in triggered campaigns deliver better subscriber experiences over a longer period of time because they're ongoing campaigns.
 - **Consider multivariate testing.** If your email sends are big enough, consider doing some **multivariate testing**. Besides being able to test more than one variation at a time, multivariate testing allows you to test the interplay between different element combinations.

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Without clearly defined processes, marketers run the risk of testing just for the sake of testing, which leads to discrepancies in methodology, lack of purpose, ambiguous results, and wasted resources.



Reed Pankratz

Sr. Strategic Consultant for Strategic Services
Oracle CX Marketing Consulting

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Testing isn't just for one-off promotional emails. Set up audience lifecycles like Welcome, Nurture and Reengagement programs with testing options built in. Then you can frequently, and easily, update your content to test your offer, subject line, and other elements for weeks at a time and get statistically significant results.



Helen Lillard

Principal B2C Consultant
Oracle CX Marketing Consulting

Oracle CX Marketing Consulting's more than 500 consultants can help with AI, email design, omnichannel orchestration, testing, and much more. Want to discuss your needs? Reach out to us at 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...

- Implementation Services
- Platform Training & Adoption Services
- 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
- Reporting & Analytics 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. Or **visit us online**.