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Holiday Marketing Quarterly:

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

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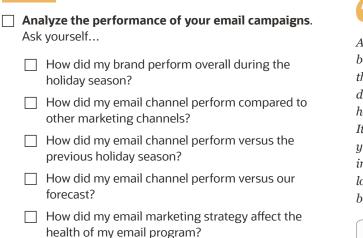- ☐ Upgrades & Expansions of Your Tech Stack

Our goal 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 **OMCConsulting_WW@oracle.com**.

Clint Kaiser
Head of Strategic Services
Oracle CX Marketing Consulting

Holiday Post-Mortems

The holiday season is a whirlwind. Come January, most B2C marketers would love nothing more than to put the holiday season behind them and look ahead to Valentine's Day and the spring season. Resist the temptation. Ensure that you learn the lessons of your Christmas Past so your Christmas Future is even better. Here's a checklist of items to document in your post-mortem, which you can review going into the Christmas Future planning cycle:

☐ **Analyze the performance of your email campaigns.** Ask yourself…

   ☐ How did my brand perform overall during the holiday season?

   ☐ How did my email channel perform compared to other marketing channels?

   ☐ How did my email channel perform versus the previous holiday season?

   ☐ How did my email channel perform versus our forecast?

   ☐ How did my email marketing strategy affect the health of my email program?

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

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An important component of any holiday post-mortem should be an assessment of your email channel list health. Assessing the incremental unsubscribes, hard bounces, and complaints driven by the typically much higher holiday email cadence can help you better assess how to approach frequency post-holiday. It can also help you better calculate the return on investment of your increased email frequency. In some instances, the boost in visits driven by sending more email may not be worth the loss of long-term revenue from subscribers who unsubscribed because of the additional emails.

Peter Briggs
Director of Strategic Services
Oracle CX Marketing Consulting

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I've seen retailers reuse the exact same email creative a year or two after sending it the first time. I've also seen brands use the same concept over and over, making slight improvements each time. An email campaign doesn't have to be original. It has to perform. If you have a winning email design or tactic, get more mileage out of it.

Chad S. White
Head of Research
Oracle CX Marketing Consulting

☐ **Identify your unsuccessful campaigns**. Similarly, determine which promotions underperformed. Can you identify the campaign elements that led to the lackluster performance? If so, make a note to avoid them in the future. Was there a fatal flaw that could be fixed to make this campaign a success in the future? Are there any good ideas that can be salvaged from these subpar campaigns?
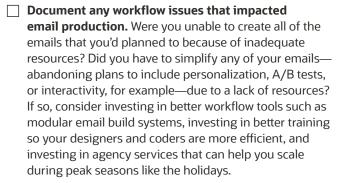
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> *There is one reoccurring theme that you almost always see in successful campaigns and never see those that are unsuccessful: simplicity. Campaigns that include too much information and too many details get lost in the inbox clutter, whereas campaigns that have clear and concise messages and offers tend to be the most effective. This is true year-round, but is amplified during the holidays as inbox volume rises and retailers are fighting for attention.*

Chris Wilson
Strategic Director of Strategic Services
Oracle CX Marketing Consulting

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

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> *I see a lot of brands focused on the performance of the key holiday shopping days like Black Friday and Cyber Monday, but they can lose sight of the fact that there are often other shopping days during the holidays that all play a key role in reaching goals. For example, the days surrounding Black Friday and Cyber Monday are often impactful shopping days as well and should be given adequate attention when planning.*

Chris Wilson
Strategic Director of Strategic Services
Oracle CX Marketing Consulting

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

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

Lizette Resendez
Associate Creative Director and Copy Director
Oracle CX Marketing Consulting

Seasonal Buyer Reactivation

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

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

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When incorporating progressive profiling, also consider the frequency or ramp up for your new holiday subscribers. Based on your business, the typical shopper may only visit you a couple times per year. Does it make sense to immediately place them into a standard promotional cadence? Consider slowly ramping up volume and proactively altering cadence based on whether they engage (or don't engage) with your email program.

Peter Briggs
Director of Strategic Services
Oracle CX Marketing Consulting

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

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

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

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

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

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

Email Deliverability Recoveries

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

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

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

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A systematic reengagement program that is triggered daily to a small portion of your inactive subscribers is a great way to methodically reactivate dormant subscribers in your file. Removing them from your standard promotional cadence and building a unique program with a lower email frequency and alternative content can be very successful in growing your active email file. At the same time, by minimizing volume to this group, you limit deliverability risks.

Peter Briggs
Director of Strategic Services
Oracle CX Marketing Consulting

☐ **Check to make sure you're not on any blacklists.** If you're listed on a major blacklist like Spamhaus, you'll know it right away. However, there are many smaller blacklists that may be causing a small percentage of your email to be blocked. Over time, these blacklists can erode your email marketing performance in subtle, but impactful ways. Learn **how to check email blacklists and how to stay off them**.
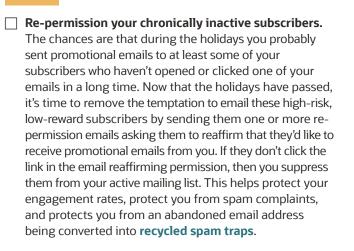
> *It's very common to run a check and see a listing or two for a very small blacklist that will have no impact on your mail. However, these smaller listings may be an important signal that you need to button up your list hygiene practices before you get into trouble with more impactful blacklists.*

Clea Moore
Director of Deliverability Strategy
Oracle CX Marketing Consulting

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

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

Daniel Deneweth
Head of Deliverability Services
Oracle CX Marketing Consulting

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

> *New subscribers are typically your most active subscribers. So, when a new subscriber doesn't engage at all, marketers should interpret that as highly suspicious.*

Chad S. White
Head of Research
Oracle CX Marketing Consulting

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

Automated Email Optimization & Growth

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

☐ **Take an inventory of all of your existing automated email programs.** Unfortunately, some brands still believe that triggered emails are "set it and forget it" emails when these high-ROI messages are really "review and improve" emails. For each one, here are some key questions to ask yourself:

   ☐ **When was the email launched?** When was the last time it was redesigned? Are the links, messaging, and content up to date? Is the current look and feel in line with the designs of your broadcast email templates?

   ☐ **What is the goal of the email?** Which metric(s) best align with that goal? How is it performing?

   ☐ **What triggers the email (i.e., an action, inaction, a date, Internet of Things response)?** How long after the trigger is the email sent? Could that timing be refined? Are some or all broadcast or segmented email sends suppressed to subscribers who receive this email? If so, for how long?

   ☐ **Is this email part of a series?** If not, could it be? If so, should it be? If it is part of a series, what determines when the next email is sent? Are there actions or events that cause one or more emails in this series to be skipped and not sent? Are there actions or events that cause this series to be terminated?

☐ **Does it contain personalization?** Are there opportunities for more personalization to be added or for the existing personalization to be enhanced? Is there a role for artificial intelligence in determining personalization, such as powering content or product recommendations?

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

Chad S. White
Head of Research
Oracle CX Marketing Consulting

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

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

Clint Kaiser
Head of Strategic Services
Oracle CX Marketing Consulting

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

    ☐ **Subject lines and preview text.** Contextuality is key with automated emails. Make it clear in the subject line that they're receiving this email because of something they did, didn't do, or requested. Test different subject line lengths, words and phrases, and tones and styles. Be aware that **subject line writing has changed** significantly in recent years.

    ☐ **Calls-to-action.** Test the CTA's words, its placement, and button styling.

    ☐ **Hero images.** Test the size and placement of the main image of your email. Also, test the image's content, such a lifestyle vs. product image, and the image's style, such as a photo vs. an illustration.

    ☐ **Friendly From.** Augmenting your sender name can help differentiate your emails and strengthen your message. You want to be instantly recognizable in the inbox, so we always recommend that you lead with your brand name, but you can follow that with additional qualifiers as part of an **email *from* name extension strategy**. For instance, your product review request emails could use the sender name "YourBrand Reviews"; your receipt emails "YourBrand Order"; and your shipping notification emails "YourBrand Notification."

☐ **Copy.** The amount of copy and its arrangement in emails has been evolving quickly, as marketers seek to do a better job of engaging time-pressed consumers with short attention spans. Can you cut 25% of the copy from your email? 50%? Are there opportunities to use bulleted text or subheads instead of full sentences? Can a screenshot, image, or animation allow you to reduce the number of words you're using?

☐ **Send Time.** Some triggered campaigns should be sent immediately, such order confirmation, password reset, and welcome emails. However, others should be delayed, including shopping cart abandonment emails, while the emails in a series should be spaced out. Test to determine the optimal delays and spacings.

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

Peter Briggs
Director of Strategic Services
Oracle CX Marketing Consulting

☐ **Make your automated emails seasonally relevant**. How can you make your triggered more relevant to Valentine's Day, Mother's Day, Father's Day, back-to-school, and holiday shoppers? Look for opportunities to add secondary messaging that speaks to shoppers' needs during these seasons and others, whether it's promoting gift guides, order-by deadlines, or other helpful content.

☐ **Expand or break up existing automated campaigns into an email series**. Sometimes one email isn't enough, especially given diminishing attention spans and the trend toward much tighter copy and fewer content blocks. Look for opportunities to add a second or even third email to an automated campaign. For instance, an initial shopping cart abandonment email might simply remind a subscriber of what they left in their cart, whereas a second email might recommend alternative products, assuming that they haven't purchased because they might be considering other products. Relatedly,

look to break up emails that are overly packed with information and multiple CTAs. This is a common problem with welcome emails, many of which would benefit from having their various content blocks split out into separate emails as part of a welcome series.

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

Clint Kaiser
Head of Strategic Services
Oracle CX Marketing Consulting

- ☐ **Launch new triggered campaigns.** Are there gaps in your triggered email program? Consider the following triggered emails:

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

- ☐ **Milestone emails**, including…

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

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

Clint Kaiser
Head of Strategic Services
Oracle CX Marketing Consulting

Need help optimizing existing triggered emails or launching new ones? Oracle CX Marketing Consulting's Campaign Automation Services team can help you with everything from conception to launch to ongoing optimization. Want to discuss your needs? Reach out to us at **OMCConsulting_WW@oracle.com**.

Creative Refreshes

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

☐ **Reassess your brand values and how you're communicating them in your customer experiences in terms of visuals and user interfaces.** Before jumping into incremental changes, consider reaffirming what your brand stands for and then brainstorm how to best convey those values in your designs. Design Thinking principles can help you avoid jumping ahead to solutions before you've fully articulated not only your problems and opportunities, but the "why" behind them.

> Oracle CX Marketing Consulting's Design Thinking & Innovation Services team can run a workshop to help you take an inside out approach to email design, starting with your brand values and working outward to arrive at email design improvements. Reach out to us at **OMCConsulting_WW@oracle.com**.

☐ **Start or add to your swipe file.** For example, regarding email marketing, ask yourself: Which brands have email programs that I admire? (**Perhaps some of these?**) Which emails have impressed me? (**Perhaps some of these?**) Take the emails that you like for whatever reason and add them to a swipe file, a place where you and your team can get easy access to them. It can be an email account that you and your team forward emails to—or, if you want longer term staying power, take screenshots of the emails and add them to a shared Dropbox folder or something similar. Take note of what exactly about the email that you like. Use these swipe file emails to help you brainstorm different design elements to potentially include in your redesigns.

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

Chad S. White
Head of Research
Oracle CX Marketing Consulting

☐ **Mock up one or more redesigned challengers.** Put all of your ideas together into one or more fully mocked up designs.

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

Lisa Harmon Stephens
VP, Creative
Oracle CX Marketing Consulting

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

Need help upleveling your customer experience? Not sure where to start? Oracle CX Marketing Consulting's Creative Services team can guide you through the entire process, from clarifying your email brand identify to crafting a style guide to redesigning the customer experience. Our Creative Services experts can handle email, social, web, and a range of other digital marketing projects. Reach out to us at **OMCConsulting_WW@oracle.com**.

Upgrades & Expansions of Your Tech Stack

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

☐ **Review your marketing technology stack and ensure you are set up for success for the coming holiday season.** Take an inventory of your current tools and then ask yourself:

    ☐ How well is it allowing you to execute on key marketing trends, such as personalization, automation, targeting, and omnichannel orchestration?

    ☐ Does your existing stack support your goals and initiatives for the coming holiday season? To help identify gaps, define your use cases early.

    ☐ Do all your tools work well together and support your efficiency and innovation goals? Are there other tools that have comparable features that integrate much better with your existing tech stack?

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

John Lillard
Principal Consultant for Implementation Services
Oracle CX Marketing Consulting

☐ **Research the market.** Look outside your organization at what your current vendor partners offer, what other potential vendors offer, and what your peers and competitors are doing. Don't just speak to vendors. Talk with independent analysts and speak with vendor customers—not just referrals from the vendor, but also customers you identify and approach on your own. Ask yourself:

> ☐ Does your partner roadmap support your long-term business needs? If not, is there another provider that can?
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> ☐ Are your competitors executing programs or campaigns that your technology does not support?
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> ☐ Is your technology able to keep up with the current market trends? Is your technology or partner able to integrate with third parties to support the newest marketing technologies and trends?

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Reassess ideas, requests, and suggestions that were discussed internally during the past year. Are there gaps in your current technology that prevents you from achieving those? Or, if the issue is resourcing, perhaps there are opportunities to streamline production of your current program in order to free up resources to drive innovation.

Peter Briggs
Director of Strategic Consulting
Oracle CX Marketing Consulting

☐ **Start the RFP process.** A request for proposal (RFP) process involves determining your needs, translating those needs into questions, sending those questions to each potential vendor, processing all of the responses, and then making a decision. That takes many months, so if you plan on sending out any RFPs, start as early in the quarter as you can—if you weren't able to at the end of the fourth quarter.

> ☐ **Do not lead with technology**. The technology should support your initiative, not define it. Define success criteria based on the business use cases that add the most value to your organization.
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> ☐ **Define the process timeline** and ensure that it has clear milestones to keep the process streamlined.
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> ☐ **Do not neglect the services requirements to support your business—include these in the RFP process.** You need to ensure that your prospective partner can support your teams and your business goals.

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

Virginia Carcavallo
Managing Principal Consultant
for Implementation Services
Oracle CX Marketing Consulting

Need help implementing your Oracle Marketing Cloud technology? Oracle CX Marketing Consulting's Implementation Services team can help get you live quickly and smoothly. Reach out to us at **OMCConsulting_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 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 **OMCConsulting_WW@oracle.com**.