

First Quarter | 2025

Holiday Marketing Quarterly

Your quarter-by-quarter checklist for success



The holiday season doesn't have an off-season. Having a successful holiday season means executing a successful year-round strategy. Oracle Digital Experience Agency's Holiday Marketing Quarterly gives B2C brands a quarter-by-quarter plan for how to achieve more during this critical time of the year 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 in the new year and during the next holiday season. In this Holiday Marketing Quarterly, we cover:

- + [Holiday Post-Mortems](#)
- + [Seasonal Buyer Reactivations](#)
- + [Email Deliverability Recoveries](#)
- + [Automated Campaign Optimization & Growth](#)
- + [Creative Refreshes](#)
- + [Upgrades & Expansions of Your Tech Stack](#)

Our goal is to always be thinking at least 3 months out with our clients so they can avoid stalling out. We hope this quarterly checklist helps you stay on track with your planning so you achieve your goals. And, of course, if you'd like assistance, we're always here to help. Just talk to your Oracle account representative, [visit us online](#), or reach out to us directly at OracleAgency_us@Oracle.com.



Spencer Kollas
Head of Analytic & Strategic Services
Oracle Digital Experience Agency

Holiday Post-Mortems

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

- ☐ **Analyze the performance of your digital marketing campaigns.** Ask yourself:
 - ☐ How did my brand perform overall during the holiday season?
 - ☐ How did each of my digital marketing channels perform versus the previous holiday season?
 - ☐ How did each of my digital marketing channels perform compared to the others?
 - ☐ How did each of my digital marketing channels perform versus our forecast?
 - ☐ How did my digital marketing strategy affect the health of my program?

"It's important to get outside of the box of November and December and look at how you set yourself up for holiday success. How did your October messaging lay the foundation for your November messaging? How did engagement with your summer campaigns help or hurt your holiday performance? Taking a holistic view helps you understand how your program's health impacts holiday performance and reinforces the strategic needs you should be thinking about as you lay out your roadmap for 2025."



Alexander Stegall
Director of Analytic & Strategic Services, Oracle Digital Experience Agency

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

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



Chris Wilson
Strategic Director of Analytic & Strategic Services
Oracle Digital Experience Agency



- ☐ **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 or in similar circumstances. Was there a fatal flaw that could be fixed to make this campaign a success in the future? Are there any good ideas that can be salvaged from these subpar campaigns?
- ☐ **Map the performance of your digital marketing campaigns by day.** While Cyber Monday and Black Friday are likely to be your No. 1 and 2, the rest of your top performing days may be a bit of a surprise—and will likely change from year to year. Where Thanksgiving falls on the calendar can have a significant impact on late 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.

“When analyzing year-over-year performance, be sure to map out the notable trends of the years you’re comparing. How many days were between Thanksgiving and Christmas? What days of the week did Veterans Day, Christmas, and other events fall on? What month did Cyber Monday fall in? When did you begin holiday promotions and how did you ramp up? Did supply chain issues affect inventories or sale plans? Did you expand or tighten your audience targeting? All of these things will help you understand the story your YoY data is telling you and derive actionable insights from it.”



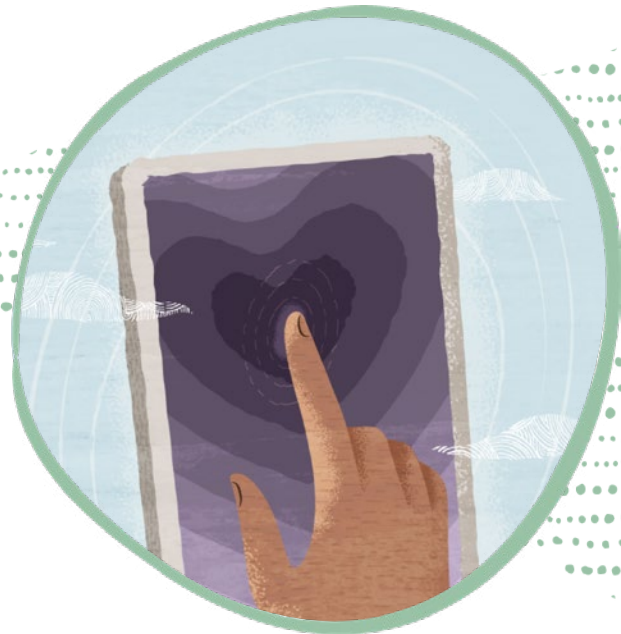
Kaiti Gary
Senior Director of Analytic
& Strategic Services Oracle
Digital Experience Agency

- ☐ **Document any workflow issues that impacted campaign production.** Were you unable to create all of the campaigns that you’d planned because of inadequate resources? To get campaigns done, did you have to simplify any of them—abandoning plans to include personalization, A/B tests, or interactivity, for example? If so, consider investing in better workflow tools such as [modular email architecture](#), in better training so your designers and coders are more efficient, and in agency services that can help you more easily scale during peak seasons like the holidays.

“[Maintaining a content calendar](#) allows you to think bigger and squeeze even more juice out of your campaigns. When do you need to start working on your more complex campaigns so they’re ready in time? When can you resend high-performing emails to non-clickers? When does your messaging need to shift from education to urgency? By laying it all out in advance, you have a greater chance of identifying opportunities while there’s still time to act.”



Kelly Moran
Senior Art Director for Copy
Oracle Digital Experience Agency

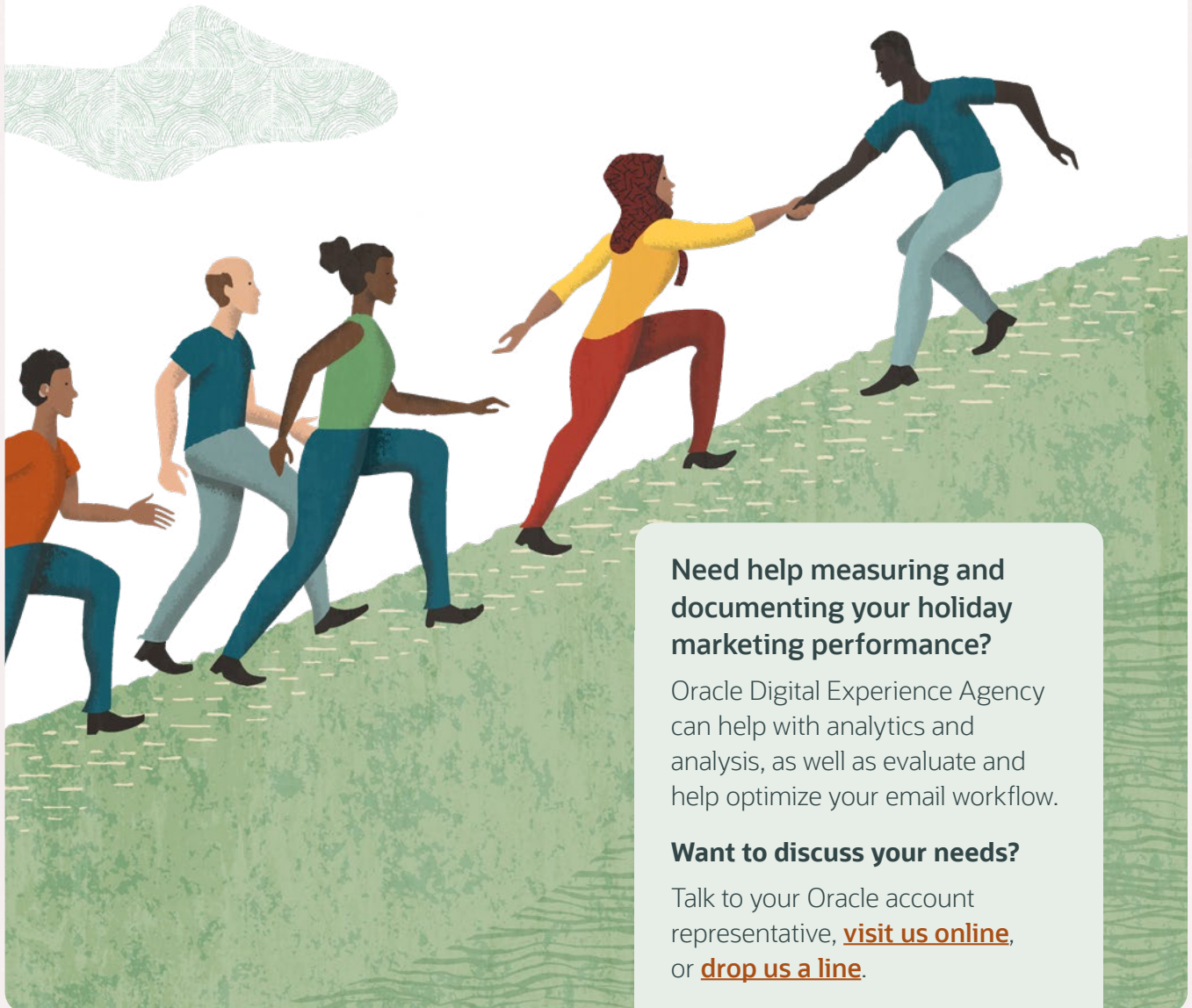


- ☐ **Document any quality control and PR issues.** Did any of your campaigns get sent with significant errors in them that impacted performance or hurt your brand image? Did you have to send any [corrections or apologies because of marketing mistakes](#)? Did you have any non-marketing issues that led to corrections or apologies? Keep a year-round log of errors, when they occurred, the cause of the error, any remediation that happened, and any negative effects from them. Learn from your mistakes—particularly recurring ones—and, when possible, change your processes and tools to minimize the possibility of the mistake happening again.

“As we continue to navigate a world grappling with war, refugees, social unrest, and polarized political views, it’s never been more important to be hyper-aware of the language we use in marketing campaigns. It’s our responsibility to ensure that messaging is inclusive and considers the perspectives of others.”



Nick Cantu
Creative Director for Creative
Services Oracle Digital
Experience Agency



Need help measuring and documenting your holiday marketing performance?

Oracle Digital Experience Agency can help with analytics and analysis, as well as evaluate and help optimize your email workflow.

Want to discuss your needs?

Talk to your Oracle account representative, [visit us online](#), or [drop us a line](#).

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, sadly, one-time buyers who never return. Turn more seasonal and one-time buyers into year-round customers by launching a seasonal buyer reactivation program that has one or more of the following components:

- ☐ **Progressive profiling campaigns.** Use these 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. 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 message streams they'd like to receive, and how often they'd like to receive your campaigns, 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 campaigns. 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 rewarding. For instance, knowing their spring cleaning plans, spring yard and gardening plans, or spring activity plans can all inform near-term messaging. Those plans are also likely to change every year, so this kind of seasonal progressive profiling should be an annual campaign.

"Your subscribers' shopping behaviors will likely look fundamentally different in January and February than in November and December. **Progressive profiling** is a great way to stay in tune with your subscribers' interests, especially during seasonal pivots and times of rapid change. Other signals can also help you understand where your subscribers are financially. For example, their engagement with gift price buckets (e.g., gifts under \$25, under \$50) can help you tailor recommendations in the new year."



Peter Briggs
Director of Analytic & Strategic
Services, Oracle Digital
Experience Agency

Want more ideas for what customer data to collect and use?

Check out our [Segmentation & Personalization Ideas checklist](#) for more than 170 customer attributes to consider, plus expert advice and insights from some of our hundreds of digital marketing and communication experts.

- ❑ **A lower introductory campaign frequency.** Shoppers who sign up for your email, SMS, push, and other digital marketing campaigns during the holiday season may only be interested in shopping with you during the holidays. Once the holiday season winds down, consider treating these new subscribers differently by sending them campaigns at a lower frequency—at least until they make their first non-holiday purchase. If you already have a **reengagement program** that sends campaigns 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 messages designed specifically to convert these shoppers into year-round customers, like the **progressive profiling** and first-time non-holiday buyer campaigns discussed next.

“To convert your holiday buyers into year-round brand loyalists, start by engaging them with content related to their purchase, including how-to guides and promotions for accessories and related products. Next, try to better understand their non-holiday needs by collecting preferences or encouraging them to explore your offerings, especially if their holiday purchase included a gift receipt, indicating the product wasn’t for them. And finally, help them see the value of your loyalty program by sharing how close they are to the next tier, along with personalized offers to get them there.”



Ana Jablonski
Director of Analytic & Strategic Services,
Oracle Digital Experience Agency

- ❑ **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 deals to subscribers who haven’t bought outside of the holiday season yet.

Want to grow your marketing audience?

Oracle Digital Experience Agency’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?

Talk to your Oracle account manager, [visit us online](#), or reach out to us directly at OracleAgency_us@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 junk and block senders. Those risks have been compounded by a more active [Spamhaus](#) and by [Apple's Mail Privacy Protection \(MPP\)](#) making it harder to determine which subscribers are engaged. Because of these issues, the holiday season can be rough on your sender reputation and have consequences for your email program well into the new year. Revitalize your sender reputation with this to-do list:

- ☐ **Assess your email engagement rate across inbox providers.** [Email engagement is a critical component of inbox providers' deliverability algorithms.](#) However, your overall open and click rates can hide potential problems, so look at your engagement rates by inbox provider. Gmail, Outlook.com, and other inbox providers not only have different tolerances around email engagement, they also attract different kinds of email users with different behaviors and risk profiles. Do a full breakdown and see if any anomalies jump out at you.
- ☐ **Move your inactive subscribers over to a reengagement program.** Low engagement is a major contributor to poor inbox placement, so boost yours quickly by [moving your inactive subscribers into a reengagement program.](#) These programs send subscribers who haven't opened or clicked an email in a while significantly fewer emails, which helps minimize the damage that these inactive subscribers do to your engagement rates and therefore your deliverability. These programs also often include [progressive profiling](#), [preference update](#), and other emails that are explicitly aimed at addressing the root causes of inactivity, which are receiving too many emails and receiving emails that aren't relevant.
- ☐ **Check to make sure you're not on any blocklists.** If you're listed on a major blocklist like Spamhaus, you'll know it right away. However, there are many smaller blocklists that may be causing a small percentage of your email to be blocked. Over time, these blocklists can erode your email marketing performance in subtle, but impactful ways. [Learn how to check email blocklists and how to stay off them.](#)



Brian Sullivan
Strategy Director of Email
Deliverability Services, Oracle
Digital Experience Agency

"Even post-MPP, it's crucial to look closely at unique open rates by receiver domain day to day, as well as across campaigns and ISPs. That's because an overall open rate of 15%, for example, can easily conceal a 2% open rate at Outlook.com, which would indicate that your mail is in the junk folder. However, because of MPP, you'll also want to watch clicks. Click rates may be much lower than open rates, but seeing big deltas between inbox providers can reveal spam folder placement."



- **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 any of your emails in a long time. Now that the holidays have passed, it's time to remove the temptation to email these high-risk, low-reward subscribers by sending them one or more re-permission emails asking them to reaffirm that they'd like to receive promotional emails from you. These are very similar to [double opt-in confirmation request emails](#) in that if they don't click the link in the email reaffirming permission, then you suppress them from your active mailing list. This helps protect your engagement rates, protect you from spam complaints, and protect you from an abandoned email address being converted into a recycled spam trap.

"Apple's Mail Privacy Protection is making it harder to determine [whether a subscriber is active or not](#). Don't be afraid to supplement your real email opens and clicks with omni-channel behaviors, such as web sessions, app sessions, and purchases. With the appropriate look-back window, all of those behaviors are helpful in making wise decisions about which subscribers are safe to continue mailing and which are best to re-permission."



Chad S. White
Head of Research, Oracle
Digital Experience Agency

- **Re-permission your never-active subscribers.** Sometimes you get new subscribers who simply don't engage at all—not with your welcome emails 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 brands re-permission never-actives after 30 days of no activity.

"Clicks remain the strongest positive signal we have for qualifying a new subscriber as safe to mail, which is why they're the heart of [double opt-in \(DOI\) confirmation](#). If you're not running DOI, ask for a click throughout your welcome series. Provide compelling reasons for them to click, whether it's redeeming a welcome offer, selecting preferences, or answering a progressive profiling question that will allow you to provide immediate value to the subscriber."



Daniel Deneweth
Head of Email Deliverability Services,
Oracle Digital Experience Agency

Not sure if your emails are reaching your subscribers' inboxes?

Oracle Digital Experience Agency'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.

Want to discuss your needs?

Talk to your Oracle account manager, [visit us online](#), or [drop us a line](#).



Automated Campaign Optimization & Growth

Chances are that your automated email, SMS, and push campaigns were the silent heroes of your holiday season. While much is made of the big increases in broadcast and segmented messaging during the fourth quarter, triggered messages like cart and browse abandonment campaigns and back-in-stock notifications likely generated a significant portion of your digital marketing revenue. The first half of the year is a great time to grow your automated programs so your next holiday season is even more successful. Here's our to-do list:

- ☐ **Take an inventory of all of your existing automated programs.** Our [Automated Campaign Ideas](#) checklist contains more than 110 triggered campaigns and can help you in this effort. For each one you identify in each of your marketing channels, here are some key questions to ask yourself:
 - ☐ *When was the automation 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 campaign templates?
 - ☐ *What is the goal of the message?* Which metric(s) best align with that goal? How is it performing?
 - ☐ *What triggers the campaign?* Is it an action, inaction, date, change in order or product status, or response by an internet-connected device? How long after the trigger is the campaign sent? Could that timing be refined? Are some or all broadcast and segmented sends suppressed to subscribers who receive this automation to let that triggered campaign shine? If so, for how long?
- ☐ *Is this message 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 message is sent](#)? Are there actions or events that cause one or more messages in this series to be skipped and not sent? Are there actions or events that cause this series to be terminated early?
- ☐ *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 or machine learning in determining personalization, such as powering content or product recommendations?

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



Chad S. White
Head of Research, Oracle
Digital Experience Agency

☐ **Identify the automated campaigns and campaign elements that need attention most.**

Unfortunately, some brands still believe that triggered campaigns are “set it and forget it” when these high-ROI messages are really **“review and improve” campaigns that deserve regular QA, updates, and optimizations.** Based on the discovery that you did above, which campaigns or campaign 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.

“A yearly audit of your triggered campaigns is a great addition to your marketing calendar planning sessions. Performance and analytics will dictate which campaigns you want to focus on first. Small tweaks can make a big impact. Regularly reviewing these programs will prevent the need for overwhelming overhauls, while also keeping your team aware of all the messages you’re sending out so they can ensure each is still fulfilling their purpose.”



Elizabeth Thomas

Senior Art Director for Creative Services,
Oracle Digital Experience Agency

“We give some of our clients’ most-used triggers festive makeovers for various holidays and special events. It’s all about keeping the branding fresh and making sure customers see the most relevant, timely content. Sometimes, it’s as simple as adding a holiday-themed header or footer borrowed from other seasonal campaigns. A small touch can make a big impact!”



Patrick Colalillo

Creative Director, Oracle
Digital Experience Agency



☐ **Identify some A/B testing opportunities for your existing triggered campaigns.**

Marketers routinely A/B test their broadcast campaigns, but only rarely—if ever—A/B test their automated and transactional ones. Considering that triggered campaigns 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 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. [Doing pre-testing CTA analysis](#) can make your testing pay off even more.
- ☐ *Hero images.* Test the size and placement of the main image of your campaign. Also, test the image's content, such as a lifestyle vs. product image, and the image's style, such as a photo vs. an illustration.
- ☐ *Friendly from.* Augmenting your sender name can help differentiate your campaigns and strengthen your message. You want to be instantly recognizable in the inbox, so we always recommend leading 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 campaigns has been evolving as marketers try to better engage time-pressed consumers with short attention spans. Can you cut 25% of the copy from your campaign? 50%? Are there opportunities to use bulleted text or subheads instead of full sentences? Can an image, animation, or screenshot allow you to reduce the number of words you're using?
- ☐ *Send time.* Some triggered campaigns should be sent immediately, such as order confirmations, password resets, and welcomes. However, others should be delayed, including shopping cart abandonment campaigns, while the messages in a series should be spaced out. Test to determine the optimal delays and spacings.

"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 your channel, so share them across the marketing organization. This is a great way to showcase your channel's efforts and increase visibility within your organization."



Peter Briggs
Director of Analytic & Strategic Services,
Oracle Digital Experience Agency



Want more A/B testing ideas?

Check out our [Website Optimization Ideas checklist](#), which contains more than 80 suggested tests, many of which are also appropriate for email, SMS, push, and other digital marketing campaigns.

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

"Sadly, automated campaigns are often put into the Set-It-and-Forget bucket. But it's critical to keep them fresh and engaging based on the time of year and data collected from customers. These are not only your highest-ROI campaigns, but the ones that have the biggest impact on your most loyal customers. Don't let them go stale."



Spencer Kollas
Head of Analytic & Strategic Services,
Oracle Digital Experience Agency

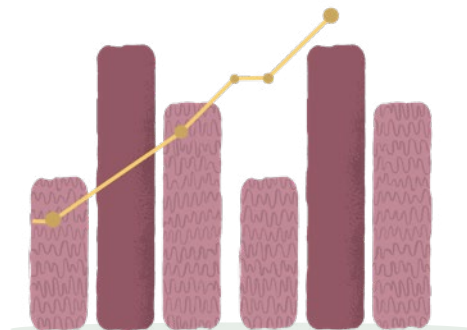
- ❑ **Expand or break up existing automated campaigns into series.** Sometimes one message isn't enough, especially given diminishing attention spans and the trend toward much tighter copy and fewer content blocks. Look for opportunities to add a second or even third message to an automated campaign. For instance, an initial shopping cart abandonment email might simply remind a subscriber of what they left in their cart, whereas a second email might recommend alternative products, making the assumption that they haven't purchased because they're considering other products. Relatedly, look to break up messages that are overly packed with information and contain lots of calls-to-action. 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.

- ❑ **Launch new triggered campaigns.** Are there gaps in your triggered campaign program? Revisit our [Automated Campaign Ideas checklist](#), which identifies more than 110 different triggered campaigns, including action-, inaction-, date-, and machine-triggered messages. Use that checklist to identify potential opportunities for you to grow your array of automated campaigns.

"Remember that not every behavior needs to trigger a dedicated touch from an automated message. In some cases, it may be more appropriate to [respond by adding a call-to-action via dynamic content](#) in a regularly scheduled message within the channel communication. Or you could use a dedicated touch for the first message and use dynamic content in subsequent messages to reinforce the CTA."



JT Capps
Director of Analytic & Strategic
Services, Oracle Digital
Experience Agency



"The optimal cadence and number of touches in an abandonment series can vary widely by brand and by cart value, and it should be thoroughly tested. However, when it comes to timing on that first touch, immediacy is universally crucial. We have seen up to a 60% increase in conversion when timing is cut from 24 hours to 1-2 hours following abandonment."



Chris Wilson
Strategic Director of Analytic
& Strategic Services, Oracle
Digital Experience Agency

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, emails, push campaigns, or social media presence. Here's our checklist:

- ☐ **Reassess your brand values and how you're communicating them in your customer experiences in terms of visuals and user interfaces.** The last few years have seen consumer attitudes and behaviors change considerably—and then change again. The first quarter is a good time to reflect on your brand and its relationship with your audience, reaffirm what your brand stands for, and then brainstorm how to best convey those values in your designs. Consider doing customer surveys, creating new personas, and partnering with your customer service operations to collect customer intel. 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.

"Audience fatigue is a real factor, as customers come out of the holiday season having received lots of marketing messages. Take the opportunity to create something unique and fresh that will leave your subscribers looking forward to more from you. Enhance your content by testing new elements like video, interactivity, and editorial themes that create additional relevance and build trust with your brand."



Scott Multer
Executive Creative Director, Oracle
Digital Experience Agency

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

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



Chad S. White
Head of Research, Oracle
Digital Experience Agency



❑ **Understand the current design trends.**

Building upon messaging changes you might want at your brand, understand the design changes that are happening within your industry and within the various channels you operate in. Allow some time for this discovery to take place. Outside experts can really bring a broader perspective to this effort. Here are the [hot redesign trends](#) we're seeing among our clients.

"A redesign is a difficult undertaking. You need plenty of time, different perspectives, and a clear end goal. Your roadmap should include brainstorming—which is at the root of all good design—and then enough time to iterate and get feedback so everyone's involved and invested in the redesign."



Katie Anderson
Art Director, Oracle Digital
Experience Agency

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

"Of course, deciding the scope and priorities of a redesign is only half the work—if that. The rest is actually doing the redesign. You'll want the right people involved, to dedicate a reasonable amount of time, and to have a rigorous process. Based on well over a decade of doing digital marketing redesign for our clients, here's detailed advice on [how to manage a successful redesign process](#)."



Lauren Gannon
Vice President of Agency Services,
Oracle Digital Experience Agency



Need help upleveling your customer experience?

Oracle Digital Experience Agency's Creative Services team can guide you through the entire process, from clarifying your email brand identity to crafting a style guide to redesigning the customer experience. Our designers, coders, and copywriters can handle email, social, web, and a range of other digital marketing projects.

Talk to your Oracle account representative, [visit us online](#), or [drop us a line](#).

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're 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 year ahead, including the next 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?
- ☐ Are there new capabilities and tools, like **AI** and **customer data platforms (CDPs)**, that you want to explore?

☐ **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 to vendor customers—especially those customers you identify and approach on your own. Ask yourself:

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

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



John Lillard
Principal Consultant for
Implementation Services,
Oracle Digital Experience Agency

Technology can be an incredible asset when used in alignment with the business—the operative phrase being 'in alignment.' As you consider new features and technologies, challenge yourself to get perspectives from a variety of sources. Beyond various stakeholders within your organization, consider analyst reports, network contacts, and more. If you do, you'll better understand whether your organization is ready for the tech, if you already have similar functionality, and if it's going to drive the intended impact."



Kaiti Gary
Senior Director of Analytic &
Strategic Services, Oracle
Digital Experience Agency

- ☐ **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. A few considerations:

- ☐ Do not lead with technology. The technology should support your initiative, not define it. Define success criteria based on the business use cases that add the most value to your organization.
- ☐ Define the process timeline and ensure that it has clear milestones to keep the process streamlined.
- ☐ Do not neglect the services requirement 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.

"We consistently see RFPs that include biases based on the capabilities of their existing technology solutions rather than focusing on what processes, integrations, and capabilities the new solution needs to be able to support. RFPs should focus on achieving specific business goals and should clearly identify which capabilities are required versus nice-to-have, as well as which technologies need to be accounted for in the proposed solution."



Patrick Maxwell
Solution Architect,
Oracle Digital Experience Agency

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Want help? Let's talk about how we can work together to seize your opportunities and overcome your challenges. Contact your Oracle account manager, [visit us online](#), or reach out to us at OracleAgency_us@oracle.com.

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