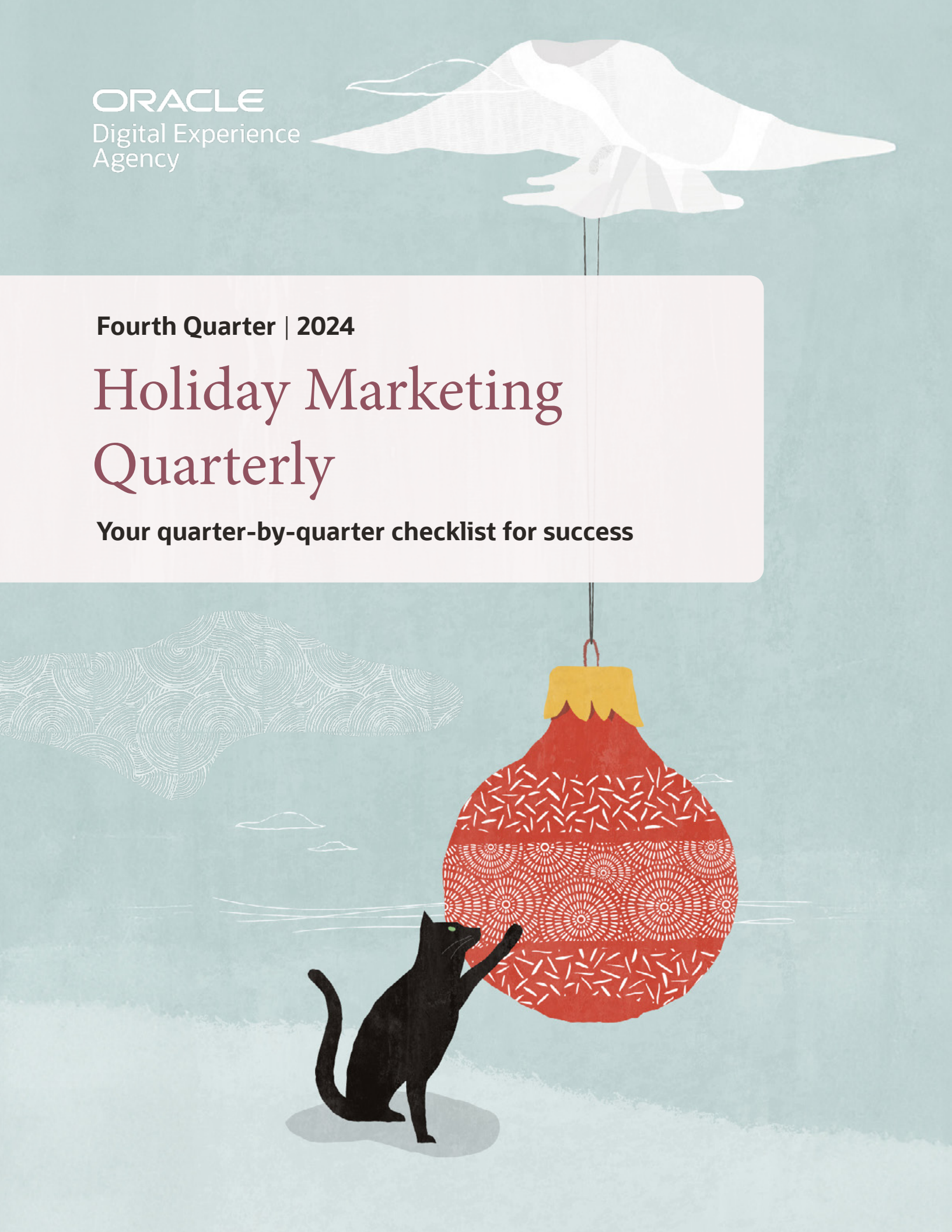ORACLE
Digital Experience
Agency

Fourth Quarter | 2024

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

+ **Engaging Seasonal Buyers**

+ **Adjusting Automated Campaigns**

+ **Leveraging New Capabilities**

+ **Using Cross-Channel Synergies**

+ **Doing Incremental A/B Testing**

+ **Finalizing Your Plans**

Our goal is to always be thinking at least 3 months out with our clients so they can avoid stalling out. We hope this quarterly checklist helps you stay on track with your planning 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
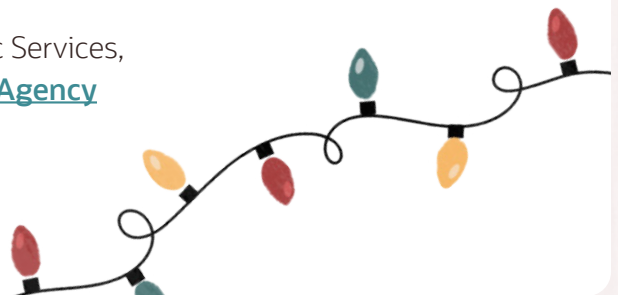
Engaging Seasonal Buyers

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

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

> "Customers who made purchases last holiday season and asked for gift receipts, and haven't purchased since are likely seasonal shoppers. Testing a holiday-themed reactivation series for this 'gift-givers' segment is worth a shot as they're starting to think about gift ideas for this holiday season."

Roald Ansano
Senior Art Director for Creative Services, Oracle Digital Experience Agency

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

> "The timing of your **short-term progressive profiling** will be driven by your need for fresh data to use for upcoming segmented and personalized campaigns. You'll want to do your progressive profiling close enough to the campaign that people are certain of their plans, interests, or desires, while also giving yourself enough time to act on their responses."

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

> "To identify safe-to-email subscribers among your inactives, start by identifying ones who have purchased from you within the last 24 months. Next, look at subscribers who are in the top tiers of your loyalty program, if you have one. Lastly, carve out your inactives who are generating **Apple auto opens**. We recommend emailing these groups once a week on different days of the week, so you can see if one or more of them cause issues. We've seen these groups produce surprisingly good conversion rates, generating revenue you wouldn't have otherwise realized."

Heather Goff
Strategic Dir. of Email Deliverability Svcs., Oracle Digital Experience Agency

☐ **Managing seasonal shoppers post-holidays.**
The flipside of reengaging seasonal shoppers is that you need a clear plan for retaining these shoppers after the holidays. Make it attractive for these customers to stay subscribed by giving them the option to opt-down to receive emails less frequently, as well as **the option to snooze their subscription** until the New Year.

"While the **email snooze option** has made headlines most recently in connection with Mother's Day and Father's Day, it started as a way to reduce opt-outs during December by subscribers who were done with their holiday gift-buying. Many of our clients who have experimented with a holiday snooze option have found it to be so effective that they've made it a year-round **preference center option**."

Jeannine Pine
Senior Director of Agency Services,
Oracle Digital Experience Agency

Need help managing your seasonal shoppers? Oracle Digital Experience Agency's List Growth & Demand Generation Services team can help you quickly and safely grow your audience, while also keeping an eye on maximizing retention both during and after the holidays. Want to discuss your needs? Talk to your Oracle account manager, **visit us online**, or reach out to us directly at **OracleAgency_us@Oracle.com**.

Adjusting Automated Campaigns

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

☐ **Make your automated campaign content seasonally relevant.** In addition to **optimizing your automation**, find ways to **bring the holiday season into your triggered campaigns**, particularly your welcome, shopping cart abandonment, browse abandonment, and back-in-stock messages. Keeping in mind that seasonal design changes should be coordinated with those that you plan to make in other channels, consider the following changes:

   ☐ *Adding seasonal imagery. A*dd snowflakes, snowmen, candles, holiday lights, and other visual motifs to your automated campaigns.

   ☐ *Adding seasonal navigation bar links.* Add a "Gifts" or "Holiday" link to the nav bar in your triggered messages.

   ☐ *Adding seasonal messaging to your primary message block.* Acknowledge in your copy that your subscribers are getting these campaigns during the holiday season by speaking to their seasonal needs and how your brand can help.

   ☐ *Adding secondary seasonal messaging.* Add secondary messaging that speaks to shoppers' needs during the holiday season, whether it's promoting gift guides, order-by deadlines, gift wrapping services, payment options, or other helpful content.

"We encourage our customers to review their triggered and transactional campaigns early in their holiday planning. The most cost-effective updates are ones you can apply globally, such as updating your header with holiday branding, navigation bars with seasonal links, or inserting a banner to promote gift centers, wish lists, or free holiday shipping/returns. These updates can be designed once and scale across a template system to create a consistent brand experience for your customer."

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

☐ **Adjust the behavior of your triggered campaigns.** Normally, it makes sense, for example, to delay the sending of a cart abandonment email for hours to avoid disrupting normal buying behaviors. However, during the holiday season, decisions are made much more quickly. Because of how time-sensitive many holiday deals are—particularly on marquee days like Cyber Monday—you'll likely want to adjust cart and browse abandonment campaigns to trigger more quickly, if not immediately after abandonment.

Similarly, if you're using abandonment series, it may not make sense for subsequent messages in those series to be sent after you can no longer guarantee Christmas delivery, for instance. And while you might use suppression rules to ease subscribers into your promotional message stream outside of the holidays, especially if you have a long welcome series, new subscribers in November likely signed up precisely to get all of your promotional campaigns, so turning off suppression may be wise.

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

Roald Ansano
Senior Art Director for Creative Services,
Oracle Digital Experience Agency

Looking for more automated campaign ideas? Check out our **Automated Campaign Ideas** checklist, which contains more than 110 triggered messages, plus tips from our digital marketing and communication experts on how to maximize the potential of automation.

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

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

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

> "Taking time to do thorough QA checks on your automated campaigns ahead of the holiday season—and especially after making seasonal updates, no matter how minimal—is always key to ensuring an optimal customer experience. Doing QA can ensure top-performing subject lines are in place, images and third-party content are still rendering as expected, and users are directed to the correct landing pages. During a time of year when more eyes are on your content, and you have the opportunity to drive higher engagement and revenue, investing a little extra time can have a huge impact."

Lauren Pierce
Senior Manager for Campaign Deployment & Monitoring Services,
Oracle Digital Experience Agency

☐ *Mobile version.* Mobile optimization is as important as ever, and being **mobile-friendly goes beyond using responsive design**.

☐ *Email rendering.* Inbox providers change their code support periodically, and rarely announce changes, which makes **email rendering complex to manage**. Take this opportunity to run a thorough rendering and functionality check before heading into the holiday season. That said, this doesn't take the place of routine rendering checks, which are part of the quality assurance checks we do for every email campaign that our Campaign Deployment & Monitoring Services team deploys for our clients.

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

☐ *Trigger logic.* Check the rules that govern when each of your automated campaigns will be sent. As previously mentioned, it may make sense to tweak these at various times of the year.

Want to boost the performance of your triggered campaigns? Oracle Digital Experience Agency's Campaign Automation Services team can help you with everything from conception to launch, and from A/B testing to seasonal optimization. Want to discuss your needs? Talk to your Oracle account manager, **visit us online**, or reach out to us directly at **OracleAgency_us@Oracle.com**.

Leveraging New Capabilities

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

☐ **New digital marketing platform capabilities.** our digital marketing platform is regularly rolling out new improvements and new functionality. That's certainly the case here at Oracle. To see all of the new digital marketing capabilities we've released in recent quarters, check out:

   ☐ **What's New for Responsys**

   ☐ **What's New for Eloqua**

   ☐ **What's New for Unity & Infinity**

☐ **New third-party tools and integrations.** Have you added new digital marketing, ecommerce, payment, or other kinds of tools to your toolbox this year? If so, make sure you've integrated it into your workflow and have your team trained on how to use it effectively.

☐ **New third-party capabilities.** For your existing third-party tools, make sure you're up to date on the latest improvements, enhancements, and integrations that might save you time or give you a performance boost.

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

"Even if you haven't added new components or swapped out existing ones, **your martech stack** has changed over the last year because of product updates. That means you have new capabilities you can bring to bear this holiday season. Make sure you know what they are. It's also possible that integration or platform changes elsewhere in your organization mean you have greater or faster access to data you can use to improve the personalization, segmentation, and automation of your digital marketing campaigns."

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

Want to ensure that you're getting the most out of your Oracle products? Oracle Digital Experience Agency's Platform Training & Adoption Services team can help you with basic training, deep dives, and updates on new functionality. 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**.

Using Cross-Channel Synergies

Year-round, marketers can gain an edge by breaking down the silos between their marketing channels—indeed, the barriers between their departments and teams as well. This is especially true during the holiday season, when all insights into customer behaviors are extra valuable and campaign coordination and orchestration are even more powerful. Here are some activities to consider:

☐ **Cross-channel campaign coordination.** Every campaign message is impactful, but it generally takes repetition of a message to maximize action across your audience. How are you coordinating your messaging across email, SMS, push, social, direct mail, and other channels? How are you varying your messaging to cater to **different channel audience capabilities and audience expectations**? Are you testing whether it's more effective to send a message across channels on the same day or stagger the messaging to reinforce it across channels over multiple days?

☐ **Omnichannel orchestration.** If you have a **customer data platform** like **Oracle Unity** in place—or have other means of sharing and activating cross-channel data in at least near real-time—look for opportunities to leverage that data by:

  ☐ *Using cross-channel behaviors to send personalized or segmented messages in any channel.* For example, sending a segmented email about sweaters to any subscriber who has browsed sweaters on your website or app or opened an SMS, push, or email campaign primarily about sweaters.

  ☐ *Using cross-channel behaviors to send automated messages across channels.* For example, using app inactivity to trigger an app reengagement email, or using email inactivity to trigger the mailing of a reengagement message via postcard.

  ☐ *Sending a message via the channel a customer is the most engaged with.* Most often, this Next Best Channel modeling involves a sort of RFM modeling across channels, with the winning channel for a message being the one that a customer has used most recently, most frequently, and generated the monetary value through. For example, if a customer abandons a shopping cart, this kind of decision engine can decide which channel is best to send the cart abandonment message via for the particular customer—or what combination of channels and in what order is best.

"Breaking down channel silos begins with changing perspective. It's about moving from a campaign or channel mentality to an audience or experience mentality. The first step is to understand what your reach is across your various channels. For example, how many of your customers are reachable via email only vs. email and mobile push messaging? Understanding your reach by channel and, more importantly, the overlaps will help inform where the largest opportunities for synchronized and coordinated experiences exist."

Kaiti Gary
Sr. Dir. of Analytic & Strategic Services, Oracle Digital Experience Agency

☐ **Share cross-channel insights.** Use insights about how your customers and prospects are behaving in one channel to inform your actions and messaging in other channels. Among others, consider sharing and using the following insights:

    ☐ *Site search insights.* What your site visitors are searching for is a real-time barometer of customer interest. Consider featuring the most searched-for products and categories on your homepage, as well as promoting them in your search and social ads and in your promotional emails, SMS, and push messages. Also, consider using your most popular site search terms in your subject lines, preview text, and body copy, or featuring a list of "Top Gift Searches" in your emails.

    ☐ *Paid search insights.* Use your more successful paid search terms in your subject lines and messages. Also consider using paid search to A/B test promotional language and then use the winner in your campaigns.

    ☐ *Social insights.* Use your popular social content to inform the products, topics, copy, and other content you use in your email, SMS, push, and other messages.

☐ **Cross-channel training**. During peak seasons, having a flexible marketing team can allow you to better pivot as needs change. Consider doing some basic cross-training now to prepare your team. For example, teach some of your web developers the basics of email development and help your graphic designers understand the constraints of email design.

"First things first: Don't be afraid to ask your customers which channels they prefer to engage with. Use that information to target them better, but also remember that customers interact with brands, not channels. By ensuring you are engaging with your customers across all channels in a similar fashion, you are more likely to meet their expectations."

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

"Some of the most successful marketing teams we work with schedule brief daily morning meetings with channel leads during peak seasons to review the previous day's performance data, share insights, and make quick adjustments to optimize campaigns for maximum success during critical periods."

JT Capps
Strategic Dir. of Analytic & Strategic Svcs.,
Oracle Digital Experience Agency

Want to improve your cross-channel coordination?
Oracle Digital Experience Agency's Analytic & Strategic Services can help with cross-channel insights, and our experts can help you execute campaigns across email, SMS, mobile push, browser push, loyalty, and other channels. 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**.

Doing Incremental A/B Testing

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

☐ **Subject line and preview text.** Subject lines are the most-tested email element, which is justified since they have the second biggest impact on opens after your sender name. But don't forget to test your preview text, which also has a sizable impact on engagement. That said, be aware that Apple Mail's rollout of AI summaries will result in your preview text being replaced by AI-written text based on the content of your email, so be careful not to make your subject line too dependent on your preview text. This is just one of **the ways subject line writing has changed**.

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

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

☐ **Heroes and other images.** Imagery is powerful for most brand communications, which is why HTML emails almost always outperform **plain-text emails** by a wide margin. Consider testing different kinds of images in your emails, such as functional vs. lifestyle, company-produced vs. consumer-generated, static vs. **animated images**, variations on model posings and croppings, and more.

"Think critically about your best available way to cut through the noise. For instance, if you know your prices or discounts aren't as compelling as your competitors', you'll need to use something else as the centerpiece of your messaging. Apply what you know about your customers instead, such as relating to the seasonal activities they're most excited about, who they're shopping for, the level of urgency they feel, and how they prioritize things like sustainability, affordability, and abundance."

Kelly Moran
Senior Art Director for Copy,
Oracle Digital Experience Agency

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

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

"Testing is one of the most important things you can do as a digital marketer. Look for incremental gains from small changes to copy and image swaps, but also explore bigger changes. Just because something is a best practice doesn't always mean it will work for your customers. Testing is important year-round, but especially during the holiday season when consumer behaviors shift."

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

☐ **Calls-to-action.** Your CTA tells your audience what you'd like them to do next. Depending on the messaging that precedes it, they'll be more receptive to taking certain actions over others. For example, consider testing high-intent vs. low-intent CTAs (i.e., "buy now" vs. "learn more"), broad vs. narrow CTA language (i.e., "shop all" vs. "shop menswear"), buttons vs. links, or large vs. small buttons. Also consider testing using pairs of CTAs that have a clear hierarchy, such as a hard-sell solid button asking people to "Shop now" next to a soft-sell ghost button asking people to "See trending looks."

☐ **Send time.** After years of big open time shifts driven by the pandemic and the embracing of work-from-home, consumer inbox behaviors have settled back down. While smaller individual-level changes in preferred open times are always occurring, the need to test different send times is less urgent this holiday season, especially if you're using **send time optimization** for campaigns that don't have a tight delivery window (e.g., Black Friday morning campaigns promoting in-store doorbuster deals).

"Email marketers have historically paid a lot of attention to subject line testing, eager to drive higher open rates. But in the age of **Mail Privacy Protection**, where many opens are being obscured, it's time for marketers to **refocus some of their A/B testing zeal on calls-to-actions** to drive much-needed clicks."

Tommy Hummel
Analytics Manager for
Analytic & Strategic Services,
Oracle Digital Experience Agency

Want more ideas of elements to A/B test? Check out our **Website Optimization Ideas** checklist, which contains more than 80 suggested tests, many of which are appropriate for email, SMS, push, and other digital marketing campaigns, too.

Need help with your A/B testing? Oracle Digital Experience Agency has experts to help you ensure that you're doing testing right, focusing your efforts on the tests that are most likely to pay off, and getting the best results across any digital marketing channel. 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**.

Finalizing Your Plans

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

☐ **Campaign plans.** You'll want to lock down your **campaign calendar** early in the quarter so everyone can get on the same page and you can maximize coordination across channels. Pay particular attention to your campaign plans on and around marquee shopping days, including Thanksgiving Day, Black Friday, Cyber Monday, and Green Monday. For more advice on what to consider as you finalize your content planning, check out **12 Trends a-Trending**, as well as our **Content Calendar Assistant**.

☐ **Workflow plans.** This plan should be two-fold. First, work ahead as much as possible, creating or at least drafting the messages and assets you know you'll need this holiday season. For example, for your email marketing, those will likely include seasonal elements such as holiday headers, seasonal navigation bars, and gift services footers. And second, have a plan for how you're going to handle the increase in workload demands on your digital marketing team. In addition to cross-training your staff as we mentioned earlier, consider **contracting with freelancers or agencies to get seasonal help**.

☐ **Contingency plans.** Update your **apology email template** and have concrete plans for what you will do in terms of messaging if your stores or deliveries are **impacted by winter storms** or other issues. Be prepared to send a **geo-segmented crisis message email** to those affected, whether it's an update about store closures, a change in hours, or other service updates. Have a designated email template ready to go to handle these kinds of notifications to subscribers.

"Make sure you have a way to get a hold of your digital marketing platform provider, digital agency, and other partners. If you have a single point of contact, recognize that could become a single point of failure. Make sure you have multiple contacts, including any 24/7 customer service centers. If you have a problem at 1am on Black Friday, you want to make sure you can reach someone."

Lauren Kimball
VP of Agency Services,
Oracle Digital Experience Agency

"With extreme weather becoming much more common, brands need to make sure they're ready to react quickly with messaging that keeps their customers informed. We recommend companies be able to send an alert message within 2 hours of deciding to do so."

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

Performance monitoring plans. Ensure that you have access to and are regularly reviewing the performance of your digital marketing campaigns so you can make adjustments to future campaigns or to your messaging strategy overall. Consider pre-defining what you'll do, for instance, if your revenue or response rates drop below a certain level, such as targeting your top engagers who haven't purchased yet with promotions for your bestsellers. Having even a rough outline of a plan will help you avoid knee-jerk decisions you may regret, such as just sending additional emails to your entire list.

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

Heather Goff
Strategic Director of
Email Deliverability Services,
Oracle Digital Experience Agency

Need backup this holiday season? Oracle Digital Experience Agency's experts can supplement your in-house team, helping with select tasks such as creative or coding, or taking over entire functions such as campaign deployment or performance reporting. Our Crisis & Rush Campaign Support can also ensure that your emergency messaging gets out the door in 2 hours or less with our 24x7 follow-the-sun coverage. Want to discuss your needs? Talk to your Oracle account manager, **visit us online**, or reach out to us directly at **OracleAgency_us@Oracle.com**.

Planning and running a successful holiday marketing program takes year-round effort. We can help.

Oracle Digital Experience Agency has hundreds of the leading minds ready to help Oracle customers build stronger, longer-lasting relationships with every customer, employee, and partner they reach—even if they aren't using Oracle platforms to manage those experiences.

Wide Scope of Services	Broad Channel Support	Many Platforms Supported
Creative & coding	Email	Oracle Responsys
Strategy & analytics	Web	Oracle Eloqua
Campaign management & deployment	SMS	Oracle Unity
Consulting & advisement	Mobile push	Oracle Infinity
Project management	Browser push	Oracle Fusion CX
Implementation & configuration	Direct mail	Oracle Fusion Sales
	Plus, omnichannel orchestration of all of the above	Oracle Fusion Service
		Oracle HCM

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**.