

Unlocking Holiday Retail Success

The Definitive Email and SMS Checklist for Retailers

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Introduction

It goes without saying that the start of the holiday shopping season presents retailers with a prime opportunity to not only drive traffic and transactions, but leave a lasting impression on their customers.

The biggest pain point for retail brands during this time, however, comes in attempting to leverage both email and SMS channels in a way that stands out from other retailers. To assist, MERGE has compiled a comprehensive Email and SMS Holiday Checklist to help serve as a resource in an effort to optimize your marketing efforts and position your brand for a prosperous and memorable holiday season. Every company is ramping up utilizing email and SMS, but positioning your campaigns around these recommendations can ensure a boost in sales and engagement.



Email/SMS Checklist

OCTOBER

- Finalize daily and weekly calendar and themes
- Validate creative needs to match themes
- Confirm tracking and tagging is operational and supports your measurement plans
- Increase send volume ahead of the holiday, to avoid being blocked by the ISPs
- Create holiday audiences
- Reactivate lapsed audiences
- Ensure your customer acquisition and messaging strategies are optimized and working as expected
- Complete A/B testing in triggers and marketing campaigns
- Develop contingency emails - prepare Plan A and Plan B
- Review transactional messages
- Activate SMS (if applicable)
- Begin using holiday shopping language

NOVEMBER

- Ensure you have enough coupon codes to support an increase in sign-ups and redemptions
- Monitor deliverability closely
- Execute the calendar
- Be prepared to pivot

DECEMBER

- Continue to monitor deliverability closely
- Pivot based on learnings/performance from BF/CM, as needed (Plan B)
- Communicate important shipping deadlines

JANUARY

- Fine tune post purchase messaging and journeys
- Maximize communications to newly acquired customers
- Consider re-engagement campaigns for inactive subscribers (Jan. or Feb.)
- Recap top and low performers to prepare for next year

Email/SMS Tips & Considerations

Below are some additional considerations and tips as it relates to optimizing content and timing, email deliverability, and audience segmentation.

Content/Timing:

- **Early Kick-off:** Consider initiating the holiday season with a strong start, aligning with events like Amazon's Prime Big Deal Day on October 10
- **Prioritize Loyalty:** Focus on customer loyalty, as 34% of consumers value deals and promotions. Highlight exclusive offers for loyal customers
- **Creative Enhancement:** Optimize creative elements with personalization, holiday-themed banners, and easy navigation to gift guides
- **Trigger Updates:** Refresh imagery and copy in trigger emails, highlighting new holiday arrivals
- **Shipping Countdown:** Implement a countdown for important shipping days to keep customers informed
- **Learn from Past Success:** Review the effectiveness of last year's campaigns and replicate those that drove the most success
- **Mobile Optimization:** Ensure all marketing materials are optimized for mobile devices to reach a wider audience effectively

Continued 

Email Deliverability Optimization:

Begin early by gradually ramping up email volume in September or early October, especially to inactive subscribers, to ensure they don't receive their first email on Black Friday. Use send time optimization to choose the best times for sending. If planning AM/PM sends, send to everyone in the AM, reserving PM sends for non-clickers to safeguard deliverability during crucial times.

Segmentation:

Leverage segmentation based on last year's shopping behavior to tailor your messages effectively. Consider increasing the frequency and timing of trigger emails, like abandoned cart reminders sent every 24 hours instead of waiting for several days. Ensure all testing and campaign logic adjustments are completed well in advance, and review suppression logic for accuracy.





By following these steps and implementing these strategies, retailers can get ahead of the game, putting themselves in great position to be well-prepared to execute successful holiday marketing campaigns that effectively engage your audience and utilize precision messaging to maximize your brand's impact. And with decades of experience working with some of the most well-known brands in retail, our team at MERGE is well-versed when it comes to preparing retailers for the always eventful holiday shopping season.

[Connect with us today](#) to bring your holiday marketing strategy to life!

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