



Marketing Email at Enterprise Scale: Best Practices to Work Smarter

How consumer-facing enterprises are getting the most out of their email martech



Executive Summary

In this white paper, we discuss the strategic and technical challenges associated with sophisticated operations. It's meant to be a resource for C-level executives working to gain more results from their email technology as well as marketing operations experts looking for tactical best practices.

Successful companies are solving their email operations challenges by starting with strategic priorities and making achievable upgrades.

Some best practices for improving email marketing include:

1. Eliminating opportunities for human error
2. Establishing a collaborative process between marketing and web teams
3. Reaching customers at their height of interest
4. Knowing when and how to say goodbye to unengaged customers
5. Having a stats playground to analyze customer behavior over time

Based on our work with

The logo for Shutterfly, featuring the word "Shutterfly" in a sans-serif font.The logo for Charter, featuring a stylized "C" icon followed by the word "Charter".The logo for CHOICE HOTELS, featuring a stylized "C" icon followed by the words "CHOICE HOTELS".The logo for BED BATH & BEYOND, featuring the words "BED BATH & BEYOND" in a bold, sans-serif font.The logo for WELLS FARGO, featuring the words "WELLS FARGO" in a sans-serif font inside a grey rectangular box.The logo for L.L.Bean, featuring the words "L.L.Bean" in a serif font.The logo for CVS pharmacy, featuring a red heart icon followed by the words "CVS pharmacy".The logo for Prudential, featuring a circular icon with a hand holding a torch, followed by the word "Prudential".

Email marketing is a vital pillar of any consumer-facing company's marketing strategy. Even incremental improvements can result in significant boosts to revenue. Read the full white paper to discover more.



When your customer base spans millions there's no doubt that email is an important — if not the most vital — pillar of marketing strategy. By improving the quality of email campaigns and better leveraging customer data, even incremental improvements can boost revenue by millions.



760%

Increase in revenue generated by email through optimized segmentation

Yet, even the most straightforward tactics that marketing operations teams deploy are fraught with technical challenges. Between disparate customer records, uncooperative marketing technology, and persistent human error, even something as simple as segmentation can be an unruly beast to tame.

So, how are trailblazers in retail, hospitality, banking and other consumer-facing industries solving their email operations challenges?

First, they're starting with strategic priorities:

Real-time + Relevance = Results

It's not just about the right email. It's about the right message, to the right person, at the right time. This goes further than mass emails to specific segments, but rather hyper-personalized emails to individual customers.

Here's a prime example: Our global hotel client's marketing stack triggers a marketing action as soon as their digital properties register engagement with

business-travel related content. Not just that, the web data layer works in the background to automatically assess other factors such as customer status, distressed inventory, and past behavior.

For many, the challenge with real-world marketing occurs because time-consuming, often manual tasks — list creation, data syncing, and batch delays — mean that even your fastest turnaround is too late. In the scenario above, a mix of strategic planning and technical implementation creates a hands-off way to reach customers at their height of interest... and not a second too late.



Achievable upgrades lead to big payoffs

Successful marketing innovators aren't trying to reinvent the wheel, but rather making incremental changes that lead to big improvements in revenue. Ultimately, this type of innovation means businesses can get more results with less mayhem.

With the variety of martech options out there, it can be tempting to try and completely swap out your tech in the hopes of a brighter, shinier future. Unfortunately, the potential downside of this is undeniable. Completely new setups struggle to get adopted by teams and have fresh issues of their own. It can take months if not years simply to get to a place of operational efficiency or even functional parity with the replaced solution.

Instead, leaders are looking at their current email marketing configuration and asking how they can make tweaks to data architecture, campaign processes, and how marketing and IT work together. These types of upgrades lead to verifiable improvements in results without the risk of major setbacks. If incremental upgrades don't provide upticks in performance, then it's time to consider a bigger change. And even then, there's no such thing as a perfect martech stack.

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Marketers only use 58% of their martech stack's full breadth of capabilities (Source: Gartner)



While Gartner's report claims that marketers are using 58% of our martech stack's capabilities, our experience puts this number much lower.

Part of identifying achievable upgrades entails leaving assumptions behind and being willing to take a different approach. Enterprise leaders are revisiting the customer journey with a fresh lens, and understanding that there are ways to test and learn instead of burning down their entire martech configuration.

The customer journey is complex, but it can be managed

Businesses making greater gains from their email campaigns aren't shying away from complexity. They know that for customer interactions to register and trigger appropriate reactions, there's no getting away from complexity.

Those succeeding at email marketing to tens of millions of customers know that they not only need to understand the customer journey, but they also need to be able to react to it. This means marketing and web/IT teams are working hand-in-hand to tame complexity: pose the right questions, identify what metrics need to be tracked (and not in hindsight!), and decide on each and every variable that should be tracked in the customer data layer. Additionally, teams will want to identify how metrics relate and build on each other. In the world of customer data, 1+1 is always greater than 2.

It's a fine balance between strategic planning and technical implementation.



When “good enough” is perfect

The email marketing machine has endless cogs and gears. Between strategy and creative input, production and campaign requirements, compatibility and deliverability, QA, sending, and reporting there's a lot that needs attention. It can feel near impossible to simply get an email out the door.

To tame this beast, and create velocity around email programs, means making compromises. For example, instead of emails displaying print-perfect on each and every email client, you may choose to optimize for the most popular clients and only address critical errors on the rest. Spending time to make emails appear perfect for email clients rarely used by customers, is likely not worth the payoff. Most of the time, you can achieve 90% of the optimizations for 10% of the effort. Then the question becomes, is the last 10% worth it, or is that effort could be better used toward something else?

Enterprise Email Best Practices: Based on Real-Life Successes

Strategic priorities make sense in theory, but without tactical solutions they may be impossible to realize. There are a number of ways successful companies are adapting their martech to get more out of email:

1. Eliminate opportunities for human error

The old school way of doing things, i.e. traditional campaign management, leaves a lot of room for human error. In fact, human error throughout organizations costs the S&P 500 companies over \$ 150 million in lost revenue. Not just that, manual tasks are often the cause of huge time lags and loss of relevance for marketing efforts.

Instead of manually filtering through data, causing implementation delays, organizations can use automation to trigger cohorts for timely email marketing. Data simply updates in the background. Interactions and reactions in real time because there's no human being trying to execute campaigns after the customer's interest level has faded. This opens up tremendous possibilities, such as AI-based smart segmentation.

Customer Data Platforms (CDPs) are excellent vehicles to achieve this and move from "Just in time vs just a little too late email marketing"



2. Establish a collaborative process between marketing and web teams

In order to implement a better data model, marketing and web teams have to shift the way they work together. Web and app data should fuel email efforts, but in order to do that both teams need to establish a data "contract." This working relationship means that teams collaborate on what variables should be tracked on digital properties as well as how and which performance metrics will be tracked.

Returning to our example featuring a global hospitality giant; web and marketing teams worked together on aspects of their guest loyalty program, which included ensuring that existing loyalty members are taking advantage of new amenities. One such amenity was the mobile key, which enables guests to access their room via their mobile device. No keys to lose. In order to send these guests email and push notifications about mobile key, marketing and data teams decided that enterprise platforms and digital properties needed to track if a guest who is checked in, and a member of the loyalty program, had or had not utilized the mobile key feature. Both teams understood that even small conveniences like this lead to a better guest experience and increase in revenue — and that planning for this kind of real-time integration and personalization needed to happen very early on.

3. Stop guessing what your customer is interested in

Emails should help fuel revenue growth, not cause customer attrition. When key metrics are not being tracked by marketing teams, emails aren't sent at a height of interest. Customers find your emails irrelevant at best, and disruptive at worst.

What if instead of guessing, you knew exactly which particular phase of buying your customer is in? For your outbound marketing to be **this good** it means you must transition from basic tracking metrics to becoming a keen listener and observer.



Real-time marketing means moving at the speed of the customer, understanding their pain points or interests, and serving up the right information at the right time.” Karen Quintos, Dell

It's all about acting on the right data, at the right time. You can achieve great results even with legacy martech platforms with some creative solutioning and an open mind.

4. Know when to say goodbye

Be eager to say goodbye... well, not really, but sometimes you have to recognize a lost-cause. Peppering your customers with emails they ignore is training them to ignore your brand. Worse yet, the more emails that are ignored, the more likely your emails will be routed away from the inbox, such as promo-tab, spam, or dumped completely.

The largest and most widely used email clients use AI to learn their user's behaviors and automatically filter, delete, and unsubscribe from marketing emails. And if they notice a pattern... yes, you guessed it, they will apply that learning across your entire audience resulting in lower inbox placement and significantly lower open and click-through rates.

While it isn't the most glamorous part of the marketing process, deliverability and sender reputation are paramount to the long-term health of an email program. It can be painful to remove 2, 5, 10% of your subscriber base, but mass emails aren't necessarily smart ones.

When you do decide to opt certain users out of marketing messaging, you can do so in a stratified way. For instance, if a customer has not engaged with an email in over 60 days, reduce the contact frequency. Keep reducing the contact frequency over time until you may decide to remove them altogether or attempt a “reactivation” strategy.

5. Have a marketing stats playground to analyze customer behavior over time



57%

Of marketers are incorrectly interpreting data and likely getting incorrect results (Source: UPenn)



The decisions you make about your marketing strategy are only as good as the information they're based on. Seems simple enough, yet many companies move forward with strategies based on faulty or incomplete performance dashboards.

Sophisticated data models allow you to see multiple time series, perform time analysis, discover cause-effect, and more. Pulling results, running tests, and validating ideas is streamlined, and there is definitely no guesswork involved. Not only that, teams should do all of the above in a timely manner, instead of acting on data that's already obsolete.

The practical issue here is that databases are ginormous and it takes a prohibitive amount of resources to produce data models. The key to overcoming this challenge brings us back to Customer Data Platforms, finding ways to store data optimally, and pulling pockets of data that can be used to test and validate ideas.

Adapt your email marketing strategy... or leave money on the table

Most marketing operations teams have a dozen new ideas they would love to implement, but they're often limited by technology or the setup of a martech stack. What if that wasn't holding you back? What if you had the technical chops to make vision a reality?

Pinpoint has experience across an array of technologies, with customer databases in the tens of millions, helping enterprises to maximize the return on their email efforts. If you have ideas, and want to know how your stack needs to adapt to make them reality, let's talk. If you think your setup is messy, we bet we've seen it before and can give you ideas and direction.