

# Finding Efficiencies with Remote Campaign Operations

Ramping up high volume senders for Email Marketing

May 2020

# Are you ready for high volume sending as a remote team?

How many campaigns are you sending per week?

Does your team have the tools you need to function as fully remote?

Is every email QA'ed before it's sent?

## Top Challenges Faced by Marketers

- 1** Strategy teams are engulfed in execution (or lack thereof)
- 2** Lack of streamlined campaign process
- 3** Lack of appropriate resources to effectively target & speak to audiences
- 4** Inefficient or non-existent Quality Assurance
- 5** Inability to properly track and report on the success of marketing campaigns
- 6** Lack of knowledge of all the opportunities within industry tools

# Introduction to Campaign Operations

**“This will be the huge shift going forward, which is that everybody wants systems that are smarter, everybody wants systems that are more predictive, everybody wants everything scored, everybody wants to understand what’s the next best offer, next best opportunity, how to make things a bit more efficient.”**

Mark Benioff, CEO Salesforce

## What is Campaign Operations?

It's the team and process that exists within an organization to build, deploy and report on the success of an email campaign or program



# COMMON BREAKDOWN OF TEAM ROLES & RESPONSIBILITIES

## CAMPAIGN MANAGER

Manages campaign process including:

- Milestones & Deadline(s) completion
- Sets up deployment (UI) with campaign details
- Deployment Scheduling
- Partners with marketing team to manage campaign calendar and campaign requests
- Delivers monthly send reports with campaign tracking and send details

## DATA SPECIALIST

- Creates send-able audience list or data extension
- Implements Data Driven Triggers
- Maps Journeys within Journey Builder
- Troubleshoots issues with data

## EMAIL DEVELOPER

- Codes HTML & AMPscript emails
- Manages updates and revisions

## TECHNICAL QA SPECIALIST

- Tests journeys and triggers to ensure accuracy
- QAs campaigns and deployments
- Verifies updates and changes are completed

## PROJECT MANAGER

- Manages project and estimated SOW timelines
- Manages hour forecast and resource allocation

# How it works Remotely



Remote work has increased by  
**400%**  
within the tech industry since 2010

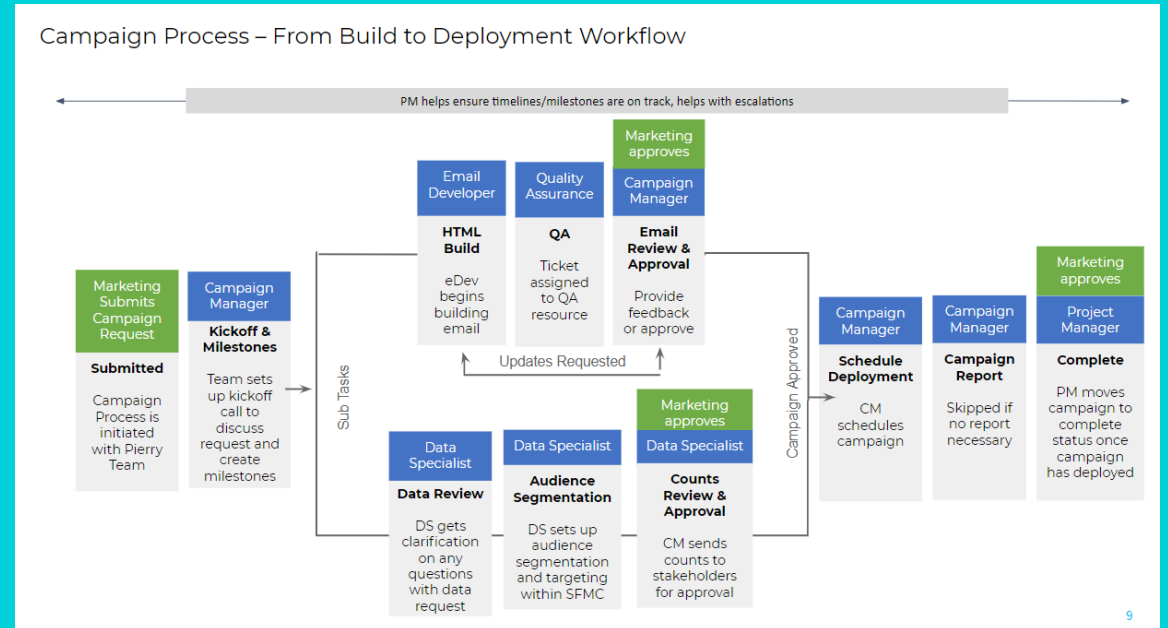
HubSpot – March 2020

## **3 PILLARS OF AN EFFECTIVE & EFFICIENT REMOTE CAMPAIGN OPERATIONSTEAM**

- 1 Defined Process**
- 2 Experts of a Focus**
- 3 Collaboration & Project Management Tools**

# A CAMPAIGN OPERATION TEAM'S PROCESS MUST HAVE DEFINED PHASES

- New Campaign Request
- Kickoff & Milestones
- Email Build
- Email QA
- Email Approval
- Audience Segmentation
- Counts Approval
- Review
- Schedule Deployment
- \*\*More phases can be added into the front or back-end of a campaign process.



# EACH RESOURCE MUST BE AN EXPERT OF A FOCUS

## CM

Campaign Manager is the chief of execution! They are all about getting those emails out the door, warming your IP, and ironing out your campaign deployment process.

## QA

QA Specialist is like your mother-in-law! Their only focus is to identify any errors or issues with the campaign that could result in minor or major consequences. They are looking for misspelled words, breaks in the HTML or anything that could disrupt the customer experience.

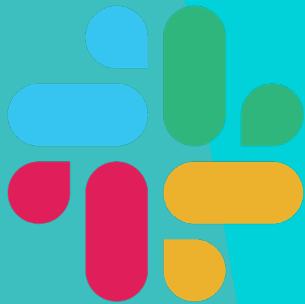
## eDEV

eDev is like the pastry chef! They are responsible for layering and building your dream cake, the elusive email! They create flawless HTML emails that are responsive so no matter how your recipients are looking at it, it's looking great.

## DS

Data Specialist is the DJ of the party! They are looking to make sure they get the right message to the right audience. They query audience segmentations and lists, and get them into the deployment tool. They also help apply personalization to messages so that customers get the right content.

# CAMPAIGN OPERATIONS MUST HAVE A SET OF TOOLS THAT EVERYONE CAN ACCESS AND UPDATE



SLACK



JIRA



MSFT TEAMS



GOOGLE DOCS

# Benefits of a Campaign Operations Team

**70%**

reduction in  
production  
timelines

**107%**

increase in  
Engagement  
metrics

**4x**

increase in  
Campaign  
Volume and  
execution

## ADDITIONAL BENEFITS

- ✓ Increased ROI
- ✓ Stronger Strategy
- ✓ Higher Brand Loyalty



# Case Study: Enterprise Health Care Insurance/Benefit Provider

2019

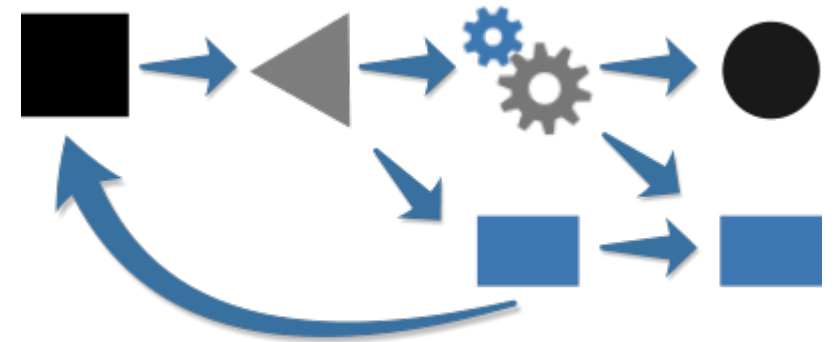
# The Challenge: Building an Efficient Campaign Process

---

H/BIP was struggling to get all their campaigns launched and carve out time to analyze results and make improvements on email marketing strategy. H/BIP wanted to make campaign builds & timeline consistent across different teams.

H/BIP needed a solution for the following challenges:

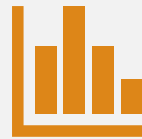
- Massive backlog of campaigns
- Streamlined reporting for recurring campaigns and A/B testing learnings
- Consistency across similar campaign builds



# The Solution:



Streamlined Campaign Process



Provided Reporting



Dynamic Templates

# Weekly Email Report

Week of:  
**7/22**

## KPI Overview

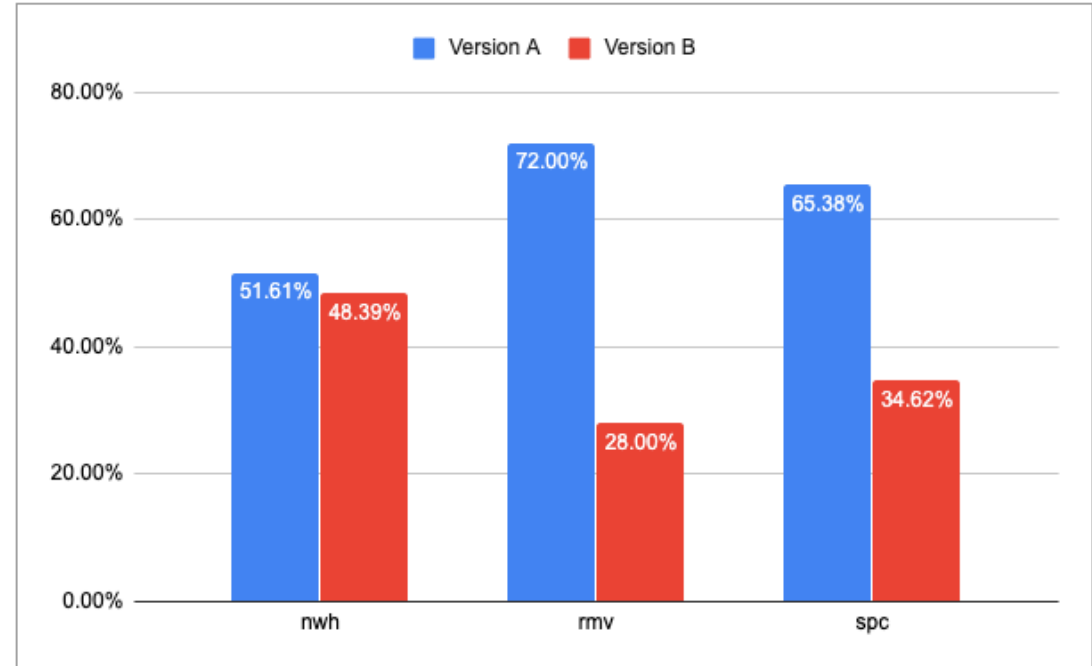
0	0%	0.00%	0	0
Total Campaigns Sent	Delivery Rate	Opens	Landing Page Views	Sessions Started
0	0	0.00%	0	0
Piery Built Campaigns	Delivered	Clicks	Account Activations	Services Started

## Campaign Activity

Campaign Type	# of Campaigns	Delivered	Opens	Clicks	Viewed Landing Page	Account Activations	Sessions Started	Services Started
Spine								
Launch								
Broad								
Reminder								
Incentivized								
Newly Eligible								

## Campaign Breakdown

Date	Campaign	Delivered	Opens	Clicks	Viewed Landing Page	Account Activations	Sessions Started	Services Started
Date								
Date								
Date								
Date								
Date								
Date								
Date								
Date								



Provided Reporting for Campaigns & A/B Test Results



Provided Brand Guidelines & Built a Dynamic Template to Automate Campaign Build Process

---

## The Results in Numbers

Up to **80%**

reduction in production timelines due to efficiencies in Campaign Process & migration to SFMC

**30%**

increase in Engagement metrics by streamlining Campaign Build and Process

**3x**

increase in Campaign Volume and execution because of streamlined Campaign Process

# OVERALL:

- ✓ Over 200 Static Campaigns built using 3 dynamic templates
- ✓ 20 Campaigns a week SLA achieved
- ✓ Built Reports to view results and provide learnings
- ✓ Created a governance and process and helped them become scalable

## SUMMARY

AN EFFICIENT & EFFECTIVE REMOTE CAMPAIGN OPERATIONS TEAM HAS THESE 3 ELEMENTS  
DEFINING THEIR TEAM TO MAKE THEM SCALABLE AND ALLOW THEM TO BE STRATEGY & RESULTS  
DRIVEN

- 1 Defined Process**
- 2 Experts of a Focus**
- 3 Collaboration & Project Management Tools**