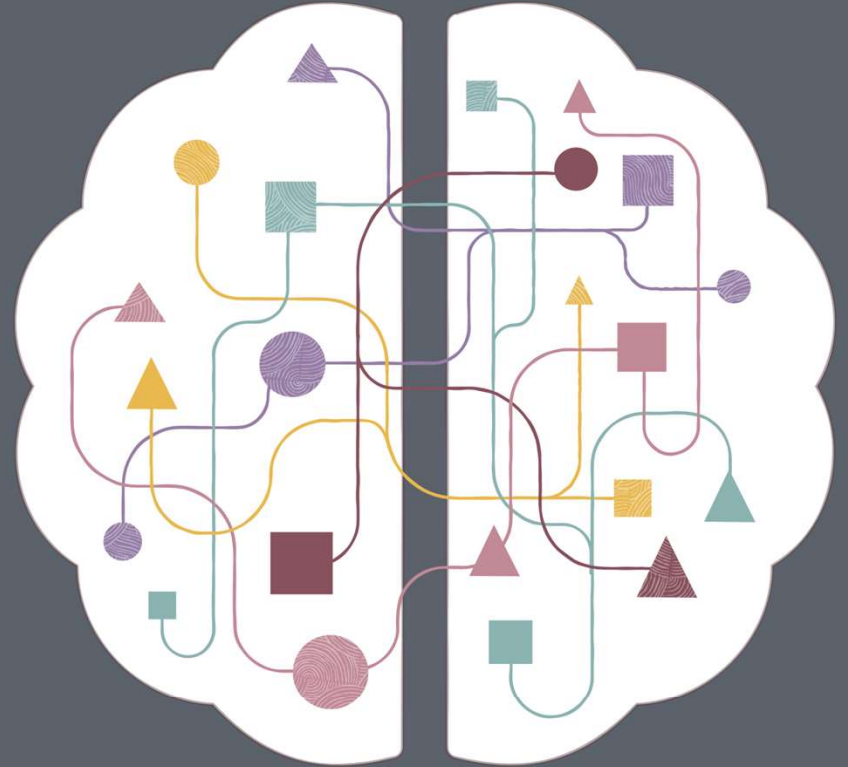


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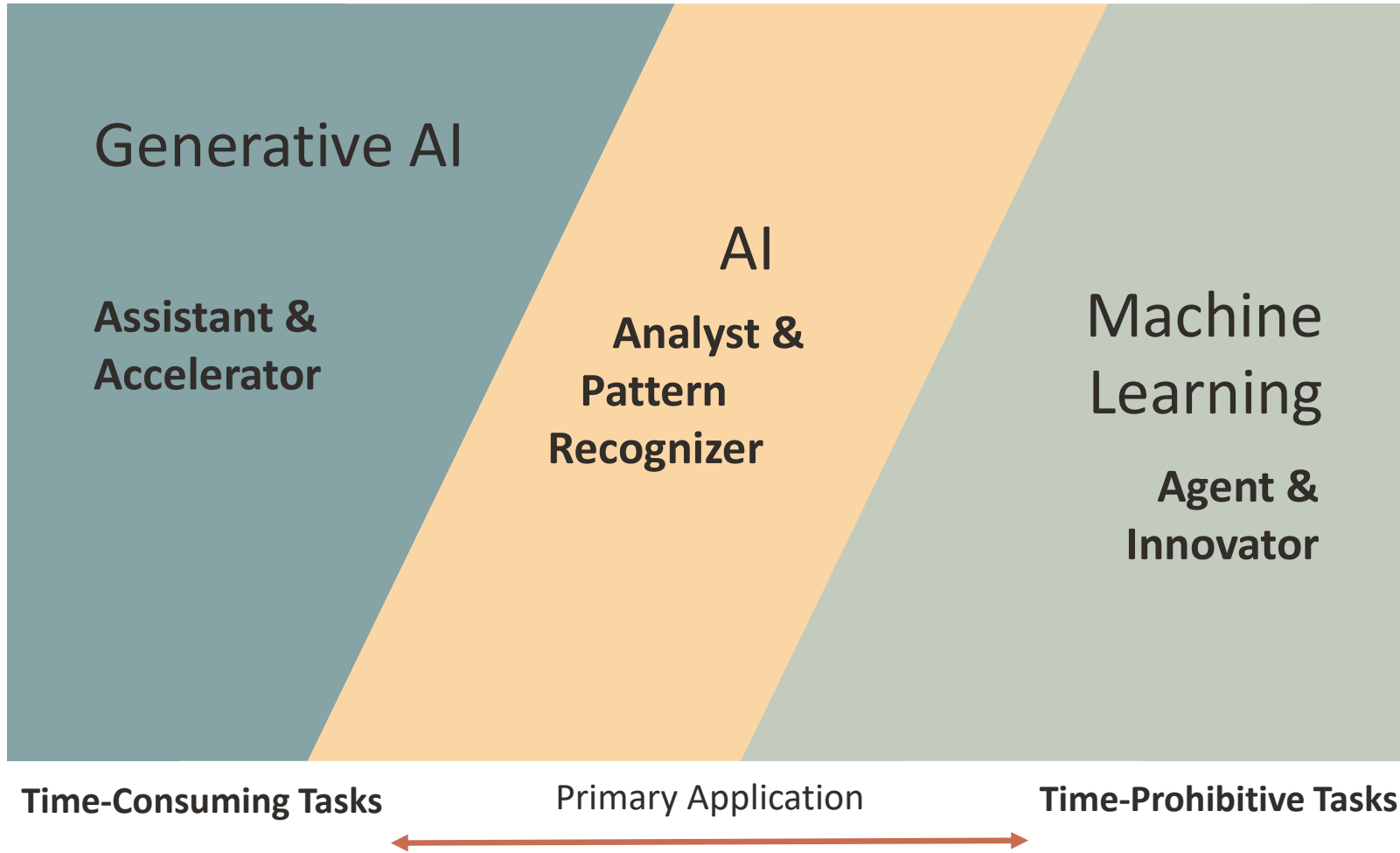
AI in Email Marketing

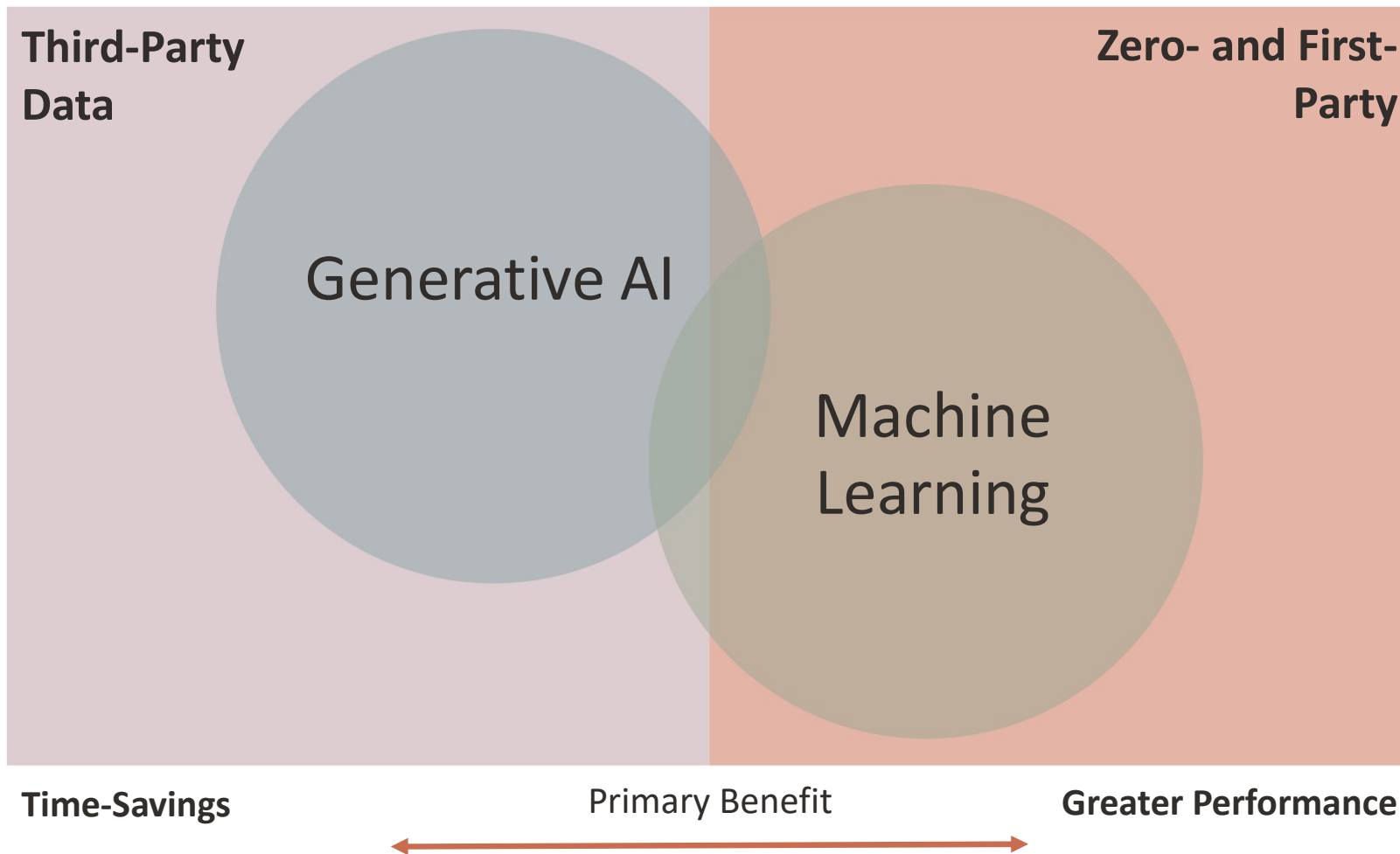


Artificial Intelligence

Machine Learning

Generative AI







Today, we'll explore the use of AI, machine learning, and generative AI in:

- ✓ The email production process
- ✓ Achieving the 1:1 marketing paradigm

...with 4 important caveats.

Caveat #1

We're going to talk about the **most substantial current and near-term** applications of AI, machine learning, and generative AI that are **relevant for most brands**. Additional use cases may arise in the future. Moreover, your brand may have find other meaningful uses of these tools.

Caveat #2

Just because you **can** use AI for all of the tasks we're going to discuss doesn't mean you **should**. Use your best judgment.

Caveat #3

We're not going to talk about completely automated GenAI-created emails that are sent without human review.

- Makes most sense for customer service emails & cold emails
- Attractive primarily to small businesses
- Enterprises want brand control and performance tracking
- Cost economics are questionable

Safe Harbor Statement

The following is not an indication of our general product direction. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, timing, and pricing of any features or functionality described for Oracle's products may change and remains at the sole discretion of Oracle Corporation.

A little about me



Chad S. White

Head of Research

Oracle Digital Experience Agency

- Author of *Email Marketing Rules* (4th edition) and nearly 4,000 articles about email and digital marketing
- ANA's 2018 Email Marketer Thought Leader of the Year



@ChadSWhite



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 - Mobile Push Messaging
 - Browser Push Messaging
 - ...and Omnichannel Orchestration

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- Oracle Infinity IQ
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- Oracle HCM
- ...and more



World-class brands choose us



Customer Satisfaction

96%

Spring 2023 Survey

NPS

70

Compared to the industry average of 43



AI in

The Email Production Process



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

We'll highlight tasks where AI can serve a role:



AI



Machine learning



Generative AI



People (non-artificial intelligence).



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Analysis



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Copywriting



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Analysis

1. Understand time constraints and set launch date



No significant role for AI.



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Analysis

2. Brainstorm and strategize email



Brainstorming themes, variations on a theme, gap analysis, etc.



Competitive/industry analysis
Building personas.





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Analysis

3. Create email brief



Summarize meeting discussions, especially interdepartmental meetings and meetings with agency partners



Organize information into structured email brief.



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Analysis

4. Make assignments and set deadlines



Auto-assignments based on current workloads, capacity, time off approved, and other factors.



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Audience



Approval



Send









Analysis

5. Get signoff on brief.



No significant role for AI.

 **Conception** **Copywriting** **Design** **Development** **Audience** **Approval** **Send** **Analysis**

1. Understand time constraints and set launch date
2. Brainstorm and strategize email
3. Create email brief   
4. Make assignments and set deadlines  
5. Get signoff on brief 



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

1. Write subject line and preview text



Exploring alternative phrasings



Edit copy (i.e., length, style)



Predicting performance and optimizing wording based on past performance.



Conception



Copywriting



Design



Development



Audience








Approval



Send



Analysis

2. Write body copy, including any personalization
-  Drafting copy & editing existing copy
-  Optimizing headline, CTAs, etc
-  Copyediting (i.e., style guide)
-  Content/product recs
-  Tailoring to different audiences.



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

3. Conceptualize art and review existing images



Exploring potential image compositions.



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

4. Write *alt* text for images



Drafting alt text based on image

Explore alternative phrasings



Edit copy (i.e., length, style).





Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

5. Write plain text MIME part of email



Drafting or auto-generating copy from HTML MIME part



Edit copy (i.e., length).



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

6. Review, revise, and finalize all email content.



No significant (additional) role for AI.



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

1. Write SL/PT



2. Write body copy



3. Conceptualize art



4. Write *alt* text



5. Write plain text



6. Review, revise, and finalize



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

1. Create wireframe, chose template, and select modules, including dynamic blocks



Building and iterating on template and module designs.



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

2. Consider potential interactive elements



Drafting wireframes and modules for interactivity.



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

3. Reconsider copywriting needs based on design so far



No significant (additional) role for AI.



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

4. Source images and incorporate into design



Creating images



Manipulating images



Creating image elements



Upscaling images



Tailoring images to different audience segments.





Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

5. Review, revise, and finalize email design.



No significant (additional) role for AI.



Conception



Copywriting



Design



Development



Audience



Approval




Send



Analysis

1. Create wireframe, template, and modules 

2. Consider potential interactive elements 

3. Reconsider copywriting needs based on design so far

4. Source images



5. Review, revise, and finalize



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

1. Name campaign file according to convention



No significant role for AI.



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

2. Code the email, including dynamic content rules and MIME parts.



Coding templates & modules



Dynamic module/content block decisioning for individuals



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

3. Add schema, microdata, JSON, etc. to enhance envelope content, if desired.



To recommend usage and create code



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

4. Add UTMs and other analytics tags to email code.



To recognize need from email brief, campaign name, etc. and edit existing code.



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

5. Add any desired interactivity



Drafting code for interactivity.



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Copywriting



Design



Development



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Approval



Send



Analysis

6. Upload email into ESP, if not created inside ESP



Email packaged up and uploaded based on design file and other instructions.



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Copywriting



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Analysis

7. Test rendering, fallbacks, accessibility, load time, etc.



& Automatically run a battery of tests and send alerts about concerns, including recommendations for how to fix potential issues.



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

8. Review, revise, and finalize email code.



No significant (additional) role for AI.



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

1. Name campaign file

2. Code the email



3. Add schema, etc.



4. Add UTM, analytics tags



5. Add any interactivity



6. Upload email into ESP



7. Test rendering



8. Review, revise, finalize



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

1. Select list, define segmentation/suppression, set up trigger logic.



RFM analysis



Fatigue analysis



Predictive activity modeling



Lookalike modeling



List preparation, manipulation, and segment definition



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

2. Set up A/B testing, including sample sizes, winner selection criteria.



&



&



Automated identification of test-and-learn opportunities, along with test suggestions, including using historical test results to periodically confirming and building upon past tests



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

1. Select list, define segmentation/suppression, set up trigger logic



2. Set up A/B testing, including sample sizes, winner selection criteria





Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

1. Check email against brief, revising if needed, but also considering new events



No significant role for AI.



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

2. Seek approvals



No significant role for AI.



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

3. Revise email campaign until approvals obtained.



No significant (additional) role for AI.



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

1. Check email against brief, revising if needed, but also considering new events



2. Seek approvals



3. Revise email campaign until approvals obtained.





Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

1. Compete pre-send checklist



&



Automatically run a battery of tests and checks against the brief, and send alerts about concerns, plus recommendations on how to fix them.



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

2. Schedule send or enable triggered email



Send time optimization



Intelligent triggers that optimize timing



Intelligent switch that chooses best channel for message



Selection of MIME types to include or email format to use



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

3. Monitor send—halting it and sending a correction/apology, when necessary.



Automatically monitor performance, sending alerts if atypical behavior is detected.



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

1. Complete pre-send checklist



2. Schedule send or enable triggered email



3. Monitor send





Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

1. Post-send email and subscriber analytics



Automated analysis of performance with summary and presentation.



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

2. Examine A/B testing results



Automated analysis of performance with summary and presentation, plus the addition of latest results to A/B testing log.



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

3. Document learnings and opportunities, making any necessary changes to workflow



Draft possible learnings and action items.



Conception



Copywriting



Design



Development



Audience



Approval



Send



Analysis

4. Socialize your wins and learnings to leadership and other teams/departments.



Automatically generate shareable insights.



Conception



Copywriting



Design



Development



Audience









Approval



Send



Analysis

1. Post-send email and subscriber analytics  & 
2. Examine A/B testing results  & 
3. Document learnings and opportunities 
4. Socialize your wins and learnings 



Conception



Copywriting



Design



Development



Audience



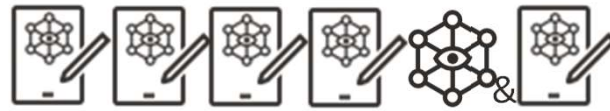
Approval



Send



Analysis



 **Conception**

 **Copywriting**

 **Design**

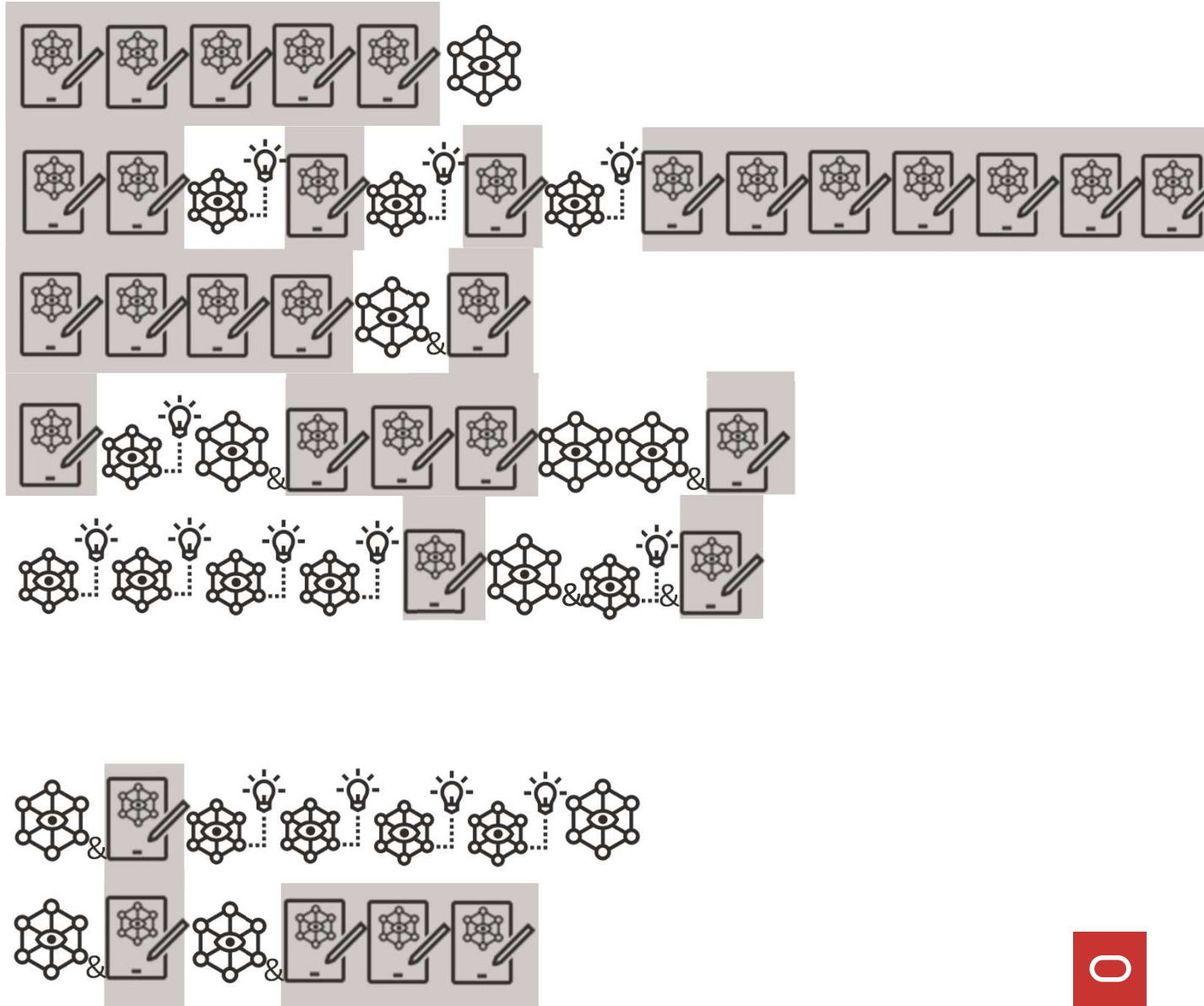
 **Development**

 **Audience**

 **Approval**

 **Send**

 **Analysis**





Conception



Copywriting



Design



Development



Audience



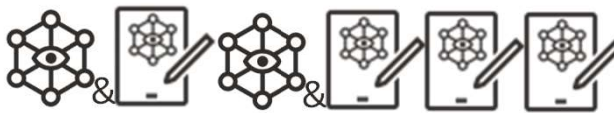
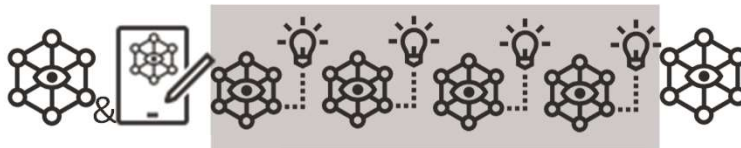
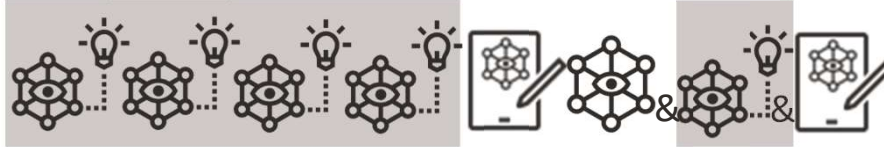
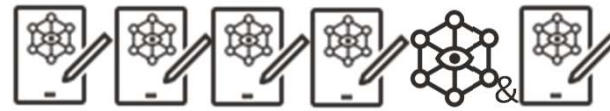
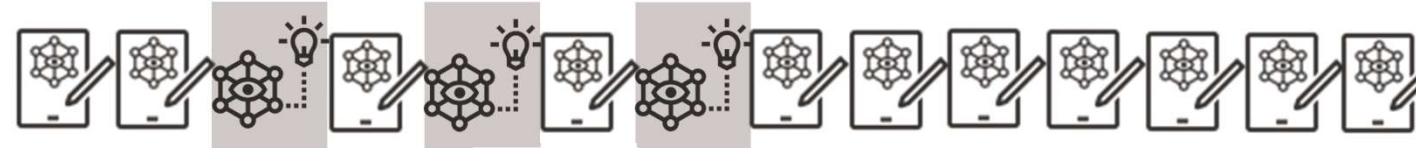
Approval



Send



Analysis



AI in

Achieving the 1:1 Messaging Paradigm

The Right Message

Predicting performance

Copy optimization

Content recs

Dynamic modules



To the Right Person

RFM analysis

Fatigue analysis

Predictive activity modeling

Lookalike modeling



At the Right Time

Send time optimization

Intelligent triggers



Via the Right Channel


Intelligent switch





While **generative AI** offers tactical advantages by helping you save time by accelerating ideation and content creation...

Machine learning offers strategic advantages by helping you achieve the otherwise impossible 1:1 messaging paradigm.



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Thank you!
Any questions?

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