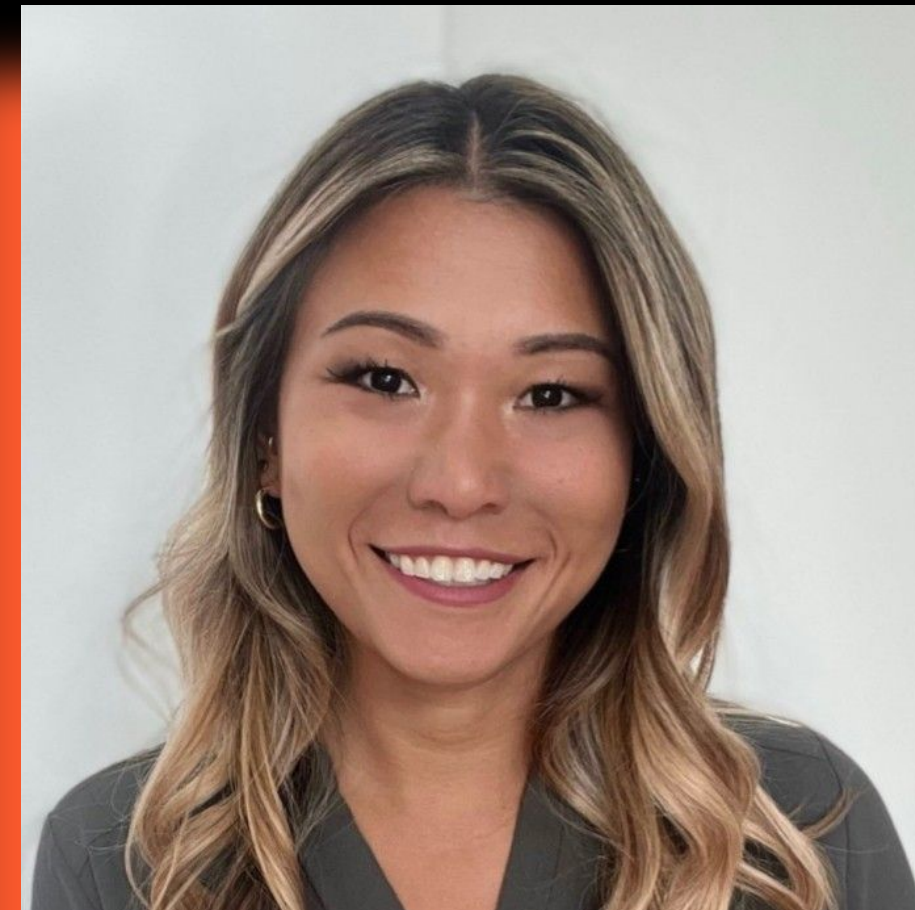


# Gina Novacco

**Sr. Manager, Global Digital Campaign Ops  
Palo Alto Networks**

Leads global team of marketing automation and web dev experts within a MOPs center of excellence. Ensure seamless implementation of email campaigns, landing pages, nurture programs, and lead import automation.

12 years of experience at industry-leading companies.





## OUR MISSION

To be the cybersecurity partner of choice, protecting our digital way of life.

We're trusted by the world's most valuable enterprises to keep them secure



10 of 10

OF THE FORTUNE 100



8 of 10

LARGEST U.S. BANKS



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LARGE MANUFACTURING COMPANIES IN THE WORLD



9 of 10

LARGEST UTILITIES WORLDWIDE



7 of 10

LARGEST OIL & GAS WORLDWIDE



9 of 10

TOP U.S. HOSPITALS

# Transforming Email Marketing at Palo Alto Networks

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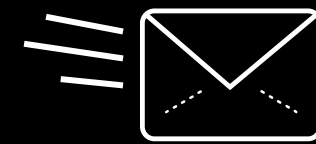
How we've revolutionized, scaled, and optimized our email marketing function.

# Fewer, better emails

Driving **more** engagement with **fewer** emails, making every customer touch effective and impactful.



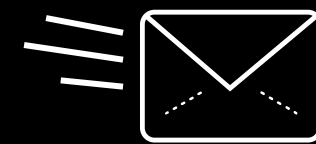
**Touch governance policy**



**Clear campaign strategies**



**Audience prioritization process**



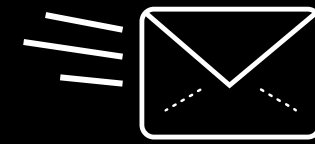
**Email production efficiency**



**Reporting & insights**



**Testing & optimization**



**Touch governance policy**

**A Marketable contact can only receive one promotional email per week (S-S).**

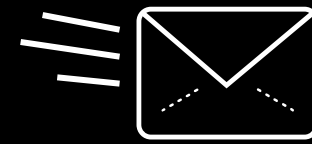
Not including operational or transactional communications.

**During any given time period, we need to run multiple email campaigns with different offers, targeting different audiences.**

**How can we comply with the touch governance policy?**







## Clear campaign strategies

# Who?

Who is your target? Get specific in terms of demographic, firmographic, and behavioral / journey stage parameters.

- Which personas? Where do they live?
- What types of companies? (if applicable)
- What signals have they shown us?

# What?

What are you offering? Why should your audience care?

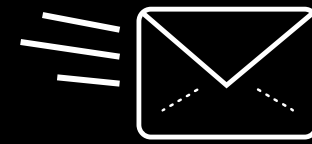
Lead with benefits: “What’s in it for me?”

One clear CTA and goal for the email: Get the click!

# When?

When does this need to be sent? Consider the time sensitivity of what you’re offering, and your customer:

- Give them enough time to register for an event
- Mind offer / report expiration dates



## Audience prioritization process

**Manage one week's worth of planned email campaigns as one project.**

### Clear Service-Level Agreements (SLAs) with requestors

- For a given send week, final targeting criteria and details are due at least two weeks prior to the send week.
- Allow for enough time to build audience logics, prioritize campaigns, and allocate audiences.

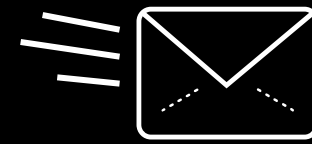
### Campaign prioritization

- Give campaigns an order of priority for audience allocation based on their potential business impact.
- Consider audience sizes (i.e. prioritize a send to 1K over a send to 200K).
- Send campaigns with significantly overlapped criteria in different weeks.

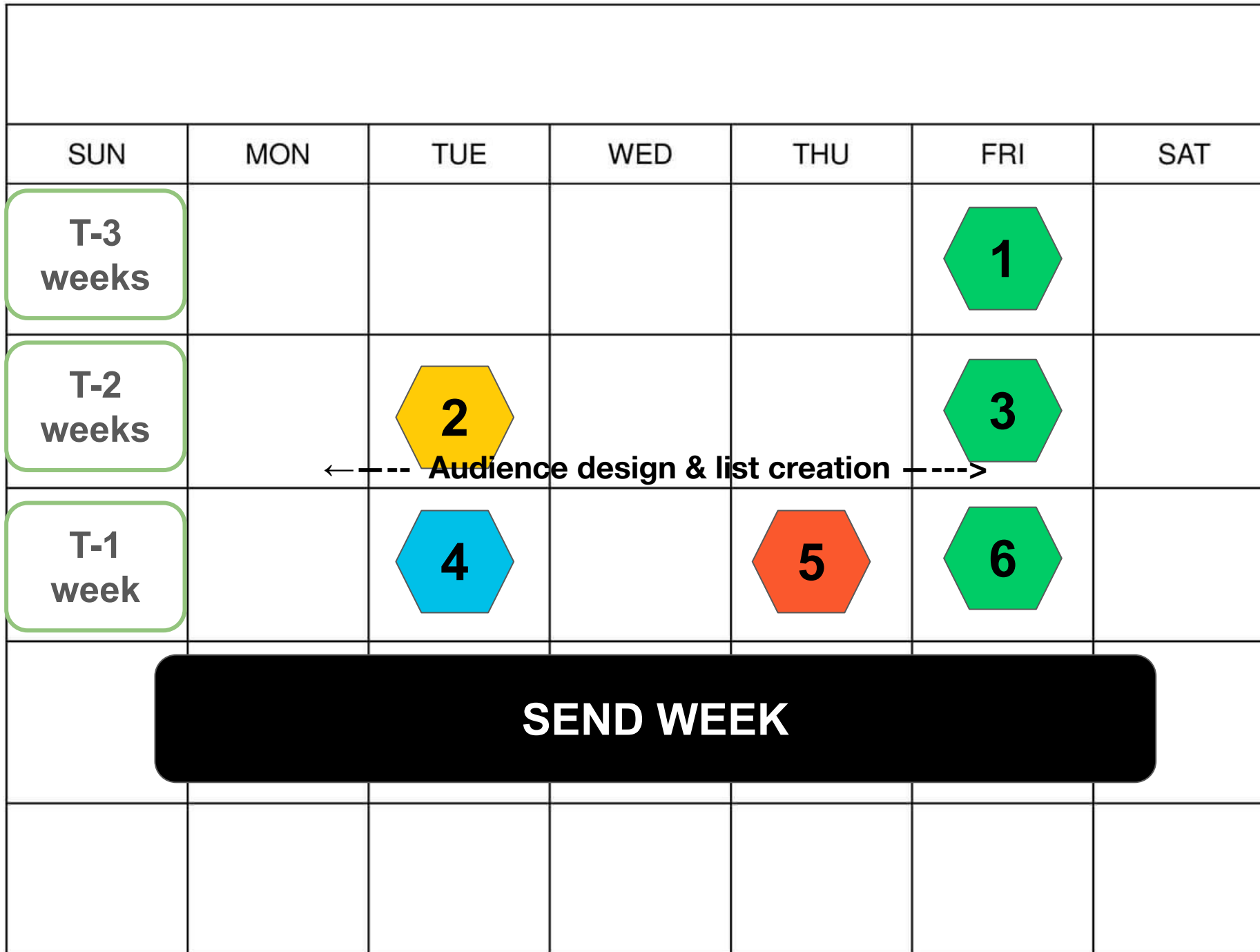
### Audience allocation

- Create “pool” of audience for your send week (marketable database).
- Allocate audiences in order of campaign priority. Remove from “pool” with each allocation; one contact can't be allocated twice.
- Assess final list sizes based on campaign goals.

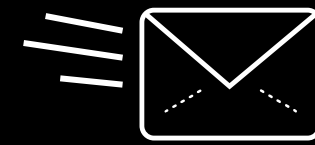




# Audience prioritization process

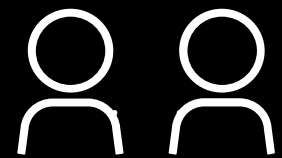


- 1. By EOD Friday of T-3**, requestor must submit:
  - Final email list criteria
  - Desired send date
  - Campaign goals (# reg, downloads, etc.)
- 2. Meeting with requestors** to establish high-level priority
- 3. By EOD Friday of T-2**, audiences are designed and lists are created. Also, to kick off email production, requestor must submit:
  - Email content
  - Creative content
- 4. Audience allocation** is done and final list sizes are shared with requestors.
- 5. Adjustments made** to audience allocations if necessary.
- 6. By EOD Friday of T-1**
  - Email previews approved by requestors.
  - QA complete, campaigns scheduled for send.



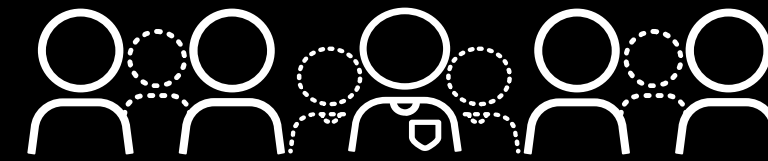
## Email production efficiency

# From 2 to 200+ email builders



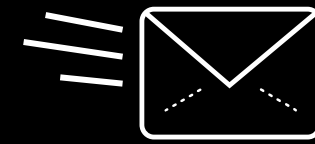
## Pre 2018

- 1-2 HTML coders building emails
- Email campaign production takes days
- Urgent turnaround need = panic mode
- Broken templates and quality issues



## 2018+

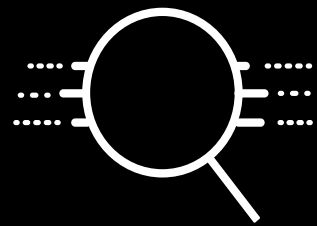
- Every marketer can be trained on how to build emails
- Email campaign production takes minutes
- Support urgent turnarounds with ease
- Minimal rendering issues



**Email production efficiency**

## Adoption of no-code email builder tool

# knak.



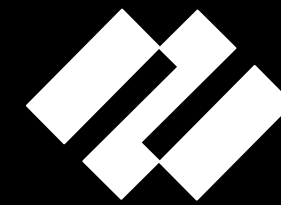
### **Minimal rendering issues**

Email client rendering simulator makes testing easy



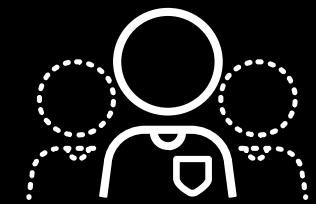
### **Mobile-optimized**

Dynamic; no more text-as-images



### **Brand consistency**

Houses templates and core brand elements



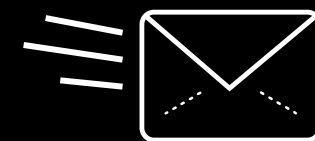
### **Efficient collaboration**

Built-in workflow and approval processes

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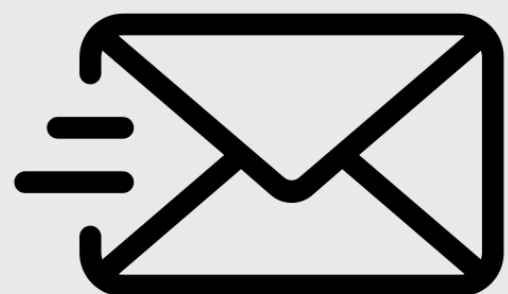
**So, we've got our touch governance policy, email strategy and operations in line with sending "fewer, better" emails.**

**Now what?**



# Reporting & insights

Monitor on a regular basis and check-in consistently, e.g. review email campaign performance every Thursday morning.



## Delivery Rate

Sends/Delivered  
Indicates list quality



## Open Rate

Opens/Delivered

- Subject Line
- Timing of send
- Brand recog



## Click Rate

Clicks/Delivered

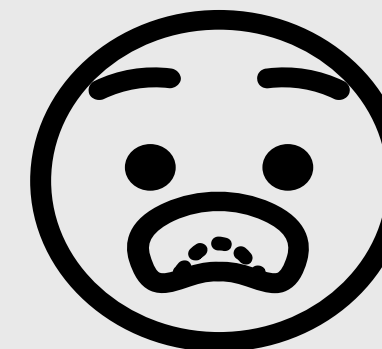
- Right audience
- Messaging
- CTA
- Layout
- Subject line



## Click-to-Open Rate

Clicks/Opened  
More true indicator of:

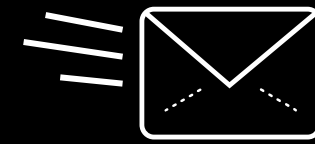
- Messaging
- CTA
- layout



## Unsubscribe rate

Unsubs/Delivered

- Wrong offer/audience/time
- Emailing too frequently



## Reporting & insights

### Establish KPI Benchmarks

**Industry benchmarks:**  
How does your email performance compare against your industry?

**Historical benchmarks:**  
Are your campaigns improving based on last quarter's averages? Last year's?

### Democratize data

Enable requestors to look up their campaign performance; E.g. Tableau dashboard, automated performance reports, spreadsheets.

Educate requestors on email KPIs and benchmarks.

### Focus on insights & drivers

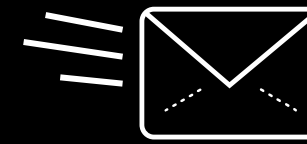
**Don't share:** This year we saw a 2.9% CTR.

**Do share:** This year, we improved CTR by 2X YoY (2.4% vs. 1.2%) by eliminating non-performant newsletters and enforcing a touch governance policy.

### Inform optimization

Get the most of your time spent on performance analysis and deriving insights; **always apply key learnings to improve performance of future campaigns.**





# Testing Tips

## Before testing

**Get crystal clear and specific about what you are trying to learn.**

- Design the test around this and only this.

**Plan to control your variables.**

- Test one specific thing at a time. Keep all other variables the same amongst test versions.

**What KPI will determine success?**

- E.g. use click-to-registration rate to determine whether the CTA pointing to page A or page B is more effective.

## After testing

**Determine statistical significance & derive an insight**

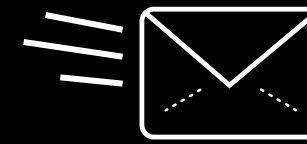
- Use an online calculator to be sure whether “winning results” are valid.
- Translate your results into a recommendation.

**“Inconclusive” is an insight**

- Assuming test pool is large enough, not having a clear winning or losing variant is an insight in itself.

**Test, test, and test some more**

- Build on previous tests for more specific insights.
- Formalize a plan for testing; work in tests whenever possible.

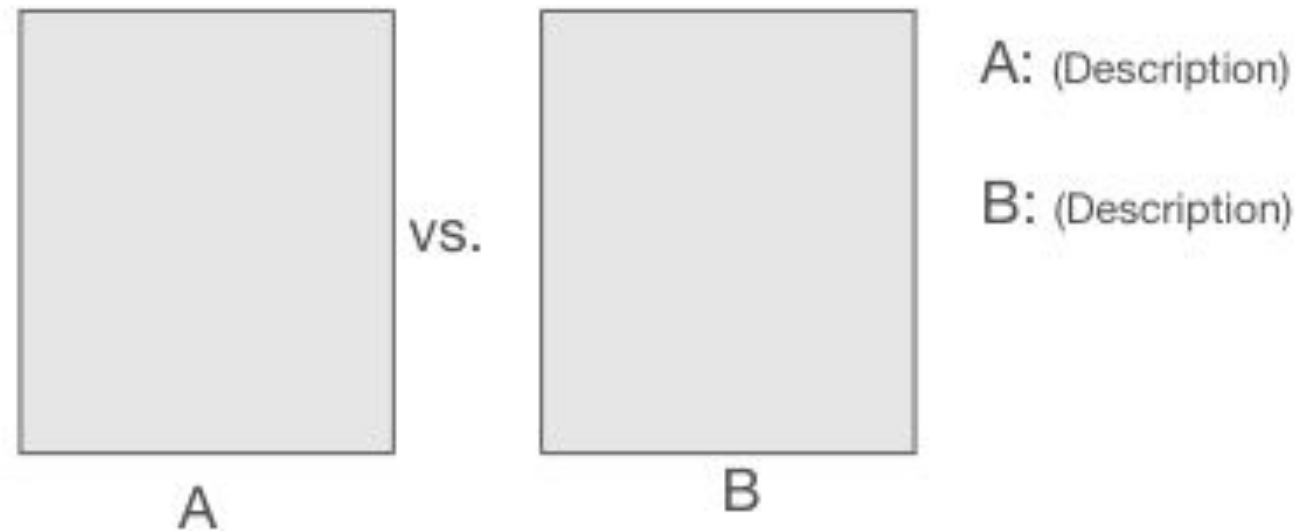


# Testing & optimization

## A/B TEST RESULTS TEMPLATE

[Type of test]: [What you're testing for]

### Test variants



### Audience

Audience size:  
GEO:  
GTM:  
Language:  
Buyer groups / personas:  
Additional criteria:

### Test details

Random sample or real-time (or other):  
Date (or date range):  
Winner KPI:  
Other notes:

### Results & Takeaway



% Confidence:  
Statistically Significant? Y/N  
Takeaway insight:

# Thank You

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**Let's connect:**

[linkedin.com/in/gina-novacco](https://www.linkedin.com/in/gina-novacco)