

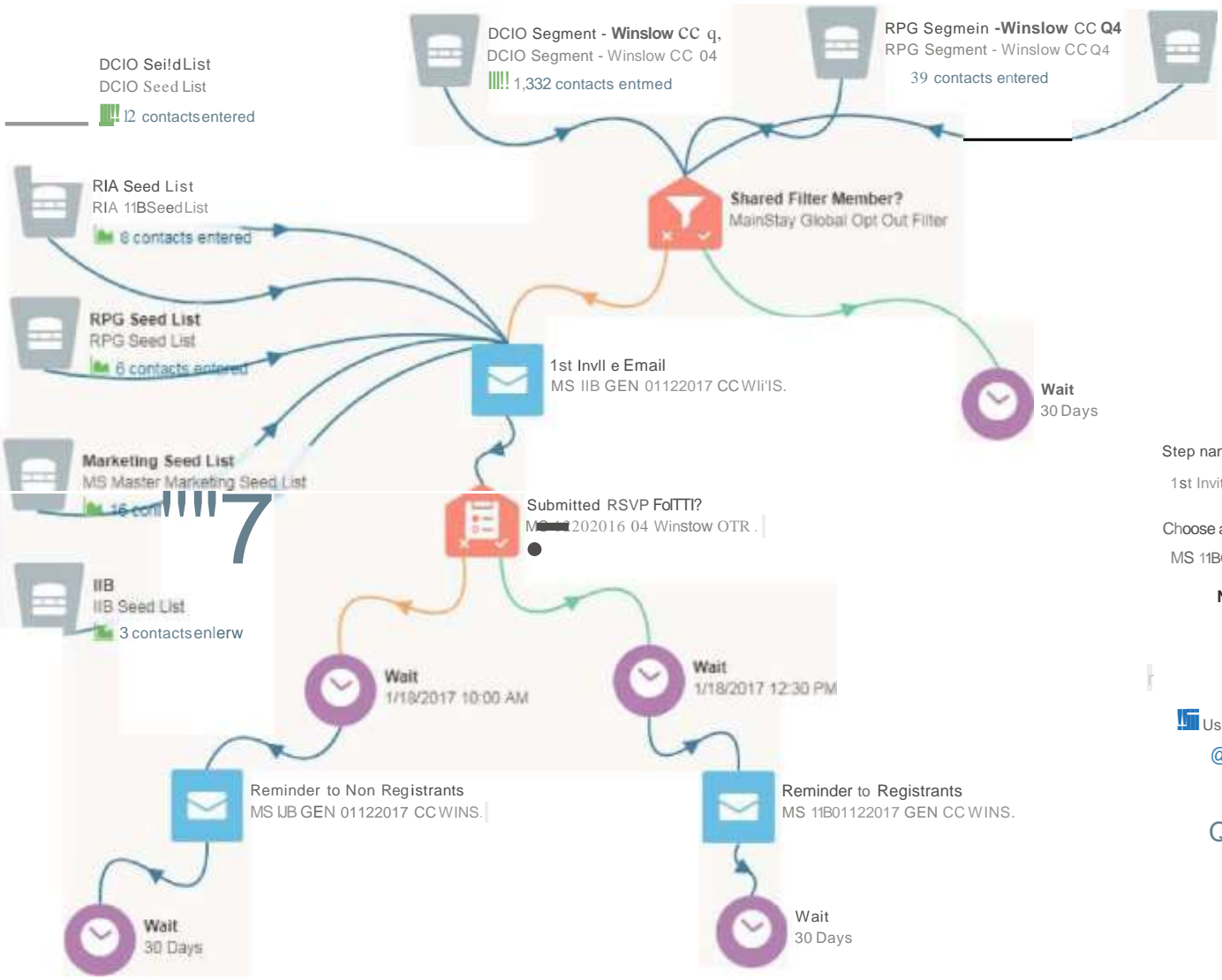
TANIA BAILEY

Email marketing strategy and execution examples

PRIVATE AND CONFIDENTIAL

WINSLOW CAMPAIGN

- Quarterly portfolio review sent by 3 business divisions
- Historically, sent with from name of the company and reminder sent to everyone one week before the call.
- Implemented efficiency, where I created a new field in the system to identify which business division the email should come from and used that field to create aliases, so that each email would be sent from a different sales person within their respective divisions.
- I also used this field to create dynamic content, so that the logo for each division would display appropriately.
- I then created a form that registrants could fill out, and we could collect data in order to use for follow up emails.
- In addition, I created different emails that were sent to registrants versus non-registrants.



Front (reporting only)
MS_12202016 04 Winslow OTR

Landing Page (reporting only)
MS 11B11717 Winslow ConlC...

Step name:

1st Invite Email

Choose an email or create a new one:

MS 11BGEN 01122017 CC WINSLOWINV_LIVE

New...

Preview...



Send using a dynamic signature rule

Scheduling

Routing

Use a Signature

Send using a dynamic signature rule

RPG-DCIO-RIA Territory Signature Rule

Send on behalf of a single user

If you have trouble viewing this e-mail, [read the online version.](#)

If you have tro

Dynamic Content - IIB Logo Dynamic Content



De

TODAY: Don't miss the Winslow Capital Management portfolio review

REGISTER NOW

Date: Wednesday, April 19, 2017

Time: 2:00 p.m. ET

Dial In: 877-407-4250

Join: [Webex Link](#)

Meeting Password: Winslow

[Download presentation](#)

For more information

Please call (877) 742-6951, Option 1, or visit mainstayinvestments.com/dcio.



Reminder - The Winslow Capital Management portfolio next week.

Date: Wednesday, April 19, 2017

Time: 2:00 p.m. ET

Dial In: 877-407-4250

Join: [Webex Link](#)

Meeting Password: Winslow

[Download presentation](#)

For more information

Please call (877) 742-6951, Option 1, or visit mainstayinvestments.com/dcio.

If you have trouble viewing this e-mail, [read the online version.](#)



Defined Contribution Investment Only

Please join Stephanie Simon and Barry Peters of Winslow Capital Management for an exclusive portfolio review

Mark Your Calendar

Date: Wednesday, April 19, 2017

Time: 2:00 p.m. ET

REGISTER NOW

For more information

Please call (877) 742-6951, Option 1, or visit mainstayinvestments.com/dcio.



[MainStay Large Cap Growth Fund](#)

Tickers | Class A: MLAAX | Class I: MLAIX

Highlights:

- 1Q Performance
- 1Q Attribution
- Investment Outlook

CENTRALIZED EMAIL PROCESS

- New York Life/MainStay Investments hired me to set up a centralized email process working with marketing managers in various teams to execute and optimize email campaigns.
- Set up SharePoint form that requestors fill out for an email campaign.
- Standardized design elements, email templates and folder structure and naming convention within email system, which dictated reporting.
- Created and maintained email marketing calendar to manage frequency.
- Set up dynamic content and sender aliases, which worked hand in hand to improve campaign efficiencies, as well as reporting.
- Set up standard and regular reporting

Example of Process Document that I created

	E-Mail Campaign Process	To communicate with the e-mail team via e-mail, please use: Email Team Requests
		Please submit your request at least 3-5 days prior to send date
	Task	Responsibility
<input type="checkbox"/>	<p>New campaign is submitted via sharepoint Draft copy is submitted with form submission in Word template The following people are notified via e-mail of the new project: Heather, Garth, Tania, Natalie, Chris J, Janiene, Mike, Russ, Arun, Paul Dan (check) Tania informs Marketing Manager and Eloqua Expert cc: Email Team Requests</p>	Marketing Manager
<input type="checkbox"/>	<p>Review copy for e-mail best practices and make recommendations</p>	Tania Bailey
<input type="checkbox"/>	<p>Schedule meeting with working team The following people will be invited to the working team meeting: Heather, Garth, Tania, Eloqua Expert, Natalie, Marketing Manager, Paul</p>	Tania Bailey
<input type="checkbox"/>	<p>Working team meets Review campaign submission form info., project scope, discuss e-mail and copy recommendations. Discuss list/segmentation, discuss template type, reporting. Identify firm exclusions. Commit to schedule.</p>	Working Team
<input type="checkbox"/>	<p>Submit final compliance approved copy - Working team notified of change via Sharepoint</p>	Marketing Manager uploads with Campaign Submission Form

SharePoint Form Created where internal clients could submit email campaign requests.

Email Campaign Request - New Item

Edit

Save Cancel Paste Cut Copy Attach File Spelling

Commit Clipboard Actions Spelling

Edit this page to modify your web part content.

Business Group *

Request Date

Marketing/Product Manager *

Campaign Name *

Campaign Goal/Purpose

Campaign Type *

Engage Requirements

Engage Approval

Frequency *

Weekly
 Monthly
 Quarterly
 Not Applicable

No
 S:\Channel-Marketing\Firm Rules of Engagement

Target Launch Date * 12 AM ▼ 00 ▼

Target End Date *

Target Audience *

List Due Date * 4/4/2018

List Source *

Subject Line *

Sent FROM Name *

Sent FROM Address *

Reply TO Name *

Reply TO Address *

Test List Recipients in Addition to Standard List

Please enter names and email addresses

Seed List Recipients in Addition to Standard List

Naming Convention Document

Naming Convention Matrix - required data points

Eloqua Component	Business Unit	Date Month/Day/Year	Sub-Unit	Division	Campaign Type	Unique descriptor	Communication Type	RESULT
Entry Format (start with first column)	Click cell & use drop down	Enter using MMDDYY	Click cell & use drop down	Click cell & use drop down	Click cell & use drop down	Your choice	Click cell & use drop down	When complete, copy & paste into CRM or Eloqua as needed
Eloqua10 Component								
Shared List	•	•	•	•	•	•		
Email Group	•	•	•	•	•			
Segment	•	☐	•	•	•	☐	☐	
Shared Filter	•	☐	•					
Form	•	•	•	•	•	•	☐	
Form - HTML Name	•	☐		•	•	•		
Landing Page	•	•	•	•	•	•	☐	
Email	MS	03-17	CH	GEN	EVNT	INSIDE ETF	FU	MS 03-17 CH GEN EVNT INSIDE ETF FU
Dynamic Content	•	☐	☐	•	☐	•		
Reports	•	☐	☐	•	•			
Images	•	☐	☐	•	•	•		
Campaign (on Canvas)	•	☐	•	•	•	•	☐	
Email Template	•		•			•	•	
		•	REQUIRED					
		☐	OPTIONAL					

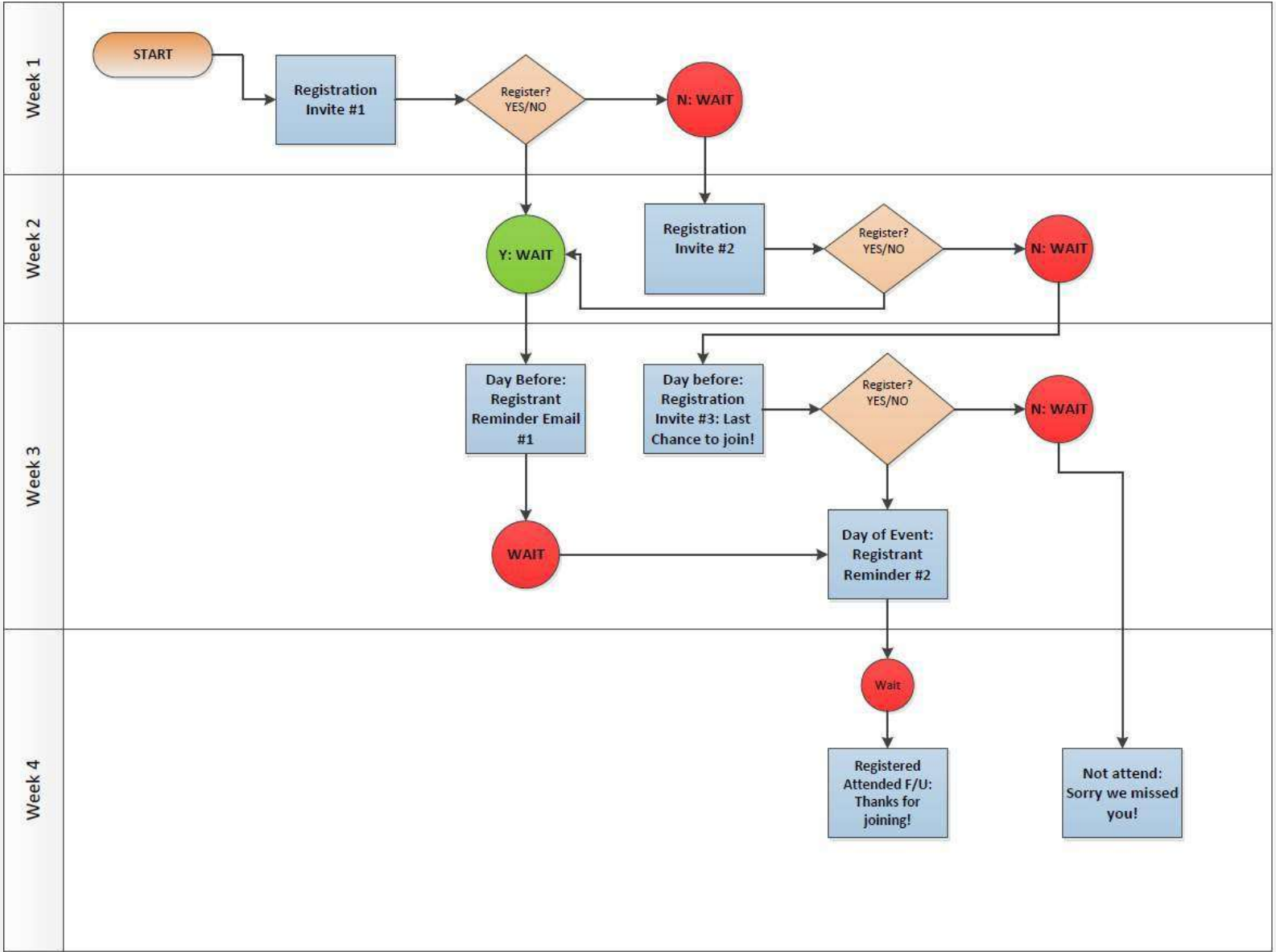
Administration Documentation

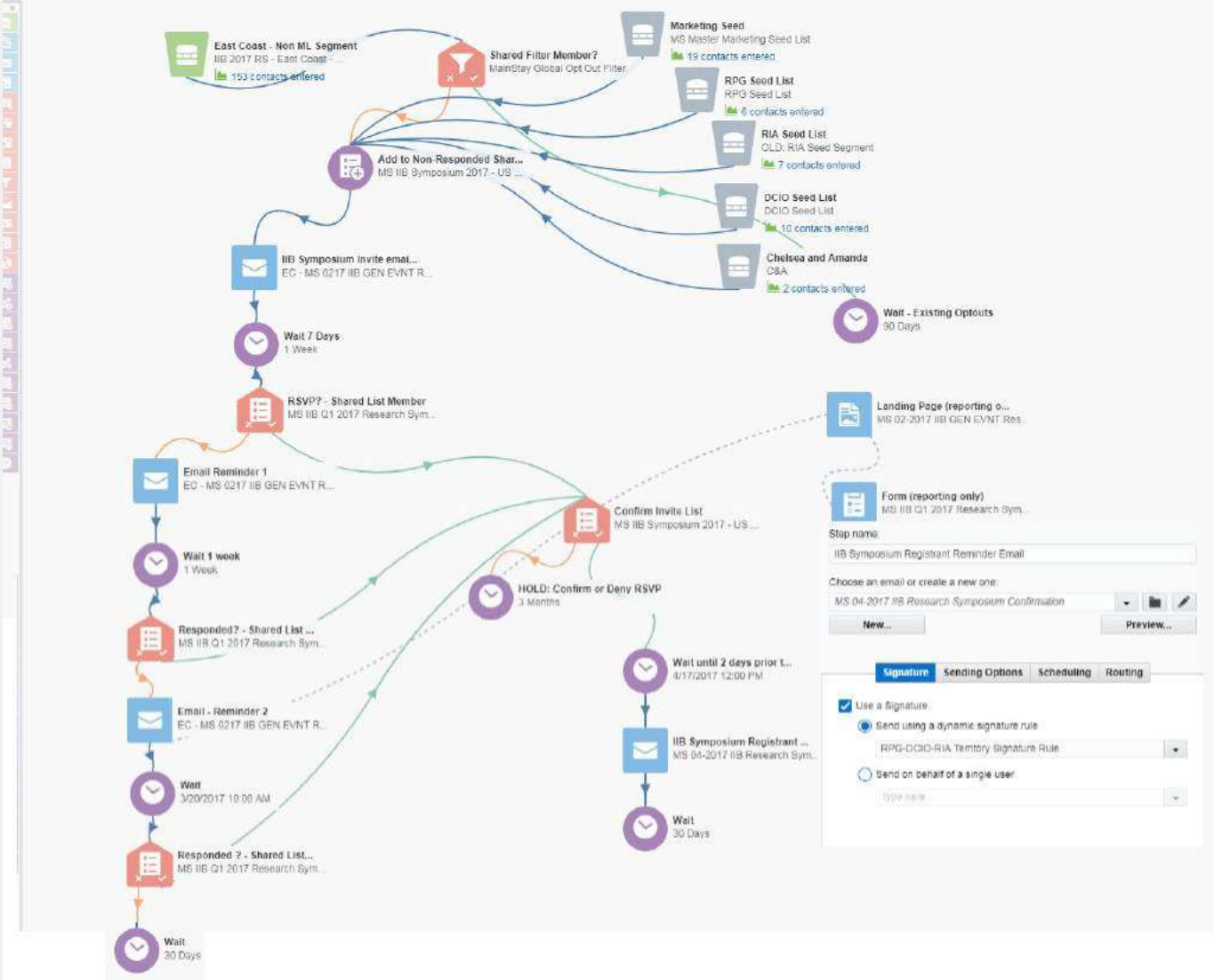
Eloqua Emails Checklist	
CREATION AND TESTING	
1	Email Creation
1.1	Email Name
1.2	Correct Email Group
1.3	Correct Folder
1.4	Correct Subject line
1.5	Correct To and From name and email addresses
1.6	Is the reply to email address attended?
1.7	Compliance approved
1.8	SMRU inserted
1.9	Firm approved
1.10	Spelling and grammar - proof reader checked
1.11	Field merges (esp formatting)
1.12	Litmus tested for rendering
1.13	All links function correctly
1.14	All links tracked
1.15	Check Email Footer
2	Testing
2.1	Test to Email Team
2.2	Changes
2.3	Test to Marketing
2.4	Changes
2.5	All changes incorporated
2.6	Email/Verbal sign off from client

Email Groups
MS & NYL Events
MS Agency Engage Templates
MS Blog
MS Convergence Calls & Webinars
MS DCIO Engage Templates
MS Due Diligence Meetings
MS Engage Templates
MS ETF Products
MS Form Hosted Conferences
MS Fund Fact Sheets & Commentary
MS Fund Products
MS Industry Conferences & Tradeshows
MS Internal Communications
MS INV
MS Newsletters
MS NYL
MS Servicing
MS Stable Value
MS Thought Leadership
MS Web Preference
Testing Area

IIB RESEARCH SYMPOSIUM

- One of our marketing managers working in the IIB division came to me as they had an important event that they needed to organize and asked for my assistance in using email marketing to help get registrants for this event.
- I set up a 4 week plan that we used as a blueprint for the mechanics of the campaign, fully automating the emails, through the use of dynamic content, sender aliases, landing pages, registration forms and personalization.
- This turned into a top performing campaign.

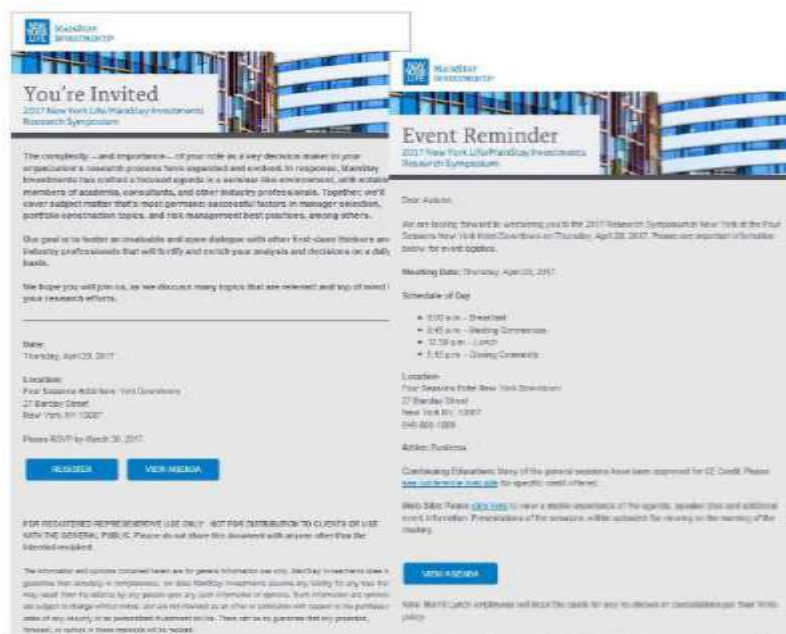




Top Performing Campaign #1

IIB Research Symposium

Total Sends	Total Delivered	Total Opens	Total Clickthroughs	Click To Open Rate	Bounceback Rate	Unique Opens	Unique Clickthroughs	Unique Open Rate	Unique Clickthrough Rate
41,917	40,995	44,442	2016	7.95%	2.27%	10,741	857	27.20%	2.09%



What worked:

- Segmentation – the audience was hand picked; quality over quantity
- Content – articulates value to the client
- Automation – Fully automated the campaign to communicate with registrants and non-registrants differently

NINTENDO EMAIL NEWSLETTER REDESIGN

- We had separate monthly newsletters for Wii and for DS. We also had separate emails for our loyalty program Club Nintendo.
- I proposed combining these newsletters basing the content on email engagement data, new products and loyalty information.

Our address has changed! Just add contact@nintendo.com to your address book.

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[Wii U](#)
[Wii](#)
[Nintendo 3DS](#)
[Nintendo DS](#)
[Games](#)
[Club Nintendo](#)
[Support](#)

Hello Nintendo Fan, Welcome to March Nintendo 3DS News!

Kid Icarus: Uprising
Super Bowser Bros. creator Masahiro Sakurai brings you this epic, action-packed sequel! A sequel to the classic Kid Icarus™ game. Discover weapons and abilities. Includes about 100 and counting multiplayer modes. [Watch the Official Site](#)

More featured games

Spin Camera™: The Curious Blender
Capture the best moments... Play them in this hilarious party game! Meet your new friend, Spin Camera. Spin Camera. Spin. Watch the fun. Includes about 100 and counting multiplayer modes. [Watch the Official Site](#)

Crash 3D™
A single levels for the action-adventure 3D game. Crash is back! Meet the new 3D Crash. Includes about 100 and counting multiplayer modes. [Watch the Official Site](#)

Major League Baseball 2K12™
The biggest league in the world is back! Includes about 100 and counting multiplayer modes. [Watch the Official Site](#)

Horses 3D™
The best equestrian game for the Nintendo 3DS™ system. Includes 3D. Includes about 100 and counting multiplayer modes. [Watch the Official Site](#)

Zuma's Revenge™
An all-new Zuma game for the Nintendo 3DS™ system. Includes 3D. Includes about 100 and counting multiplayer modes. [Watch the Official Site](#)

Enjoy Classic Handheld Games from Nintendo eShop

[Watch the Official Site](#)
[Watch the Official Site](#)
[Watch the Official Site](#)

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Hello Tania, Welcome to February Wii News!

PokePark 2: Wonders Beyond
Go beyond POKÉMON. A world of adventure with a world of creative content. Step into PokéPark and play as Pikachu™, Charizard™, Snorlax™ and more! To receive the exclusive Pokémon in store February 7th. [Watch the Official Site](#)

More featured games

Rhythm Heaven Fever
With catchy music and racy scenarios, this is the wackiest rhythm game you'll ever play! 50+ rhythm games, 100+ power-ups, and more! Just \$29.99. [Watch the Trailer](#)

Pre-order Xenoblade Chronicles™
Discover the world of the Xenoblade Chronicles™ game on the Wii U™ and look out for the game in stores on April 18th. Includes about 100 and counting multiplayer modes. [Watch the Trailer](#)

Who's crashing Mario's Party?
Find out in his wacky party game yet-Featuring boss battles, vehicle races, and outrageous minigames. In stores soon! [Watch the Trailer](#)

NBA 2K12™
NBA 2K12 includes a plethora of innovative gameplay features, as well as a revamped presentation and all-new tutorial mode. [See Game Details](#)

Wipeout 2
Summer Tonic and Winter Chiller! The big tracks are back, with over 1000 cars and crazy Party Fun! Speed past opponents. Furious crashes! Pure crash, crash and dash your way through both summer and winter courses in over 30 wacky courses. [Watch the Commercial](#)

Great Final Fantasy® games on Wii

[Final Fantasy 2000](#)
[Final Fantasy II](#)
[Final Fantasy III](#)
[Final Fantasy IV](#)
[Final Fantasy V](#)

[Watch the Official Site](#)
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NINTENDO NEWSLETTER

FEATURED

SUPER MARIO BROS. 2™ AVAILABLE NOW
JOIN THE COIN BOSS! See the Gold Flower and other new power-ups, items, and characters in the official site! [Watch the Trailer](#)

EARN FREE GAMES WITH CLUB NINTENDO
Register your Wii™ console or Nintendo 3DS™ system & earn Coins for a free game. [Join Now](#)

New & upcoming games for Nintendo 3DS

[Super Mario 3D World™](#)
[Mario Kart 8™](#)
[Animal Crossing: New Leaf™](#)

[See All Nintendo 3DS Games](#)

New & upcoming games for Wii

[Mario Kart 7™](#)
[Mario Party 9™](#)

[See All Wii Games](#)

New from Club Nintendo

[Classic NES racing for 150 Coins](#)
[New football for just 100 Coins](#)

Must-see game trailers & videos

[New Super Mario Bros. 2™ TV Commercial](#)
[Banner™ Anime City Animated Color Developer Interview](#)
[Planet 3 Game Guide](#)

What's new around Nintendo

[Nintendo 3DS system in the wild](#)
[huluPLUS](#)

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FEATURED

SUPER MARIO BROS. 2™ AVAILABLE NOW
JOIN THE COIN BOSS! See the Gold Flower and other new power-ups, items, and characters in the official site! [Watch the Trailer](#)

DOUBLE THE COINS
Connect your Super Mario 3DS™ system to a Club Nintendo™ account & earn double the Coins! [Learn More](#)

New & upcoming games for Nintendo 3DS

[Super Mario 3D World™](#)
[Mario Kart 8™](#)

[See All Nintendo 3DS Games](#)

New & upcoming games for Wii

[Mario Kart 7™](#)

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What's new around Nintendo

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[Watch the Official Site](#)

Subject: (TEST-HTML) Thank you for buying a Wii U console

If you're having trouble viewing this e-mail, [click here](#). And, to ensure that you continue to receive e-mail from Nintendo, please add nintendo@email.nintendo-news.com to your Address Book.



GET GAMES
& REWARDS

EARN COINS

HOW IT
WORKS

REGISTER
A PRODUCT

LOG IN ▶

WE HOPE YOU ARE ENJOYING YOUR Wii U™ CONSOLE!

Did you know you can get 160 Coins if you register your Wii U at Club Nintendo and take a survey?

Then, any future game you purchase from the Nintendo eShop will automatically be registered.

[LEARN HOW TO REGISTER ▶](#)



Wii U

HOW U WILL PLAY NEXT

Browse the Wii U game lineup.

View trailers, screenshots, and game info for all of the amazing titles in stores and in the Nintendo eShop – plus exciting download-only games from the Nintendo eShop on your Wii U.

[SEE ALL Wii U GAMES >](#)



Connect with other Wii U players.

Miverse™ lets you be social with the Wii U community, right from your console. [LEARN MORE >](#)

Wii U Chat lets you communicate in real time with other Wii U owners via the Wii U GamePad controller. [LEARN MORE >](#)

Nintendo

Follow us on:



WII U ONLINE PRIVACY POLICY



WELCOME CAMPAIGN

- When I started at Nintendo, there was a welcome campaign set up for each console (Wii, Nintendo DS), as well as one for Club Nintendo. This would result in people getting multiple welcome emails.
- I put together a program where various data points were looked at, the email campaign was overhauled and a whole new email was designed with new and updated dynamic content.
- The data points used were click data, demographic and gameplay/console registration data to determine which content to serve up. This same data was used to determine how to identify the segments (which console purchased, Club Nintendo member Y/N etc)
- This resulted in a more efficient welcome program, with lower churn rates, increased engagement rates and an increase in Club Nintendo membership.

RSVP now to get hands-on with Wii U in NYC.

Wii U
Experience



Exclusive Invitation

Nintendo would like to extend
a special invitation for you to join us in

New York City
June 26 - 30*, 2012

*reserve your day and time below

Club Nintendo is very excited to invite you to get a sneak peek of Nintendo's upcoming Wii U™ console! You've been chosen from amongst our most loyal members to get this exclusive hands-on experience with the revolutionary new touch screen controller, full HD graphics, and innovative games you won't want to miss.

To make your first Wii U experience even more memorable, we want you to invite your friends and family to join you. Upon completion of the registration process, you'll be provided with three invitations you can share with whomever you like.

To register, please visit WiiUExperience.com and enter the code below to reserve your spot.

CA323

Reserve my spot now!

After completing the registration page, you will receive an email confirmation with invitations to share with three of your friends. Space is limited. To guarantee access to the event, please RSVP by **June 16**. Otherwise, your spot will be forfeited due to space limitations.

Invitation is nontransferable. RSVP is required. Must be 18 years or older to register. Children age 17 and under must be accompanied by a parent or legal guardian to the event. Wii U is a trademark of Nintendo. © 2012 Nintendo.

WII U PRELAUNCH

- Geo targeted email campaign using dynamic and personalized content
- Over 30 cities
- Invitation emails for each city
- Reminder Emails for each city
- Monitoring RSVPs to get enough for each city to be at capacity or close to.(80%)
- Monitoring guests of attendees numbers
- Follow up email with survey
- Executed over 1-2 months