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ELOQUA MARKETING SOFTWARE

PLATFORM REDESIGN

CASE STUDY

Cloud Marketing Agency Services

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Logarithmic is a **Marketing Automation Consulting** firm specialized in providing solutions on leading marketing automation technology systems including Eloqua, Salesforce, Marketo and Hubspot.

SUMMARY

CUSTOMER STORY

Industry
Information Technology
Location
California, USA
Company size
10,000+ employees

CHALLENGES

- Smoother **navigation and interaction** within the install
- Enabling **real-time sales cycle synchronization**
- Establishing **interconnectivity** of multiple **data sources**
- Properly **structured system** for better **transparency & visibility**
- Separate **Marketing, Sales and Admin operations** in Eloqua
- Improving trackability of all contact data by enabling **contact-level interaction history**

SOLUTIONS

- Digital project management best-practice road mapping and **initial situation assessment**
- Designing a **new Eloqua install concept** on the basis of 3 pillars:
  - **Business Objectives**
  - **Thorough Documentation**
  - **Separation of Operations**
- **User-Friendly** Platform Design
- **Real-Time** Platform Design
- **Connected** Platform Design
- Key emphasis on **Interactions**

RESULTS

- **Workflows were adjusted** to reflect recent business requirements
- The Eloqua administrative team **regained control** over the system
- The new design allowed for **business requirements to dictate workflows**, not the other way around
- **Clarity and focus was restored** for users from the Marketing, Sales and Admin departments

A true extension of my team and a very valued partner.

I've worked with LogDMS for a few years on many projects. I could not be more impressed with their professionalism, teamwork, communication and results. Their attention to detail, cost and project management is outstanding.

Their team is knowledgeable, responsive and committed to supporting our initiatives. They not only make my job easier, but they make me look good.

Anonymous
Head of B2B MarTech

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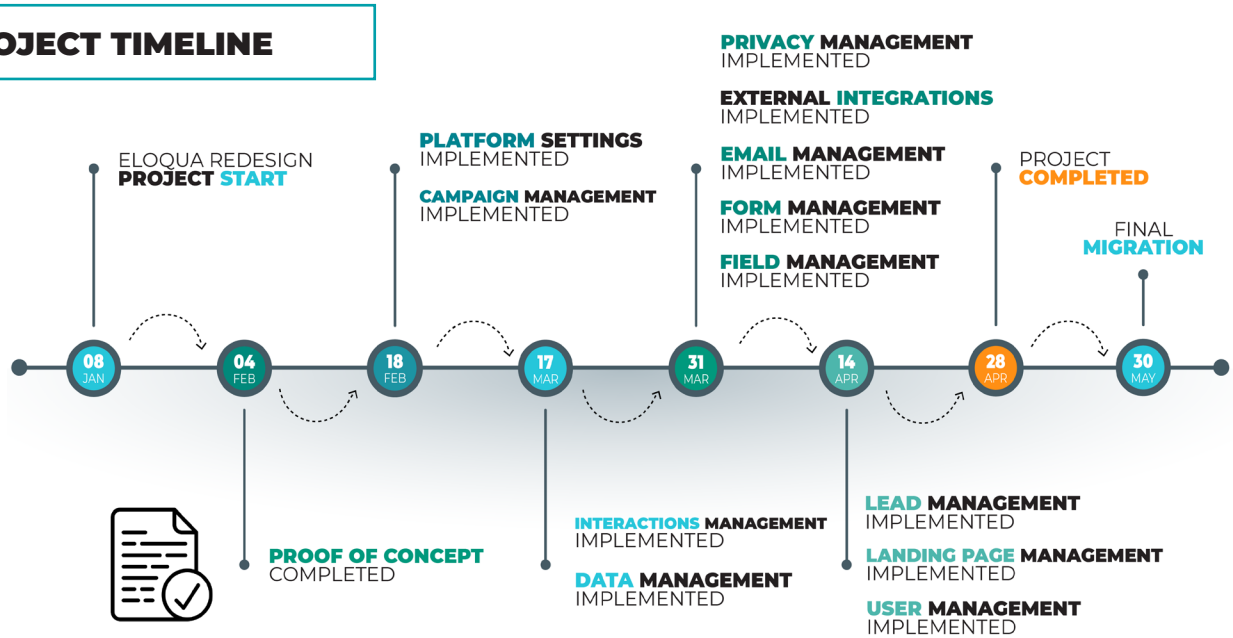
OVERVIEW

Our customer is a global **information technology** company headquartered in California, USA. A **Fortune 500** member, our client retains numerous titles in the IT industry. To rank so, they benefit from our trusted MarTech expertise to make the most out of **Oracle Eloqua** marketing automation technology.

During our **ongoing collaboration**, we identified a substantial opportunity for improvement, consisting of the **complete redesign of our client's Eloqua install**.

As multiple pain points had been identified due to the **setup of the old architecture**, not all **client requirements** were being met. We aimed at addressing all these identified challenges quickly and effectively.

PROJECT TIMELINE



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STEP 1

Establishing the Scope of Challenges

The project began with an initial **workshop** aimed at establishing **key challenges**, and set the new Eloqua instance platform requirements. Upon assessment, a list of **planned improvements** was drafted.

With the scope of work established, focus shifted towards **enhancements of Marketing, Sales, Project Management & Administration** department functions.

Assessment & Methodology

Digital Project Management approach

To deliver the project in a timely and consistent manner, we used **AGILE Methodology (SCRUM)** as it allowed for **incremental deliveries**, based on **priorities** and project developments. The project was split into **sprints**, consisting of 2 weeks each, easing the management process for such an extensive project. Given this approach, in case of specific events occurring such as the impossibility to determine an accurate structure of activities, changes were achievable through a **change control process** that involved:

- Reviewing **change opportunity**
- Evaluating **schedule impact**
- Analyzing **resource allocation impact**
- **Re-baselining** the schedule, tasks and resources

This organized approach allowed for **better flexibility** and the provision of a **dynamic response** to possible complications in the workflow or unanticipated circumstances. In addition, to oversee developments, a **new project management intake process** was drafted.

This enabled interactions through a **communication plan and schedule**. Thus, our team could get very early clarifications for project details through **convenient, templatized planning** and scheduling, which means submitting a **basic technical description** for all specific project requests to be carried out.

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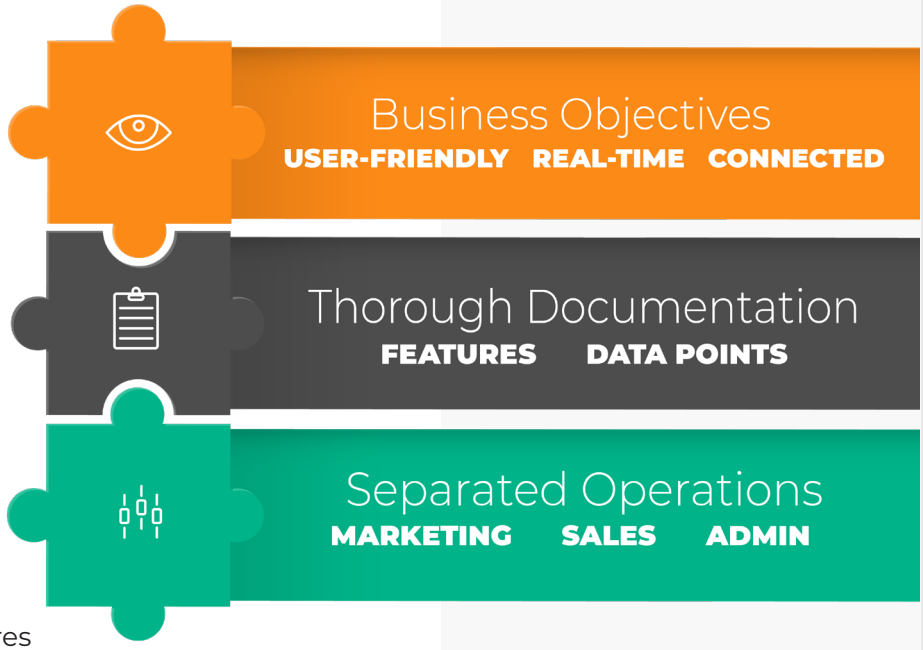
STEP 2

Design Proof of Concept for The New Eloqua Install

Our team designed the **Proof of Concept (POC)** for the new Eloqua instance based on all information collected and processed during the initial workshops.

This included all critical information on **specific client needs and requirements,** setting the key focus for all upcoming framework architecture, design and platform configuration or potential custom enhancements.

After its presentation before our client and following updates based on **feedback sessions**, the new POC was approved, and activities shifted focus towards **drafting the new Eloqua install**.



As a conceptual base for the redesign POC, **3 pillars** that incorporate **newly established principles** for the new instance were developed, as follows:

By means of placing **emphasis on Business Objectives**, clarity would be conferred for **interactions** within the instance, and through it, with customers. With interactions as the key to User-Friendly, Real-Time, Connected Platform Design, as well as **comprehensively documented platform features and data points,** client goals from the new Eloqua instance would be achieved.

Besides the new platform architecture would allow for **consistency and unity within Eloqua operations**, while also separating Administrative, Marketing and Sales functions.

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STEP 3

Marketing Enablement

Privacy Management

To improve Eloqua functionality for the Marketing team, the newly implemented install came with numerous tools for better **deliverability**, **data navigation**, and information **processing**.

The privacy workflow redesigned regarded **normalization and standardization of data** while also contributing to leads' subscription status updates occurring autonomously.

The valuable information stored within the privacy history table is shared downstream, allowing the end-user to **easily manage** **subscription statuses** for various email campaigns through the **Eloqua Preference Centre**.

Field and Form Management

Deciding which data needs to be collected from users, carefully storing the most essential, and **accurately analyzing** this valuable information, to facilitate better **real-time decision-making** is of high paramountcy.

With the introduction of form management within our client's newly implemented Eloqua install, we enabled **easy customization for data gathering**.

Thus, we provided a **convenient, flexible tool** for collecting information.

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Marketing Enablement

Field and Form Management

Through a well-structured form, opportunities for **identifying target markets** became greater, allowing for a more **complex campaign approach** algorithm. Meanwhile, field management tools complemented this data gathering system through **feedback forms**, facilitating navigation and structuring data in great detail.

Data Management

Another essential feature to improve data management within the redesigned Eloqua install consisted of introducing **closed data loops**.

Considering that every marketing asset or project is developed with a **specific aim**, this system allows users of the new Eloqua install to track which particular asset contributed to a particular leads' attraction. Thus, estimating the client's **return on investments** about a particular asset or campaign was enabled. In such a way, our client was granted access to valuable data reports that point out **individual assets' contribution** to the acquisition of leads and opportunities.

The same system also facilitates a similar process executed for **multiple assets**. In this case, instead of tracking links of assets to leads, from the bottom up, the closed data loop firstly analyzes leads, from there deriving particular assets' **contribution towards the acquisition**, from the top downwards.

Summed up, the new system manages to **track individual campaign elements' efficiency** and assess the contribution of multiple assets towards a particular aim. Thus, our client gained a solid understanding of the return on investment for the resources allocated to the development of assets through detailed reporting on their contribution to lead generation.

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Marketing Enablement

Touch Governance

Having established robust systems for market interaction, notification, and data gathering, an overarching system was needed to utilize the collected data effectively.

A Touch Governance system was developed, focusing not only on data collection and processing but also on funneling interactions within email campaigns and customizing them.

In more detail, Touch Governance works as a set of filters that structure and assess email receivers. The first filter used in this system is Master Exclude. When applied, specific users in our customer's audience would not continue receiving any email campaigns.

This status is achieved if the user blocks all unregistered emails through 3rd party programs, but also if a sales representative blocks them.

The second filter, Business Units, increments users based on their interaction with campaigns, excluding them from the receivers' list. In this case, the critical information is whether they enter or leave campaigns. Additionally, this filter cleans up the contact list based on the number of campaigns the receiver is subscribed to, limiting to maximum 2. The list of hard-bounce receivers is also filtered out.

The last filter is the 10-6-0 rule. This concerns contacts who receive 10 emails within the last 6 weeks but generate 0 engagement, to be excluded from the list of contacts for campaigns. Our recommendation regarded applying this rule to each separate email campaign.

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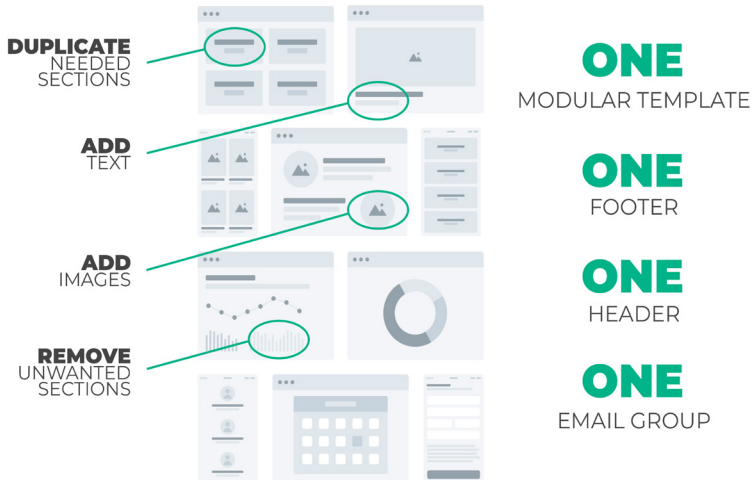
Marketing Enablement

Asset Management

Newly introduced asset management tools represent an **overarching system** that enabled template-based **customization** of campaign assets. Firstly, the tool provided customizable templates for email campaigns, allowing for fast and convenient ways to **build and configure newsletters**. Besides, this enhanced tool also facilitated landing pages and forms customization.

Creating campaign assets became possible in a templatized way, **maintaining the flow of logic** and structure consistently. A range of options for **automation of data processing** and **inbound visitors' categorization** was enabled alongside through dynamic content.



Since databases within Eloqua are **interconnected**, the system can flag them as competitors, partners, or resellers to **control custom options** and **notify campaign managers** based on visitors' domains.

The system also **prevents form registration with a non-business email** or enables the **LinkedIn autofill option**. Besides, all data regarding interactions with page media gets registered, even if hosted by 3rd parties.

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Marketing Enablement

Asset Management

Combinations of these options are further complemented in the newly designed Eloqua instance with a customizable progressive profiling feature. This facilitates finding an optimal number of information request fields on a landing page and analyzing how visitors interact with them.

Data gathering was also extended into collecting information regarding our client's query parameters (jump IDs), carrying this forward from the referrer, in perfect accordance with pre-set customizable rules, in the scope of attribution. The tool comprises basic yet essential features of instructive and dynamic validation rules.

They allow setting specific information fields as required before proceeding, as well as use global page variables (as localization and URL parameters).

Another important feature is the management of microsite fallback pages; if the link itself or server congaing the link is out of order, keeping the visitor interacted and possibly generating a positive inbound reaction to a negative outbound one.

Campaign Management

The same asset management tool also extended into campaign management fields, providing a templatized approach throughout campaigns. Ever since, our client was able to deliver similarly structured and visualized assets throughout entire campaign activities.

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Marketing Enablement

Campaign Management

The campaign management function takes full advantage of **collected data regarding leads**. Eloqua segmentation is augmented by all processed data available in **3rd party sources** (such as Redshift), without duplicating information across multiple systems. This data is used in campaign activities to adjust interactions with receivers according to their attributes. In such a way, a **detailed and personalized interaction** was facilitated.

The campaign management tools implemented now allow our client's team to **set business rules** about receivers' attributes, enabling a **customized, automated algorithm of reaction** to selected attributes, such as preferred language, business title, company, industry.

Email Deliverability

To improve the deliverability of emails, **feedback loops** were introduced. The purpose lays in providing insights into **customer interactions with emails**.

Based on data gathered through this system, our client became able to see if an email was marked as spam, moved to the trash folder, or other such interactions. Thus, they could update contact lists for receivers and categorize them as **engaged and un-engaged**. Un-engaged receivers could be excluded from campaigns and later targeted with **re-engagement campaigns**.

Re-engagement Campaign

The new Eloqua install also comprised the foundation for **a system aimed at re-engagement** of inactive users. This would allow our client to **attempt at reaching out to inactive receivers** to re-engage them with email campaigns, through three attempts to contact and a thorough analysis of users' interaction. The first attempt, focused on delivering high-quality content, included waiting time for interaction status update. The second email would directly ask the receivers about their interest, followed by a third "Sorry to see you leave" attempt.

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Sales Enablement

Lead Management

For smoother sales activities, an **improved lead management system** was introduced within the new Eloqua install. Its purpose revolved around enabling better conversion rates from customer interactions to leads. A three-step process of lead creation was introduced.

A vital distinction needed to be made between **creating a new lead** altogether, or **updating a pre-existing one**. It was paramount for duplication of leads not to take place in the new Eloqua install. Secondly, the mandatory information requirements were set before a lead was to be created. Our client's sales team then became able to ensure both **completeness and quality of leads**.

Additionally, the new system would introduce a **Marketing Interaction Template** process. This allowed for **templatizing rules set for lead generation**, making the lead creation process more **accessible and convenient** by generating a set of criteria.

Interest Listener

Another key feature of the newly implemented Eloqua install was introduced to create leads based on **specific attributes** originating from each department. Requirements for creating leads could thus be **dynamically adjusted** by each business group.

Critical information required for this purpose stemmed from the **type of interaction** (webinar attendance or email link clicked) and the **set of rules for lead creation** originating from sales.

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Project Management & Administration Enablement

Platform Settings

Before the new Eloqua install could be utilized, a **platform configuration process** had to be carried out. The platform settings tool enabled the administration team to set **basic rules and adjustments** for the new instance. These became a backbone for how the new Eloqua operates.

External Integrations

Since our client also utilizes **external databases** such as Redshift, it was essential here that the new install allowed for **flawless integration** with external sources. Therefore, this option was architected into the new install. It was ensured that transitioning to the new Eloqua would not cut off any data within our client's previous database.

Additionally, the platform allows for full connectivity with LinkedIn tools for lead generation, WeChat messenger and information synchronization, and Facebook Lead Ads Feeder, helping form leads and sending them to Eloqua Finally, utilizing the **Eloqua interaction table tool**, data is also gathered via our client's key social media channels, summarizing them into a single table.

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Administration Enablement

User Management

For better **internal security**, a user management feature was introduced.

The system works through the **issuance of admission levels** to our client's employees through the administration department.

Therefore, when requiring access to specific files, clearance is first **approved by administration**, granting the respective permission.

There are **five main security groups** within the newly implemented Eloqua install. The first two are the **Customer Administrator** & **Customer Administrator Lite**. These two groups ensure Eloqua maintenance, provide support for end-users, while being able to access all assets, projects and web profiling tools. They can **create new users** and manage **CRM integrations**.

The end-users are **Advanced Marketing User**, alongside **Active Sales User**, and **Basic Marketing User**.

Users belonging to the first group have complete access to every marketing project, campaign, or asset. Active Sales Users can log into **Eloqua Engage** for lead nurture, and are included into signature rules for dynamic email sends. They also **request email notifications** for specific contact actions. Lastly, the Basic Marketing User level grants limited access to marketing assets or campaigns.

Ultimately, organization, structure and platform security was achieved.

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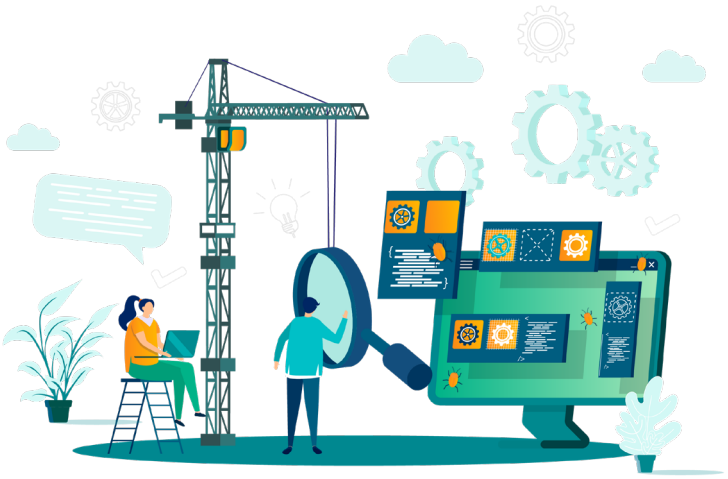
STEP 4



Eloqua Sandbox

The process of Eloqua platform configuration took place in **Eloqua Sandbox** (testing environment) – a virtual platform that serves as a draft.

After being fully architected, configured, and developed, the new Eloqua install underwent **multiple Quality Assurance sessions**. At this stage, we carefully checked if the entirety of tools, features, and elements worked adequately and that the install was completely bug-free.

User Acceptance Testing

When the platform was ready to be presented to the client, User Acceptance Testing began. During this process, our client's team tested the new install and verified the configured product's quality.

Our client checked if all tools and features worked as required or needed adjustments. In this project, **three rounds of User Acceptance Testing** were needed before fully validating the new Eloqua install.

Deployment to the **live environment** was then possible.

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STEP 5

Follow-up Activities

After the final polishing up, the last step focused on **ensuring our client's complete integration** of the new Eloqua instance within the internal organization.

Emphasis was placed on **providing training** and facilitating a **thorough understanding** of numerous new functionalities enabled, their many benefits, and to offer insights into best using the new opportunities created.

To guarantee the most comprehensive grasp of how the new instance operated and what features and new tools were added, an **Eloqua Migration Workshop** session was organized, custom-tailored for our client's employees and key users of the Eloqua install. Another useful asset, the **Eloqua Playbook**, was created for our client's team as a veritable "how-to" guide on the most fundamental level, providing details on every part of the new install functionality and operations.

What this granted was a smooth, flawless transition to the new platform and an ongoing partnership in MarTech expertise. Since guidance, campaign production, maintenance, and operations alike for the new instance would require our experts' dedication, **LogDMS provides continuous support**, ensuring proper platform functionality. **Embedded in our clients' team**, as we say, we continuously engage in identifying possible projects aimed for improvement.

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RESULTS

Despite a project aim of such magnitude as redesigning, from the bottom up, a new, whole, faultless Eloqua install, the project was **delivered on time**, meeting all our **client's needs, goals and platform requirements.**

- Changes and improvements were designed and implemented to enable Marketing, Sales, and Admin department activities while keeping them separate.
- Newly implemented tools and features created a holistic database, while workflows were reconfigured to support the most recent business requirements.
- New logic chains enabled better visibility and navigation and integration of 3rd party platforms such as Tableau, Dynamics 365, and many others.
- This new design allowed for incoming business requirements to dictate workflows and not the other way around, thus providing our client with entirely new project execution opportunities.

Are you interested to learn more?

You may address any further questions to us at **office@logarithmic.com**

Can we assist?

Leverage our years of expertise in

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