logarithmic
digital marketing solutions

ELOQUA DATA RESTRUCTURING

ENHANCING PLATFORM GOVERNANCE

CASE STUDY

Eloqua Data Restructuring
Case Study

SUMMARY

Data has become the core of most business activities, aiding decision-makers in better understanding key consumer behavioral demographics' patterns.

Our client, a world leader in serving science, faced certain challenges in optimizing their marketing automation platform governance. To strengthen their capabilities, our team developed effective solutions aimed at establishing new data structure logic.

The essence of the data restructuring project lies in optimizing a chain of elements (such as Eloqua form management) in the scope of lead generation. The new logic for data gathering activities provides a solid foundation for data-reliant processes, while the updated convention for data storing and naming ensured that essential data is collected, adjusted to fit the Prospect Table format.

Finally, we developed an autonomous Eloqua lead generation system, accommodating well-defined notification systems for rapid administrator response.

These approaches solved our client's platform administration challenges, leading to overall improved MarTech functionality.

CHALLENGES

- Inefficient usage of available fields

- Unconventional naming procedures

- Lack of data structure and organization

- An unoptimized approach for data gathering through Fields and Forms

- Crucial data missing for lead generation

- Invalid values in the Primary or Secondary Product of Interest

- System errors (when details are correctly added, but leads are not created within 1h)

SOLUTIONS

- Real-time lead generation monitoring

- Normalization and translation of record data

- Implementation of lead evaluation steps to optimize autonomous lead creation

- Record evaluation based on data needs

- Implementation of historical data gathering and analysis of contacts' activities

- CRM campaign execution algorithms and methodology optimization

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OVERVIEW

Our client - the world leader in serving science, aims to enable their customers to **make the world healthier, cleaner, and safer**. Whether accelerating life sciences research, solving complex analytical challenges, improving patient diagnostics or increasing productivity in laboratories, our client is there to support them.

Together with the client team, our Eloqua Platform Admin professionals identified a challenge within our client's approach towards organizing their database, causing **lead generation implications**. The solution implemented lies in restructuring the client's database and **creating a new logic** for how this should be **organized and maintained**.

Under this approach, we **streamlined multiple processes** to ensure our client's convenience and clarity. Effective solutions included **Eloqua form templatization**, an optimized logic for **form and field management**, and an Eloqua **form processing model** to ease the process of updating datasets.
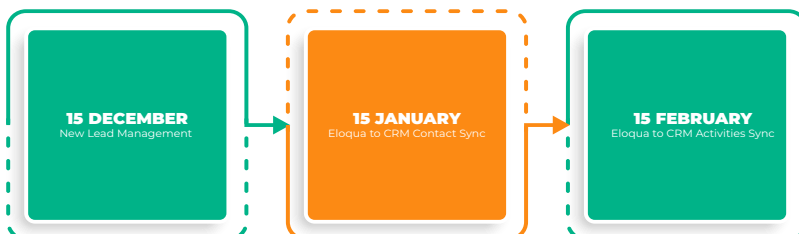
Our business was born as a response to this on-going knowledge sharing.

It all comes down to how we manage to articulate very technical aspects of what we do in a way that clients easily understand. Solutions and best-practice processes often come handy right off the shelf, but when we customize or build from scratch, we feel it really makes a difference.

It's rewarding not just for our clients, but for us, equally.

Catalin
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15 DECEMBER
New Lead Management

15 JANUARY
Eloqua to CRM Contact Sync

15 FEBRUARY
Eloqua to CRM Activities Sync

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STEP 1

Establishing the Scope of Challenges

We identified specific needs during initial workshops with our client, collaboratively outlining the key elements to be tackled to cater to these business requirements.

The core challenges revolved around underperforming data structuring and data processing, closely related to the inadequate optimization of Eloqua resources. The software facilitates creating 250 custom contact fields, but platform users were experiencing issues when the maximum capacity was reached without a clear and structured field use.

Besides the custom contact fields, standard Eloqua fields need to be added to contacts, accounts, campaigns and CDOs, leading to overwhelming data volumes. Although processing this data requires vast resources, the payoffs are unquestionably beneficial. Therefore, standardization of data structuring and processing saves significant time, easing data management and maintaining the advantages of using customer information in the scope of decision-making.

Technologies

Oracle Eloqua Marketing Software

STEP 2

The main areas this project focused on are:
- **Form Configuration Management**
"How and which data to collect and structure"
- **Lead Management**
"How and which data to translate into leads"

Form Management

Collected data undoubtedly varies in its level and degree of usefulness. Some information helps improve targeting and makes reaching out attempts smoother, more relevant and personal, while other datasets are essential even to have a contact to reach out to.

Hence, we introduced mandatory form fields, ensuring that vital information is gathered through every possible interaction medium between our client and their customers.

Use of these fields provides our client with essential information needed to generate a lead. As such, it avoids creation of incomplete datasets that lack critical data such as a contact's name, email address or country.

We incorporated these mandatory fields into another new feature developed by our specialists. The Eloqua Form Template reduces configuration time for new forms by letting users choose a template from a list of pre-selected ones. These templates already incorporate the mandatory fields required to collect minimal data needed to create a lead.

To enable an even more efficient form processing approach, we developed a system of database updates. The new system enables a dynamic and automized database updating process. The contact list is updated with either form data or custom data inputs.

In essence, this implied that data gathered on database contacts could now both manually and automatically be added to expand or update information about contacts. They can also be manually updated with custom values, meaning that unconventionally gathered information can be used when updating.

Lead Management

The newly implemented Lead Management system starts with an Eloqua Prospect Table (EPT), where all leads are initially created.

An Eloqua Custom Data Object (CDO) linked to Eloqua contacts, the system is overarching, operating on information gathered from three distinct primary data sources.

- **Eloqua Forms**

The majority of records originate from forms. These are now templatized, easier to configure and contain all mandatory fields for gathering essential information in order to create a lead.

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	Current Prospect Table				New Prospect Table				
Category	Field Name	Data Type	Display Type	Default Value	Field Name2	Data Type2	Display Type2	Default Value2	Comments
Personal Information	Email Address	text	text		Email Address	text	text		
Personal Information	First Name	text	text		First Name	text	text		
Personal Information	Last Name	text	text		Last Name	text	text		
Personal Information	Business Phone	text	text		Business Phone	text	text		
Personal Information	Country	text	singleSelect		Country	text	singleSelect		
Personal Information	State or Province	text	singleSelect		State or Province	text	singleSelect		
Personal Information	City	text	text		City	text	text		
Personal Information	Postal Code	text	text		Zip or Postal Code	text	text		
Interaction Information	Form Name	text	text		Form Name				
Interaction Information					Form ID	text	text		The only unique identifier of a form.
Interaction Information	Form Submission Date	date	text		Form Submission Date	date	text		
					Campaign Name	text	text		MS CRM Campaign Name
					MS CRM Campaign ID	text	text		MS CRM Campaign GUID
Interaction Information	Source Campaign	text	singleSelect	86490E1B-C61B-E811-8194-0050569244C2	Campaign Source	text	singleSelect	86490E1B-C61B-E811-8194-0050569244C2	Is this the original source?
Privacy information	Email Opt-In	text	checkbox		Email Opt-In	text	checkbox		
Privacy information	Email Opt-In Date	date	text		Email Opt-In Date	date	text		
					Email Opt-In Source				
Privacy information	Email Opt-in Program	text	text		Email Opt-in Program	text	text		
					Phone Opt-In				
					Phone Opt-In Date				
					Phone Opt-in Source				
					Phone Opt-in Program				
Account Information	Company	text	text		Company	text	text		
Account Information	Business Unit	text	text	8	Business Unit	text	text	8	
Account Information	Organization Type	text	singleSelect		Organization Type	text	singleSelect		
					Organization Profile				
Lead Information	Title	text	text		Job Title	text	text		
Lead Information	Job Title/Role	text	singleSelect		Job Role	text	singleSelect		
Lead Information	Lead Request Details	largeText	textArea		Lead Request Details	largeText	textArea		
Lead Information	Demo Requested	text	checkbox		Demo Requested	text	checkbox		Lead Trigger
Lead Information	Sales Call Requested	text	checkbox		Sales Call Requested	text	checkbox		Lead Trigger
	Request a Quote	text	checkbox		Quote Requested	text	checkbox		Lead Trigger
					Lead Triggered	text	checkbox		Check if any of the above are checked
Lead Information	Proposal Requested	text	checkbox		Proposal Requested	text	checkbox		Quote Requested is Correct

• Direct Upload

The second data source is a direct upload. Essentially, it regards records that go through the Eloqua Lead Management workflow but contain data that is not suitable for an Eloqua Form. This information can be uploaded by hand through a predefined template.

• Eloqua Workflow

The third data source is an Eloqua workflow, consisting of 3 stages, including a 6-step data transformation process required to fit data into Eloqua Prospect Table.

These six steps help normalize data to be processed in the Eloqua Prospect Table since the CRM can only receive, read, and process numeric values. The six rules form the new workflow's first stage, examples of which include normalization of country values or predefined mapping of certain fields.

The second stage involves evaluating CDO records to determine if they have the bare minimum details required for lead generation.

Otherwise, a notification is sent to investigate the failed leads. We designed each route to stamp the records with a process code. The evaluation stage contains 11 filters that certify holistic data for lead generation.

The last stage of the program flow sends the CDO records to the next step in the lead creation process. Before generating a lead, the dataset has to pass through a gate system.

CREATE LEAD

FINISHED?

YES → CODE 01
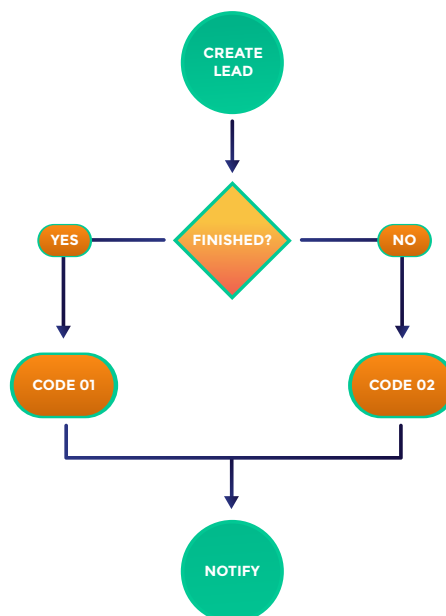
NO → CODE 02

NOTIFY

The system then checks whether the lead was successfully created. At this stage, it has either managed (CODE 01) or failed (CODE 02) to create the lead. Based on the outcome, the system notifies platform administrators.

Prospect Management Notification System

All failed attempts to create a lead were designed to **send a notification** to the Prospect Table Notifications program canvas. This contains **different routes for each failure** reason.
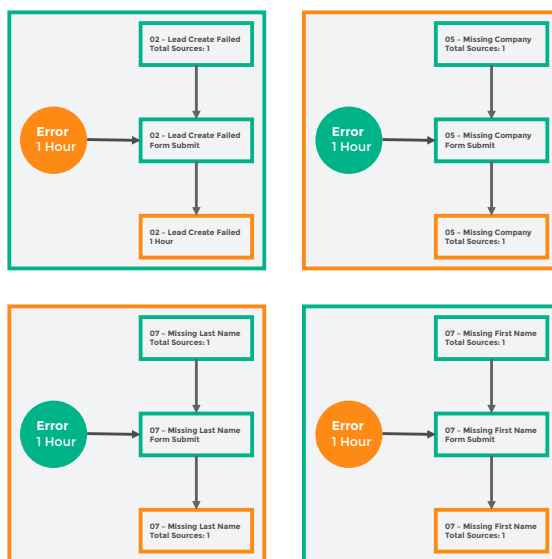
Each failure scenario contains **4 steps:**
· The **Listener** step brings **failed records** from the **previous program canvas.**
· The **Form Submit** step submits every failed record to the Prospect Management Lead Failure Notification form, where records and failure reasons can be manually checked.
· An **Error** waiting step holds all failed form submit attempts and **re-tries to submit the records** every hour if lead creation had failed and no intervention took place.
· Lastly, the **Exit** step focuses on **removing all program canvas records** once held for one hour. Each exit step has a **descriptive name** enabling easy, convenient **investigation and identification** for each specific record route.

Lead Creation
Internal Event & External Call

Within the new Lead Management system, External Calls and Internal Events are co-dependent functions aimed at automating data transmissions and notifications.

External Calls are set to determine what data is being transferred back and forth from Eloqua to the CRM system when executing a particular action.

For example, if a lead is updated in the CRM, the external call acts and only updates the fields specified in the external call itself. It uses field mapping to determine which Eloqua fields update the corresponding lead record fields in the CRM.

An **Internal Event** is an action that can be executed when a marketing activity occurs (i.e., email click-through, email bounce) or through Integration Rules.

Internal Events determine which External Calls get triggered when a particular Internal Event occurs.

Technologies

Oracle Eloqua Marketing Software

Three options are available with an Internal Event: Enable/ Disable the Event, Modify the default External Call mappings for the Event, or Modify the External Call mappings for a specific asset in the Event.

These options facilitate the smoother and easier automation of lead generation procedures, as well as general CRM activities. The introduction of Internal Events and External Calls also automizes datasets and data transmission among various databases.

Additionally, these newly introduced Eloqua options enable a dynamic notification system. Thus, what is facilitated are rapid manual adjustments to CRM processes.

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STEP 3

Testing & Follow-up Activities

We carried out **stress testing** in Eloqua Sandbox, a digital testing environment. Our client was highly involved in **creating several testing scenarios** to ensure relevance. These were **different configurations of datasets** in various degrees of completion with **different elements present or missing**.

To ensure the holistic performance of the new system, we additionally evaluated the **system speed for generating leads** per the initial specifications (the process should not take more than 1 hour to complete). We also tested the proper **transition of previously generated leads to Excel files**, following lead generating rules. Therefore, the transition was evaluated as well as whether the system recognizes **which leads were successfully created** against those for whom an external call to solve missing data issues is required.

Completing the system's development required careful **integration with the existing CRM**. We developed a set of detailed **manuals** to make the transition smoother and familiarize employees with every nuance of operating it.

As well, we hosted a set of **training workshops**, facilitating a more **effective learning and change management** process. Finally, our teams established a long-term **joint activity to maintain and operate the new system**. So, we consistently ensure that our client's Eloqua instance is set for optimum running time, comprising **clean, logical workflows**. Activities revolve around consistent monitoring, determining where issues arise, their direct consequences, and which actions to take to **diminish threats before any issue escalation**.

Challenges were placed, solutions drawn, and commendations never failed to appear.

When we first encountered this disruptive technology, pre-made processes were scarce, whilst the hype of marketing automation had just hit. The expectations of early adopter companies were high, but so were our hopes that what we did mattered.

Relying only on our wits and knowledge of the platforms, we started our endeavor to create solutions for issues no one ever had before.

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RESULTS

■ Optimized utilization of the maximum 250 Eloqua datapoints

■ Transitioned to a new naming convention

■ Achieved a more transparent, organized and structured database

■ Optimized data gathering via the introduction of mandatory fields and form templates

■ Normalized all data values to match a singular data convention

■ Leads are created adequately within 1 hour

■ Set up a dynamic autonomous notification system for errors in lead generation

Technologies

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Would you like to find out more about our **Eloqua Platform Admin expertise?**

Please don't hesitate to reach out to us at
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