logarithmic
digital marketing solutions

ELOQUA PRIVACY FLOW REDESIGN

CASE STUDY

Eloqua Privacy Flow Redesign
Case Study

SUMMARY

CUSTOMER STORY

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

CHALLENGES

- Rebuild the **privacy management flow** as to:

  - Successfully **honor each (un)subscription** through collecting and distributing downstream accurate and complete information

  - Align with the **privacy team**

  - Diminish **system outages** occuring due to workflow logic failures

- Build solid **debugging and troubleshooting** processes

- Design **change log tracking** and documentation

SOLUTIONS

- Project management best-practice road mapping and **initial situation assessment**

- Design a **new privacy concept** based on 5 pillars:

  Timeless · Measurable · Scalable · Trackable · Compliant

- Designing new workflows for critical **backlog fixes**

- Build, test and validate proof of concept for the new privacy flow

- **Document and deploy** the new privacy flow

RESULTS

- Fixed all existing backlog issues

- **Cleaner database** and new systems set up for maintenance

- Easier **troubleshooting** process

- Zero system outages, zero failures

- Alignment between stakeholders

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

Eloqua Privacy Flow Redesign

Case Study

logarithmic
digital marketing solutions

CONTACT DETAILS

🌐 www.logdms.com

👤 office@logdms.com

Technologies

Oracle Eloqua Marketing Software

OVERVIEW

Our customer is an international information technology company headquartered in California, USA.

A Fortune 500 member, our technology enterprise 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.

The project highlighted in this case study started in August 2019, lasting until October 2019.

The aim of activities revolved around redesigning the client's Eloqua Privacy Flow concept, in the scope of determining and diminishing any potential errors, setting up an improved, all-throughout validated, new Privacy Workflow Proposal.
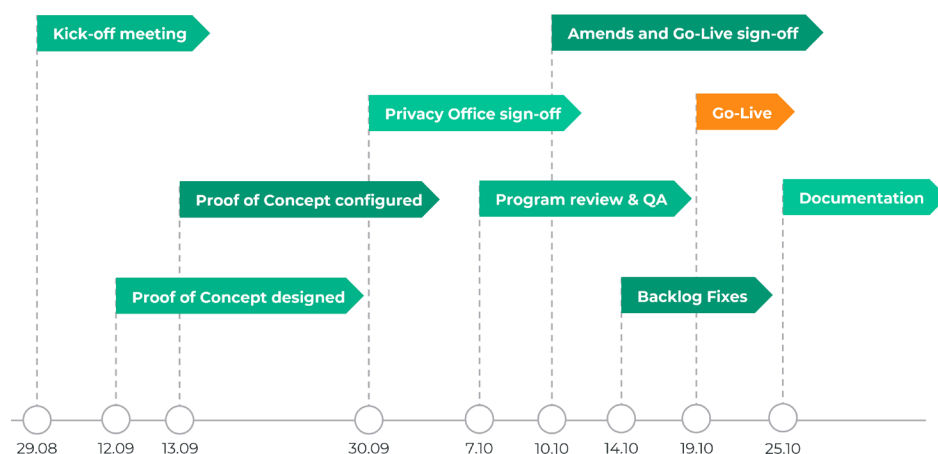
CLIENT TEAM INVOLVED

· Privacy Team
· Lead Management Team
· System Administrators
· Marketing Team
· Technical Team
· External Contractors

LogDMS TEAM INVOLVED

· Eloqua Consultant
· Project Manager
· Eloqua Platform Architect
· Campaign Production Expert

PROJECT TIMELINE

Kick-off meeting

Amends and Go-Live sign-off

Privacy Office sign-off

Go-Live

Proof of Concept configured

Program review & QA

Documentation

Proof of Concept designed

Backlog Fixes

| 29.08 | 12.09 | 13.09 | 30.09 | 7.10 | 10.10 | 14.10 | 19.10 | 25.10 |

Case Study

STEP 1

Evaluate Existing Privacy Flow

To kick-off the project, we had daily workshops for two weeks with the entire project team. The objective was to understand the client's current Privacy Flow and collect the needed data for a thorough situation assessment.

Participants included the LogDMS Eloqua Consultant and Platform Architect, as well as the Privacy Office and Business Case Owners, from the client's side.

Using project management best-practices, multiple dashboards and reports were drawn up in order to determine where deficits may have occurred, and what their potential source of error was.

Initial assessment
Subscription and Consent Setup in Eloqua

Eloqua's built-in privacy setup is the contact subscription status; a status which can easily keep under control who can receive what group of emails.

The subscription status is updated based on direct content input. This input can come through Eloqua forms or emails, or through other systems.

In order to handle various sources of privacy, mediums, consent purposes, or integrations, in this Eloqua install we have, for email, business phone, mobile phone, fax and mail, the following simple mandatory attributes: opt-in, opt-in date and opt-in source. These are populated via the connected systems and other means of populating contact data, but by themselves are not accounted for in the native email subscription status.

To translate this client-specific setup into the Eloqua native subscription status, the privacy workflow was created in Eloqua. Changes to either Consent or Subscription Status were translated into the appropriate field value by the Eloqua workflows. As such, consent values were being aligned with the subscription status.

Technologies
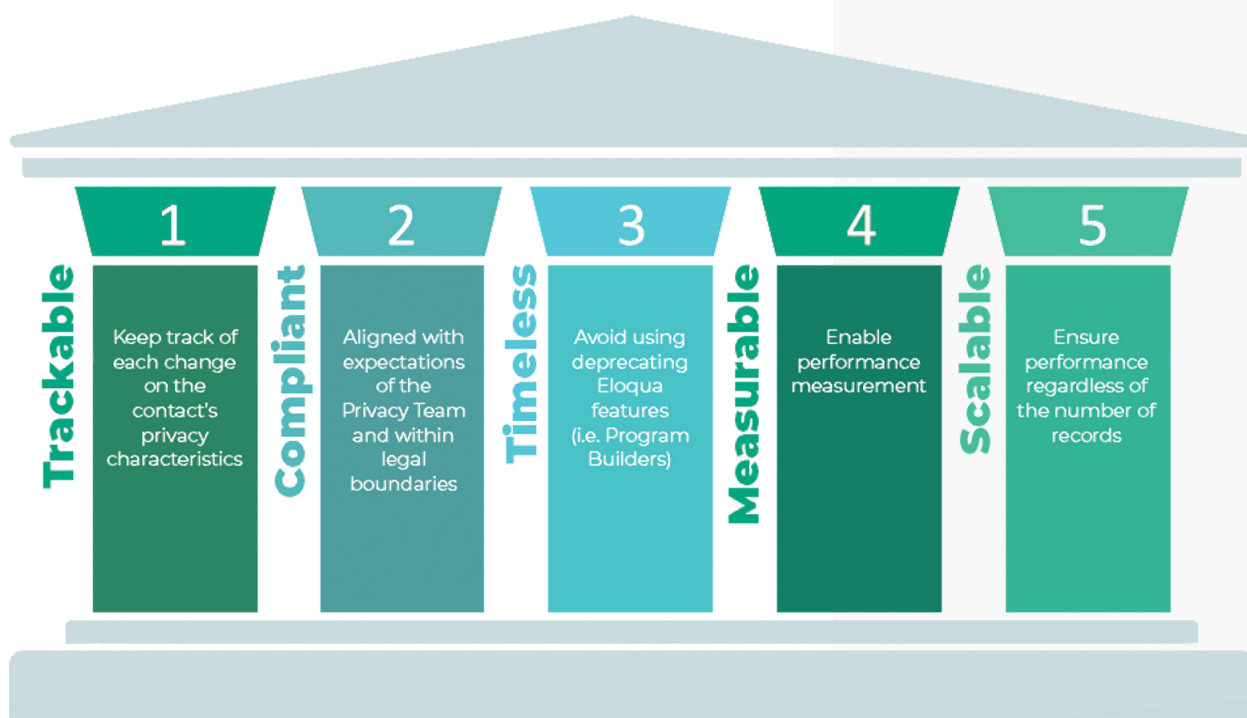
Oracle Eloqua Marketing Software

STEP 2

Design Proof of Concept for the New Privacy Flow

Based on all information collected and processed during the initial workshops, the LogDMS Eloqua Consultant and Eloqua Platform Architect were able to design a new privacy flow Proof of Concept (POC).

Presented to the client, and updated following the first feedback session, the new POC was validated, and activities shifted focus towards building said flow.

As foundation blocks for the new privacy flow Proof of Concept designed by LogDMS, five pillars are used. Incorporated into each step of the new program, the principles stand behind the new privacy flow, as follows.

Five principles as foundation pillars:

Trackable
1 Keep track of each change on the contact's privacy characteristics

Compliant
2 Aligned with expectations of the Privacy Team and within legal boundaries

Timeless
3 Avoid using deprecating Eloqua features (i.e. Program Builders)

Measurable
4 Enable performance measurement

Scalable
5 Ensure performance regardless of the number of records

Technologies

Oracle Eloqua Marketing Software

STEP 3

Build New Privacy Flow in Testing Environment and Perform the User Acceptance Testing

Following the thorough initial situation analysis, as well as having finalized designing the new program, the LogDMS team began **building the new privacy flow concept**.

For starters, the workflow agreed upon was built in a **new Sandbox instance** (testing environment).

Based on specific client requirements, several testing scenarios were drawn up by the team.
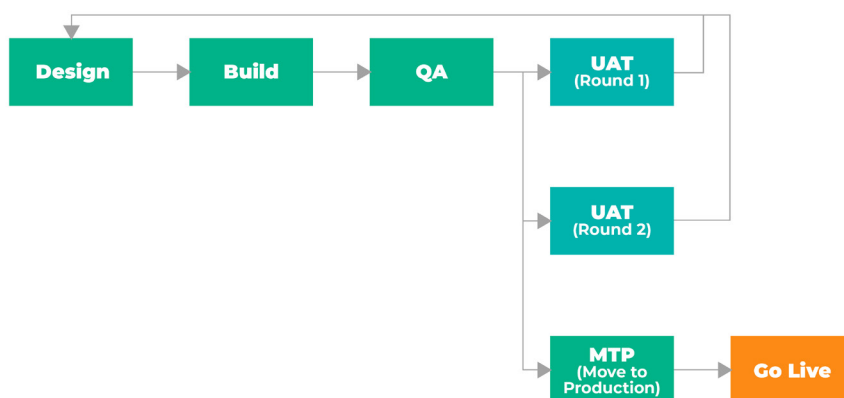
Upon completion, these testing scenarios were handed back to our client, for them to perform the UAT (User Acceptance Testing).

Two rounds were needed in order for the concept to reach its final form.

DEPLOYMENT OVERVIEW

Case Study

STEP 4

Build & Deploy Privacy Flow in Live Environment

The new concept, once designed, validated and having passed the UAT sessions, was built in the live Eloqua production instance. On the same set of test scenarios, the client performed another UAT session.

STEP 5

Fix Backlog Issues

In the beginning phase of the project, as presented under Step 1, a set of deficits was identified, which needed to be retroactively corrected after determining their cause of error. Examples include specific opt-outs which had not been successfully honored, or system loops that heavily consumed the platform's resources.

New Privacy Flow details:

1 There are **4 opt-in statuses for 5 mediums.** The statuses are **Yes, No, Unverified** and **Unknown.** The mediums are **Email, Mobile Phone, Business Phone, Address** and **Fax.**

2 For countries where **double email opt-in** is a requirement, a **confirmation email** is sent. If the opt-in is not confirmed within 30 days, it is invalidated.

3 A script was implemented to bring the privacy verbiage through the form for **proper consent tracking.**

4 A **privacy history table** was deployed, keeping track of each privacy change.

5 **Known opt-ins cannot become unknown.** For example, if someone is unsubscribed from emails, and a second system sends an update with the status unknown, **the unsubscribe sticks.**

6 Allow sales teams to apply an **isolation status** on contacts they're engaging with.

7 Any incoming opt-in status is **standardized** (e.g. Ja to Yes). Administrators are **immediately notified** if a non-standard opt-in status appears in the system.

8 All **opt-in changes** for all mediums need to **flow downstream** to multiple CRMs and DMPs.

Eloqua Privacy Flow Redesign

Case Study

CONTACT DETAILS

📍 Soșeaua Bucium, 25
700282
Iași, Romania

📞 +40 752 150 816

🌐 www.logdms.com

👤 office@logdms.com

RESULTS

The new flow design was launched successfully, with all backlog issues fixed. **What did this mean for our client?**

In this project:

- We managed to **correct consent information** for approximately 600k records
- We normalized and **standardized the consent information** for 10 million records
- We managed to **stop system loops** that were heavily impacting other Eloqua workflows
- We **aligned multiple teams**, from different departments and organizations, on privacy design
- We **aligned Eloqua to the surrounding systems**
- We instilled a **long-term vision** for expert design and maintenance of **best-in-class privacy design**
- We ensured a good, much cleaner and **safer User Experience** for all our client's customers
- We significantly **reduced chances of data loss**

Are you interested to learn more?
You may address any further questions to us at **office@logdms.com**.

Can we assist?
Leverage our years of expertise in

Oracle Eloqua Marketing Software