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A MARKETING GEEK'S GUIDE TO:

# ORACLE ELOQUA ADVANCED FORMS





## ABOUT THIS SERIES

Oracle Eloqua is the most powerful marketing automation platform on the market. It has the ability to scale to the needs of the largest enterprises and the flexibility to solve just about anything you can throw at it.

With all this power and functionality, sometimes complexity enters. That's where these eBooks come in. We took Eloqua capabilities that draw lots of questions and simplified them so they are easier to understand and implement. At Relationship One, our mission is to "Inspire Success." We hope that reading through this eBook series will inspire you to try something new, solve a problem you've been dealing with, or invent something that will take your marketing efforts to the next level.

Let our experts help you dive into an area of Oracle Eloqua that you're curious about and watch the inspiration flood in. Happy Eloqua-ing!

## A MARKETING GEEK'S GUIDE TO: ORACLE ELOQUA BLIND FORM CREATION

Oracle Eloqua has a plethora of different tools, some of which you might not even be aware of. That's where these eBooks come in. We organized some of our most useful tool tips into this handy eBook for you to learn a lot in a quick read! Let's dive in to see what our experts have to say about Blind Form creation, Campaign Fields, and Progressive Profiling in Eloqua.





# CHAPTER 1: ORACLE ELOQUA BLIND FORM CREATION

The Blind Form Submit, or, as I like to call it, the Swiss Army knife in your digital marketing toolbox. Want to dynamically redirect a user to a specific landing page? Build a Blind Form Submit link. Want to pass contact values to a Custom Data Object (CDO), an account, directly to your CRM – or better yet – all three at once? Use a Blind Form. How about sending a notification email to a sales rep when a contact clicks through high value content in an email? You guessed it—a Blind Form! If you’ve set up Blind Forms before, you probably know about this great generator or this quick guide on the basics of a Blind Form Submit URL. But if you’re new to the world of Blind Form Submits or you want to brush up on the details of how to set one up, Chapter 1 is the right place for you to start!

## FIRST, THE WHAT:

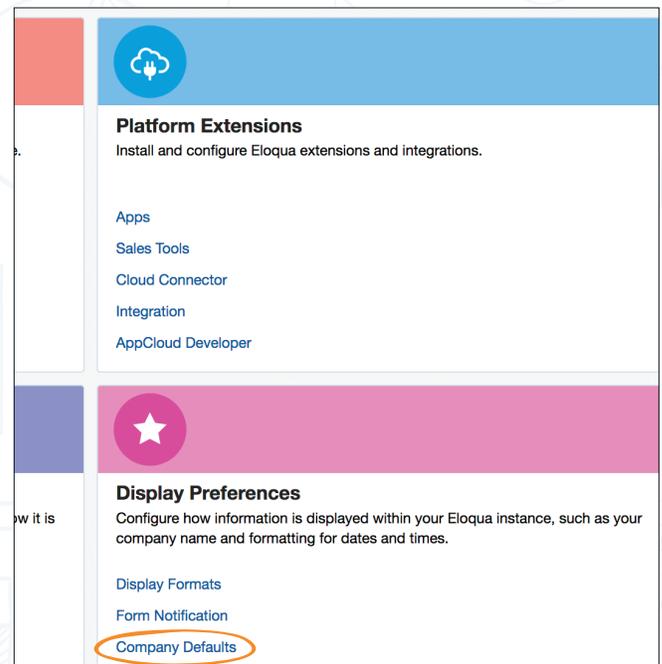
It all starts with an Eloqua form. There can be no Blind Form Submit without the form. The only difference is that usually an Eloqua form needs to sit on an Eloqua or third-party landing page. But with a Blind Form, we’re skipping the landing page and secretly, or blindly, posting data straight to Eloqua. Hence the name Blind Form.

## THEN, THE WHY:

It’s simple. With a Blind Form, you can collect basic responses from your contacts with only one click. One great use case: encouraging subscriptions and registrations without a lot of effort on the contact’s end. Instead of filling out and completing a traditional form on a landing page, contacts click one button to complete their action.

## FINALLY, THE HOW:

To get started, you’ll need to find your Eloqua Site ID. You’ll use the Site ID when building the URL for your Blind Form Submit. The easiest way to find it is to navigate to the Settings Menu (that gear-like icon in the top right corner of your Eloqua window) and then to Company Defaults.



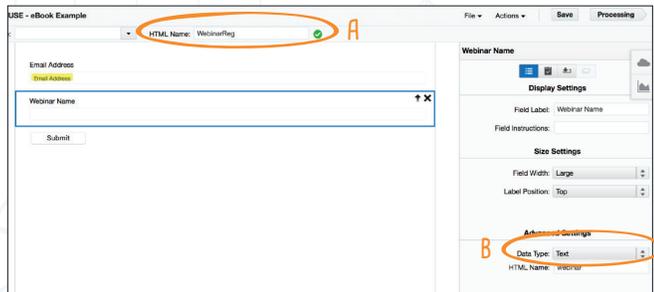
From Company Defaults, you’ll see your Site ID listed right after your Company Name and Company URL.



Now that you have your Site ID, you’re ready to start building your form.

Let’s say you’re hosting a webinar and you want to send out an email with an RSVP button. All you need is a simple form with an “Email Address” field and a custom field or two to capture some pre-defined information.

Once you've built the form, do yourself a favor and change the HTML name to something short, unique, and memorable (a). While you're at it, change the HTML names for your custom fields as well (b). This will save you from potential headaches when you're building or troubleshooting the URL later.



Now that you've built your form, you're ready to start assembling the submit link.

### EVERY BLIND FORM SUBMIT NEEDS THE FOLLOWING:

- [https://s####.t.eloqua.com/e/f2:](https://s####.t.eloqua.com/e/f2)

*This is the base URL for every form post. Replace the #'s with the Site ID you grabbed earlier.*

- `?elqFormName=WebinarReg;`

*This is how Eloqua knows which form to submit the information to. Remember, we changed the name to WebinarReg so the link is easier to build.*

- `&elqSiteID=####;`

*This is how Eloqua knows which instance you're using. Again, replace the #'s with your Site ID.*

- `&emailAddress=<span%20class=eloquaemail >EmailAddress;`

*This is how Eloqua knows which instance you're using.*

**\*PRO TIP: THE %20 IS JUST A FANCY HTML WAY OF INCLUDING A SPACE SINCE URLS DON'T TYPICALLY INCLUDE SPACES. YOU CAN ALWAYS USE %20 TO PUT A SPACE IN OTHER FIELD VALUES WITHOUT BREAKING THE BLIND FORM SUBMIT LINK.**

Those are the basics. If you want to add any other custom fields and values, use this simple formula: `&Field-HTMLName=value`. For example, if we want to pass the value of "Product Demo" into the Webinar Name field, it would look like this:

- `&webinar=Product%20Demo`

*(see what I did with that %20 there? Fancy.)*

LET'S PUT IT ALL TOGETHER:

`https://s####.t.eloqua.com/e/f2?elqFormName=WebinarReg&elqSiteID=####&emailAddress=<span%20class=eloquaemail >EmailAddress&webinar=Product%20Demo`

Red = customize with your own information

Green = optional additional fields

### NOW, YOU'RE READY FOR THE FUN PART!

Let's set up some form processing steps. Going back to our Swiss Army knife metaphor, this is where we bust out the scissors, toothpick, can opener, and corkscrew. The form processing steps in Eloqua open up a huge range of possibilities in terms of defining the user experience for the contacts that click through your Blind Form Submit link.

Sure, there are the standard steps like "Update Contact - With Form Data," "Send Submitter an Email," and "Redirect to Web Page", but that's just the beginning! Continuing on with our webinar example, we could also utilize processing steps like:

- Update Event Registration: Use Eloqua's Event Module to manage reminders, send confirmation emails, and so much more. Check out this blog post for Event Module insights.
- Add to Campaign: Add the contact into a nurture campaign and collect more profile information for future marketing efforts.
- Update Custom Data Object (CDO): Capture a record of every webinar the contact has registered for by updating a CDO. Get even more sophisticated with Update Custom Object - With Custom Values and set a data stamp for each time the contact has clicked through.
- Run Integration Rules: This one requires a little more set up, but allows you to pass one or more values directly to your CRM.

ALMOST DONE...

You've built your form, added the fields you want to track, built your URL, and set your uber-powerful processing steps. What now? Add your new Blind Form Submit link to your email and test away. You'll be ready to deploy that awesome email in no time.

Still have questions or need help setting up a particularly tricky Blind Form Submit? Let us know! We're always happy to help.



## CHAPTER 2: PROGRESSIVE PROFILING IN ORACLE ELOQUA

### FIRST, THE WHAT:

No one likes to be left behind. Marketers have been trying to tackle the issue of form abandonment for decades. They have tried everything from landing page testing, content changes, and call-to-action changes in order to combat abandonment rates. These long-time solutions can work, but there's a better way. What if you could limit the frustrations of your customers and still get the information you desire? It's possible with Progressive Profiling!



1. EMAIL ADDRESS



2. COMPANY  
TITLE



3. PHONE NUMBER  
CURRENT SOLUTION  
PRIMARY CHALLENGE

As the contact comes back to get more information from you, Progressive Profiling allows you to ask them to complete additional fields that gather more specific information the more they interact with you. You get to know them better over time, and they're more likely to share more personal "high value" data about themselves, all through an easy process that gets them what they want. Then, like any form data collected, this information can be used to enable lead scoring, persona development, and predictive analysis modeling.

Good use cases for Progressive Profiling are primarily centered around digital destinations that visitors are coming back to. Examples include gated thought leadership resources on your website, a nurture program that will access the same form from various landing pages, and registration forms for events.

### THEN, THE WHY:

If it isn't already obvious, reasons to use Progressive Profiling include:

- Higher conversion rates: Contacts can quickly submit a form and will be less likely to abandon your landing page.
- Better user experience: A user only has to submit a small number of fields to get to information and isn't asked to submit the same information over and over again.
- Gain better insight into buyers: Having the option to ask for different information each time a person submits a form allows you to market to his or her particular needs better and tailor your marketing and sales messages to future contacts that meet similar criteria.

Progressive Profiling is not a new strategy. In fact, it's been around for some time, but there haven't always been easy solutions. However, Eloqua's Progressive Profiling makes it simple!

## FINALLY, THE HOW:

Before you start, it's important to define what "success" means to your team and know your benchmarks. Set yourself up to track form completion rates and field completeness metrics so you can monitor and optimize your approach to progressive profiling. Second, collaborate with sales to define what fields (or data) are most valuable. Relationship One's Former VP of Marketing, Erin Rowles, has provided her take on what this conversation should look like in "The Comprehensive Guide to: Using Video for Lead Generation, Scoring & Nurturing"

*"Gather trusted and valued members of sales and marketing in a room. Whiteboard the information that is really important to you and your sales team to know about a future customer. Identify the characteristics (contact, company or interested-based) that will give you the opportunity to market smarter to that person. If you've implemented a lead score model, be sure to include that criteria so you can gather that data to score effectively. Remove from the list anything that doesn't make sense to ask for on a form, for which you think a person would likely provide a false answer or that you can reliably get from a list append service (if you have one in place). Sort the list by what's most relevant. Divide that list in groups of 5. There's your sequence."*

The last step is the technical implementation. Eloqua has built the functionality of Progressive Profiling into the form area of the platform. Create your form as you normally would and add any contact or custom fields that you always want asked on the form regardless of how many times the form submitter has submitted a form. Then, drag the Progressive Profiling fields type option onto your form and add the contact and custom fields that you want to dynamically appear.

Lastly, configure the display settings, which include how many dynamic fields you want displayed per experience and whether to randomize the fields or display them in the order that you've configured.

As with any new or updated form, it's always a good idea to test the user experience to validate that it operates the way you'd expect and ensure you'll gather the desired information.

### A FEW ADDITIONAL PROGRESSIVE PROFILING TIPS TO CONSIDER:

- The Progressive Profiling tool inside Eloqua does not allow the fields designated for Progressive Profiling to be required.
- Limit your Progressive Profiling fields to 3-5 key questions.
- Create multiple forms for different buying stages so that you can continue to gather information over time.
- Capturing the source or referring URL in your form data provides great insight as to which pages are converting and which ones are not (and likely need attention).

Progressive Profiling is a valuable tool that you can add to your arsenal of marketing tactics. It allows you to effectively improve the lead capture experience for form submitters and provides your organization with a better opportunity to capture the information you can use to better target your users. Don't give up on the landing page testing, content changes, and call-to-action changes that you've been doing to help combat abandonment rates, but complement that hard work with a feature like Progressive Profiling.





## BEST PRACTICE: IS YOUR FORM TOO SHORT?

Web forms are a reliable and useful tool for modern marketers, but it can be surprisingly hard to get one “just right.” Depending on your audience and value proposition, forms have a wide range of possible fields and features. Your form must have an appropriate number of fields. But what is that number, exactly? The answer depends more on psychology than you might expect.

Good forms can't have too many fields – that's an early lesson in Marketing 101. But there's a more advanced lesson: Good forms can't have too few fields, either.

Marketing is an exercise in psychology. The burden is on marketers to get into customers' minds. Let's consider, then: If people fill out forms to receive information, what would be their biggest concern about completing a form (data privacy issues aside)? Most likely, they'd be anxious that the information they receive will prove less valuable than the information they provided – that the treasure won't have been worth the toll of the gate.

A form with too few fields can signal lack of value. When contacts perceive a lack of value, they are less likely to convert, leading to a feedback loop of problems. We need form conversions to generate the data to help improve content and messaging to drive more form conversions.

On the other side, we marketers are acutely invested in giving prospects the most seamless experience. Why introduce friction by making the form longer? We understand the doubt, but it's a concept everyone is familiar with, deep down. As the saying goes, “If something looks too good to be true, it probably is.” Quality outcome demands quality investment.

The same principle that makes you hesitant to buy a new car at a very low price is the same one that makes a customer suspicious of a form that has only a few fields and guarantees an exceptional white paper. This could make them assume the asset is mediocre, because the brand promoting it doesn't want much in exchange.

The key is to project value so your leads perceive value. In our experience testing both B2B and B2C forms, the ideal range is three to five fields. You can skew toward fewer fields when your organization is making a small demand: For example, fill out this form to gain access to a one-page case study.

When it comes to this fact about forms – that they must have the right number of fields – marketers should keep in mind “right” doesn't mean “few.” A shorter form is not necessarily more effective, and prospects don't always prefer fewer fields. Depending on the value of your offer, more fields can reassure leads, aligning more closely with their expectations of payment (their information) for reward (your content). Knowing this can help marketers make better forms that yield more conversions.



# WRAPPING THINGS UP



Well, there you have it. Hopefully these tools will help you bring your Oracle Eloqua instance(s) to the next level. Like what you've learned? We have other Marketing Geek eBooks to check out! If you have Oracle Eloqua and you need support with Blind Forms, Progressive Profiling, Campaign Fields, or anything in between, please contact us. We love helping companies transform their marketing automation!

