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A MARKETING GEEK'S GUIDE TO:

PLANNING YOUR ORACLE ELOQUA INTEGRATIONS

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:

PLANNING YOUR ORACLE ELOQUA INTEGRATIONS

Planning for an Oracle Eloqua integration is a daunting task. With so much to consider, how do you know where to start? That's where your Marketing Geeks come in with guidance! Learn the differences among major Oracle Eloqua integrations, key points when integrating, and other critical considerations in this eBook! As always, some of our best content has been assembled in an easy-to-digest guide. Let's go!

CHAPTER 1:

ORACLE ELOQUA INTEGRATIONS: WHAT'S THE DIFFERENCE?

Oracle Eloqua has some great capabilities when it comes to integrating with your respective CRM system. Two that we work with often are Salesforce.com and Microsoft Dynamics CRM, so we decided to break it down for you: What are the biggest differences when integrating the systems? Is one more easily integrated with Oracle Eloqua? Should you even integrate them at all? There's a lot we could say about this topic, so let's dive in.

TERMINOLOGY

We'll start off with the basics. One striking difference between the two CRM systems is the terminology. The main CRM record types – such as contacts, leads, and accounts – referred to in Salesforce as "objects," are deemed "entities" in Microsoft Dynamics CRM. Additionally, although Salesforce uses human-readable values in its pick lists, Dynamics uses GUIDs (Globally Unique Identifiers) to configure pick list values. For example, in Microsoft Dynamics, states are identified using four-digit number codes.

DATA FLOW

Another difference is in the data flow, which determines how information will pass between your CRM and your Oracle Eloqua instance. If you're looking for direct one-to-one linkage between your CRM contacts and accounts, and your Oracle Eloqua contacts and accounts, Microsoft Dynamics CRM will work just fine. If, however, you'd like the flexibility of passing data from related objects to your accounts and contacts – such as the contact or account owner, or account data to its linked contact – Salesforce would be the way to go.

Your data flow can change on a case-by-case basis, depending on your specific needs and goals. Typically, anything you'd want to use for marketing segmentation can be brought from your CRM to your Eloqua instance, but where this changes is when you ask yourself what should come from Eloqua back to your CRM. Why wouldn't you want to bring everything over? Some people may not want to pay for extra data space in their CRM, and instead will just keep their information in Eloqua, or they may just not have an idea of where they want to tie it.

OVERALL INTEGRATION CHALLENGES

No matter which CRM system you use, there are some common decisions to make when preparing for an integration. Many teams have some difficulty when it comes to determining what fields should be brought over to Oracle Eloqua, and how they should be organized – whether on the contact record, account record, or in a custom data object. The roadblock is often due to the marketing, sales and IT teams' different uses for your data. In order to avoid delays, sit down before beginning the integration process to create a list of priorities for each team. Identify what's working for everyone in your current business process, pain points that could use some help, and areas you can leverage Eloqua's capabilities to automate everyday tasks. With all that on the table, you can reach an agreement that combines structured data transfers with the flexibility marketers need for effective targeting and the visibility to help sales close the deal.

WHY NOT INTEGRATE?

There are a number of reasons why your organization may opt out of integrating your CRM and Oracle Eloqua instances.

1. You are a newer Eloqua user and your CRM team may not have the resources to fully implement an integration.
2. Your marketing team may decide to focus on email sends first, and then tackle integration at a later time.
3. Your company may have records that haven't been cleaned up recently, making integration more complicated. This is the most common reason integration may be delayed.

If I do integrate, how can I make sure it goes smoothly?

There are a few things that you can do before you integrate Oracle Eloqua and your CRM to set yourself up for success.

1. Identify what you hope to get out of the integration as a whole. This will help you to focus your goals and keep the project on track.
2. Sit down with all key players (typically marketing, sales, and IT) and decide which information needs to be standardized.
3. Make sure each team has the same definition of a qualified lead. Then, look at the meaningful lead stages to each party, and set expectations as to who owns each, and how each team will work together to keep each other accountable.
4. Decide what the end testing process looks like.

Hopefully these tips and things to look out for during your integration helped you understand the nuances of integrating Oracle Eloqua with either Salesforce or Microsoft Dynamics CRM.

CHAPTER 2:

KEY CONSIDERATIONS WHEN PLANNING YOUR ORACLE ELOQUA INTEGRATION

Whether you are working in an established instance of Oracle Eloqua and preparing to integrate with a CRM for the first time, or your busily implementing Oracle Eloqua and integrating simultaneously, there are many decisions ahead of you – and making the correct ones helps ensure your integration meets the needs of both marketing and sales.

In this section, we'll focus on some of the key considerations and pitfalls to be aware of as you plan for your integration journey. For clarity, when we refer to "integration," we are referring to integrations with Oracle Eloqua and a CRM that Oracle Eloqua natively integrates with via the integration panel or through an Oracle integration app. A list of those CRMs can be found here at Oracle's Help Desk.

USE CASES AND RELEVANT FIELDS

Your CRM likely contains a wealth of information, making it overwhelming to figure out what data needs to be brought into Oracle Eloqua. Generally speaking, information needed for segmentation, personalization, scoring, routing and reporting are the fields to focus on. One of the most important and often overlooked steps, however, is documenting all of the marketing and sales use cases that the Oracle Eloqua to CRM integration needs to support.

As a first step, work with relevant team members to document the different ways you'll use the data. A simple example: "Marketing needs to personalize the To and From name of emails based on a client's account manager using signature rules." This indicates it is important to have information in Eloqua that both identifies current clients as well as who their account managers are.

From simple to more complex, having a clear understanding of your use cases will help to solidify what information to integrate.

DATA MODEL

Once we begin to understand which fields we need to bring in from CRM and how they will be used, we also need to understand how this data is stored and associated to contacts or leads inside your CRM and the differences in how that can translate into Oracle Eloqua's data model.

Oracle Eloqua has three primary tables – contacts, accounts, and custom objects. While there is only one contact and account table, you can have multiple custom object tables that support either a one-to-one (one custom object record to one contact or account) or one-to-many (many custom object records to one contact or account) relationships. Oracle Eloqua does not currently support a many-to-many relationship (one contact being associated to multiple accounts or one custom object being associated to multiple contacts).

In order to have relevance for most purposes like segmentation, each custom object record must be mapped back to one contact or one account and they cannot be mapped to both at the same time – meaning it cannot be used as a type of join to link multiple tables together inside Oracle Eloqua.

Depending on your particular CRM, you can set up various auto syncs that will pull data from your CRM into Oracle Eloqua and store it into contacts, accounts, or custom objects. If you are using Salesforce as your CRM, you can pull up to one table deep of related tables in the same sync. As a simple example, you can pull associated account attributes into the contact table at the same time you pull contact data through your Get Contacts auto sync. For all other CRM's, each auto sync can only pull from one table in CRM at a time. In all cases, auto syncs can only write to one table in Oracle Eloqua at a time. If you need account data on both the contact and account tables in Oracle Eloqua it will take a minimum of two auto syncs to accomplish.

CRM's support relational tables where a reference object, for example a table of the products you sell and whether they have a subscription license or perpetual license, can be associated back to other objects using values common to each. In this example, my contact may be associated to an opportunity, the opportunity has a code that represents a product, and that code matches the attributes or description of the product in my products table. For your marketing use case, if you need to target contacts based on those associated with an opportunity with a product that has a subscription license, referencing that many tables in CRM back to Oracle Eloqua in a useable way can be tricky.

While this example may be a bit more complex, ultimately, once you have a clear understanding of what data you need and how it will be used, there are a variety of tactics that can be applied to structure the data the way you need it in Oracle Eloqua.

EXISTING VERSUS NEW INSTANCE OF ELOQUA

Another consideration is whether you are integrating with a brand new instance of Oracle Eloqua, or an existing instance that already has contact and other information stored. In the first case, if the source of your contact data will be your CRM, typically there is little risk in integrating directly into your production instance of Oracle Eloqua. If you pull all the data in and there is an issue, it's reasonably simple to clear it out and start over again.

By contrast, if you are integrating with an already established instance, best practice is to first thoroughly test the integration in an Oracle Eloqua sandbox to help ensure existing operations and data in Oracle Eloqua are not corrupted. An important note is that Oracle Eloqua sandboxes are one directional, meaning you can replicate your production instance to the sandbox instance, but you can't push changes from sandbox back down to production like a typical CRM sandbox. For this reason, it's best practice to build the integration in your production instance, ensure everything is disabled, then replicate to sandbox and test what you built there – otherwise you are not really testing what you just built.

The other consideration that becomes more important when integrating with an existing instance is data priority, particularly if you have already been using a flat file integration via an SFTP. "What to Look for When Conducting a Review of Your Integration," describes in detail how data priority helps decide what data "wins" on a field-by-field basis between what was already in Oracle Eloqua and what is coming in via the new CRM integration or other sources. Data priority also come into play when we talk about same-email duplicates in your CRM.

SAME EMAIL DUPLICATES

Except in rare cases, the global key for Oracle Eloqua is email address, and even in cases where this has changed, Oracle Eloqua has a uniqueness constraint whereby no two Oracle Eloqua contacts can have the same email address. This is very different from CRM systems where same-email duplicates are not only possible, but depending on your lead management model, it might be expected and commonplace. Before we get into lead management models, let's first get an understanding of how same-email duplicates affect Oracle Eloqua.

While customization is possible, typically when auto syncs are pulling from your CRM and writing to Oracle Eloqua, email address is the mapping key. For organization's leveraging the Salesforce or Oracle Sales Cloud Integration apps, you can choose the first created or last modified record to be chosen, but for all auto sync-based integrations, ASCII logic applies. When CRM records with the same email address are imported into Oracle Eloqua at the same time, duplicates are merged into a single, complete record, with the highest ASCII value retained on a field-by-field basis. In ASCII methodology, Z is higher than A, 9 is higher than 1, letters are higher than numbers and lowercase is higher than uppercase. In the example below, the first table shows two different contact records in CRM and the second table shows the resulting record in Oracle Eloqua:

Email	First	Last	Company	Title	Address
bob@email.com	Bob	Smith	Company A	Marketing Director	123 Any St, Vancouver, BC
bob@email.com	Robert	Smith	ACME	Director of Marketing	456 Any St, Seattle, WA

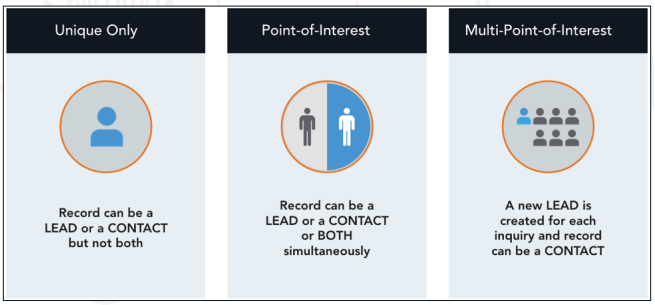
Email	First	Last	Company	Title	Address
bob@email.com	Robert	Smith	Company A	Marketing Director	456 Any St, Seattle, WA

With the new app integration, you have more options to handle duplicate import records. However, Eloqua will still need to merge records (or choose one) when multiple records contain the same email address. Unless your lead management model specifically requires it, removing and controlling same-email duplicates in your CRM will help with data quality in Oracle Eloqua. Try as you may to enforce dupe blocker and other methods, same email duplicates have a way of sneaking in. For perspective, if a same email duplicate exists in CRM but only one of the two is actively being managed and edited, the auto sync will pull just the modified record. Additionally, setting your Get Contacts data source to have a higher priority than your Get Leads data source helps ensure if you have a same email duplicate on the contact and lead table in CRM, the Contact data will win out in Oracle Eloqua.

LEAD MANAGEMENT MODEL

Another important decision will be around which type of lead management model you are looking to implement. This will be a joint decision between marketing and sales, and is mostly dependent on the way your sales organization is structured and how they receive and manage leads. Do you have an inside sales team ready to qualify leads with a 5 minute SLA? Are you aligned regionally or vertically? If someone responds to two completely different product offers, will the same salesperson contact them or is it handled by different sales reps?

The answers to these questions will help determine which lead management model you need to implement in Oracle Eloqua. The three most common options are described in the image below:



Based on your business' unique sales structure and needs, the logic for your CRM Update Program (the primary way that Oracle Eloqua updates contacts and creates or updates leads) will need to be built to support your individual sales structure.

While there are many things to consider when getting ready to integrate with Oracle Eloqua, these are a few of our favorite topics to review with clients.

CHAPTER 3:

THE 5 WS OF PLANNING YOUR CRM AND ORACLE ELOQUA INTEGRATION

Whether your CRM and Eloqua platforms are mature or new, every integration story should include the 5 Ws to gather the necessary information for a happy ending:

- WHY – Capture the goals for this project and identify how success will be measured.
- WHO – Select a core team that includes the five key roles.
- WHERE – View the data from the perspective of each CRM and Oracle Eloqua platform.
- WHAT – Determine the entities, programs and fields required to support the business goals.
- WHEN – Create a project plan with tasks and milestones that will meet the launch date.

THE WHY

In today's marketplace, prospects self-educate before they talk to sales. This puts more responsibility on marketers to not only source leads, but to engage them before passing qualified leads to sales. Prospects expect communications that are targeted and relevant whether they are at the top of the funnel or on the cusp of a purchase.

Integrating your CRM and Oracle Eloqua platforms reflects this shared responsibility for the sales funnel, providing a unified view of leads and customers to sales and marketing.

For your specific organization many of the WHY questions will be addressed when choosing your CRM and Marketing Automation platforms.

- Why this solution?
- Why now?

In WHY phase, you need to understand the business goals for the integration and how it will be measured. For example, your goals might include:

- Improving alignment between sales and marketing
- Increasing marketing efficiencies to deliver highly qualified leads at a lower cost
- Boosting sales

THE WHO

Your core team should include players that have the knowledge and authority to make decisions and configure the platforms.

Outlined below are five key roles required for your core integration team. For some teams one person may represent multiple roles; other teams will require multiple people to represent a single role. We have worked on Eloqua CRM integrations where we were a team of two. In other integration projects, multiple people represented a single role, for example, in complex integrations the role of the Eloqua admin may require a solution architect and a technical lead.

SALES REPRESENTATIVE

It's imperative for someone on your core team to articulate the sales needs and speak to how sales uses the CRM in their day-to-day work. For example, what data is needed in order for sales to receive and follow up on a new lead?

CRM ADMINISTRATOR

Eloqua does all the heavy-lifting in initiating the calls for both the push and pull of data between the two systems. All field mapping is done in Eloqua. For this reason, the bulk of the CRM Admin's time will be as a SME advising the team on the CRM data structure covering everything from the relationship of the entities to the individual field values. Beyond this advisory role, the CRM Admin tasks may include:

- Create Eloqua as a CRM User
- Provide information on number of records that will be imported to Eloqua
- Add new fields to CRM if needed

- Enable sales tools
- Configure tracking for change of email address
- Assist with troubleshooting
- Confirm accuracy of data pushed to CRM

MARKETING REPRESENTATIVE

This person is the voice of the marketer and should clearly communicate the requirements for what data is needed for targeting, personalization, scoring, routing and reporting. The representative needs to understand and discuss use cases about the data that supports the Eloqua campaigns.

In addition to understanding the day-to-day needs of the marketer, this person should understand the marketing KPIs. This role should also have a breadth of knowledge for the Eloqua instance that includes governance, segmentation and data sources into Eloqua (list uploads, forms).

ORACLE ELOQUA ADMINISTRATOR

The Eloqua Administrator translates the business requirements of sales and marketing into the design solution. This role is responsible for understanding the Eloqua data model and applying it to building the programs and configuring calls for the integration. The Eloqua Admin will also help identify any limitations or risks for the solution. Many organizations use partners to help with the technical configuration.

PROJECT MANAGER

The project manager keeps the project on time and budget. They identify scope, milestones and document changes that impact deadlines or budget.

THE WHERE

Perspective is everything. Eloqua and CRM are two different systems and therefore differ, from their data structure to their terminology and unique keys. It's imperative that you understand the data source and how it impacts your integration solution.

This is the discovery phase. Level-set around the business goals within the context of each of the two platforms. To get started, include two foundational discussions:

- Lead Life Cycle Discussion
- Eloqua Data Model Review

LEAD LIFE CYCLE DISCUSSION

Whether your sales and marketing teams completely align, or you are just beginning to define your lead life cycle, reviewing your lead process should be one of the first discussions for your core team. Focus on the sales and marketing roles and responsibilities for each stage of the funnel. Use this discussion to flesh out key requirements around what entities are being used, and the type of data that must be mapped. For example, you should discuss:

- What is a lead? (Do marketing and sales share a common language for prospect, lead, etc.?)
- How are leads assigned and worked (by telemarketing, inside sales, regional, by product)?
- If a lead is rejected, does it go back to marketing for further nurturing?
- When is a lead converted?
- What is the relationship of contacts to accounts?

ORACLE ELOQUA DATA MODEL REVIEW

The Eloqua data model review introduces terminology, entities, field types and data management models from the Eloqua perspective. As with the Lead Life Cycle Discussion, this is a foundational discussion that sets the stage for future requirements discussions.

ADDITIONAL DATA SOURCES

The integration solution must also take into account other data sources. Capture additional data inputs such as form submissions, list uploads, automated import or third party apps. Minimally, the data may require cleansing before integrating with your CRM; however, multiple inputs may require a larger data architectural workshop to document the data structures and relationships.

THE WHAT

This is the define phase. It's time to get into the weeds and discuss what data sales and marketing needs. Ultimately you will define and document:

- The overall solution for the entities that will be mapped between the two systems and the relationship of the entities within Eloqua.
- The list of fields to map for each inbound and outbound call.
- The requirements of the lead management model for how sales receives and manages leads and contacts from Eloqua.
- The supporting programs needed for lead management and data integrity.

Once the documentation has been approved by the core team, you can move to the develop and deliver phases.

THE WHEN

The project plan includes the tasks and milestones leading up to the integration launch date. Managing to the project plan is the responsibility of the project manager team member. In building out the timeline, carefully consider these questions because they can impact scope and timing:

- Are the platforms mature, new or a migration?
- Is this integration part of a larger organizational implementation?
- What is the scope of the Eloqua integration. For example, does it include Lead Scoring or Closed Loop Reporting?
- Will testing be done in an Eloqua sandbox?
- How many rounds of testing are required? For example, will testing be done for the DEV, QA and UAT CRM environments?

HANDING YOU THE KEYS

While every integration is unique, the same principles apply, from team member roles and responsibilities to discovery and delivery. The 5Ws of integration will get you started down the right road and help avoid wrong turns.

CHAPTER 4:

CAMPAIGN INTEGRATION: CONFIGURATION OPTIONS AND KEY CONSIDERATIONS

Campaign integration is the sending and receiving of campaign information between Oracle Eloqua and your CRM. Often confused with Closed Loop Reporting ("CLR"), campaign integration can have its own configuration with or without full CLR. With a few updates to your Oracle Eloqua instance it's fairly quick and simple to allow Oracle Eloqua to create and update campaigns, send campaign membership to your CRM and pull in campaign information from your CRM. The real key is understanding your campaign membership options and choosing the right one(s) to suit your business needs.

Let's begin with an overview of the various ways to send campaign membership from Eloqua over to CRM:

- Native Integration – Eloqua detects campaign responses based on defined response activities and creates a corresponding member response in the CRM campaign.
- Manual Campaign Association – Using values assigned to Oracle Eloqua contact fields, external calls associate CRM leads and contacts to a CRM campaign.
- Salesforce Campaign Association App – This app is added as a step on the Campaign Canvas and works for the Salesforce CRM only. It is configured to associate the Oracle Eloqua contact's corresponding SFDC lead and/or contact with an SFDC campaign.
- Oracle Sales Cloud Integration App – This app is added as a step on the Campaign Canvas and works for the Oracle Sales Cloud CRM only. It is configured to associate the Oracle Eloqua contact's corresponding CRM lead and/or contact with a CRM campaign.

NATIVE INTEGRATION

Oracle Eloqua evaluates contact activities performed on campaign assets. If an activity is defined as a response in Oracle Eloqua, it creates a member in the corresponding CRM campaign. These activities and corresponding CRM campaign member settings are configured in Response Rules. To view and manage Response Rules, click the gear button on the right-hand side of the Oracle Eloqua navigation menu. In the lower left quadrant, click Response Rules.

In this area, you can:

- Identify Oracle Eloqua activities and External Activities that should be considered responses to Oracle Eloqua campaigns
- Define the CRM campaign member status associated with each activity
- Define whether an activity should be considered a campaign response in CRM

If Oracle Eloqua detects an activity listed as a Response Rule, that contact is identified as responding to the Oracle Eloqua campaign in which the activity was performed and a campaign response internal event is created and stored.

Oracle Eloqua uses external calls to create a member in the corresponding CRM campaign. To trigger these external calls, the Oracle Eloqua contact record must pass through the "briefcase step" in Program Builder. This step is generally included in a dedicated campaign update program appended to the main CRM integration program.

The member's status is determined by the selection made in the Oracle Eloqua Response Rules. If a contact completes multiple response activities in the same campaign, Oracle Eloqua will overwrite a lower-priority response with a higher-priority response. For example, an external activity of "Event Attended" is typically a higher priority than "Form Submitted."

There are several "essentials" to help ensure the campaign response is generated correctly:

- "Sync to CRM" box checked on canvas
- Presence of a valid CRM ID on canvas

- Response rule assets on the canvas
- Response happening within the Reporting Start on and Ends On date (+12 months)

Oracle Eloqua retains these internal event responses independently, so every response activity performed by a contact will be used to create or update CRM campaign member. This ensures that no data is lost if a contact performs multiple activities in a short period. This also means if the lead does not yet exist in CRM, but successfully gets created at some point in the future, their previous campaign memberships will be sent over at the point they finally reach the briefcase step. It's important to note that the campaign membership date in CRM defaults to a creation date of when the response is actually sent, so historical membership will not push through with the historical date the membership was captured. This can impact reporting based on campaign membership creation dates.

MANUAL CAMPAIGN ASSOCIATION

For activities that are not defined as Response Rules, data on the Oracle Eloqua contact record can be used to create campaign membership in CRM.

To accomplish this connection, the Oracle Eloqua contact record must have values in two fields. These fields can be populated via form submission, contact upload, or using update rules in the Oracle Eloqua system:

- Last CRM Campaign ID
- Last CRM Campaign Status

The values in those fields dictate the CRM campaign to which the record is associated, and the status of that campaign member.

Oracle Eloqua will use external calls to create a member in the corresponding CRM campaign. To trigger those external calls, the Oracle Eloqua contact record must pass through Program Builder. These calls are generally part of the main CRM integration program, or can be included in a program dedicated to campaign integration.

Since this information is maintained in contact record fields, Oracle Eloqua can only track one campaign at a time. The fields will be overwritten each time values are entered for new campaigns. This makes it possible for campaign information to be lost if a contact performs multiple response activities in a short period. This also means that any historical information on campaign responses will be lost if the campaign value is replaced before being sent to CRM.

SALESFORCE CAMPAIGN ASSOCIATION APP

The Salesforce Campaign Association App leverages the Campaign Canvas to update Oracle Eloqua contact record fields and link them with CRM campaigns.

During initial configuration of the app, you can define how Oracle Eloqua contacts are associated to SFDC campaigns. These settings apply to all uses of the app across the Oracle Eloqua instance:

- Associate only the SFDC lead (if one exists)
- Associate only the SFDC contact (if one exists)
- Create two SFDC campaign members – associate both the SFDC lead and contact
- Create only one SFDC campaign member – if a lead exists, associate it; if not, the contact is associated to the campaign
- Create only one SFDC campaign member – if a contact exists, associate it; if not, the lead is associated to the campaign

The app uses the same underlying mechanism as Manual Campaign Association, updating fields on the Oracle Eloqua contact record and using those values to create the SFDC campaign member. However, since the contact record doesn't have to pass through Program Builder to make the association, we're more likely to capture all campaign responses. Also similar to manual association though, if the lead does not yet exist in SFDC, the "historical" campaign membership is lost that happens prior to

The app allows customization on a campaign-by-campaign basis – member status can be different for the same activity performed in different campaigns. It is also possible to associate records to different CRM campaigns within a single Oracle Eloqua campaign.

ORACLE SALES CLOUD INTEGRATION APP

Similar to the native integration option, the response rules are configured and the Oracle Sales Cloud Integration App includes a campaign actions page where you can create actions to send campaign responses to Oracle Sales Cloud when a response is captured or changes.

WHAT IS A TRUE "RESPONSE"

Integral to the native campaign membership option is how you define Response Rules. The most common examples

of responses are form submissions, event registration and attendance, or other external activities. If you choose to include Email Clicks it is important to think about the impacts of this decision. Unfortunately, you can't decide which specific clicks are campaign responses and which clicks should not result in campaign membership – it's all or nothing – meaning clicks to your newsletter article, your call-to-action to register for a webcast and clicking the cancel link on your reminder to attend are all treated by Oracle Eloqua as campaign responses if clicks are defined in your response rules.

Sometimes clients define Email Sent as a response rule for the purposes of creating a "Sent Email" campaign membership in CRM for sales visibility. An often-unknown consequence of this is losing the ability to leverage the "Responded to Any Campaign" shared filter criteria. Listing Email Sent in the response rules is essentially telling Oracle Eloqua every email sent is a campaign response (which it is not).

If sales insists on seeing Email Sends as a campaign membership response in CRM, consider using a campaign canvas-based app if available for your CRM to send the Email Sent campaign membership over after the first campaign email goes out and leverage the native integration for all your other types of responses like form submissions and event attendance. This gives you the best of both worlds!

HOW TO DECIDE WHAT WORKS BEST FOR YOUR ORGANIZATION

The important thing to note is that you don't have to choose just one – We work with clients that are using more than one option to meet various specific scenarios. You will want to choose a primary method, but as you look to solution for more complex use cases sometimes a combination of approaches will be the best course of action.

When deciding between native integration and manual integration, it's important to analyze how you define an MQL and a campaign response, and how you build your campaigns. As mentioned in the native campaign integration description, if the campaign is integrated where the "sync with CRM is checked" and the assets are on the canvas, ALL actions defined in the Response Rules can result in campaign membership creation. If you have 3 forms on your canvas and only one is considered MQL-generating or a campaign response, all the forms (including a cancellation form) can result in campaign membership creation.

It's also important to remember that your options vary based on which CRM you are using. With the transition away from Program Builder-based integrations to app-based integrations, this will change over time. Your Oracle Eloqua account director, your Oracle Eloqua partner or the Oracle Help Desk will be your best sources of confirming which options are available.

SOMETIMES CUSTOM IS THE ROUTE TO SUCCESS

We all love out-of-the-box, but every business and their needs are unique and often times the answer is some combination of the membership options and possibly even a custom object to save the day. Ultimately, if you can document clearly all the use cases and how you need campaigns and memberships created and sent, an Oracle Eloqua technical architect can help you determine the most effective and efficient route to take.

WRAPPING THINGS UP

Wow, that was a lot to digest! Did you get it all? Lucky for you, this guide will always be around to revisit at any stage of your Oracle Eloqua integration journey. Don't go through it alone! Leverage all this awesome content for integration success.

It's been our pleasure to guide you. If you're working on your own integrations and looking for some personalized assistance, please contact us. We love setting companies up for success!