INSPIRED MARKETING

ISSUE 9 | SPRING 2023

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CRAIG RICKS & KYLE MURPHY

OF PACIOLAN ON CONSOLIDATING THEIR MARKETING AUTOMATION EFFORTS

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CONTACT US

RELATIONSHIP ONE

1.763.355.1025
getinspired@relationshipone.com
relationshipone.com

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At Relationship One, we empower organizations to modernize their marketing through strategy, technology and data. With a core staff of experienced marketing consultants, integration specialists, data analysts, and development gurus combined with our library of AppCloud apps, we help companies deliver personalized and engaging experiences that drive loyalty and revenue. Our team of experts brings together deep industry knowledge and technical expertise to help clients achieve their marketing and customer experience goals by leveraging Oracle CX Marketing, Salesforce Marketing Cloud, and Adobe Experience Cloud product portfolios.

OUR MISSION IS SIMPLE — INSPIRE SUCCESS.

CREDITS

MEGAN GAUL
Brand & Marketing Manager

BLUE SKYS STUDIO
Cover Story Photos

TABLE OF CONTENTS


INSPIRESUCCESS

LETTER FROM THE EDITOR

Ron Corbisier
FOUNDER AND CEO | RELATIONSHIP ONE

After a two year hiatus, I'm absolutely thrilled to say, welcome back to the Spring 2023 edition of Inspired Marketing magazine! Thinking back to the fall of 2020, we as marketers were forced to quickly adapt to a rapidly changing environment. One of the biggest challenges was the sudden shift in consumer behavior, as lockdowns and social distancing measures led to a significant increase in online shopping and a decrease in in-person shopping. This made it more difficult for marketers to connect with customers and consumers through traditional channels such as brick-and-mortar stores and events. Marketers who were able to pivot quickly to digital channels and develop new strategies to engage with consumers online were able to succeed in this challenging environment.

Another challenge for marketers during the pandemic was the uncertainty and unpredictability of the situation. With circumstances evolving rapidly and frequently, marketers had to be agile and adaptable in order to keep up. This meant that many marketing plans and campaigns had to be quickly revised or scrapped altogether. Marketers who were able to stay on top of the latest developments and adjust their strategies accordingly were more likely to succeed.

Despite these challenges, there were also successes for marketers during and after the pandemic. One of the biggest successes was the increased adoption of digital technologies and platforms. As more people turned to online shopping and digital channels for entertainment and communication, marketers were able to reach larger audiences and gather more data on consumer behavior. This led to new opportunities for targeted marketing and personalization, as well as new ways to measure the effectiveness of marketing campaigns.

MARKETERS WHO WERE ABLE TO STAY ON TOP OF THE LATEST DEVELOPMENTS AND ADJUST THEIR STRATEGIES ACCORDINGLY WERE MORE LIKELY TO SUCCEED.

In this ninth edition of our Inspired Marketing Magazine, you'll find examples of how marketers like you have found creative ways to stretch their marketing budgets, optimize their teams, and strengthen their processes - all musts when being hyper-focused on ROI while providing a bit of sanity during such a turbulent time. With efficiency and effectiveness in mind, we will also discuss some tools and techniques that can stretch those budgets even further.

Craig Ricks and Kyle Murphy of Paciolan, the second largest ticketing and marketing solutions provider for live events that sells about 120 million tickets on behalf of 500 teams and venues, share how they streamlined their marketing operations and improved their ROI by migrating to 120 Oracle Eloqua instances in less than 12 months.

Catherine Slayden shares her experiences in streamling Eloqua training and user onboarding at Medtronic by creating a series of targeted and interactive online courses that were tailored to specific job roles and skill levels. Medtronic's approach not only improved the effectiveness of the training, but also made it more accessible and engaging for employees across the organization.

Matt Waters outlines how Ricoh consolidated processes and applications by implementing a single global marketing automation platform across the organization. This effort allowed for greater consistency and efficiency in marketing operations, and enabled Ricoh to better track and analyze their marketing efforts.

Cognex's Kris Gormley gets data right with Eloqua and Salesforce by implementing a comprehensive data governance strategy, including regular data cleansing and validation processes. The approach has helped to ensure data accuracy and consistency across both platforms, and has enabled Cognex to make more informed decisions based on reliable data.

On top of those great stories of marketing inspiration, our consultants share their experience and learnings as they serve many of the world's signature brands. So, as always, grab a warm cup of your favorite blend and see what you can take away from this issue to inspire your own journey.

STORIES OF MARKETING INSPIRATION

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REALIZING SUCCESS WITH THE ORACLE MARKETING CLOUD

Sharing stories of inspiration is what we do. This magazine is full of ideas, best practices and innovative marketing techniques that will inspire you to do your work.

Throughout our Inspired Marketing podcast, we've spoken with modern marketing leaders across all industries to learn more about their modern marketing journeys. We share these stories to help fuel your inspiration, drive you to excellence and teach you more about the marketing automation platforms you love.

This is always our favorite part of the magazine. Prepare yourself for fresh ideas and knowledge from industry experts. In this edition of the *Inspired Marketing* magazine, we will learn from Paciolan, Medtronic, Ricoh, and Cognex.


CRAIG
RICKS
KYLE
MURPHY

CONSOLIDATING THEIR MARKETING AUTOMATION EFFORTS

CRAIG RICKS AND KYLE MURPHY BOTH WORK FOR PACIOLAN, A WHITE-LABEL SOLUTION PROVIDER FOR LIVE SPORTS AND ENTERTAINMENT ORGANIZATIONS. CRAIG IS THE CHIEF MARKETING OFFICER, AND KYLE IS THE DIRECTOR OF MARKETING AUTOMATION AND CRM. THEY BOTH DETAIL THEIR EXPERIENCES WITH CONSOLIDATING THEIR MARKETING DATA INTO ONE INTEGRATED PLACE WITH THE HELP OF RELATIONSHIP ONE.

RELATIONSHIP ONE HOST, SCOTT INGRAM: Today on the inspired marketing podcast. I'm joined by Craig Ricks, the Chief Marketing Officer, and Kyle Murphy, Director of Marketing Automation and Salesforce Administration, at Paciolan. Welcome to the show, guys.

CRAIG RICKS: Glad to be here.

SI: So, Craig, maybe you can help kick things off and tell us about yourself and who Paciolan is, since I'm guessing most people haven't heard of you, even though there's a pretty good chance they've transacted with you.

CR: Good point. Paciolan is a live entertainment ticketing and fan engagement solution provider. We're the second largest primary ticketing provider in North America and the largest in college athletics. We help our teams and venues to engage fans, sell tickets and create amazing experiences. On an average year, we'll sell about 120 million tickets on behalf of 500 teams and venues, just a ton of volume and transaction that goes through the system.

Our biggest book of business is in college athletics. We work with the likes of Texas, Alabama, USC, UCLA, Michigan and Michigan State. One hundred and sixty college clients work with us, about 75% of the Power Five. So, chances are, if you bought a ticket to a college athletics event, you bought it through the Paciolan system. We're a white label solution provider. So, if you go to UT, Texas's athletic website, you see University of Texas and then you go to transact and buy a ticket. You buy it on the Paciolan eCommerce platform, but it doesn't look like you ever leave Texas's athletic site.

We're excited! In our roles, Kyle and I oversee an in-house marketing agency: a variety of digital disciplines from programmatic marketing, search, social, display and video. More importantly for this, Kyle oversees a marketing automation team and a Salesforce administration team. At the end of the day, we help our teams and venues to engage fans and sell tickets.

SI: Awesome. It's one of those things where I had no idea until I started paying really close attention as I bought some UT football and basketball tickets this year. If you really look closely, you'll see Paciolan, here and there, which is pretty awesome. Well, we have been working on a huge project together, these last number of months; you want to talk about what that is, and what prompted this effort?

CR: I can start, and I'll pass over to Kyle Murphy, our Director of our Fan One Automation and Salesforce services. We have been doing marketing automation services for about 125 clients for the last 10 plus years. We outgrew our previous system. It was robust, but it wasn't quite meeting our business requirements. As we surveyed the landscape of all marketing automation solutions, and it was a diligent process, it took us quite a bit of time, about a year or so to do the due diligence. We found that Oracle Eloqua was the best solution, best in class to meet our needs and our clients' needs. We then had the onerous task of migrating 125 clients over from our previous provider over to Oracle Eloqua in less than a year. That's a big challenge and it's a lot of work, but we're so excited.

To embark upon that, we really needed a partner. We need to partner to help us to unlock the value of Oracle. We need a partner to help us get trained up, educate ourselves, and put together best practice so we could scale this quickly. We found that Relationship One was the ideal partner to do that. And I'll tell you, I've been at my role for about 19 years, and I've gone through technology transitions in the past, and they're challenging, and we couldn't have picked a better partner than Relationship One to help us through this transition.

SI: Well, Craig, I certainly appreciate you saying that; you have been an amazing client to work with. Just the level of sophistication, care and diligence on your team is really just amazing. It's been a great, great journey. We're probably 80% through those migrations, and we're coming up on the final turn, wrapping this giant first phase of the project up to get everybody moved over.

CR: Kyle and team are sprinting through to the finish line. We've got till the end of June to do it. We're busy, but it's been fantastic and we're excited. Kyle can talk more to some of the feedback and experiences, but it's been a great journey for us. We're really excited about where this can take us and our clients in the future. We really feel like this is going to help us to elevate fan experiences on behalf of all of college fandom.

SI: Kyle, why don't you speak to what we're seeing so far? This has obviously been going on for some number of months. We've got a lot of your clients transitioned over already. I like to skip ahead to the dessert - what kinds of things are you seeing from a customer experience/client experience perspective?

KYLE MURPHY: Yeah, for sure. Before I jump into some of what we're seeing, because it plays a role in my answer, I've been in a marketing automation role with Paciolan for 10 years. We outgrew the previous system, but where we started and where we are is completely night and day. To your earlier point, we're only a few months into this integration. I'd like to think that we were early adopters of marketing automation in the sports and entertainment industry. In doing so, we created a lot of excitement, but also a lot of struggles and hurdles that we had to get over in regards to doing some simple things in a complex tool and process. I think early on in our migration (away from that complex tool) we're already seeing the ease of use of the Oracle tool and how we work together with R1 to create a scalable solution that could be more easily implemented across 125 customers in less than a year. This has allowed our customers to really run with it.

From a process standpoint, we have to continue to focus on migration, migration, migration. We're doing some trainings and implementations and migrations, in bulk over a course of a couple months. Just to see that we can jump on and train a group of clients one month, start moving on to another client group the next month, but those who were trained last month are already grasping the features and functionality; they are building out emails, forms and campaigns. That really speaks to the efficiencies that we gained, not only with Eloqua, but through the partnership with R1.

SI: It's been a relatively short fuse considering how many clients we had to move over. I guess it's probably worth calling out that you have a separate Eloqua instance for every one of your clients. So, we've been in the process of migrating 125 instances as we work through this effort together.

KM: Yep. Those are instances. Those are data feeds. Those are data migrations. Those are forms, and templates, and campaigns, times 125. So yes, we have had our work cut out for us. And again, that's why we're so thankful for the support that we've been offered. The process we put together has just made it possible, which I don't know if I thought was going to be the case when we first started with the timelines that our leadership gave us, but we're almost there and the light is at the end of the tunnel.

SI: Well, and it's not like we could pause ticket sales in the meantime, right? Everybody's got to keep the fans happy and keep selling tickets.

KM: Exactly. And keep in mind, we started this when there was still some uncertainty around live events in the pandemic where layoffs had occurred at many of the organizations that we were dealing with. So, less resources on their side to potentially grasp some of the requirements and the things that we needed from them. It's hard to imagine the outcome of where we are sitting right now from where we started and all the things that we had to figure out. A lot to be proud of.

CR: Yeah, that's a good point, Kyle. During the pandemic, we leaned in and used that as an opportunity for innovation. That's when we surveyed the landscape, selected a partner and then selected Relationship One to help us to implement. As a technology company, if you don't use that opportunity to lean in and innovate, you're behind already. That was a great catalyst for us to get started. We knew we needed to make the evolution, but it allowed us to really hit the ground running. Kyle will tell you: marketing automation was critical. It was critical all the time during the pandemic, and when there was uncertainty, communication was at a height. We were making this strategic pivot during a critical time in the industry and in the country. It added some pressure, but it's going great so far.

SI: Love it, love it. Let's talk about how we set this project up. I talk a lot with my clients, and we've certainly talked on this show before, about that kind of upfront work. Doing the strategy, really developing a plan. I always think of it as our opportunity to measure twice and cut once. That was probably three times, or maybe even 125 times, more important with this approach, because we had to come up with a model to do this migration at scale and run 10 to 20 clients through this a month. Kyle, do you want to speak to the kind of work we did on the front end to make this possible?

KM: Definitely. If we were left on our own to figure this out, I think we would still be in the planning phase. From day one we had an initial call just to talk through everything that you could think of. What's your data model? What are your volumes, deliverability volumes? How many users are logging in? What are the security settings that need to be set up for instances? From the very beginning, I think we had a good rapport with each other as far as what we needed. To be fair, we have a very complicated data model, not one that I think fits natively into what Eloqua normally provides. Working with your team we were able to come up with a way to standardize custom data objects that linked back to the contact table for us to segment and personalize more easily.

From there, data was king, as it always should be. Once we figured out the data model and how that was going to work for all our customers, it was a matter of building out our schedules and building out a playbook, to stick with a sports analogy. The first couple instances were handheld. I think there was a lot of Relationship One building and a lot of Paciolan watching. After we built those first two instances - all the assets, all the data feeds, all the custom data objects - Relationship One created a playbook that we could then utilize and follow for how we subsequently build out all of the other instances.

We went from Relationship One doing all the work for the first few instances, to us doing things together and Relationship One checking our work, to now we're collaborating and Paciolan's really building out the instances. We are moving on to some more strategic and exciting things now that we're more self-sufficient and building some of the tools that you guys taught us.

SI: Let's go back to the complicated data model piece, because there was some exciting development that happened along the way to help you solve for some of those things. We had started building an app, for some other clients in the financial services space, that you helped us accelerate the development of to help solve for some of your use cases. Do you want to talk about that Personalization Manager app and some of the ways that's evolved and how you're using that?

KM: When we first started working with you guys, it was a brand-new relationship, right? We didn't know much about each other, other than Oracle had recommended you as a great group. There was a lot of trust that we needed to gain. And from day one, we told you what we needed, and I feel like it was almost like it was day two that you had delivered or promised to deliver a tool. It was what we needed for our complex data model.

In ticketing systems, you could have more than one account, whether it's a business account, a personal account, a group sales account, or your season ticket account. A lot of times you're going to exist in a ticketing database more than one time with the same email address. Natively, Eloqua has a contact model that works off unique email addresses and when it's time for us to start sending out our renewal confirmations or our season ticket member benefits, we need to personalize and segment and display down to the ticketing account level. Native field merges and personalization were clearly a limitation that we needed to get over.

The Personalization Manager App that Relationship One was building at the time, and then I think potentially expedited the timelines on our behalf, which we are very appreciative of, came in and allowed us to loop through data more succinctly and accurately when we needed to. So that if we needed to send multiple emails to the same email address with different custom data object records we could do that through a simple drag and drop onto the canvas. A simple configuration of the criteria using the CDO fields that we needed to utilize, and then plug in cloud content directly into the email. We've been utilizing that already. We're already using that for our customers today for some seat selection, as well as some renewals. It's been extremely beneficial for us.

CR: Scott, I'll add in some context, too. What is important to me as the executive sponsor for this project? It's a lot of things. Kyle's team doing the heavy lifting, but I appreciate the executive communication. We do a once-a-week sync-up with you, Emily, Kyle and I, and Ron is available if something comes up. The communication is key. You've got some super talented staff. Sarah's outstanding, and she understands our questions. Most importantly, there is a shared responsibility and shared ownership of the result and end vision. We feel your urgency when we ask for things and that is greatly appreciated. Going back to the partnership, if we didn't have that, it would be onerous and difficult. So, we're excited about where we are today and where we're going in the future, thanks to the partnership with Relationship One.

KM: To echo, there are so many times where internally we decide we're not even going to open a service request with Oracle. We're not going to go to our Oracle rep, because we know we've got it covered through our Relationship One representatives. You guys are really a one-stop shop for all things Eloqua that we need, down to deliverability, down to the Personalization Manager App, down to data feeds, API limits and building out landing pages for us. It really has been an immense partnership that we could not have done the volumes at scale that we're doing today without your team's involvement.

CR: Oracle's been a great partner too, but there's three legs of the stool here. There's R1, there's Paciolan, and Oracle, and all three legs are working well together. That's super important.

SI: Part of the secret there is that coordination behind the scenes. Craig, you called it out well that communication is so key. With any major project like this, we're always mindful of what's happening from an executive stakeholder perspective. Are we aligned at that level? Are we aligned technically? Are we aligned with Oracle and making sure that we have the support? We basically built a streamlined response process, because we knew how critical and how time dependent some of these things were. We needed to make sure that as issues came up, we're having to provision dozens and dozens and dozens of instances, we needed to have a process to make that work. This all sounds amazing, but it's not all rainbows and unicorns, right? Let's talk about

> "YOU GUYS ARE REALLY A ONE-STOP SHOP FOR ALL THINGS ELOQUA THAT WE NEED, DOWN TO DELIVERABILITY, DOWN TO THE PERSONALIZATION MANAGER APP, DOWN TO DATA FEEDS AND API LIMITS AND BUILDING OUT LANDING PAGES FOR US. **IT REALLY HAS BEEN AN IMMENSE PARTNERSHIP THAT WE COULD NOT HAVE DONE THE VOLUMES AT SCALE THAT WE'RE DOING TODAY WITHOUT YOUR TEAM'S INVOLVEMENT."**
>
> - KYLE

some of the challenges and the lessons learned. If we could go back and do it again, are there things that you would've done differently in your approach to this project?

KM: Good question. Not to be too obvious with my response, but the biggest thing would be time. In many ways, we are learning how to drive the bus while already on the bus: trying to build out sophisticated processes and campaigns where we had 10 years of that knowledge and experience in a previous provider, all within less than a year.

I think timing is important. I know many single organizations may take three or four, maybe even up to six months to do a single migration, let alone 125 in less than a year. Looking back, there's always those hurdles, there's always those what ifs. I know it would've been great to have some additional time but truly, I think everything that we're doing right now has been eye-opening in the sense that we are working toward, not to get too theoretical here, but we are rebuilding what marketing automation looks like for the premier colleges and live sports or live events organizations in the country. We really have the opportunity in front of us to build something new, to build something efficient and scalable that allows our customers to engage their fans. So, I don't know if I'd change too much. The data model we were able to find a fix for. We're building out the Personalization Manager App together to continue to iterate and make that even more functional in new ways that we didn't think we needed before. So outside of time, I really am proud of what we've been able to build together. I don't think I would change too much.

CR: As you're going through something as transformative as this, there are going to be some bumps on the road. There must be, but how you manage the bumps and how you navigate some of these things that pop up is what's so critical. We're feeling great about where we're going and we're feeling super excited about the future, and what we're doing. We're making so many transformative changes with this. We feel really excited about how this is going to help us to unlock fan engagement.

There are some challenges. We're doing a lot of new things with the data model on Paciolan with the data warehouse; we're fundamentally changing how we're empowering our schools to use the platform. It is a super good balance of ease of use and power, which is awesome for our schools and our venues. I agree with Kyle, you don't know what you don't know when you get into a big project, but I think we're managing the bumps along the way very well.

KM: I think throughout the entire implementation, we all had our fingers crossed, or we were waiting for that barrier that we just couldn't get over, and that never happened. I think every challenge that was presented was one that we could strategically work through with your team and Oracle on a solution and one that would work well for our current needs with the idea that, if possible, we would continue to iterate and improve in the future.

Going back 10 years ago when I first started doing marketing automation for live sports entertainment, the coolest thing you could do was someone updating their preferences for you to send targeted communications and segments. Over 10 years, iteration and improvements generated other opportunities way past what we're doing today. Our mindset right now is, to Craig's point, the hurdles and the things that we're going through now are likely not going to be hurdles or barriers for us in the future, and ones that we've already had solutions put in place so that we can move forward, and our customers can use the tool as designed.

CR: I would say we're just starting the journey. The first 12 months: it's quite a lift, but the journey after the 12 months is going to be even more exciting. We can unlock all the strategies and then in parallel, which we haven't really addressed yet, but we're also deploying Oracle Infinity to help with customer identification and personalization of journeys. That's another solution that we weren't familiar with that we're deploying now in conjunction with Oracle Eloqua. We're really excited about how that helps us to future-proof a lot of the external impacts in the industry, like third party cookie deprecation. There's a lot to still unpack, but we're feeling great about our current position and excited about the future.

SI: Let's talk about that exciting future. That is a perfect setup for that direction. I think your approach has been really smart. This first phase, the first year was just about let's move everybody from your old platform to this new platform. Let's do that as seamlessly as possible. Let's not introduce too much complexity as we're working through that, now that we're starting to wrap up that phase, you have your eyes on the horizon. We've got this stable new place; we have all our clients moved over. Now we really get to innovate and take advantage of this investment that you've made. What types of things are you thinking about with the new elevated platform?

CR: I could start, and Kyle, you can dive in with greater detail. It's funny you say that the marketing managers had a meeting yesterday just to talk about ideation and future innovation. Some things that we're always looking at are tightly integrated customer journeys. How do you engage fans on both automation and digital marketing in one singular customer journey, and then how that pipes over to Salesforce. You've got better insight into each of those fans from a 360-degree view. We're looking at how we can innovate there, which is super exciting.

I think the market dynamics of third-party cookies going away is super interesting. We at Paciolan, and then also with our other entities of our corporate enterprise, are always looking at how we future-proof so we can help to engage the most interested fans. We're looking at those solutions as well to make sure we don't lose remarketing audiences. How do we engage those interested fans? It all comes down to personalization. There's never a fan that's ever annoyed by getting a personalized message from their favorite college institution. Think about getting a message from UT: Scott, you're a Texas fan, you get something from them and it's personalized to you, you're super excited. When that journey is enhanced and improved, you're likely to spend more, invest more, and donate more, and it just enriches that relationship. We're excited about unlocking all these tools to enrich relationships and fuel fandom.

KM: I think, to reiterate, first-party data is so huge right now as is the amount of first-party data that we are collecting through the ticketing platform, but now also through Infinity and through Eloqua data capture forms, activities, and web visits, is really going to empower what Craig was just talking about. As part of this transition, we completely changed our entire data process. Instead of batch files, everything's powered through a data lake, syncing back and forth between each other. It's all centrally stored and available for us to utilize. In the future, continuing to build that out, continuing to feed Eloqua, and even our Salesforce instances with more enriched data that our customers can act on to do exactly what Craig was just talking about, enrich and enhance the user experience from the customer's end.

"WE'RE EXCITED ABOUT UNLOCKING ALL THESE TOOLS TO ENRICH RELATIONSHIPS AND FUEL FANDOM."

- CRAIG

In the past, customers would potentially be offended or be scared that you know too much about them. You know what pages they've been on and how many times they've been on it. But now when you're talking to people or marketing to people, if you don't know what they want you've lost the opportunity. Now your content is not relevant enough for them, so they're just going to opt out and eliminate the ability to communicate in the future. We need to use all that data we have to be more strategic, to be more efficient in how we're communicating, so there's that delicate balance of personalization without stepping over any boundaries.

As we look at other kinds of functionality and tools, mobile is huge, as we've seen over the last two years or so. On the ticketing side, we've transitioned a ton of resources to mobile ticketing, to contactless ticketing, to get into events without a physical ticket. I continue to see that trend moving even further on the marketing and sales side. Identifying and utilizing a system like Eloqua, which has the opportunity for SMS to be integrated as part of an omnichannel strategy along with digital, along with direct calls through Salesforce, is something we're certainly going to focus on. We have not yet dipped our toes into SMS integrated campaigns through Eloqua, but that is something that is certainly on the radar, as well as additional AI opportunities: fatigue analysis, send-time optimization, just ensuring that we can continue to give our customers access however they want to improve the customer journey.

CR: One thing I'd add to that is just enhancing the micro moments to happen during an event experience. Now we know everyone that went into the game; it's not just me buying a ticket for Kyle and Scott. When I transfer that ticket, I know that it's Scott and Kyle there as well, but now we have your data, and we can immediately send you a message afterward with game highlights or recaps or upcoming events. So really capturing those micro moments that happen in live events is so important.

I love what I do so much, so does Kyle, because we are at the nexus of live entertainment and sports and data and marketing, and it's awesome. We get to talk about how we can help to influence this industry through technology and innovation. It's so exciting. If you think about some of the greatest memories that you have: I bet if you go back, Scott, you think about some of your best experiences at UT. You probably remember who you were at the game with, because there were these memories, these experiences of these amazing games. Through technology and through smart marketing and through data and through hard work, we can capture these fans and create these amazing experiences and memories. It's super fun to work in that space.

SI: Yeah, it is an entertaining dynamic and a fun space. I know you recently hosted your annual user conference, bringing all those marketers together who are working with all these different teams and allowing them to collaborate and allowing them to bring innovative ideas and things that they want to be able to do for their fans and for their communities.

CR: Yes, it was awesome. Coming out of the pandemic we had a year of no fans which was difficult. Then we had a year of fans coming back and less staff, which was also difficult. We had our user conference, and it was the first time coming back in two years and it was magical. We had an amazing experience to talk about how we persevered and how we got through it and where we're going in the future. It was reflective of the industry. The industry came back; there was a year and a half of sitting at home and no games to go to, or very limited games to go to. When fans came back, it was cathartic for communities because they were able to come back and cheer for their favorite teams and be in their favorite stadiums, and it creates these amazing experiences. We're excited to be part of that. We're glad to have persevered and gotten through the pandemic. It was a challenge, and we're super excited about where we're going in the future.

SI: I'm just glad you're not selling cardboard cutouts anymore.

CR: I still have mine in my garage. It kind of freaks me out when I drive in, but it's still there.

SI: Amazing. Well, this has been such a fun story to dig into. I know this is probably going to be a little bit of a continuation. I think we might revisit this in a handful of months, maybe with Michaela, and get a little bit of a different perspective as you guys continue to go through this journey. I wonder if there's any additional insight or idea that you're hoping to share, knowing that we were going to be talking today, just for your peers and colleagues out there who are listening to this show. Is anything that comes to mind? Kyle, do you want to start with that?

KM: Yes, you mentioned Michaela, I think the entire team at Paciolan has been just working their butts off to make this happen. We've got an incredible team over here. Michaela Patt's our manager on the marketing automation team, who's been really serving as the project lead in collaboration with Relationship One and others. Surrounding myself, and I know Craig would agree, with people who are smarter than us and super hard workers has been immense in this project. We couldn't have done it without the team back at Paciolan: the rework of the data feeds, down to the building of the assets and the instances, as well as the Salesforce team that's taken all that data and reworking it in ways that haven't been done before. Kudos go out to those guys, but I am also excited about the future. As Craig said, this is year one of primarily focusing on migration. I'm so excited for when those migrations are finished and all the innovative opportunities that are ahead.

CR: I'll just add one last comment. For anyone who's contemplating a transformation like this for technology, it always boils down to partnership. In my 19 years at Paciolan, I am a long-term partnership kind of guy, that's kind of in our DNA here at Paciolan, and Kyle's the same. The partnership is so critical. If you're going to trust your business, your technology transformation, to a partner - Oracle and R1 are fantastic partners, and we're so appreciative.

SI: I appreciate you saying that Craig. So, we call the show Inspired Marketing. And my favorite question to ask and the way that we always close the show is what is it that inspires you, Craig? What is that?

CR: I am a fanatic, so everyone always says you've got to love what you do, and I love what I do. I'm a fanatic for live entertainment. I'm a fanatic for college sports. I get inspired to go to games and have those experiences. I also get inspired to leave that legacy to my kids. I have two daughters, they are 14 and 11. I take them to games, take them to concerts, and I just love seeing their reaction and because I want to leave that legacy of fandom to them. So, that's what really inspires me: moving the needle in the industry and connecting fans to their favorite teams and live entertainment, but also from a personal perspective, fueling my own fandom and my family's fandom.

KM: Wow, I was hoping you were going to do that, too, because family was going to be what I said as well. I'll touch on that a little bit, too. I grew up in sports; I have always been involved in sports. My dad played sports, and to me sports represented family. I think it's something where I can go: I can wake up every day and know that I am a part of a team. Even today it's not work. It's a family and it's a team where we go to bat for everyone every day; trying to build something that has long-term benefits is so exciting: working with a team to inspire others, to build something. What we're doing right now with Relationship One, with Oracle, to build out legitimately the future of marketing automation in live sports entertainment and college athletics is exciting and gets me invigorated every day to see what else we can do.

SI: Amazing.

CR: I've got one more cool thing to share with you, Scott. I'm a third-generation Michigan State Spartan. My dad is an economics professor at Michigan State for 40 years. My grandfather was the Michigan State wrestling coach back in the day. When I was little, I would go into Michigan State basketball games: we'd walk into Old Jenison Field house, and we'd see all these old coaches and teams. I saw the picture of my grandfather in his wrestling team back in the day. This is from 1929. It was cool to have that history as you were a kid going to games. Now fast forward, Kyle and I get to influence not only Michigan State, but 160 other schools and universities, and it's awesome.

SI: Amazing. Thank you both. This has been really inspiring.

CR: Cool.

KM: Awesome.


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MEDTRONIC

TRAINING USERS ON ELOQUA

CATHERINE SLAYDEN IS THE ELOQUA ADMIN FOR GLOBAL IT AT MEDTRONIC, A MEDICAL DEVICE COMPANY THAT IS SAVING LIVES EVERY TWO SECONDS. CATHERINE SHARES HER EXPERIENCE WHEN IT COMES TO CREATING A MORE STREAMLINED TRAINING PROCESS FOR MEDTRONIC'S GLOBAL USER BASE. PRIOR TO THIS, CATHERINE WAS SPENDING OVER SIX HOURS ON TRAINING TASKS A DAY, AND IT BECAME CHALLENGING TO MANAGE SOME OF HER CORE WORK RESPONSIBILITIES. THROUGH THIS PROCESS, CATHERINE HAS FREED UP A LOT OF HER TIME, AND SHE SHARES SOME OF HER KEY INSIGHTS ON THIS WEEK'S EPISODE.

RELATIONSHIP ONE HOST, SCOTT INGRAM: Today on the Inspired Marketing podcast my guest is Catherine Slayton. Catherine is an Eloqua admin for Global IT at Medtronic. Welcome to the show, Catherine.

CATHERINE SLAYDEN: Thank you for having me, Scott.

SI: Well, it is great to have you here, and we are going to talk about the work that you and your team have been doing to train and effectively enable hundreds of Eloqua users. But before we do that, let's just talk a little bit about you. Why don't you tell us about yourself, your role there at Medtronic and about Medtronic for folks who aren't familiar?

CS: Medtronic is a global medical device company. I think we're probably most famous for our pacemakers. Our founder, Earl Bach, he actually invented the first battery-powered pacemaker back in the '50s. It's kind of a cool story about how there was a power outage, and children who needed pacemakers. So, that all kind of grew, and now we make products that actually treat 70+ health conditions: everything from diabetes to cardiovascular, to neuro, and everything in between. It's a very cool place to work, because in addition to doing something that you enjoy and are good at, you also know that you're working for a company that does real and constant good in the world. I think at this point our official statement is that we're saving lives every two seconds. So, that's pretty awesome.

SI: That is awesome, and it's fun for us because I'm learning, most recently as we work on a campaign, about spine robots that cost a million dollars. So, there's some pretty exciting stuff that you guys have.

CS: There's very exciting stuff, there's so much of it, and it's constantly changing and evolving. It's just amazing. As for me, I work in Global IT, which is our centralized IT area, and I am an Eloqua Admin. When you say Global IT team, you sort of imagine a very large group of people, probably 20+, but actually we're a teeny tiny team. There are only four of us who are full time on Eloqua, and that's a recent development. As recently as three months ago there were only three of us. We are supporting all of Medtronic's businesses and all of our regions, and we're using five instances of Eloqua. So, as you said, Scott, we have right now, I think, almost 1,000 users across all of those. To be able to manage all of that demand and all of those folks, on our own team we've developed a divide and conquer method that really plays to each of our strengths. I'm very lucky to be on such a good team where we're all very different. We all really like each other, and we all really work well together. We've been able to divide things up based on who's good at what, and who's interested in what. My background is primarily in marketing and writing, and in education. In addition to sort of those traditional admin duties that you think about with Eloqua, I am also the person who's responsible for all of our new user training and our existing user ongoing education. I also do our global governance and regular reporting. A lot of our reporting has to do with not just providing the metrics, but also taking a look at what does that mean and how can we improve? I also get assigned to a bunch of projects across the business as help is needed.

SI: Excellent. A small but mighty team. Clearly you guys have a lot on your shoulders with all of the users that you are supporting. I definitely want to talk about that and really focus our conversation today on how do you do that. How do you effectively train and enable that volume of users? I know that's been evolving, and we have stepped into to start to help with that here of late, but I'd love to hear the backstory and the history of how you've done that historically and what that evolution has been like.

CS: Well, you know, if you want backstory, I've got it for you. We definitely have a very small team, and it has been historically a challenge to get all of the folks who need access to Eloqua, not only just the right access based on what they need to do, but the right training for what they need to do. I came to Medtronic about five years ago. When I came on, we were kind of in a time of flux. To be fair, it's corporate America, it's always a time of flux, but we were moving from our old platform, which was Exact Target, over to Eloqua. There was really no process in place to get either new email marketers who are just starting up or email marketers who've been working on Exact Target trained up in Eloqua. We could send them through the Oracle education program, but the cost of that was a bit high for the majority of our users, as was the time investment. Costs, budgets, and time are always really limited resources. So, that was a struggle. For those of us who did go through the Eloqua training, the official Oracle version, we loved it. We thought it was incredibly robust. It goes very deep into the weeds. It covers everything you would need to know, but that was maybe a little bit more in depth than what most of our users would actually need to do because most of them are building emails, sending campaigns, and reporting back on them. They didn't need to know how to do the complex things like the integrations and all of that stuff.

When you combine that with someone who's relatively new to Medtronic and wants to prove herself, you get the situation that I was in. I have a background in higher ed. I worked in higher ed both in marketing and as an educator for a while. I thought: what if I used that history to solve this problem? If I could come up with a really solid training process that could add value to users, and to Medtronic as a whole, that would also cement my status so that they'd have to hire me full time. Plus, it would make life easier just in general for a ton of people - for users, for the admins. It would also make sure that Medtronic was really covered as far as global governance and compliance goes.

From there, I set out to invent the whole process. I enjoy big challenges like this. I was an educator in the past, so setting curriculum, building content, putting together the presentations and figuring out how to deliver that — that was actually fun for me. I set out to do that and also incorporate all of the legalese you have to understand if you're doing email marketing. Email marketing is very regulated. Data privacy is obviously very regulated, and our own industry of healthcare and medical devices is very regulated. There's a lot of complicated legal stuff that I had to try and get across to folks who maybe weren't aware of it or hadn't seen it before, in addition to teaching them how to use the system.

I did that for about three years pretty much on my own, actually 100 percent on my own for two and a half years: updating the curriculum and the content every six months or so, depending on when laws were changing, or when Oracle made updates to Eloqua. Over time, Medtronic's usage of Eloqua was really starting to grow hand over fist. We were getting more and more of our operating units on to Eloqua. We were having more and more people wanting to learn Eloqua to do it themselves. Plus, there were a lot of areas where they wanted our team and Global IT to handle that for them. So, as all of that demand grew, it became unwieldy. It wasn't something that I could handle on my own anymore. Unfortunately, our team was not growing to meet the demand. I know that numbers are helpful. So, for context, when I first started training people about five years ago, it was one or two people coming to me for training per month. By the time that we pulled in your team at a Relationship One, back in December, we were at about 20 people a month. I was spending easily six hours a day just on training, which is too much time to spend on any one task, especially if that's really not supposed to be your primary focus. I was supposed to be doing other higher level admin work, governance work and project work. It just became unmanageable, so I reached out to my manager and told him I need help; I can't do this anymore. He actually recommended that we go to Relationship One, because we've worked together on so many great projects, and we have such a great collaborative sort of relationship. I can't even tell you how exciting and how much of a relief it was to me to get some of this off my plate and to work with you guys to do it.

SI: Yeah, it's definitely been a fun project. And even since your numbers that you shared in December, since we've taken on the project at the beginning of the year, I think we're seeing even more people on a monthly basis come through and get the training so that they can then get access to the system. Maybe you can talk about that because I think it's actually a pretty smart process that you have in place where it's not just that you have to do the training, but there's some hoops they have to jump through before they can get their keys to Eloqua and take it around the block.

"I CAN'T EVEN TELL YOU HOW EXCITING AND HOW MUCH OF A RELIEF IT WAS TO ME TO **GET SOME OF THIS OFF MY PLATE AND TO WORK WITH YOU GUYS TO DO IT."**

CS: Yes. I've always been a very step-by-step process driven person. I love lists; I love checking things off. That's how I approached the creation of this training process. What they have to do is they have to first learn how to use the system, how to use Eloqua. Then they have to learn our specific Medtronic standards and expectations for what they're going to send out into the world. The way that we ended up setting up training and dividing between the Relationship One side of things and my side of things is that Relationship One took on what we call the functional training. That's everything that an everyday Eloqua user would need to know: how to search the contact record, add new contacts, how to build an email and sending email, how to use the multi-step canvas. All of that is covered in the functional training that Relationship One does. And that makes perfect sense, because, of course, Eloqua, as far as it functions, is the same regardless of where you're using it. So, it doesn't have to be Medtronic-specific information. I don't have to be the one who leads that, but where it does have to come to me is the next step. And that is our Medtronics standards training, which is what we're calling it now. That's where we take a pause and a step back to review some of the legal stuff: again, you know, GDPR CCPA, all of the acronyms you can think of. We talk about our brand standards and what we expect to see and how we use sender information, or reply to information, how we format our emails, all of that good stuff. So, at the end of that standards training, I do a demo of a standard resend campaign: send an email, wait X amount of time, and then re-send the email with a new subject line to folks who didn't open the first time. That demo becomes their homework assignments. Every trainee has to go into our sandbox and build their own resend assignment that they send to me, then I review it and make sure that they've built it correctly, which indicates that they understand the functional side of things, but also that they have absorbed and understood all of the standards for our brand, the way that we speak to our customers and the way that we set things up. It's only after they do that that we actually give them keys to use Eloqua. Even once they get into Eloqua, we still have one more task for them to do. Once they're in Eloqua, they can go ahead and build whatever they want, but they can't activate it until they go to their admin for that instance and have that admin do a review to make sure that their segment is set up correctly, their email is looking good and everythings going to work as expected. It's only then have they passed all of the training homework, but also a real-life example, that we give them activation permissions.

SI: It's such a smart process, especially from your perspective when you own governance. The best way to make sure that governance works is to check that work and make sure that people have had the appropriate amount of training, and really understand the rules and regulations and all that goes into it. Any of our highly regulated industry clients have these types of things they need to be concerned about because there are serious implications if somebody steps outside of what's required with all of these different rules and regulations.

CS: Absolutely. I think maybe that's the hardest thing to get across, but also one of the most important. You can make a mistake when you're setting something up so that something doesn't display correctly, which is a little bit embarrassing and you may need to do a resend to apologize or whatever, but it's not the same as sending an email to everyone in the globe instead of to just your country. We spend a lot of time talking about the importance of data hygiene and accuracy and closely segmenting to make sure that at the end of the day, you are sending your emails to the right people and to people who are going to want to read it and engage with them. We also spend a lot of time talking about what I think a lot of our email marketers think of as the "fun stuff," which is like what designs are trending and how are people clicking, that kind of thing. It's really fun trying to find a balance between what I find interesting, but most people find boring, which is the legal side of stuff, and the fun creative side of things too.

SI: Now we're only a handful of months into this, but how, I don't know, life-changing has this been in terms of you getting some of your time back?

CS: It has been hugely life-changing. I looked at the numbers today and we rolled this out in January. Right now, I think we're at about 90 - that's nine zero, almost 100 trainees who have gone through just in the past few months. Obviously, that's a huge number of people, and that wouldn't be manageable for me on my own anymore. I think the fact that this process has been updated to make it easier has definitely helped. You can see that in the numbers of people who are coming through and moving through more efficiently. I would say also, for myself, a huge win is that I probably have about three hours back a day. That's how much heavy lifting your team at R1 is taking off my plate, like three hours a day, which is wonderful because then I can spend that focusing on other ways that I can help improve email marketing at Medtronic. I do a lot of ongoing education for our users. I like to lead regular presentations about hot topics or questions. I've done a bunch in the wake of COVID about how to effectively use Eloqua to market digitally online webinars and other events. That's really freed up so much time for me to be able to do things like that and also to manage the instance that I oversee and also to help my team out with other projects. So that's made an enormous difference to me. I think it's made a big difference to the trainees as well. One of the things that I really want to give kudos to your team for is the fact that now we're able to offer real-time cohort training to our new users. In our previous life we were only able to offer on-demand modules that I would record and make available. People could go through them as their schedule allowed. That's the only way that I could accommodate all of the training demand. People learn really differently. They have different preferences for how they would like to be instructed in new things. I think it makes a huge difference to have a real-time option available, because if they need to they can stop the instructor to ask their questions, and that means they don't get lost anywhere. By the time they get through to the standards training and to the homework assignment, they have a better understanding of how to do things in the platform so we don't have to address those issues again at any time.

SI: Yeah. It's really been a fun fulfilling project on our end as, as well. Right. Going back to the Oracle University example. It's an incredible solution and platform, but there's a lot there that maybe isn't relevant for folks who are just going to be doing

essentially the basics in Eloqua. What we've been able to build all of the training to be really specific to Medtronic. We're working in your sandbox; this is what your environment looks like. It's not like there's different fields and different things are in different places. This is what your reality is going to look like. I think it's been just a really great fit all the way around. And it's certainly way more efficient for your users, being able to spend just a few hours in training versus, I don't know, a few days in to get the same level of competence.

CS: Absolutely. And that's definitely something we've heard from people who've seen both sides of it. The majority of our trainees have never gone through the Oracle stuff because they haven't had to. But there are some folks who have done both. I don't want to brag on us, but I do want to brag on us. So I'll say I've gotten really positive feedback from pretty much everyone who's done training, but especially from people who've done both our trainings, one of which is very focused on everyday real life, here's what you need to do, versus the Oracle, which is a little bit more heady, a little bit more high level, a little bit more administrative-type of stuff.

say, okay this is your environment. We understand your business and know these are the types of campaigns that you're going to do. This is the type of governance that you need to be aware of. Here's what's in bounds and out of bounds. Here's how the security roles specifically are affecting you, all those types of things. I think the outcome is just a really nice fit for everybody.

CS: Absolutely. At the end of the day, it's about personalization and relevance, which is as important in education as it is in email marketing.

SI: There you go. Well, what's next? I always like to be forward-looking, and you guys are always doing fun, innovative things. So where do you go from here?

CS: I definitely know that there are a number of proposed very complex and potentially life-changing projects that are being discussed at Medtronic. They're all kind of still in the early discussion stages. As far as sort of where I live, which is the Eloqua training zone, I like to think that we're going to keep innovating and keep updating, because, of course, things are going to continue to change. We're going to need to update our content as there are new laws, as Oracle makes changes to the Eloqua platform, all that kind of stuff. I am always open to feedback from our trainees, and I have definitely used that in the past to make changes to the process,

> **"I'VE GOTTEN REALLY POSITIVE FEEDBACK FROM PRETTY MUCH EVERYONE WHO'S DONE TRAINING,** BUT ESPECIALLY FROM PEOPLE WHO'VE DONE BOTH OUR TRAININGS, ONE OF WHICH IS VERY FOCUSED ON EVERYDAY REAL LIFE, HERE'S WHAT YOU NEED TO DO, VERSUS THE ORACLE, WHICH IS A LITTLE BIT MORE HEADY, A LITTLE BIT MORE HIGH LEVEL, A LITTLE BIT MORE ADMINISTRATIVE-TYPE OF STUFF."

SI: Yeah. Well and you know, it's just the nature of the beast, right? You have to account for all kinds of different use cases, industries, platform configurations, and everything else in that type of environment. Whereas we're able to be focused and

to make it easier for everybody to streamline things, to make it more interesting and more accessible to folks, especially folks who haven't done email marketing before. So, kind of the idea of just continuing to evolve and shape training.

I also really love the idea of potentially getting to a point where we could actually do live, in-person cohort training. I know that's probably a ways off with the world being as it is right now. I think there's different types of instruction that are more valuable to different types of people. I'm a huge lover of on-demand training, because I'm actually a bit of an introvert and I'm very self-driven. I like to manage that process myself, but I know a lot of people love in-classroom training. I definitely see the value of the human element, the real-time interaction, the ability to stop and ask questions, and also to understand who the people in the room are and what they're trying to do. I would love to get to a point where not only could we have an on-demand option, an online cohort, but then also in real-life cohorts, too.

SI: I think we are all eager to be able to get back to at least having the opportunity of doing things live in person and being in the same room together. So, well, there goes the evergreenness of this episode; we are obviously eager to finish getting our vaccines and get back to it. But Catherine, two questions that I like to ask every guest, just in your own day to day, the things that get you through your life: what are the tools and apps that you can't live without?

CS: I was thinking about that also in the evergreenness of things, but it's funny because in the last year COVID has changed like everything really. And I have to say, I did not rely as much on technology pre-2020 as I do now, certainly. Some of the things that I really rely on every day: first of all is my Notes App. I'm a list taker and a list follower. If something's on a list, I'm going to do it, even if it's just for the joy of like checking it off. I'm also a huge podcast lover, and that is fairly recent. I think that started last summer. I honestly think it's a result of not having as much human contact. I love true crime podcasts. I listen to them on Apple Podcasts and on Amazon Music. I also love music on Amazon Music and Pandora. My favorite Pandora station right now is Mayor Hawthorne. He's kind of neo-soul. Pandora has done a cool upgrade now where you can set it to different modes. You can just listen to that artist, you can listen to their deep cuts, you can listen to just the hits, or you can do what I'm doing right now, which is discovery mode where it plays a lot of similar artists. You get to hear some new people, which is cool. I'm also a big reader, so I love my Libby App, a library app, and then Goodreads, which keeps track of what I'm reading, whether or not I like it, and it gives me recommendations for what I might want to read in the future.

SI: Excellent. And then the final question, we call the show Inspired Marketing, but we always like to hear what it is that inspires you?

CS: To me "inspires" is such a heavy word. If I think about what really inspires me at a high level, it's things like beauty and real skill in art or music or writing very specifically. Those are kind of my three big passions; they always have been. When I want to get creative myself, really nothing inspires me like people who have really huge talent in those areas. But you know you can't be inspired at a high level all the time, and I think especially in the past year or so it's been about getting through the day. When I think about the every day, I think of inspiration more as motivation. So, really what motivates me on a day-to-day basis is sunshine. And then also my love of food, for better or worse. I am based in Minnesota. We do not get the best weather or the sunniest weather all the time, but if the sun is out, I am motivated to get stuff done, to get up, and get out into the world. There have been days when really what I look forward to is being able to go on a long walk, listen to my podcasts and then come home and treat myself with something highly fattening ordered from Door Dash and maybe a bottle of wine.

SI: I love it. Catherine, thank you for inspiring and motivating us.

CS: Thank you. I hope everybody got a little bit of fun out of it.

RICOH

CONSOLIDATING TECHNOLOGIES AND BUSINESS PROCESSES

MATT WATERS IS THE DIRECTOR OF MARKETING OPERATIONS AND MEDIA AT RICOH. WHEN MATT FIRST JOINED THE COMPANY, THERE WERE A LOT OF DIFFERENT SYSTEMS AND CRM PLATFORMS BEING UTILIZED THROUGHOUT HIS DEPARTMENT. IT WAS HIS TEAM'S MISSION TO CONSOLIDATE THESE DIFFERENT TECHNOLOGIES AND BRING A MORE STREAMLINED FOCUS TO THE BUSINESS. MATT SHARES SOME OF HIS KEY INSIGHTS IN THIS WEEK'S INTERVIEW AND SOME OF THE SUCCESSES THE TEAM HAS EXPERIENCED SINCE THE COMPLETION OF THIS PROJECT.

RELATIONSHIP ONE HOST, SCOTT INGRAM: Today on the Inspired Marketing podcast my guest is Matt Waters. Matt is the Director of Marketing Operations and Media at Ricoh. Welcome to the show, Matt.

MATT WATERS: Thanks, Scott. Appreciate being here.

SI: Looking forward to this conversation, we're going to talk about your marketing automation consolidation journey and a little bit of the operating model around that. But before we do that, why don't we contextualize this just a little bit. I'll have you talk about yourself, your role, and a little bit about Ricoh for those who maybe aren't as familiar.

MW: So, let's start off with a little bit about Ricoh. Ricoh is best described as a global technology company that operates in 200 countries and regions around the world. Over an 85 year history, it's been focused on proving and supporting the operations of businesses through innovative technologies, services and people. Ricoh is best known for its print and imaging solutions. However, we're really a leading provider of digital services and information management, and really focused right now on empowering digital workplaces by driving digital transformation and business operation optimization for our customers.

A little bit about myself: I've been a marketer for over 25 years, and I've worn a number of hats over the course of my career in B2C, B2B, and BDE marketing. I've also been on both sides of the aisle, both on the agency side and on the client side. I am probably best described as a grassroots marketer, which means staying really focused on understanding the marketplace and, more specifically, the needs of the customers within it. It also means making sure to have a clear understanding of the business from end to end and how it works to provide a holistic approach to delivering an exceptional customer experience. Currently, I'm the Director of Marketing Operations at Ricoh for the North American region covering both Canada and the U.S., wearing a number of hats, but part of this is overseeing marketing technology and its related support processes.

SI: Excellent, that's some great context. Why don't we talk about the origins of this project? Where did you start? What were you guys trying to solve for initially?

MW: About four or five years ago, I was asked to actually come and take on a North American role for the U.S. and Canada overseeing demand generation operations. When I stepped into that role and started on that journey, what we noticed from a Ricoh standpoint, and going through a North American view, was that we had a number of different CRMs, a number of different marketing automation platforms, all running in different areas of the business, all supporting different business needs. As I walked in with the team, what I noticed, too, was the team was being forced in its current state to operate multiple different marketing automation platforms and manage all these different aspects of the business. So that itself was a real challenge. As you can imagine, trying to manage from one platform to another platform to another platform. So that's kind of where the problem really emerged itself was with taking a look at just trying to operate North America at scale with all of these different platforms in play.

SI: Perfect. And I'm one who likes to skip ahead and know how this is going to wrap up. Give us a preview of what it looks like today. What kind of results are you seeing? And then we'll fill in all the details in between.

MW: The vision was to try to consolidate everything to a single instance and have one marketing automation platform to be able to run and manage all of the different business units across the U.S. and Canada. That's effectively where we are today with a couple of small stragglers outside of that. As a result, we've been able to eliminate a tremendous amount of duplication. Programs that we once had to replicate on one platform, then in another and another, the teams can now build once. We can basically replicate inside the same instance and expand out, or customize it to whichever business unit we need to help support. There's been a lot of ability to suddenly be more effective in our productivity. A big one from a business perspective is just to eliminate a lot of duplicate costs: not just in having a similar technology, but then also the support and operations that are required to run that.

SI: We see this a lot, especially in larger organizations and organizations that grow through acquisition. Where does this proliferation of platforms come from? You end up in this place where we've got data all over the place, it's duplicated. We've got skill sets that are all over the place. I know that's kind of where this started. How did you really start and define this project and figure out how you were going to take it on and do this consolidation?

MW: It's a great question. It really started off with understanding the problem and, to your point, a number of different acquisitions over the years, both on the Canadian side and on the U.S. side — all the different technologies acquired in that process. It really started with a vision of suggesting: Hey, look, is there a way to get everything into a single platform? It started really with doing that research, understanding what the business needs were, where there were opportunities to remove some of the duplication. That vision really helped to support not just the immediate piece of where Ricoh was at the time, but also in our ability to grow as we evolve in the years to come. Some key pieces to that were understanding and looking at not just the marketing automation platform, but all the different systems that it connects to. The CRMs operate, and still do operate, independently between Canada and the U.S. today. But then the business also had its own plans to do some of that consolidation. That research, that dialogue, and that pre-planning was a critical element to get things moving.

SI: Perfect. Let's keep going on that theme. In terms of some of those key steps and key milestones, what were some of the most important parts of this project as you worked your way through it?

MW: I would say it goes back to that homework phase. Really understanding the business requirements was absolutely critical. Knowing that, although it's a platform that supports marketing, it integrates with a number of areas of the business. From a demand-generation standpoint, a lot of people think of demand generation solely as pre-sale work, but the platform and the communications actually gets used in presales, sales and post-sale efforts as you're trying to streamline a customer experience from end to end. The homework piece was really, really critical. I think the other big step was also just going through and selecting the right platform. We had some very specific needs. We knew that we weren't going to consolidate every single region to a single CRM. Being able to find a technology that allowed us to still operate with multiple CRMs and still operate from a single marketing automation platform, that piece was critical. The other critical step was just having that really clear vision and plan, and then communicating and working with all of the various stakeholder partners. As you can imagine, an undertaking like this is not just a marketing effort, a marketing operations effort, but it was also sales operations at the table and IT at the table. We had Oracle, Salesforce, and even Relationship One, all critical people that had to be part of that vision and the roadmap.

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SI: As you're working through that vision and that plan, how are you setting expectations around a timeline and defining this is how long we think this is going to take. I know that's always kind of a delicate dance, right, because this isn't a straightforward project.

MW: To your point, that planning document really becomes important. I think one of the advantages we had was working with our various stakeholders. As you can imagine, there's other projects that are happening inside the business at any given time. One of them was also to get some consolidation between some of the business units that we had acquired over time. We watched to understand what was happening with some of the CRMs, because we were consolidating some of the CRMs at the same time. We're also looking at some of the other integrated platforms. Everything from chat to phone, et cetera, that your marketing automation platform can potentially get connected to. That planning document and those dialogues were really important. And then that allowed us to set the milestones and timelines for when we would do migration.

I think the other piece to that, too, was how do you handle an elephant? You take it one bite at a time. That was another piece to this was starting small, taking a look at where there were opportunities to get consolidation, because maybe in one business unit marketing automation platform wasn't integrated or there wasn't the same level of maturity or sophistication as some of the other areas. Starting in spots where it was the least amount of risk and least amount of effort that we could get some early wins and get the momentum moving.

SI: I think from a change management perspective it's often good to start in that way, right? With those kinds of easy wins, we start to build some momentum. We start to have some stories that we can tell across the businesses to show we're making good progress here. Let's talk about some of the harder parts, because there's always challenges and things you didn't expect. What was the hardest part of this project? Or if you could start over today, what is the thing that you might've done differently to avoid some of the tricky bits?

MW: Good question. What would we have done differently? I don't think there's much that we would have done differently. One of the key things as part of that early research and homework was actually asking a lot of organizations who've gone through consolidation projects, what were some of the pitfalls, what were some of the challenges? I think the team collectively did a pretty good job of trying to mitigate those. To your point, there's always tough spots that you don't imagine.

I think the hardest piece across the board is alignment in the operating models, particularly around the marketing automation platform. As you can imagine each business unit, when it stood up its CRM and then its own marketing automation platform, all the different language, nomenclature, lead scoring, fields — all of that was labeled differently. Really bringing the business together so there was this universal language, I think that was the biggest and hardest challenge that became particularly noticeable when you're bringing two regions together. Canada and the U.S. operate somewhat independently and have some autonomy about how they go to market and have very different approaches in language in both the systems. This gave us an opportunity not only to consolidate business language, which made it easier to view results from a North American standpoint, but also to align an operating model for demand inside the marketing automation platform. In today's world, we have a universal definition around fields, our lead scoring and our reporting. That way, too, you can compare results north and south. As we build programs, we can replicate them a lot easier. That probably was the single biggest challenge was that alignment and getting that consolidation to get everybody to get away from what they were used to, and then coming to a common ground and a common language.

SI: So you're saying you were able to bridge the difference between process and process.

MW: Absolutely. I get teased about that a lot, because depending on what side of the border, the vowels can change.

SI: Great stuff. We teased some of the successes at the beginning. What else are you seeing now that you are well into this consolidation, you've come into the single platform? What are some of the other things that you're seeing in terms of impacts to the business and the way that you're able to operate this new world?

MW: Well, if I put my business hat on, I think one of the big things you see is cost, right? Everybody's always striving to think about the cost of acquisition. When you start lowering your operating costs, that profitability, or cost of acquisition, can really improve. That was one key thing that you see right away. The cost of when you remove all of those different platforms and have those savings. I think the other thing that we're seeing is better communication between some of the regions. We have programs that run in the U.S., we have programs that run in Canada, and that sharing between the two regions allows them to pick up programs and then make the regional customizations instead of rebuilding everything completely from scratch.

We are heavy Eloqua Engage users on both sides of the border. Having those rep templates and having some of those available to share between regions are important. The other thing that we really see is governance, especially in today's environment of privacy security, having universal governance and a universal standard for what that looks like and how we speak to prospects and customers, I think has been really important, too. There's consistency in that governance, but then also consistency in language and the customer experience. We've seen a lot of wins that way, because we removed having to do that six or seven times across multiple platforms. I think the last big one would be just that ongoing consolidation work. As we're continuing to optimize Eloqua, all regions and all business units are seeing the benefit. Before you had to have an independent roadmap for each one of the platforms to get the improvements, or if there was an issue, you fix one here and then prioritization became a problem. As we continue to improve and optimize the platform, optimize integrations, everybody's getting a universal benefit from that and especially down at the customer experience level.

SI: Yeah, that's fantastic. You briefly mentioned this at the beginning, your style, you're a very hands-on, practitioner-oriented business leader in your approach. Talk about how you've applied that and a bit about the operating model here and how you're really making this work in the day to day, because I think you've had some great success in the way that you've kind of led a lot of this work.

MW: Well, thank you, Scott. It's been a team effort. Across the board, I have to say the success comes from the partners you have and from the internal resources at Ricoh. We've got tremendous employees with tremendous skill sets, and being a part of that has been a real privilege. It's definitely not a success I own on my own. It's one that is absolutely a team effort. The approach to this team effort is a key piece to my business approach. No one does this on their own, but having that vision and bringing all the stakeholders, I think, was a key element to it.

The other piece of it is just everything comes back to a customer experience, right? You can imagine from a customer's point of view, interacting with Ricoh as they do. Instead of having individual interactions, now you can have a universal experience and see and explore everything that Ricoh has to help support the various businesses. As a vision and as a philosophy, using customer experience as the guiding principle for this has allowed all of us to continue to drive this improvement. From a success standpoint, what you see is better engagement from customers and prospects. Where before, someone would come in for a very specific reason, now they have the opportunity to explore what else might be available to them. Before it was just a very siloed experience - you come in, you're in for what you know, and then you are done. I think that philosophy has really helped to be a guiding principle across the board.

SI: Perfect. I'm going to leave this open and let you take it where you want. Technology is a huge part of the underlying work that you're doing. How do you think about all of this tech and how it gets applied?

MW: From my perspective, technology plays a critical role, especially in this day and age as a marketer. Over my 25 years, I've watched technology evolve dramatically, as I'm sure all your listeners have, too. The concept of MarTech or marketing technology stack, it's an underpin to anything you do as a marketer today. I think one of the biggest challenges we always have is that the pace in which technology evolves, and all the different tools and widgets that come out are always offering a unique way to engage customers and create a customer experience. How I look at it is that I love learning. It's one of my key principles of being able to be a builder and a learner. Therefore, you're always trying to keep a pulse on the market, and that technology can help work a bit as a guide. By looking at the marketplace, looking at the latest and greatest technology that's coming out and understanding what they're doing with it allows us to re-imagine what the next level of the customer experience could be. Having the ability to test and try different things on a year-to-year basis — different tools, different techniques, different processes with that technology to improve engagement, improve customer experience because that's really all we're all after — helps a lot. Technology in this day and age as a marketer is really that guiding principle. You have to be attuned to it. You have to watch and follow the marketplace and where it's going and then adapt it into your business environment as quickly as you can. Keep what works and then remove what doesn't. You've always got to be on that pace of being an innovator and test and try. And that's really why to me, technology plays a big role in.

SI: That's a really interesting approach, because what I think I heard you say is you're really paying attention to the technology roadmaps and what's happening in that space and using that to inspire your own user experience and marketing roadmap, and then testing and trying and playing with them to bring that all together in the real world.

MW: Correct. When you think about it in this day and age, especially with the next generation of buyers that are coming through, they're all technology natives. You really need to be attuned to the various ways that they interact and communicate or interact and receive information. When you look at the generation of buyers and leaders that are coming into the market today, they are very tech savvy. They love their tools. They love their apps. Being able to engage in that, you need to be able to be part of that communication cycle as marketers. They're the ones who are really guiding the marketplace on technology, and therefore you need to be really attuned to that. If you want your business to be able to reach those buyers, it's going to be through using and leveraging some of the latest technology.

SI: Awesome. That's a perfect transition to kind of what's next. Where do you go from here? What's on your own horizon?

MW: With respect to the organization, Ricoh itself is driving to be the leader in digital services, and with that technology is part of the DNA of Ricoh. We are continually working to improve, not just within Ricoh to drive exceptional customer experience, but also with our customers. Our customers are in the same boat. They are all looking to connect with the technology and become digital savvy companies to allow them to engage with their audience base. That is our roadmap and position going forward: staying on the bleeding edge of where we need to be with technology and then being able to move quickly to where the market is is driving, and also being a driver in that market to help those businesses. Internally, if I look at our marketing automation platform, we still have a little bit more consolidation to do. What we're driving for is optimization of our lead scoring modules. We're testing out different types of market category scoring, but the goal is to drive an exceptional customer experience, to connect with customers where they are, and use technology to really leverage those engagements.

SI: Matt, what about you personally? What are the tools and apps in your own world that you find you can't live without?

MW: There are days it's tough to unplug. I know that's always a challenge, but on the day-to-day, I'd have to say, funny enough, video conferencing and communication is critical for us. Microsoft Teams is one of those platforms that we live and breathe by inside of our organization. For me, being able to connect with all of my different colleagues around the globe, that is a platform that I couldn't live without.

I think on a personal level, my Microsoft To Do, although it's not the most robust to do task lists in the world, it keeps me organized and keeps me moving on a day-to-day basis just to check things off and make sure that things are moving. I would also honestly say the Google platforms. A lot of the

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Google technology for me has been big, particularly because I'm a data guy. Google analytics: we've got a pretty strong analytics group, and the reports they provide through Google help us to drive where we need to go next and understand where there's opportunities for improvement and where to build on successes. So, that's another platform, I would say, in our tool chest that I can't live without.

SI: Awesome. Matt, you always have such great insights and thoughts on this, and I would just want to make sure that I didn't leave anything on the table. Was there anything else that you were kind of hoping to share today that we didn't quite get to before I ask you our closing question?

MW: Scott, I think we covered a lot in this conversation. I think where I'd leave it off with is that it's been quite a journey, and it's an ongoing journey. We've had a tremendous team behind us helping to get the success we have in consolidation. We've moved this business internally from roughly five to six marketing automation platforms, and we're down to one core platform and a small straggler, which is quickly on the radar. By doing that, our customer experience and our engagement with the customer and with our prospects have been significantly better. And just as an overall operation, it's a big project with some great results, and I'm really excited to keep it moving forward.

SI: Fantastic. Well, we call the show Inspired Marketing, and I always like to ask it as our closing question. What is it that inspires you?

MW: Honestly, I think the opportunity to build and the people you get to work with to build it. As I mentioned before, our talent inside of Ricoh is tremendous. I work with incredible colleagues and lots of great ideas. I think one of the things that, ironically, has kept Ricoh strong and in the forefront is it's a company that's been really driven by word of mouth because of the great ideas that come from the talent of the organization. So for me, coming to work every day and being able to work with those people, to look at where there's an opportunity to build and grow and being able to actually do that inside the organization: that's what keeps me motivated every single day.

SI: Well, we certainly appreciate the opportunity to work and build with you and your team. And I really appreciate you taking the time today.

MW: Thank you very much, Scott. I really appreciate this today, and thanks for the opportunity.


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GETTING THE RIGHT TOOLS FOR YOUR PROCESS

KRIS GROMLEY IS THE SENIOR PROGRAM MANAGER OF MARKETING AUTOMATION AT COGNEX. TODAY, SCOTT AND KRIS TALK ABOUT GETTING THE DATA RIGHT BY SEIZING OPPORTUNITIES AND HOW TO FIND THE RIGHT TOOL THAT WORKS FOR YOU. KRIS SHARES HER JOURNEY WITH ELOQUA AND SALESFORCE AND HOW THESE TOOLS ARE NOW HELPING THEM CLEAN UP THEIR DATA TO GET THE RIGHT WORK DONE.


KRIS GORMLEY
SENIOR PROGRAM MANAGER OF MARKETING AUTOMATION
COGNEX

RELATIONSHIP ONE HOST, SCOTT INGRAM: Today on the Inspired Marketing podcast, my guest is Kris Gormley. Kris is the senior marketing automation program manager at Cognex. Welcome back to the show, Kris.

KRIS GORMLEY: Thank you.

SI: We were just talking. It's been a little while since we did this last; in fact, last time, I think, we were in person at a large event. The world changes and evolves, but we're going to come back to a topic that doesn't seem to change and evolve a lot, which is just getting our data right and getting CRM connected so that we can do great things in marketing. But before we go there, let's just contextualize a little bit. I'll have you reintroduce yourself and talk just a little bit about your role and about Cognex for those who aren't familiar.

KG: Sure, absolutely. I've been in marketing for my whole career, but I began focusing on marketing automation marketing operations when I started at Cognex, which is going to be five years ago in April, which is hard to believe, but there it is. I'm primarily responsible for managing our Eloqua instance and our now brand-new integration with Salesforce. We just went live with that in early January. Just on the third, right after the start of the new year, we went live with that new integration. I'm also a subject matter expert, I would say, on integrations with other tools. We use things like PathFactory and Demand Base, ON24, and Drift, so I'm the conduit for the integration with Eloqua to those tools. For a good portion of my last eight to 10 months, I've been hyper focused on Eloqua and Salesforce. They're in my dreams at this point. I think that's what we were going to cover today.

SI: Perfect. It's a super common connection, probably the one that we see the most often. So, why don't you frame this up for us a little bit: what was the starting point? What were you trying to solve for? What were you hoping to build and get out of this?

KG: Prior to Salesforce, our CRM was [Microsoft] Dynamics, and it just was sort of Frankensteined a little bit, at least that's my terminology for it. When we brought Dynamics on, we changed it a gazillion ways to make it map to our sales process. As a result, it became very difficult to use and very difficult for Eloqua to communicate with, but it's not my tool, right? That was the trick to all of this. I was just hoping, and secretly keeping my fingers crossed, that decisions would be made, and not just be rumor, that we would shift to Salesforce, because I knew that doing so would make for basically an upgrade in Eloqua at that point. Rather than using the old integration method we'd have the Salesforce integration app. I knew that over the years when I had run into brick walls so many times working with Dynamics, a lot of those would be alleviated in the future by working with Salesforce.

We finally got news that the company decided to make that shift. I did a little happy dance and then became a member of that project team to get things kicked off. It was a huge team with tons of people involved because obviously the CRM touches a lot in the organization. Marketing was just one integration point for it. I had high hopes myself, personally, that by making this shift, not only would Eloqua more easily integrate with Salesforce, but also, I was really hoping that there would be a lot of cleanup to the CRM database.

We were having a massive duplication issue, which Eloqua was just confused by, for lack of a better word. I couldn't implement lead scoring. To be honest, I tried. I think that what we were talking about three years ago was implementing lead scoring. I made every effort possible, but when your data has severe difficulties, it basically kept it from being reliable for us. We had to wait until it was cleaned up. So, that was my biggest hope to come out of this shift: not just the communication with Eloqua, but that the data would be better, and we'd therefore be able to do more with it than we had been able to because of that data.

SI: Perfect. As you know, I always like to kind of skip ahead and read. I guess it maybe isn't the last chapter, but a later chapter in the book before we really dig into all of the hard-fought learnings that you had working through that project. So how are things going? Where are you now?

KG: From a standpoint of the integration with Salesforce, we are fully integrated and live; we went live January 3. I haven't had time yet to pick up on lead scoring again. I can talk a little bit more about that as we get into the details, but everybody's using it. There were expectations of a little productivity dip in Q1 because of the timing of everything. I think we certainly are experiencing that; it comes with the territory when you make such a large shift, and with the sales organization shifting along with us. Generally, I'm happy with where things are sitting right now. We certainly are working out some kinks still, things that we didn't anticipate and that you can only see and find when real data is running between the systems. We're still dealing with a few things like that, but generally I think we're in a better place.

SI: Excellent. This is just the beginning of continual improvements now that you have this new foundation, right?

KG: Of course, exactly. Now we have something to work with. Dynamics didn't make it very easy to work with.

SI: I'm going to set you free here, rather than leading you too much, although I may have a few follow-up questions, but just talk us through this project. You started with this is not your tool, obviously this is a very large diverse set of stakeholders that make up the project team that are working through this. What were all the different little things that you learned through that process?

KG: There's a lot of nuances here. Not the least of which was that those that were, I would say, leading the implementation in the company, they honestly didn't realize that Eloqua existed at first. They had never worked with our systems. Even once they were told, hey, there's this Eloqua thing in marketing that's going to need to be integrated with Salesforce, too. It was, oh, okay, let's maybe talk about that, and they had no idea the extent to which information was flowing, that lead management was initiated from Eloqua. They just were so hyper focused on opportunities and accounts, all the straight-up sales functions. I had to educate, and there was a lot of education that took place.

I was a core member of the project team, but I was not leading that project team. I had to insert myself into conversations and meetings to ensure that Eloqua was considered a core application that needed to be integrated and not just an afterthought. There were some cycles there, but they were receptive to it. They just didn't know what they didn't know, which was fair. That happens to me all the time — lots of meetings and discussions to start out with lots of requirements gathering, and things of that nature. At that point, I turned to R1 because I only knew the integration method that we had been using. I didn't know what the Salesforce integration app did or how it did it or what it was going to do for us. I was educating myself as well as to what was really going to be an improvement for us. It was a lot of learning at the beginning, a lot of learning. And then it was more training and education when then things started to get close to implementation. There were a lot of things that we were trying, to keep our eyes on at the same time. I was really the only individual representing marketing in all of it. Unfortunately, we didn't even really have a marketing executive, so that got a little tricky at times. Without that elevated person in the room when high-level decisions are being made, we didn't have representation. There were challenges along the way, but it was a great experience for me to go through and try and manage everything all at the same time. Basically, like I said, I had to represent marketing to all these people that didn't really have marketing backgrounds at all. They really had no idea where I was coming from, so it was a very interesting exercise.

SI: Well, I think that's such a relevant part of this story that we see from so many different perspectives. I often think about the internal: how do we market marketing, right? In this case, educate the rest of the business and the technology team on this is what we do. This is the data we need. This is how it flows. Really advocating for what you need and how this is going to impact you and how that impacts the business. I think the other thing that you called out that was just great is recognizing that I don't have all the answers. Let's get some help. Let's get some resources. Let's find and bring in different pieces of expertise as we need that to fill in gaps as we go through this process.

KG: Absolutely. This was all new to me. I hadn't used Salesforce in my prior life either. Salesforce was all new to me. There was a lot of learning that took place in the past eight to 10 months for me.

SI: Like any good marketer, it starts with learning first, too. You must understand and gain that perspective and understand where the other person's coming from.

KG: Yes, definitely.

SI: If you could go back knowing all that you've learned in these last handful of months and do differently, what are those things?

KG: The one thing that I think would have changed the landscape for me was, as I mentioned briefly earlier, having an executive marketing representative that shared my knowledge of the lead management process, and, unfortunately, just due to departures at inopportune times, that just didn't exist. It was difficult to navigate those waters when I'm not in those high-level meetings with the executives. I can't represent marketing if I'm not there. We didn't have an executive in that role that could do that. We found ourselves sometimes a little bit beyond our control. We must do what we must do, so there was a lot of focusing on what I could control instead.

There were many changes that I chose to focus on instead, instead, things like data integrity. Campaigns were changing completely in how we were creating them, and how we were tracking them is completely different. Restating a lot of data was completely new. One of the difficulties we had in integrating with Dynamics was a lot of our data was coded. It wasn't in friendly terms. We had these 32-character guide codes for countries, states and industries. That was sort of good news, bad news because I was very excited to no longer have to deal with all the garbage codes that didn't mean anything, but at the same time, I had a really long list of things that needed to be touched and updated once everything was restated. It was devil in the details, really in the weeds for a lot of things. I think it would've helped to have someone less in the weeds that was at a higher level, but sometimes you just can't control those types of things, so you work with what you got.

SI: Whenever you can have it, and it's something that I often try to guide my clients around is really identifying who those executive sponsors are — especially when you're in a situation like this that is very cross-functional, and people have completely different goals and different objectives. My all-time favorite executive sponsor described his role as calling balls and strikes. At some point, you just must decide. It may not be the perfect decision. It might not even be the right decision, but a decision needs to be made so that we can move forward.

KG: Right.

SI: The other thing that you said, or you alluded to in the way that you told the story, is just your own way that you adapted your thinking and the flexibility that you offered in terms of let's bring a new way of thinking about how we can connect these systems and how we can do this. Not holding true to a rigid, we've always done it this way, we need to do it the same way, which isn't usually the case when you're bringing two different systems together.

KG: We had to really look at everything from every angle and decide what was the right way to move forward. We didn't want to recalibrate everything a year from now. We wanted to make all the right changes at the same time, which is why I decided to as part of the timing of the implementation with Salesforce to change how all our Eloqua users manage email campaigns. We used to use, and I can't even explain how or why it was set up this way because it's before my time at Cognex, the same form for everything. We would put a source campaign code on it, and that would be the differentiator, but it was the same form. I decided no, we're not doing that anymore. We're doing one form per campaign. There was a lot of additional learning and education that had to go on of just for just the Eloqua users outside of Salesforce. By the way, there are also some updates to Eloqua moving forward that will really help us in using Insight reports and being able to rely on the data that's in them. That's what this means kind of thing. It was trying to look around and make sure we weren't missing anything.

SI: What a great call-out, right? Anytime you're going through this type of pretty significant dramatic change in the core infrastructure of the business, to use that opportunity to think, well, can we improve on what we were doing before? Is there a way that we can right size our process and our approach so that we can get better

data and fuel better marketing? I wonder if there's other things like that, if there were these other kinds of secondary and tertiary success outcomes that accidentally tumbled out. It's like NASA accidentally invented Velcro.

KG: That's right. For me, that was basically a big win, because I just saw that as being somewhat ludicrous — that things had been set up that way to use a single form, and to just get data on form submissions was a complicated task because there was one form for everything. It made sense to take the opportunity. I was going to have a very captive audience of people eager to learn and get trained on Salesforce, so I just thought maybe I'll train them on a different way in Eloqua, too.

SI: Perfect. Well, I think you may have alluded to this at the top, but what's next? Where do we go from here?

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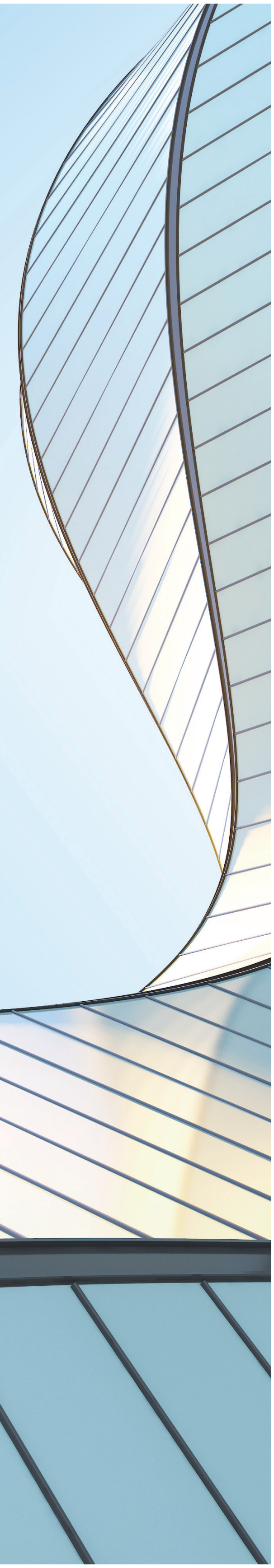
KG: The next thing I think is going to be getting back to trying to lead score. Unfortunately, as much as we got rid of some duplicates and we did, there were rules and things that were created and developed by the project team that would identify here's the accounts and the contacts that we're going to migrate over to Salesforce. A lot of them were not going to migrate because they just don't meet these criteria. Unfortunately, a lot of duplicates met the same criteria, and they were migrated in. We still have more duplicates than I would like to see in Salesforce, which means we have more work to do there, and that's just unfortunate. We tried to use the tools to the best of our abilities, but the reality is it comes down to a salesperson who should be selling, not spending their time on this. I completely agree. But having to go through and say, all right, you, we need to merge these three contacts. This is the primary one. There's only so much technology can do for us before it comes down to: we need someone that knows who this person is at this account. We still must figure out how to do that, because we still have a few too many in there. I think that to make lead scoring work optimally, because Eloqua just keeps talking to different ones and suddenly an opportunity gets attached to one it's not talking to and it's messy. That's ultimately where I want to go, and I think that's where other members of the marketing team want to see lead scoring implemented. Everyone is talking about how important data integrity is. Believe me I've seen what can happen when it's not there, and it's of number one importance. We're doing better than we were before, but we're not out of the woods yet.

SI: Yeah. Well, and unfortunately, the work of cleaning data is never done.

KG: No, it isn't, but like I said, I think it's been improved. Now we have our SDEs, our inside sales team, who suddenly lost access to contacts that didn't get migrated. They are still in Eloqua, but they're not in Salesforce yet because they haven't taken any action. They haven't engaged in a long time, so they weren't deemed worthy to come over to Salesforce. There are all those types of productivity blips that I think we're still going to experience this quarter; it just comes with the territory. I do think, overall, it was a smooth transition. It certainly could have been a lot more hair-raising than it was, so it's all good. We're moving up from here.

SI: Perfect. I keep playing with this analogy. Everybody talks about changing the wheels on the bus while you're driving, or the engine on the plane. The analogy I like better, because those sound death-



defying, and in most cases I don't think lives are at stake, but I've been a big Tour de France fan. I feel like it's when you've got something wonky with your bike, if you can ride up to the support car and lean on the car and then the mechanic leans out and works on it a little bit. I like to think sometimes that we're that partner, right? We're there in that support car. You're going to lean on us. What you can't do is just stop. You can't say, well, we're just going to turn off marketing for six months while we work on this. That's not a thing.

KG: No, no, that was certainly not. Although, there were times when I was like, oh maybe we should, but yeah, you can't, it's not an option. You figure out a way forward.

SI: How did you work through that? As you had kind of the parallel systems and the cutover, what did that look like?

KG: It was difficult. It was difficult because of the way that we had been working. Like I said, with all these source campaign codes, they were on landing pages. They weren't on the form, because we were using one form for everything, so we were coding that on landing pages. Well, then we changed how we were doing it, and the biggest headache was Dynamics had a certain campaign code that was a guide with 32 characters. Campaign code for Salesforce has, I think, it's a 16- or 17-character ID. They don't recognize each other. They look nothing alike, so we had to figure out how are we not going to lose leads during this cutover time? Because if we do it too early, we change things too early, then we're sending a Salesforce ID into Dynamics, and Dynamics will fail it. If we send a Dynamics guide into Salesforce, then Salesforce will fail it. It was a very tricky balance. We just had to pause leads for a week, but that's why the go live was when it was, that's one of the reasons that that helped, because it's Christmas week. It's between Christmas and New Years, and activity is lower. It was the best time; we could just hold the leads in Eloqua for a week while we restated values, changed campaign codes and all that kind of fun stuff. There were a lot of look up tables and data update rules, too, in all of that to try and cover the bases. When we turned things back on with Salesforce and things went in, they would be changed before being sent to Salesforce. There was a lot of: what time are you doing that, because I need to do this currently? It was literally down to time, hours of the day, when are we going to do what to try to work through those things.

SI: Lots of coordination. I'm glad I asked. To torture my analogy a little bit further, it's kind of like, I guess we are going to pull over and change bikes, but you know, maybe if we do this while everybody else has taken a drink of water or something, we can have less of an impact and catch back up quick.

KG: Yes. I think that's a pretty good analogy. We did it at the best opportunity we had for that time of year.

SI: Kris, it is great to have you back on, and I'm going to ask the question again, because we must ask the question here on the Inspired Marketing podcast. What is it that inspires you?

KG: You know, I knew this question was coming, and I spent some time thinking a little bit about it. I think last time I mentioned my two daughters who still inspire me. They're 16 and 13 now and going through a stage of life that I certainly wouldn't want to go through again. They helped me realize I'm not a teenager dealing with all that comes with that, so everything's okay.

There are many people who inspire me, but there was one name that came to mind: Jimmy V, Jimmy Valvano. He's a former NC state men's basketball coach. He had a speech at the ESPYs, the ESPN awards, back in 1993. If you've never seen it, I highly recommend googling it, because it's so compelling. I watch it multiple times every year. He had cancer; it was eating away his body, and he died within two months of giving this speech. I'm a cancer survivor myself so I always go back to that. There's a line that he says in it saying, "don't give up, don't ever give up," and it's a very powerful speech. Like I said, if you haven't heard it, Google it. It's compelling, but he inspires me by giving the speech that he did less than two months before he passed away. He was just an amazing individual.

SI: Kris, that may be the most inspirational story I think we've heard, and I've done a few of these. Kris, always a pleasure. Thanks again for coming on.

KG: Oh, thank you so much for having me, Scott. I appreciate it.


PathFactory™
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Find Out How

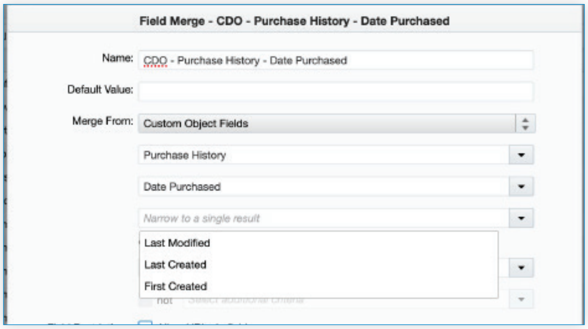
AN APP TO PERSONALIZE ELOQUA ASSETS USING MULTIPLE CUSTOM OBJECT RECORDS AT ONCE

SARAH SCOTT
SENIOR MARKETING CLOUD CONSULTANT

Have you ever wanted to send an email for each Custom Object record associated with a contact? What about sending a single email to a contact but merging data from multiple of its Custom Object records at once, either directly in the email or inside a linked Landing Page? How about export select Custom Object data without having to export the entire contents of the object? With our new Personalization Manager app, you can do all that and more!

Custom Objects (CDOs) are a powerful way to expand and customize the Eloqua data model. They can be configured to link additional data to Contacts (via Accounts or directly) as either an extension table with a one-to-one relationship or as an expansion table with a one-to-many relationship that allows for multiple CDO records to be associated with a single contact, meaning each contact or account record can be associated with one CDO record or with several in a single Custom Object. Tracking purchases, events attended or form submissions are a few examples of scenarios where it may make sense to use a one-to-many relationship between a contact and CDO records.

However, despite the powerful advantages one-to-many Custom Object data provide, there is a limitation on how they can be used for personalization in Eloqua assets like emails and landing pages. Native options include using Eloqua field merges to personalize content with a contact's linked CDO data. But field merges are limited in selecting only the First Created, Last Created or Last Modified CDO record, forcing a selection of only one record, though many may exist, and providing minimal control over record selection.

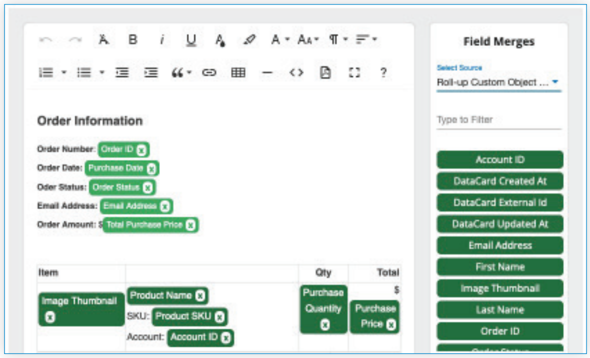


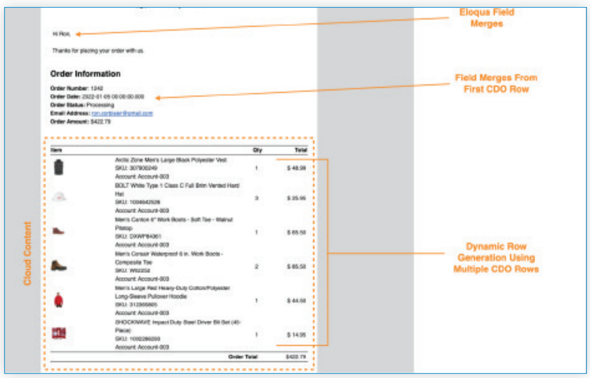
Instead, by using the Personalization App in Eloqua, we can merge in data from multiple linked CDO records at once – either displayed as rows in a single table or by sending a uniquely populated email for each one. The CDO records included can be selectively chosen using evaluation criteria in each configured app step. For example, within a single Eloqua instance, there could be a campaign that is configured to send an email to any contact that's made a purchase in the last month with a table merged in displaying a unique row for each product purchased in that time frame as well as a second campaign configured to send an email per product purchased simply by configuring the same app in two separate canvases to run through these different scenarios. This has never before been possible with Eloqua without significantly changing the structure of the data.

And it doesn't stop with emails. The Personalization Manager app has the ability to create dynamic personalization for emails, landing pages and external channels based on Custom Object data. Some examples include:

- Send order or shipping confirmation messages that include a dynamic table personalized using data from multiple Custom Object rows
- Create an Eloqua landing page that includes data from one or multiple Custom Object records, like an order summary or year-end activity report
- Export mapped Custom Object data, as individual records or multi-row data, from an Eloqua canvas in real-time or on a defined schedule for external channels like telemarketing, display advertising, etc.
- Create householding campaigns that allow for personalized communications for each "shared" or "household" Custom Object record that is linked to the same email address
- Send event confirmation emails providing a summary of registered sessions, stored as Custom Object records, and link to a confirmation landing page

Essentially, the Personalization Manager app allows you to create highly personalized emails and landing pages as well as create custom CDO exports using data from one or more Custom Object records at a time, which greatly expands the native capabilities of the platform and has never been possible until now. If you use one-to-many relationships in your CDOs, this app can take your campaign personalization to an entirely new level.





Our Personalization Manager app can help you utilize existing Custom Object data to take your personalization to the next level.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5 KEYS TO BUILDING A STRONG DATA STRUCTURE

JOHANNA GONZALEZ
MARKETING CLOUD CONSULTANT

Let me ask you a question: could you bake a cake without instructions? Sure, but how will it turn out? Will it taste and look good, or will you be left with a pile of globs?

Think about your data structure as the marketing instructions you need to be successful. Creating a data structure enables you to build your marketing strategies and sales initiatives, and ultimately report on your success. A data structure is more about getting the right data (ingredients to your recipe) rather than collecting thousands of data points. Once you have your data structure defined, you can apply meaning to the data you've collected. Without any context, it's just noise.

HOW DO WE BEGIN TO BUILD A DATA STRUCTURE?

Your data structure is the foundation of your marketing day-to-day activities, and it is key to your success. Today, most marketers use data to influence their programs and to build goals that contribute to a company's bottom line. Have you heard about the data-driven approach or seen it in many, if not all, marketing materials? Building a data structure will allow you to get the insights you need to be agile in an ever-changing digital environment.

HERE ARE 5 KEY ACTIONS TO BUILD A STRONG DATA STRUCTURE:

1. DEFINE THE DATA YOU WANT TO COLLECT

Start with the simple things. Define your Firmographic and Demographic data. Who is the contact/lead, where do they work, what do they do, and where in the buying process are they? Collecting this data information should be inherently part of any marketing or sales process.

Then, think about your business structure. Do you want to categorize your data by region, product or brand? How will this categorization help you build programs for your business to meet revenue goals? What data is missing and is important to collect? Also, can you get this information directly from your customer, or do you need data augmentation vendors?

If possible, you should always incorporate Behavioral data into your data structure. Such data can include: how is a contact/lead engaging with your website/content/social channels? What are their communication preferences, and are you allowed to contact them? Answers to these questions usually reside in your marketing automation tool. Bonus point, most of these tools are automatically collecting this data for you. Your challenge will be how you want to make sense of this data and then connecting it to your funnel for attribution. While this is a good thing to have, it is something that doesn't have to be incorporated immediately as you build your data structure. If you are just starting off, I would suggest highlighting the areas you think you want to focus on and monitoring these areas independently from your structure. Doing this will allow you to think about the usability of this data and what is really needed to make better business decisions to impact your goals.

Collecting and defining your data structure is not a race; it is a slow and steady marathon to get you to the finish line. You don't have to have all the pieces defined and ready to go on day one. You can always start with the minimum and then add or iterate as you go.

2. DEFINE YOUR GOALS

Start with the business objectives, and then figure out how marketing can contribute to these goals. Think of these goals in terms of the funnel (e.g., drive awareness, traffic, leads, sales, or customer retention).

What marketing strategies are you implementing to meet those goals? Do these strategies require additional data points for integration? For example, is ABM a play you want to implement? Or, are you doing partner marketing? Is social media a big part of your strategy?

Sometimes, implementing these tactics requires a conversation with your sales or revenue operations team. When building your data structure, think about expanding your list of stakeholders so that you build a comprehensive structure that is supported by different functions in your organization.

3. DEFINE THE SOURCE AND PRIORITY OF YOUR DATA

Think about where you want this data to live. Is it your CRM system, your marketing automation tool, or a data warehouse? In actuality, it can be any of these versions, a couple, or just one. However, knowing which data resides in which tool is important as you build your data structure. Yes, that's right, we are talking about Data Governance.

While thinking about the data sources, also think about the priority of the data. What is the source of truth for the data you are collecting? Sometimes, different systems are responsible for sources of truth. For example, your CRM can be the source of truth for all account and sales data, while your marketing tool can be the source of truth for your marketing activities and preferences data.

As you build your data structure, identify the sources of truth for each data point so that you know how to prioritize the data when it is integrated between systems. A recent study in the Harvard Business Review found that centralized single sources of truth, while they build standardization, sometimes inhibit the ability for you to be flexible in your strategy. Creating flexibility within your data structure allows you to build agile personalized experiences for your marketing strategies. Therefore, you may want to consider different systems that are responsible for different data points as their sources of truth. Ultimately, you can be as complex or as simple as your goals and business strategies require. The main point is to document it so that you and your team can easily identify the priorities and sources of the data.

4. DEFINE YOUR REPORTING

You want to think about how you want to categorize your data. Will you be using custom internal parameters or industry standards like UTM parameters or a combination of these? Building this categorization into your data structure will help you create better reporting and set you on a path for attribution of revenue for all your efforts.

Reporting on your data structure can be complex if you do not follow the previous steps. Define, identify, and document all of the data points you are collecting. Also, not every data point will need to be used for reporting purposes. As you build your data structure, identify the data points that will contribute to your reporting and dashboards. For example, you will most likely not report on first name, but you may report on regions and activities (engagements). As you build your data structure, talk to your stakeholders to understand what data is needed to assess your business goals.

Also for reporting, think about how you will govern your data. Is your data clean, and are you getting the right information? Build data completeness reports by volume or data cleansing reports. While this may not contribute to your goals, it improves your personalization and marketing strategies.

5. AFFIRM THE DATA STRUCTURE PROCESS

Ask yourself and your organization the following questions through every step of the process:

- Does this data matter?
- Why do I need this data?
- Is this data redundant?
- Am I aligning this data to goals?

Typically, once the data structure is implemented we tend to set and forget. It's not because we don't care, but simply because our day-to-day priorities change. Apply a critical filter to the questions above to avoid creating data structures that have no meaning. Let's not forget the goal of the data structure is to make your efforts easier and to provide quantifiable insights into your efforts.

To easily monitor, build out dashboards that help you answer these questions. Are you collecting the correct data points? Do you have enough volume for the data you are collecting? You can also use qualitative checkpoints with your internal marketing team to see if the data you collected is impacting their goals positively.

No matter what, building a data structure is somewhat fluid. You need to have a lot of the basics in place, but you can always optimize based on learnings or business goals. However, setting up the right process and data structure foundation is important so that you can build upon it.

FINAL TAKEAWAY

To invest in a data-driven marketing approach, you need to have a strong data structure to track the effectiveness of your strategies. You don't need to perfect it all on day one. The process may be a long-term goal, but you don't have to delay kicking it off. Once you've implemented a data structure, you can begin to see the benefits instead of guessing the effectiveness of your campaigns and targeting. As a result, you can acquire new business by collecting the data you need to ensure you meet your goals. You, too, can bake like a pro with the right ingredients and recipe. ≣

MULTIPLE BRANDS IN ELOQUA

JEN YURMAN
ELOQUA SOLUTION LEAD

If you are currently using Oracle Eloqua or are in the process of implementing, it is important to consider your company's brand identity when configuring your instance. Brand strategy is used across Eloqua to help maintain consistency with your corporate identity as well as to meet deliverability best practices. In a traditional configuration, a company will use a single Primary Subdomain for all of the relevant areas covered by branding and deliverability in Eloqua:

- Email sender subdomain
- Bounceback subdomain
- Application subdomain
- Images subdomain

For example, since Relationship One has one brand, our configuration would be:

- Email sender: *sender@example.relationshipone.com*
- Bounceback: *bounce@example.relationshipone.com*
- Application: *app.example.relationshipone.com*
- Images: *images.example.relationshipone.com*

If your company has multiple brands, with their own unique identity, Oracle recommends that you purchase and implement the **Premium Branding & Cloud Service – Multiple Brands** in your Eloqua instance. With this add-on, you will be able to to configure up to 20 brands in one instance of Eloqua. What this means is that each brand will have a separate primary subdomain with a dedicated IP address. When creating an email in Eloqua, the user will be able to choose the appropriate brand for that campaign through customized routing, which is managed through the Virtual MTA. If you need more information on email authentication in Eloqua, visit their Help Center.

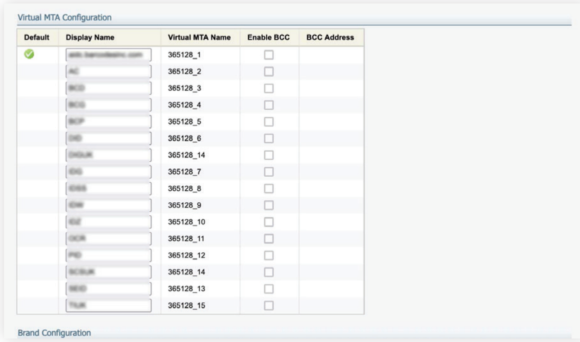
There are requirements that need to be met in order for Oracle to approve this package to be implemented in your Eloqua instance, most importantly that each brand is a part of the same parent company, all image and app domains are secured, and a subscription management option is configured per brand.

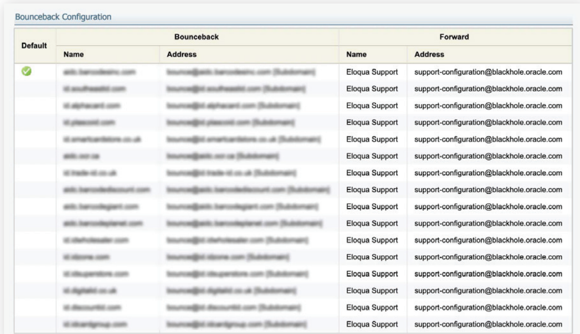
Now that you know the basics for why you would need to implement multiple brands in Eloqua, next we will run through the steps of how to get it done!

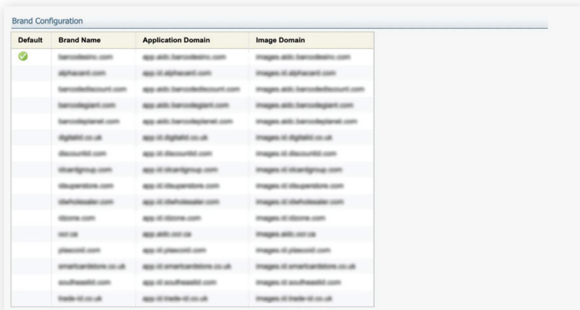
1. Contact your Oracle representative to discuss your brand requirements and to purchase the Premium Branding & Cloud Service – Multiple Brands.
2. Once approved, complete the Oracle Eloqua Branding & Deliverability workbook.
   - You will be asked to complete one workbook per brand, naming one as your default. Each workbook will include the necessary configuration requirements for your IT department as well as for Oracle Support.
   - You may need to work with your marketing/branding teams to determine the subdomains you will use for each brand.

Best Practice Alert: As a reminder, your sender domain should be a subdomain and different from your company's root domain (what you use to send email internally) and should match your bounceback domain. This will protect your internal email from potentially winding up on a blacklist as well as helping your Eloqua campaigns to pass DKIM and hit inboxes instead of spam!

3. Purchase SSL certificates to secure your new subdomains.
   - All of your new branded application and image domains will need to be secured.
   - If you decide to implement secure 1st party cookies to track visits to your company website and/or use Eloqua landing pages, you will need to configure and secure those domains as well. If able, it is recommended that you purchase one SAN certificate for your application, tracking, and landing page microsite domains.
   - You will also need a separate SAN certificate to secure your branded image domains.
4. Work with Oracle Support to enable your SSL certificates as well as your Virtual MTA configuration.
   - Once it is fully enabled, you will see something similar to this in the Email Defaults area of your Eloqua instance:







Configure your custom subscription management process so that contacts can opt-in (or out) of each brand's communications. Your best bet is to use out-of-the-box Email Group functionality for this.

5. Once Eloqua is all set up and ready to go, you will likely need to perform an IP warming period for any of your IPs that meet the monthly volume threshold. Best practice calls for a minimum of 50,000 emails per month.

GENERATE AUTOMATED REAL-TIME TRANSACTIONAL EMAILS FROM ELOQUA

KIM AMATO
SENIOR MARKETING CLOUD CONSULTANT

Sending Automated Real-time Transactional Emails just got easier thanks to the Transactional Email for Oracle Eloqua app developed by Relationship One.

Have you been tasked with sending transactional emails from your commerce platform, ERP systems or CRM in Eloqua? Although Eloqua is a robust email platform, getting data to trigger transactional emails from Eloqua, in real-time, can sometimes be a challenge. That's no longer the case with this new app.

You can now configure an unlimited number of transactional events to trigger automated emails out of Eloqua in real-time. The below use cases are just a few examples of how this app can be used across your organization. More information can be found on our Relationship One site.

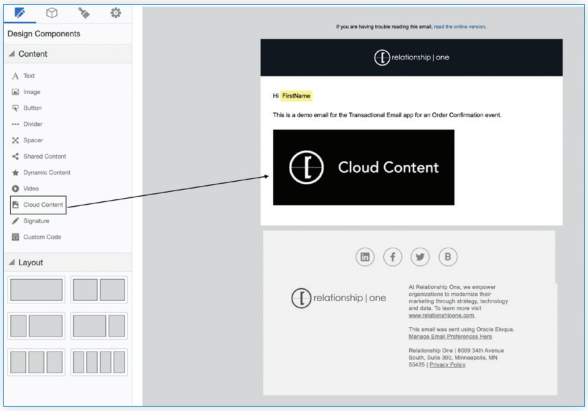
- Send Order Confirmation Emails
    - Real-time Data
    - Personalized Emails
        - Use basic information
        - Use array data such as purchase items, SKUs, quantities, price, etc.
    - Shipment Tracking Emails
        - Real-time shipment tracking updates
        - Customers informed and up to date
        - Send inventory update notifications
    - Account Notifications
        - Real-time data
        - Confirmation emails for new and updated account information

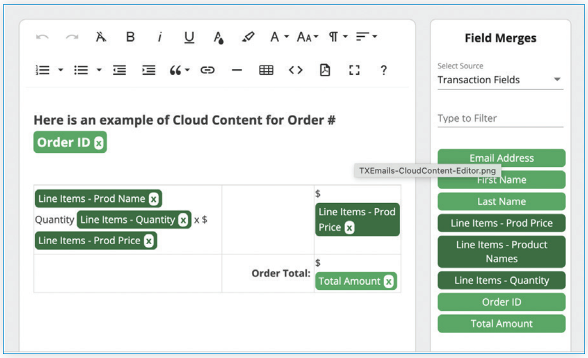
Once the app is configured, Eloqua contacts are sent personalized emails in real-time when an external event fires. If the Contact does not exist in your Eloqua instance,

it will be created. The app also allows you to write the transactional data to Eloqua Contact fields if needed. You can write all or just specific data points to Contact fields. Writing to Eloqua CDO fields is not available at this time but is on the road map for future releases.

If you're concerned about technical requirements, fear not. This new Transactional Email App rates very high in functionality and very low on the difficulty scale. Here are the basic steps and resources you will need to get started with a subscription or start a trial. For more information, you can read the Transaction Email User Guide.

- Create a Relationship One AppCloud Account
  - If you do not already have an account, you can set one up.
- You will need a Technical Resource that can generate a schema from your external systems JSON data structure.
  - Use either a secure webhook or an API endpoint using basic authentication (more details in the user guide).
- You will need an Eloqua Email specialist to create transactional email templates using Cloud Content and the rich text editor to create the content that should be added to your email. You can personalize this content with any of the Transactional parameters specified in the event.

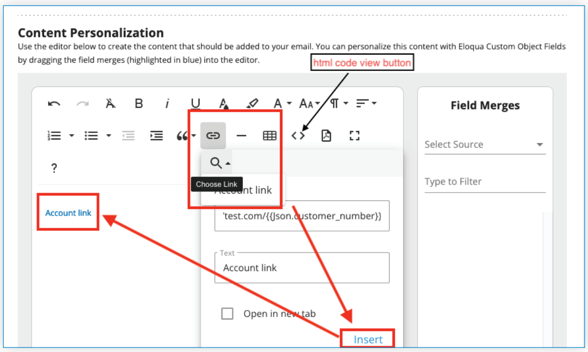




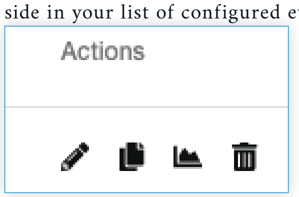
- You will need an Eloqua Campaign specialist to create the Campaign to send your transactional email.

SOME ADDITIONAL OPTIONAL FEATURES THE TRANSACTIONAL EMAIL APP OFFERS:

- Create Dynamic Links (step 5 in the user guide)
  - Use non-array mapped parameters from your JSON content within the Email Cloud Content used in your Email Template.
  - Using the editor, drag and drop field merges to fill in any path variables or query parameters.
    - Give your dynamic link a name that you will reference in your email.
    - Keep in mind your URL needs to be complete. If your field merges do not include your starting protocol and base URL, you will type that in the editor.
  - To use the new dynamic link, you will place it in your Email Cloud Content using the Insert Link in the Content Personalization section.
    - Select the dynamic link you created in your Event by clicking on the Choose Link button in the toolbar; then use the search dropdown to select your link and click on insert.
    - You also have the option of applying html code to create a button using the dynamic link in the shared content by selecting the Code View button.



- Event Status Callback
  - Enable the Event Status Callback function to configure status callbacks for failed or both failed and successful events.

- Testing Mode
  - When you enable testing mode, you must specify a testing email address so you can safely test your event confirmation.
    - Note: enabling Event testing will automatically disable the event if it was set as Enabled.
  - Actions Icons
    - You will find 4 very useful action icons to the right side in your list of configured events.
    - 

    - The edit icon is used for editing your event.
    - The copy icon allows you to copy events.
      - The copied event will include JSON schema, field mapping and any dynamic links.
      - You will need to provide a new email and the authentication method.
      - Note: The email must be unique per event.
      - The reporting icon will provide a log of all events when the Transactional Event is enabled or in Testing mode.
      - The delete button will delete the event.

There are also some bonus features! Emails sent by the app are included as part of Eloqua's native functionality.

- Emails are included in contact activity history.
- Emails are accessible within Oracle Profiler (profiler licenses required).
- Eloqua Dashboards, Email Operational Reports and Insight Reports will contain transactional email data.

THREE STEPS TO EFFECTIVELY TRIGGER ENRICHING EMAILS WITH DATA WAREHOUSE DATA

SARAH SCOTT
SENIOR MARKETING
CLOUD CONSULTANT

Sending emails from marketing automation platforms has never been easier. Today, most marketers are already sending emails that are both personalized and targeted to customers and prospects based on data stored in their marketing automation platform and seeing great results. By taking this approach one step further, even more significant results can be achieved. Integrating data warehouse data with a marketing automation platform can be incredibly powerful in tailoring the personalized content included in promotional emails as well as defining the exact timing of when a transactional email should be sent.

Integrating data warehouse data with a marketing automation platform can be done in a variety of ways. The first step is to define where the data warehouse data should be stored in the marketing automation platform. As an example, in the Eloqua marketing automation platform, there is an option to save the imported data directly in the main contact table or alternatively, it can be stored in a related custom data object that has been set up to capture this information. Depending on the data included in the import(s) from the data warehouse, a combination may be used. For example, if the data warehouse contains customer information as well as purchase history, it is likely that the customer info would be written directly into the contact table whereas the purchase history would be best stored in a relational table, or Eloqua CDO, in order to maintain the 1:many relationship between a customer and their purchases.

Once the data architecture has been defined in the marketing automation platform, the integration method can be selected. For real-time data feeds between the data warehouse and the marketing automation platform, the most direct integration approach would be via API. However, if an API integration is not an option, the next best method would be to schedule automated imports into the marketing automation platform, likely using an SFTP as a middle point. For example, in Eloqua, this approach would require export(s) from the data warehouse to an

SFTP followed by scheduled imports from the SFTP to Eloqua. In either case, the data would be sent from the data warehouse to the marketing automation platform for use in marketing emails.

With data flowing from the data warehouse into the marketing automation platform, the final step is for marketers to begin using it! For promotional emails, this could be as simple as adding additional personalization into existing email copy or as complex as defining entirely new audiences based on their non-marketing automation platform activity history. In these scenarios, the customer experience will be augmented, and we could expect a boost in the relevant email reporting metrics. If the data feed calls for a 1:many relationship with the contact data (e.g., purchase history) these use cases can be further explored with the use of apps. For example Relationship One's Personalization Manager app can do great things for promotional emails in Eloqua to allow for messaging a contact or prospect multiple times, once for each eligible purchase rather than once overall.

For transactional emails, there is an opportunity to generate audiences directly as a result of the data warehouse data and for near real-time email messaging to be set up. This data can also be used as part of the reporting for transactional messaging. Depending on the marketing automation platform being used, there are a variety of ways to optimize specifically for transactional email messaging. For Eloqua, this could be done by using Relationship One's Transactional Email app.

In any scenario, by leveraging the data warehouse feed either for audience generation or by taking advantage of the opportunity to include additional points of personalization, the quality of emails being sent will rise and the consumer will feel empowered by the enriched email content rather than feeling overwhelmed by too many non-targeted emails.

THE IMPORTANCE OF A PROJECT KICKOFF MEETING

RELATIONSHIP ONE

A lot of effort is put into getting a project off the ground, but without a solid start you can find a project going off track very quickly. That is why I want to share with you the importance of a project kickoff meeting, and a quick outline of what I think is a good baseline of items to cover in your meeting.

First, what is the kickoff meeting? It is a way to meet all the team members and stakeholders before the project work begins; it allows you to align on key objectives and get buy-in to key milestones early on. The kickoff meeting is an invaluable way to communicate key project information with the whole team.

SIX THINGS I LIKE TO COVER IN THE PROJECT KICKOFF MEETING

Introductions

This is such a great way to get to know all the stakeholders and common understanding of the project. Giving each person a chance to introduce themselves and their role will allow you everyone to get to know the team members and their level of interest and authority, which will be invaluable moving through the project. Another benefit from taking the time for everyone to introduce themselves is it can help set the room at ease and create a more collaborative atmosphere.

Executive Summary

A clear understanding for why the company is investing in this project allows for each team member to better align their role to the project. Even more importantly, when the team understands how the project fits within the company's goals, they become more invested in their role on the project.

Scope and Deliverables

The meat of this kickoff comes now when you dig into the scope and deliverables. Once the team has heard what business need we are trying to solve, it's now time for them to see how we plan on getting that done. The scope defines the boundaries of the project, so when the team is in full swing and things get uncovered during the project, it is easy for all to identify if those items are within scope. By clarifying the scope early and continuing to align with the scope during the project, it will help prevent scope creep.

Roles and Responsibilities

During the introduction you might have gotten a glimpse into the different roles, but clearly defining who on the team is responsible for which milestones now will help prevent confusion during the project. Identify if the project has an executive sponsor or who will be the approver of the milestones. Discuss who is doing what and why, and explain their relevant skills. Also define any line managers that will approve milestones on the project.

Timelines

A kickoff meeting isn't the time to get into each task deadline, but rather to review a high-level overview and identify an end date and the due dates for phases of the project. During this time, you can explore if there will be any potential challenges with the phases outlined this might help you mitigate future risk.

Communications and Meeting Plans

Lastly, when wrapping up the meeting, make sure to plan out how the team will communicate throughout the project. At Relationship One we use Basecamp for tracking conversations and meeting notes, but if the client has a specific tool, such as Teams or would simply rather receive emails, we will use what works for them. Along with communications, we make plans for regular status meetings, at a minimum meeting every week for 30 minutes. We also start scheduling discovery or working sessions depending on the project need, but we make sure we have made a plan to regroup after the kickoff call.

After the kickoff meeting, send a wrap email to the group, thanking them for their time, recapping next steps along with action items, and sharing with them a stakeholder register. The register will remind them of who they met on the call and what that person's role is for future conversations. Creating this strong foundation for your project will help set you up for success.

USING ONLINE BEHAVIORAL DATA TO YOUR ADVANTAGE

MELISSA SANTOS
DIRECTOR OF CONSULTING SERVICES

One of the greatest joys of being in the marketing technology space is watching its evolution over the years. Targeting based on online behavior was just a dream not that long ago. Now, it's pervasive and expected. Serving customers information and content at just the right time has become the ante. Today, consumers expect a personalized experience based on their likes, dislikes, habits and purchases. Rightfully so, they are selective with their email subscriptions, follows, and online registrations because they only want messages that matter to them. As marketers, it's critical that we crack that code – what's important and when is it wanted.

As we accrue additional technologies and capabilities in the marketing space, we can't lose sight of the bigger picture. We need to harness our customer's data and behavioral activity not just for promotional marketing, but also for transactional. We all live in a busy world. Life is hectic. It's not uncommon for consumers to research items, choose favorite products, build their online carts, and then forget all about it. Distractions abound, and people's attention is diverted endlessly. At this very moment, there are likely hundreds of consumers that have interacted with your brand, had every intention of purchasing or requesting information, and then failed to convert. Sometimes, a reminder is exactly what they need. This is where Oracle Infinity shines.

INFINITY AND BEHAVIORAL DATA

Infinity gives you an easy way to track, analyze and use this behavioral data across your email marketing, SMS and other online channels. This makes it easy for you to personalize retargeting initiatives, trigger messages based on actions such as form or cart abandonment, and offer in-the-moment recommendations across multiple channels. Once you've defined the online behaviors you want to track, Infinity can funnel those individuals into various programs within tools such as Oracle Eloqua and Oracle Responsys.

Online behavioral tracking can be overwhelming. The amount of information across your digital channels is endless. It can be hard to pinpoint the best starting points. Here are a few simple events you can track for remarketing efforts that not only increase conversions but also enhance your customer's experience with your brand.

BEHAVIOR TRIGGERS

Form Abandonment

Forms are a critical component of any online marketing strategy. Forms serve a variety of purposes: registration, subscriptions, gates, requests for information, and the list goes on. According to WPForms, 68% of forms started are never completed. That's right: two out of every three forms with data entered will never be submitted. This is a huge loss for marketers. Behind every abandoned form is a consumer with interest — interest that may have been distracted based on competing information. By using a tool like Infinity, you can capture data on abandoned forms and funnel known individuals into your marketing automation tools. From there, you can send highly targeted messages depending on the individual, the form they abandoned and their digital behavior.

When creating form abandonment campaigns, consider the reasons why someone didn't submit. Was the form too long? Were the required fields too personal? Did the individual decide that the content wasn't worth sharing their data? Did they reconsider their need for help? Once you answer these questions, you can re-engage that individual. You can offer them similar content to re-engage them. You can consider progressive profiling on your form to enhance form submission rates. You can utilize lead nurturing tactics across channels to send a form reminder or provide different content to garner the same form information.

Abandon Browse

Abandon browse is like window shopping. Potential customers are perusing your site and viewing multiple pages and/or products. They may be gathering information on your company, product or service. In some cases, they are further down their journey and are comparing features, pricing and reviews across your brand and others. No matter what the reason, you can capture these views and funnel individuals to proper re-marketing efforts. According to Salecycle, "Browse abandonment emails have an 80.9% higher open rate and 50.5% higher click-through rate than traditional emails, while 26% of all browsers that open these emails will click through and return to the site."

Based on the pages visited, you can likely tell the nature of a session. If customers are simply browsing products, a top-of-funnel campaign targeting their interests could be beneficial. If they are looking at pricing pages or high-value content, it may be better to provide them bottom-of-funnel content. Whichever path you choose, utilize their behavioral data to customize their content based on their actual interests. Whether email, SMS, push, etc., always look to personalize their experience.

Abandon Purchase

Unlike abandon browse where consumers are "just looking," abandon purchase implies a much greater intent. If someone takes the time to add a product to their cart, they are highly interested. They may not complete their purchase for a number of reasons, including cost, timing, indecisiveness, alternatives, shipping charges, security or just plain distraction. According to Baymard Institute, the average cart abandonment rate for desktop is 70% while it's 86% for mobile and 81% for tablets. Those are incredibly high numbers. The marketers who capitalize on abandon purchase data have a much greater chance of seeing ROI from these individuals.

As marketers, it's our job to utilize a consumer's behavioral data to target relevant messages that help aid their decisions. If customers have concerns about price, for example, consider a discount for certain products or send an alert when they go on sale. If shipping costs are the issue, perhaps a free shipping promotion will sway them. Coupons, reminders, in-store offers, etc. can be extremely successful when targeted properly. These individuals may also be prime for other types of communication that help finalize sales and purchases. As always, you can use their products of interest to offer personalized recommendations and information in future campaigns.

Purchasing

Of course, marketing doesn't stop after purchase. Once someone has clicked "buy now," there is a world of marketing possibilities. They have a clear interest in your brand and products. They've invested in your company, and they're ripe for customer loyalty measures. At this stage, you're armed with all kinds of behavioral data from online shopping and, perhaps, in-store purchases. Using the marketing tools at your disposal, you can send marketing messages that target your customer's habits, interests, preferences and needs. Perhaps they like certain types of products. Maybe they purchase perishables around the same time each month. Consider everything you know about these individuals beyond their purchase. Look for ways to connect with your customer based on what, how and where they like to shop. Using tools like Infinity IQ, not only can you target marketing messages across channels, but you can also personalize online interactions to serve up content that resonates each time your buyer visits your website.

WHERE TO START?

Like any other marketing initiative, start with your strategy. Which targeting effort aligns with your greatest business need? If lead generation is top of mind, start by reviewing your forms and their abandonment rates. Consider ways you can tweak these forms to garner greater submissions. You can also target form abandoners with different offers and content. Folks who browse your website and don't make a purchase are also prime for lead nurturing events that benefit from top-of-funnel content. Meanwhile, if your greatest area of concern is bottom of funnel, pay closer attention to abandon cart events and post-purchase targeting to enhance repeat buyers.

These are just a few of the ways you can use online behavioral data to enhance personalization to your customers and prospects. The data captured can be used cross-channel, including in-store, email, SMS and push. The key is using this information to provide unique experiences that customers will remember. It's never just about closing a sale. It's about building a connection that will last a lifetime.

THREE METHODS TO AVOID OVER-MAILING THROUGH ORACLE ELOQUA

RELATIONSHIP ONE

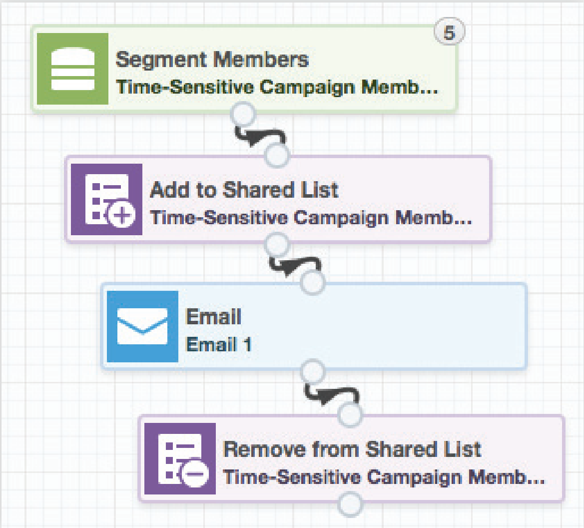
As an email marketer, you walk a fine line: remind prospects of your presence and benefits, but don't make them feel overwhelmed. Although the perfect email frequency is unique to each audience and message, simple steps can help manage your sending schedule and keep leads subscribed by not over-mailing them.

In the spirit of the saying, "always leave them wanting more," here are three approaches to ensure your audience won't feel smothered.

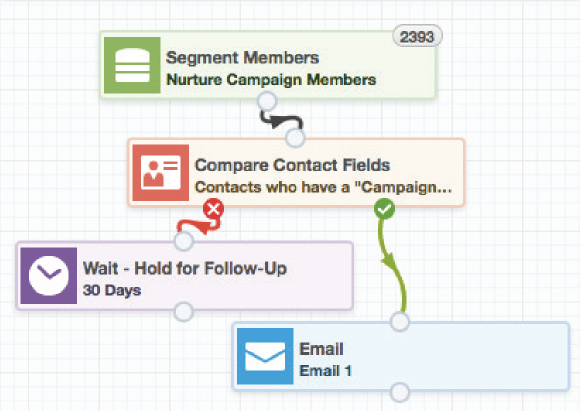
1. CREATE AN EMAIL SUPPRESSION SHARED LIST

You likely have ongoing nurture campaigns as well as programs to publicize events or special offers. To avoid a one-two punch from multiple campaigns, create a shared list to hold contacts that are part of high-priority or time-sensitive initiatives.

When contacts enter one of these campaigns, include a step to add them to your suppression list. Include a step after your last campaign action to remove the contact from the list.



For drip campaigns, those that are not time-sensitive, include a decision ahead of each email send to check for membership in the suppression list. If a contact is a member, continue checking the list and delay the next email until after they've been removed.



The shared list can also serve as an exclusion criterion in segments for other time-sensitive campaigns that have an overlapping target audience.

2. USE A CONTACT FIELD FOR EMAIL THROTTLING

Similar to the shared list approach, marketers often use a contact record field to indicate when a prospect should be excluded from certain mailings.

When a contact enters a campaign, put them through an update rule to mark the suppression field. Once the campaign is complete, use another update rule to clear that field and release the record back into the wild.

Alternatively, you could add a wait step after the email send action to hold them "safe" form receiving an email right after an email was just sent to them. Once the desired amount of time has passed, push them to the clear the suppression field to make the contact eligible for communications.

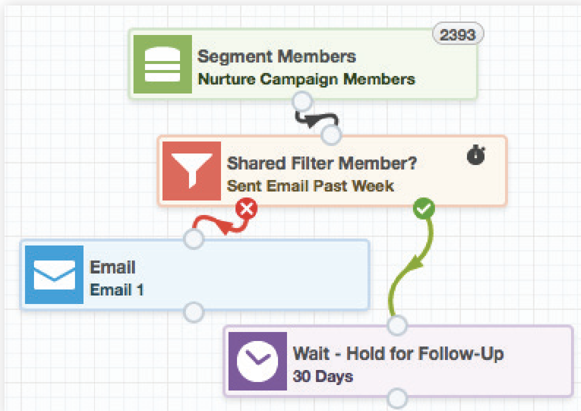
You may choose to add this field to an integration with your CRM to give your sales team quick visibility into the campaign membership of their leads and contacts.

In some cases, you might want to allow your sales team to exclude a record from marketing programs. By checking the field in CRM, a sales rep can signal to your team that a contact should be withheld from campaigns for the time being.

3. EMPLOY AN ACTIVITY FILTER TO METER YOUR MESSAGES

Before sending a batch email via Campaign Canvas, check to see whether a contact has received a message in the recent past. Like we talked about earlier, this period could be anywhere from a few days to a few weeks, depending on the "sweet spot" for your organization.

Create a shared filter to find contacts who've been sent any email at least once within a given time range. If you've reached out to them during this period, hold the contact in a decision step and send the next email once they've had time to digest your earlier communication.



This approach can also be used to suppress contacts who've been sent emails from particular campaigns or email groups, or even specific Oracle Eloqua emails.

The flexibility of the shared filter can be an advantage. Once it's created, your team can edit the criteria and instantly update the decisions made in every campaign using that filter. For example: You have been waiting three days between emails, but testing shows you get better results with a five-day downtime. Simply update the shared filter to adjust the waiting period across your campaigns.

Ultimately, successful campaigns show off the valuable, creative solutions you have to offer. Don't bury your carefully crafted messages in an avalanche of emails – use strategic timing to keep your prospects coming back for more!

FIVE B2B MARKETING TACTICS TO SURVIVE AND THRIVE IN A RECESSION

CHRISTINE POLEWARCZYK
SVP PRODUCT MARKETING AND RESEARCH, PATHFACTORY

B2B marketers will have to work even harder and more efficiently than they are right now to thrive through the recession. Many are starting to notice economic headwinds that are slowing sales cycles and will potentially impact future marketing budgets and require teams to do more with less. Focusing on the right B2B marketing strategy and tactics will be crucial at this time to deliver results and demonstrate marketing impact for any and all efforts and spend.

Below are five areas that B2B marketers should be focusing on right now to improve the performance of their B2B content and campaigns and ensure they support opportunity creation and deal acceleration.

1. GET CRISP ON YOUR CONTENT STRATEGY.

Audience-centric content strategy is literally the backbone of anything we do in B2B marketing, particularly in digital. Without it, we cannot be effective in driving engagement, purchasing decisions, or customer retention. Everything else we do and the other elements discussed here require a strong content foundation aligned to audience needs and interests.

- **Examine your content inventory.** You can't create a high-performing content strategy or campaign without understanding what you have to work with. Most B2B marketing organizations have massive amounts of content waste with 65% of marketers reporting significant content waste issues in the 2022 Forrester State of B2B Content Study. To get a handle on the problem, marketers must be disciplined about keeping a documented content inventory that classifies content by key criteria like target audience, journey stage, format type, offering, industry, topic, geography and language. Content performance and consumption metrics should be part of the inventorying process as well.

- **Conduct a content strategy gap analysis.** Once you have a content inventory cataloged, analyze it to understand where you have the most egregious gaps in supporting critical scenarios. For example, you may realize you have a lot of early buyer journey stage content, but lack the assets required to drive further buyer journey progression (i.e., mid- and bottom-of-funnel content). Alternatively, you may realize your messaging within assets being used for a campaign or program are no longer relevant based on economic or industry changes. PathFactory content audit capabilities can help you understand what content performs across multiple dimensions influencing future assets. For example, you can see what topics or asset types get the longest read times when deployed via a specific channel, like paid social. This type of insight can help you plan and budget intelligently across channels.
- **Update your content plans based on what you learn.** After conducting your gap analysis, revisit your content investment plans. Don't let shiny object syndrome dictate what content you create. Make sure your content plans are grounded in thoughtful decision-making and data. Did you find some high-performing blogs that could be repurposed as chapters in an e-book? Did you discover some topics that have been performing well across multiple assets and others that aren't generating as much engagement? Adapt your plans based on what you've learned.

2. RE-EXAMINE AND REDEFINE LEAD NURTURE.

"Set it and forget it" email nurtures should be evaluated ASAP to make sure that they are still in line with current messaging, marketing programs and business priorities. Does current offer sequencing make sense? Do you have stale or under-performing content assets in your nurtures that should be removed or replaced? Are your subject lines and overall messaging on point based on current market factors? Now is the time to make sure your nurtures are working their hardest for you.

- **Maximize the click with content binging.** Traditional nurture that involves sending emails with a new offer every week or two after an initial trigger event like a downloaded asset is old school. PathFactory content tracks allow B2B marketers to point nurture clickthroughs to "content tracks" that house collections of highly relevant, curated content that's tailored to the audience. This approach encourages content bingeing and is proven to accelerate buyer journeys and purchasing decisions. And, because the MAP and PathFactory work better together, any content consumed in a "binge session" will automatically remove that content in a future email nurture drip and skip the audience to the next asset in the nurture they haven't yet consumed.
- **Refresh lead scoring logic.** If your goals or tactic mix has shifted in any way over the course of the year, it's also important to go back and revisit your lead scoring logic to make sure that you aren't inadvertently under-valuing or over-valuing certain engagement types. It is generally a best practice for sales and marketing to evaluate lead scoring models together at least a couple of times a year for any necessary fine tuning. Evaluate scoring logic and thresholds based on current audience engagement and pipeline trends.

3. CRANK UP YOUR WEBSITE CONVERSIONS.

Having the right content and lead scoring models isn't going to be enough if you can't trigger action and convert website traffic. B2B marketers need to remove the friction in finding information on their websites and make it easier for buyers to buy.

- **Declutter the web experience.** Particularly at the enterprise level, websites are often overladen with navigation choices, links and content offers - to the point of being overwhelming. If your target audience enters your website through organic search and lands on a product page, for example, do they know where they should go from there? If they are looking for something specific, will they quickly get lost in a confusing experience instead of having a helpful one? Marketers have to make every click and visit count. As a first step, take a look at pages that attract high traffic from organic search but have high bounce rates, low pages per session, or poor conversion. Identify any opportunities to simplify and personalize the experience on those pages to increase their performance. Traffic is meaningless if it isn't generating further action.
- **Leverage content AI, automation and analytics.** To increase website conversions and accelerate the buyer journey, B2B marketers need to take advantage of content personalization capabilities to create highly contextualized experiences. Manually selected next-best content recommendations on a web page often don't perform well because they aren't truly personalized. They were pre-programmed based on assumptions that a marketer made when building the page. First-party and third-party data about visitors, combined with AI and automation, now give marketers the content intelligence they need to deliver dynamic experiences that change based on what is known about the visitor, their engagement history, and what content is performing the best. These capabilities also encourage content binging and help you collect unknown visitor engagement data and carry that forward into their profile when the visitor becomes known.

4. APPROACH ABM HOLISTICALLY AND ENABLE SCALE.

While lead scoring is still an important tool in the marketer's toolbox, qualifying an individual lead is no longer enough. Because B2B organizations make purchasing decisions in buying groups or committees, it's critical for your content strategy, nurtures and website experiences to focus on activity at the account level, not just the individual lead level. Doing so helps sales and marketing align and act on the most promising opportunities, instead of wasting time on individuals and accounts that don't demonstrate real intent.

- **Align sales and marketing on target accounts.** Increasingly challenging market dynamics make it especially critical now for sales and marketing to work in tight alignment on account-based strategies. Sales and marketing teams need to validate and potentially re-prioritize what are the most important accounts to target in current market conditions. Knowing what accounts are active, how many and which people are active in that account, what content they're consuming and actions they're taking, and anonymous vs. known account activity are all critical inputs to making informed ABM decisions and capitalizing on opportunities. In this economy, every marketing and sales motion counts. Work together to make sure you're focusing on the right accounts at the right time in a tightly orchestrated fashion.
- **Create account-based content experiences.** B2B buyers increasingly expect B2C like experiences that are tailored to them specifically. Yet marketers often struggle with the time and effort it takes to create customized ABM programs and content experiences. Focus on creating microsites or destination pages for your most important target accounts first with branding, messaging, content and calls-to-action that have been personalized. From there, consider solutions like PathFactory to deliver ABM personalization at scale using AI, automation and analytics.

5. EXCEL AT ENABLEMENT WITH BETTER REVENUE INTELLIGENCE

Revenue enablement is critical to ensuring that our B2B content and campaigns perform at their best. Too often, when a lead or opportunity is handed off from marketing to sales, deals stall or fall through because the seller isn't enabled properly to carry through with cohesive messaging, activate the right content, or understand the account dynamics that should be informing the seller's thinking and actions.

- **Prioritize opportunities using revenue intelligence.** To beat recessionary factors, B2B sales and marketing have to excel at identifying the right opportunities at the right time and accelerate those deals as much as possible. Identify and prioritize accounts with activity across multiple contacts. Even if they are a combination of known and unknown individuals, these accounts are demonstrating stronger buying intent than accounts showing activity from a single lead.
- **Enable sales and marketing with content intelligence.** It's important to understand which accounts have activity by multiple contacts, but it's equally important to understand what that activity is, what content is driving engagement, and then use those insights to better enable their collective journey and decision-making process. Consider using tools like PathFactory to surface known and anonymous account activity, provide sellers and marketers with data and insights to inform next-best actions to take on an account, and enable them to quickly create personalized content hubs for buying groups.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CAMPAIGN ENHANCERS
Personalization Manager
Transactional Email
Asset Name Generator
Campaign Metadata Manager
Channel APPS
Eventbrite
Google Ads
Hootsuite
Twilio SMS
INTEGRATIONS
SFTP Importer
Oracle NetSuite
DATA MANAGERS
Data Cloud
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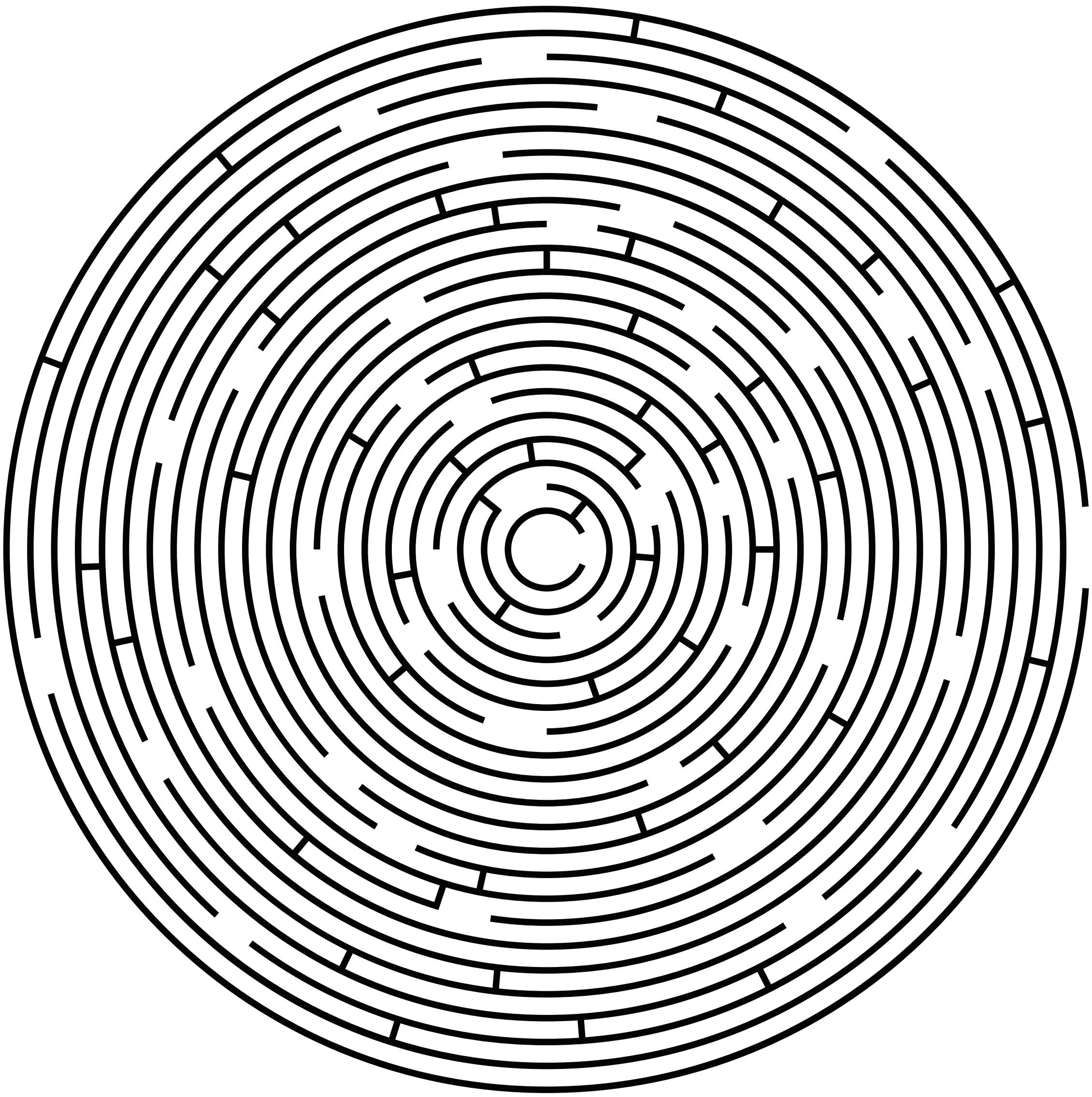
BRAIN CANDY

MAZE TO CHALLENGE YOUR BRAIN

In order to be a successful marketer in today's world, you need more than just an eye for detail. You also have showmanship and creativity! Show off your skills by making it through this maze without any mistakes - can't hurt, right?



MARKETING BUZZ WORD SEARCH

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Relationship One	Lead Scoring	Transaction	Lead Generation
Oracle	Marketing Automation	Data Cloud	Lead Nurture
Adobe	Segmentation	AppCloud	Storyscaping
Salesforce	Lifecycle Marketing	ABM	Agile Marketing
Eloqua	Dynamic Content	Responsive	MRR
Responsys	Personalization	Deliverability	SaaS

REFRESHING RECIPES

A little sour and a little sweet...kind of sounds like our marketing automation technologies, huh? While sometimes they make us pucker, other times they are the key to our success. For when you need it, check out these cocktail recipes!

NEW YORK SOUR

INGREDIENTS

- 2 oz rye whiskey or bourbon
- 1 oz lemon juice, freshly squeezed
- 3/4 oz simple syrup
- 1 egg white (optional)
- 1/2 oz red wine

INSTRUCTIONS

1. Add the whiskey, lemon juice, simple syrup and egg white (optional) into a shaker with ice and shake hard until well-chilled.
2. Strain into a rocks glass over fresh ice.
3. Slowly pour the red wine over the back of a bar spoon so that the wine floats on top of the drink.

BERRY FRENCH 75

INGREDIENTS

- 1.25 oz berry flavored vodka
- .5 oz fresh lemon juice
- .25 oz simple syrup
- 2 oz dry sparkling wine
- Fresh berries, for garnish
- Lemon wheel, for garnish

INSTRUCTIONS

1. To make simple syrup: combine one part sugar with one part hot water until the sugar is dissolved. Let cool before using.
2. Combine first three ingredients in cocktail shaker with ice and shake until well-chilled. Strain into a chilled cocktail glass and top with sparkling wine. Garnish by dropping fresh berries into your glass or a thin lemon wheel floating on the surface of the drink.


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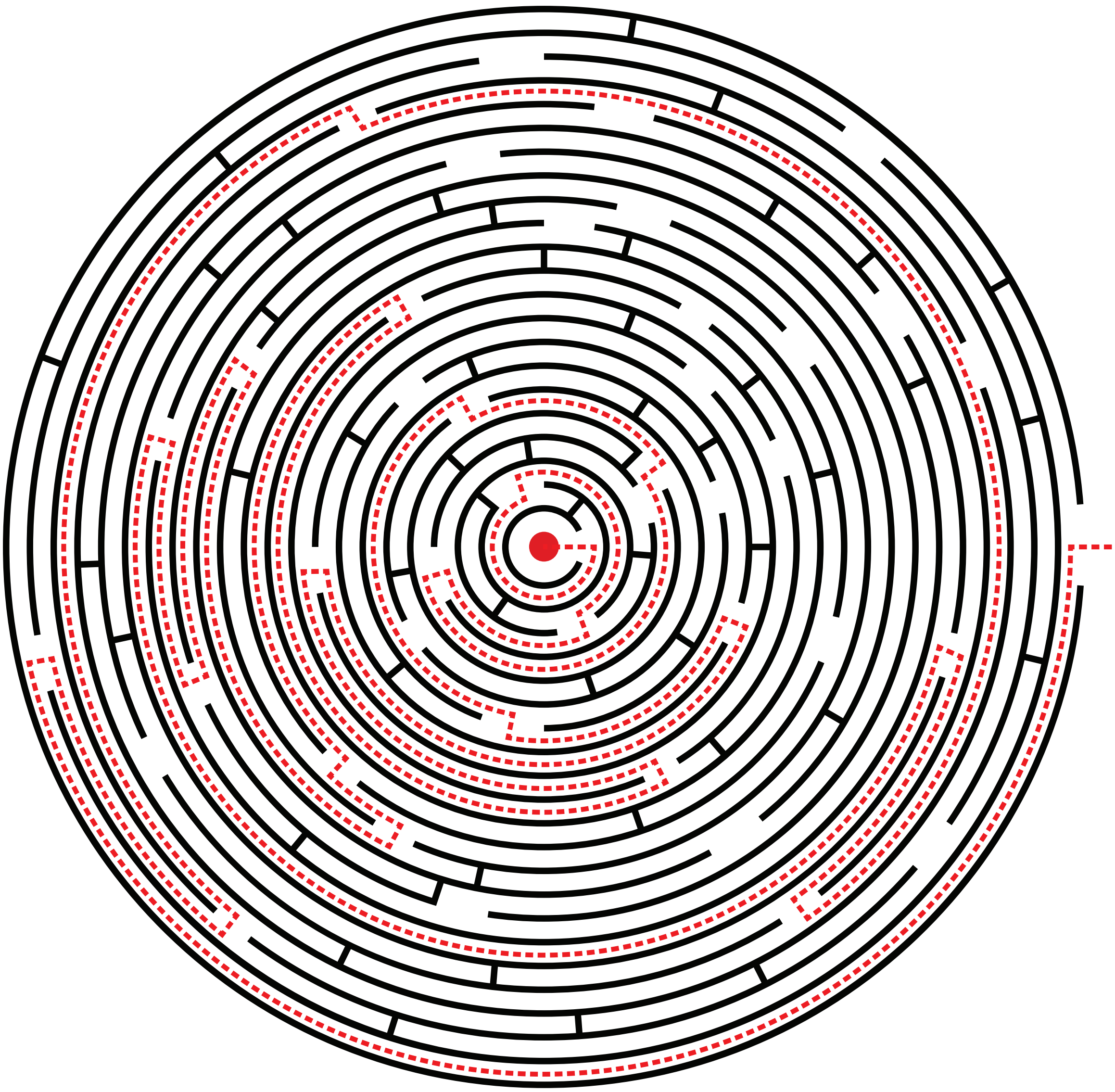
BRAIN CANDY

ANSWER KEYS



MARKETING BUZZ WORD SEARCH

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R N O I T A R E N E G D A E L R W P N T
R Q P W R S W B E F N O K P Z C L X F Y
M F I F P A T X S Q D R E S P O N S Y S
E L O Q U A G I L E M A R K E T I N G N
X K T Z E S I F O W G E E L C A R O D Y
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Relationship One	Lead Scoring	Transaction	Lead Generation
Oracle	Marketing Automation	Data Cloud	Lead Nurture
Adobe	Segmentation	AppCloud	Storyscaping
Salesforce	Lifecycle Marketing	ABM	Agile Marketing
Eloqua	Dynamic Content	Responsive	MRR
Responsys	Personalization	Deliverability	SaaS

relationship | one

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