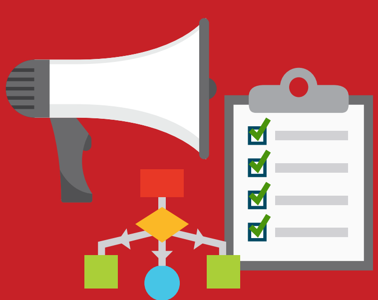
Eloqua Campaign Starter Pack



A collection of checklists and templates to help you plan, create, measure and improve your marketing campaigns.

Testing, otherwise known as how to get rid of your pre-launch jitters

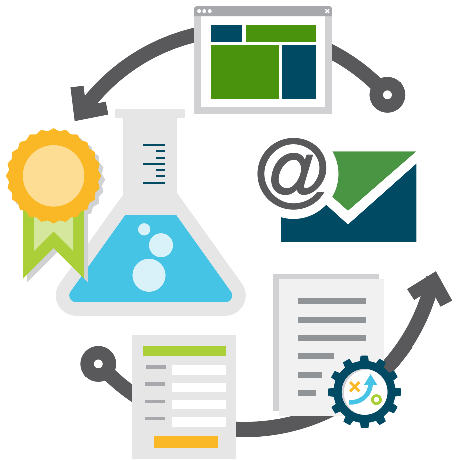
Clicking the "Activate" button can be one of the most nerve-racking actions you take within Eloqua. There are so many items that run through your head as you try to calm yourself and remember that you have indeed checked all those items off. Testing and retesting is one of those items that you never want to skip, it will ensure you get the best possible performance from your campaign. Here at The Pedowitz Group we have a very rigorous process that we follow for doing pre-launch testing and quality control. While that might be a bit strict for your company's use, below are some basic testing best practices you can easily adapt to suite your campaign process.

Why Test

To start, there are many reasons on why we test. From testing your individual assets and apps that make up the campaign to ensure they are rendering and working properly, to ensuring that your campaign flow is set up properly and the correct contacts will be receiving your communications. One of the worst feelings when activating a campaign is not knowing if your contacts will receive the correct emails, or be able to view them properly, better yet move down the right path after they have taken the appropriate actions. You want to think about all the scenarios that could happen in your campaign and test them all.

On the following pages are specific sections outlining major testing you should be doing and how to do it.

Testing Assets



Before you test the campaign as a whole you must test each individual asset you have created for a given campaign. That includes all emails, landing pages, and forms. You are testing for rendering issues, responsiveness, plain-text version, link functionality and correct alt-tags.

When testing your email the easiest thing and probably the first thing you can do is to do a Test Send from Eloqua to your own inbox. If your images are not automatically downloaded you can check to see that all alt-tags are in place before downloading the images. Once the images are downloaded you can check for best practice items such as the CTA placement, (example: ensuring it is above the fold). Here you can also ensure that all links are functioning, as they should, and linking to the correct pages. You want to check that all links within the email as well as links in the header and footer. This includes the links to view the email online, the privacy policy link, and the unsubscribe or manage preference links. To test your emails, it is best to use a tool like Litmus, Email on Acid or Eloqua's own email tests. You can send your emails to these tools and it will display your email on a variety of email clients, browsers, and operating systems, even in a mobile format. This gives you a great idea of what your email will look like to a variety of people on various devices.

Are you setting your campaign planning up for success? Check out our tips on designing with reporting and metrics in mind:

http://www.pedowitzgroup.com/campaign-success-through-design-and-reporting-the-revenue-marketer/

As you are testing the links in your emails you will be going through to the landing pages so either as you're testing your emails or after you have opened all the necessary landing pages you can begin to test them. You want to ensure the landing pages display correctly as well as make sure any links work, and direct to the correct pages.

On any landing page that contains a form you want to submit the form and ensure the processing steps are correct. This can include everything from ensuring you are routed to the correct confirmation page after submitting the form, to confirming that data is being written over to the correct contact, custom object, routed to a program.

Overall the goal of testing each of your assets is to ensure that your audience will have a positive user experience, and to catch any errors in the process.

Testing the Campaign Canvas

Before you being testing the campaign canvas the first step you have to take is to create a copy of the Canvas. This is very important for a few reasons. First you will be changing evaluation and wait times to shorter periods so that you can test the whole campaign in a reasonable amount of time. A second reason for copying the campaign canvas is to ensure your reporting metrics are not inflated by your testing. If you were to test on the original campaign canvas, when you pull your reporting metrics, the testing period and metrics would be included, skewing your actual campaign metrics.

Once you have created a copy of the campaign canvas change the evaluation and wait times to about half hour increments to give you time for the necessary actions to take place so you can test the different paths someone could take. When you make your test list you want to ensure you know which email addresses are going to take specific actions and which ones will not so you can ensure that they are routed through the campaign appropriately. For example, one email address will submit a form, while another one doesn't, so you can test both paths. This process of course becomes more important as the routing information gets more complicated.

Through the testing process you want to look for any emails that fail to send, emails sent at the wrong time, or any filter fails if you have those throughout the campaign. It is very important to have a list or table that outlines your contacts, their actions, and the path they should go down so that you can be sure when you activate your campaign your audience will have the experience you want them to.

Finally, when you are ready to activate your campaign it is good to create a separate segment if you want to have a seed list so that when viewing reporting metrics for the campaign you can easily filter out the segment of internal users to ensure that your metrics reflect true engagement.

Testing Cloud Connectors/Apps

If using Cloud Connectors or Apps in your campaigns you also want to make sure to test these before activation to ensure they function as you expect them to. This may include running through different scenarios (i.e. if you have Progressive Profiling you may need to test through each of the variations that an email recipient could receive), similar to the various options outlined in how you test a campaign flow you may need to keep track of exactly which contact is testing what with your cloud connector and app testing.

Since there is many different cloud connectors and apps, it is difficult to have one set testing process for all. When testing your apps the first thing you want to think about is "What are we trying to accomplish?" or "What do we need this app to do?" From here you can start building out scenarios that you want to see happen with the app and start assigning contacts to each scenario. Then you can begin to build out how you are going to test them, and finally test them. You will want to document all of this to ensure the app is working properly and minimize risks.

Are you Ready to Report on these Campaigns? Here are some quick wins in Insight Reporting to help you along the way:

http://www.pedowitzgroup.com/5-quick-wins-for-insight-reporting-in-e10/

We all understand the pre-launch nerves when hitting "Activate" but with a little advanced planning and a bit of care you can reduce the butterflies and ensure success.

Finally, on the next page you will find a great checklist for pre-launch (post-testing) to get you on your way.

Campaign Pre-Flight Checklist

Asset	Item	Description	Impact on Eloqua
Emails	Subject: Make sure its correct		N/A
	From Name and Address		Cannot save
	Reply-To Address		Cannot save
	Logos and Alt Tags	Ensure they are correct and descriptive	N/A
	Links: Work Properly	Linked correctly and work properly	N/A
	Text: Check for grammar, typos, spelling, flow	Grammar, Typos, Spelling	
		Copy Edit	
		Flow	N/A
	Location, Date and Time	Correct Location and Date	
		Time contains time zones	N/A
	Contact Info: Correct Name and Numbers		N/A
	Appearance: Does it display correctly in all platforms (litmus)		N/A
	Naming Conventions Followed		Difficult to find/manage campaigns long term
	Text Version: Reflects HTML?		N/A
	Email Groups		Preference/Subscription Management is managed via Email Groups, be sure to properly place your emails inside of email groups by subscription type.
	Field Merges	Ensure there is a default	Validate all scenarios are properly accounted for; displays correctly
	Dynamic Content	Ensure there is a default	
	Tracking Links		If your links are not tracked, results will be difficult to track.
Landing Page	Appearance: Does it display correctly in all platforms (Litmus)		N/A
	Is it tracked?	Has it been added to the canvas?	Will not be tracked
	Vanity URL	Is there one created to avoid LP=id# when visiting the page	N/A
	Copy editing		N/A
Forms	Processing Steps Configured	Hidden Fields	Cannot Save
		Hidden Field: Campaign ID	
		Writing data to contact record/data card	
		Redirect	
	Copy editing: Labels, picklists, buttons		N/A
	Naming Conventions Followed		Difficult to find/manage campaigns long term
	Hidden fields capture data correctly		Will limit your ability to track things properly.
	Query strings capture data correctly		Will limit your ability to track things properly.
	Correct Follow-up Page after submitting the form		N/A
Campaign	Naming Conventions Followed		Difficult to find/manage campaigns long term
	Synced with CRM		N/A
	Campaign Details & Activation Dates Input		Cannot save
	Steps Properly Configured	Segments, Wait Steps, Decisions all entered	Cannot save
		Wait Steps	
		Decisions all entered	
	Assets Tracked	Forms Tracked	All landing pages and forms added to campaign for reporting purposes
		Landing Pages Tracked	
	All settings are configured	Region	All data input needed for proper tracking
		Product	
		Campaign type	
		SFDC creation	
		Campaign ID	
		Actual cost	
	Segment Defined		

The Pedowitz Group is the world's largest full-service Revenue Marketing company. A two time Pacesetter winner, The Pedowitz Group helps global clients transform their marketing organizations from cost centers to revenue centers by assessing and optimizing six controls: strategy, people, process, technology, customers and results.

Oracle Eloqua enables marketers to plan and execute campaigns while delivering a personalized customer experience for their prospects. Campaigns greatly scale for audiences across channels including email, display search, video, and mobile. With integrated lead management and easy campaign creation, our solution helps marketers engage the right audience at the right time in their buyer's journey. Sales teams can close more deals at a faster rate, increasing marketing ROI through real-time insight.