Drive, influence and measure results and business with reporting

Eloqua Reporting and Campaigns Module

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"Today's boards want chief marketing officers who can speak the language of productivity and return on investment and are willing to be held accountable…[They] don't need corporate marketing officers who have creative flair but no financial discipline. **They need ambidextrous marketers who offer both**."

John Qulech, Professor of Business Administration and Senior Associate Dean for International Development, Harvard Business School (Wall Street Journal)

Agenda

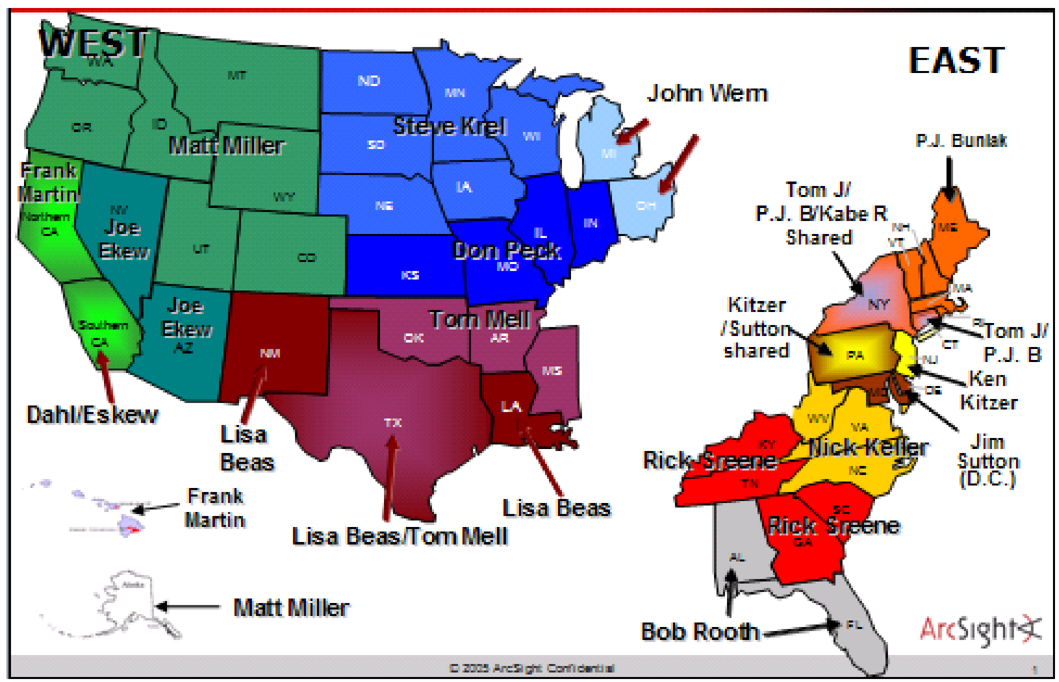
- Eloqua daily field reporting
  - Business need
  - Daily reports – Sales, Inside Sales, Federal, Management
  - Visitor activity alerts
- Campaigns module
  - Business need
  - Campaigns module overview
  - Reports and dashboards
- Key take-aways
- Demos
- Appendix

Business Need: Market your marketing efforts

- Give sales visibility into marketing efforts and results through reporting
  - "I need more from Marketing."
- Address the quantity and quality complaints
  - "I don't have enough leads."
  - "How do I know if this is a warm or cold lead?"
  - "This account went quiet?"
- Customize your reports to Sales, the internal customer
  - "Who is on our website and what are they interested in?"
  - "I don't want to see all the leads, just the ones from my territory."
  - "I don't want to see the ISPs – please remove Comcast!"

Remove the quantity and quality complaint by giving visibility to your inside sales and sales team

- Daily territory activity reports by
  - Territory
  - Lead owner = salesrep
  - Email type (for Federal)
    - Email address = *.gov, *.mil, *.nav



Daily reports: Web visits and leads from sales territory

An auto-generated daily MS Outlook email from Eloqua

ArcSight

Howard Bruskin's - Condition Visitors (Time Span)

Condition: Howard Bruskin's Contacts **Time Span:** Last week **Is In Condition:** In Condition

Total Records: 63

	Personal Info					Visit History			Other Info
Visitor	First Name	Last Name	Email Address	Company	Phone Number	Total Visits	Total Pages	Last Visit	Salesperson
Unknown				mo.charter.com		1	1	1/4/2008 4:39:54 AM	
Unknown						1	1	1/3/2008 5:04:53 PM	
Unknown				il.comcast.net		1	4	1/3/2008 4:59:48 PM	
Unknown						[illegible]	7	1/3/2008 4:57:08 PM	
Unknown						[illegible]	24	1/3/2008 4:48:23 PM	
Unknown						5	48	1/3/2008 4:42:51 PM	
Unknown						5	59	1/3/2008 3:57:04 PM	
Unknown				dteenergy.com		1	4	1/3/2008 3:39:41 PM	
Unknown				desm.qwest.net		1	12	1/3/2008 3:23:25 PM	
Unknown						4	63	1/3/2008 2:44:50 PM	
Visitor	First Name	Last Name	Email Address	Company	Phone Number	Total Visits	Total Pages	Last Visit	Salesperson
Unknown				wi.charter.com		1	3	1/3/2008 2:33:37 PM	
Jeffery	Jeffery	Maung	jmaung@firstindustrial.com	First Industrial Realty Trust	9732276600	3	57	1/3/2008 11:04:25 AM	
Unknown				itradepress.net		1	1	1/3/2008 10:21:45 AM	
Unknown				il.comcast.net		1	2	1/3/2008 9:15:11 AM	
jason	jason	szymanski	jason.szymanski@dmx.com	chcgil.sbcglobal.net	8479303100	1	8	1/3/2008 9:02:41 AM	
Unknown				boeing.com		1	3	1/3/2008 8:5[illegible]:41 AM	
Unknown				ewashtenaw.org		3	3	1/3/2008 8:07:10 AM	
Unknown				customer.algx.net		1	1	1/2/2008 [illegible]:04:59 PM	
Unknown				res.rr.com		1	1	1/2/2008 3:57:38 PM	
Unknown				chcgil.sbcglobal.net		1	1	1/2/2008 3:17:10 PM	
Visitor	First Name	Last Name	Email Address	Company	Phone Number	Total Visits	Total Pages	Last Visit	Salesperson
Unknown				lgtpmi.ameritech.net		1	3	1/2/2008 2:50:53 PM	

Value to Unknown - drill down to activity

DTE Energy

Number of visits
Total Pages

Best practices on daily report settings to customize to your sales needs

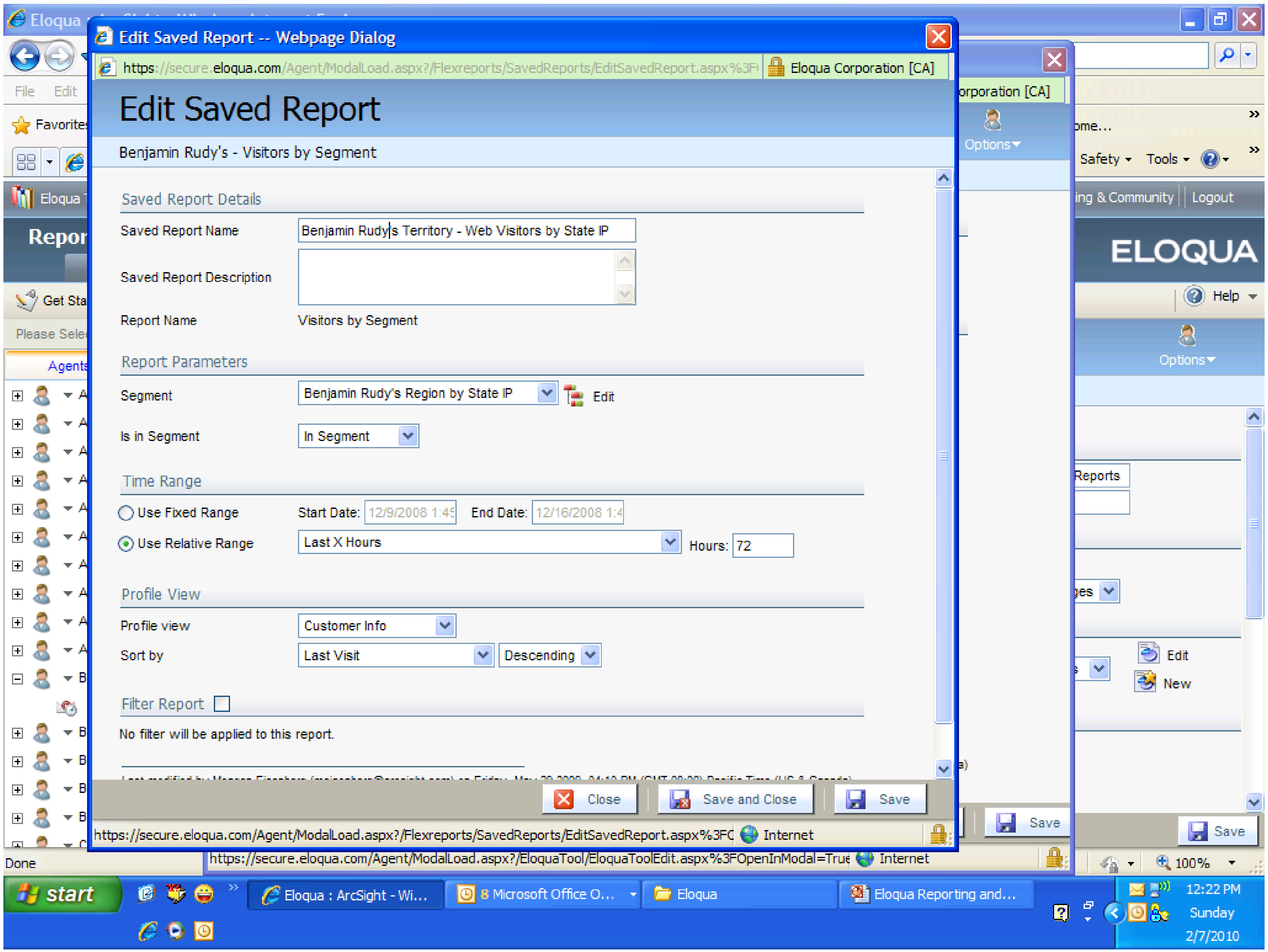
1. Deliver daily in the AM in their time zone
2. Duration: Use relevant range – Last X Hours – 72
3. Profile View: Customer Info View (not Technical information)
4. Customize columns
5. Sort By: Last Visit, Descending

Best practices on daily report (cont'd)

6. Must use exact spelling (salesrep and location)
7. Filter out the following with Aggregate Company / Email condition
   - ISPs
   - Your company and Eloqua
8. Rename the report to something relevant
   - "Condition Visitor (Time Span)" means nothing to the field
   - "Web visitors by State IP address" is more informative
9. Handling Federal
   - Conditions (OR):
     - Email address contains .gov, .nav, .mil
     - State IP address = District of Columbia
     - Salesrep = Howard Ruskin

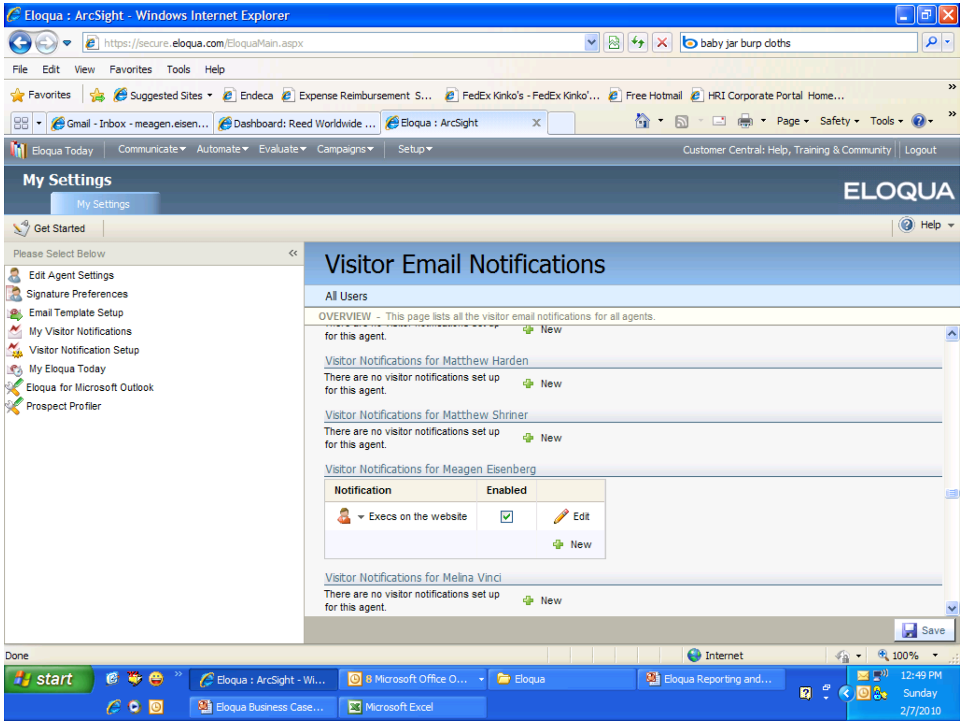
ArcSight

Example of daily report settings



Give visibility to your inside sales and sales team through alerts

- Activity alerts by
  - Company
  - People (email address)
  - Content (Implicit)
    - where on the website, what downloaded
  - Explicit
    - title, revenue, active project, etc.



Company, content or individual alerts:
An Outlook email from Eloqua automatically delivered upon target activity

From: Eloqua Notifications [mailto:eloquanotifications@eloqua.com]
Sent: Wednesday, February 01, 2006 12:57 PM
To: Gary McGrath
Subject: Website visitor notification: Anne Wood

ELOQUA Eloqua Notification System

Your personal notification of activity on your website. Target prospects, identify visitors, and develop sales relationships with your online visitors. (Please note that if you are unable to see the reports here, your email client may not support the latest HTML features. Log on to Eloqua to configure your notifications to send text emails)

A visitor is online who meets your criteria:

Profile Field	Value
First Name	Anne
Last Name	Wood
Title	Mktg Staff
Company	Molecular, Inc.
State/Province	Massachusetts
Lead Score	25
Phone Number	(617) 218-6500
Email Subject of Most Recent Email	Thanks for registering for the Eloqua User Groups
Salesperson	00500000001XsIP
Email Address	awood@molecular.com
Total Visits	11
Most Recent Form Submitted	MK - User Group Notice - 012506
Last Visit	1/31/2006 3:28:42 PM
Total Pages	38
Most Recent Search Query	
Product Pages - Website	10

Full Visitor Overview: Click here

System time: 12:56:58

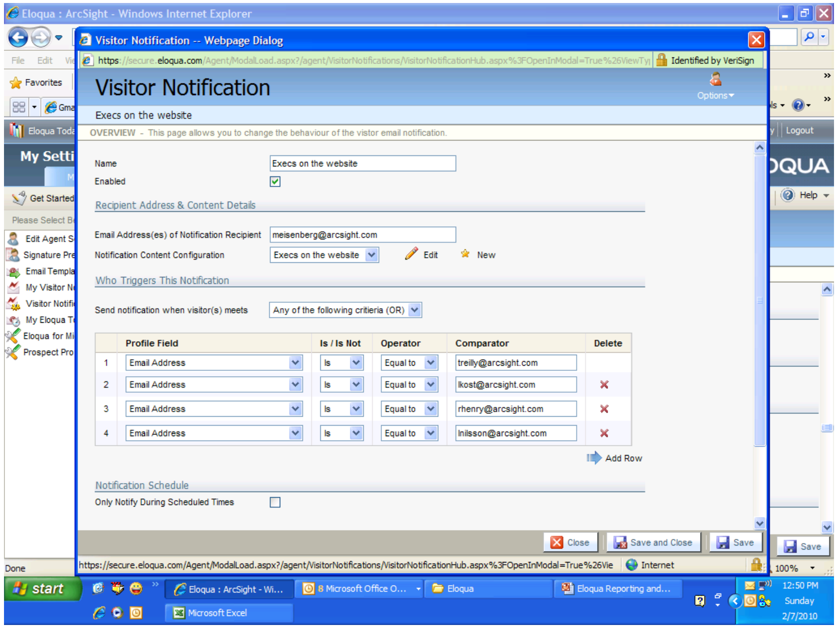
"Who in my top accounts or territory is checking us out?"

"Notify me if Mr. CXO pulled down xyz whitepaper or hit abc page…"

"Notify me if visitor is qualified." (right title, company, vertical, activity, etc.)

Best practices for real-time alerts:
Visitor Email Notifications

1. Location in Eloqua: Setup menu -> My Settings -> Visitor Notification Setup
2. Top 10 accounts – why no more than 10?
3. Recommended for Strategic Account Managers versus the daily activity reports by State IP/ Country IP
4. Recommended for Direct Mail activity monitoring
5. Send notification when visitor(s) meets: Any of the following criteria (OR)
6. Monitor your boss and boss's boss



Follow-up to reports:
What is the best sales process?

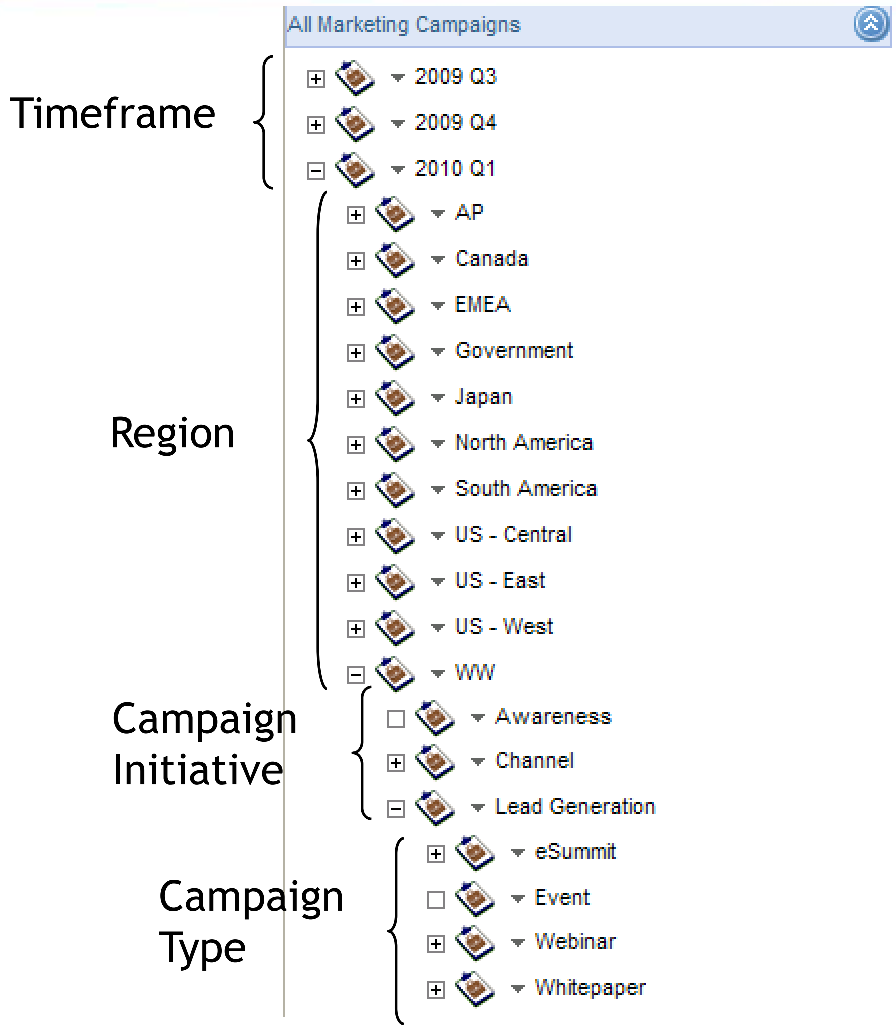
1. Check your reports for your leads regularly; the top of the list are people who have visited the website most recently.
2. Examine the data
    1. Total Pages, Total Visits, Last Visit
    2. Specific product information pages
    3. Registration forms
3. Call back your most interested prospects ASAP, less than 48 hrs ideal
4. Leave a compelling message using their online activity to help target their interests
5. Don’t tell them “you are tracking them”
6. Log into Eloqua and save your username and password

Campaigns Module:
Reporting and Dashboards

Business Need: Campaign success, ROI and marketing mix/spend allocation

- What is the ROI on this campaign? CPL and CPO?
- What does my lead funnel look like per campaign/campaign type/region/quarter/all time?
- Am I spending the right amount on the right marketing mix?
- Which campaigns are delivering the best results?
- How did marketing contribute to deals closing?

You can track campaign overview, metrics and revenue at all levels of your hierarchy



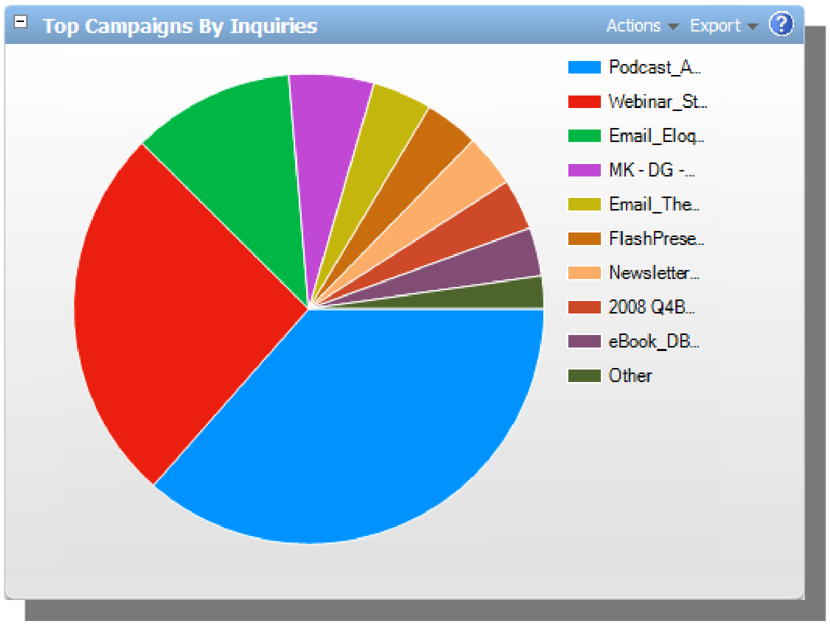
Campaign Dashboards by Timeframe, Region, Campaign Initiative and Type

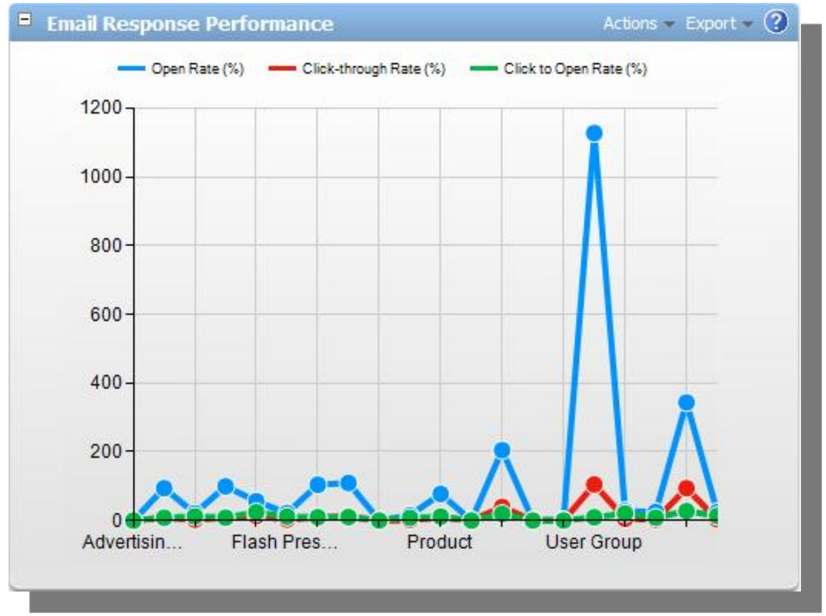
- Campaign Metrics Dashboard
  - Email performance and deliverability
  - Campaign responses - Integrated Marketing and Sales Funnel*
    - Suspects, Inquiries, MQLs, SALs, SQLs, Customers
  - Top campaigns by responses, activities*
- Campaign Overview Dashboard
  - Opportunity metrics – pipeline and forecast to close
  - Top campaigns by Opps generated / by Opps revenue
  - Top 10 Opps forecasted to close
  - Responses by State / conversion
- Campaign Revenue Overview Dashboard
  - Opportunity metrics – pipeline / overall revenue summary
  - Attributed / Influenced revenue and ROI
  - Overall profit and ROI comparison
  - Opportunity touches

* = resides in Campaign Metrics and Overview Dashboard

Campaign Metrics Dashboard:

Track campaign metrics, email performance, response and SF.com Integration



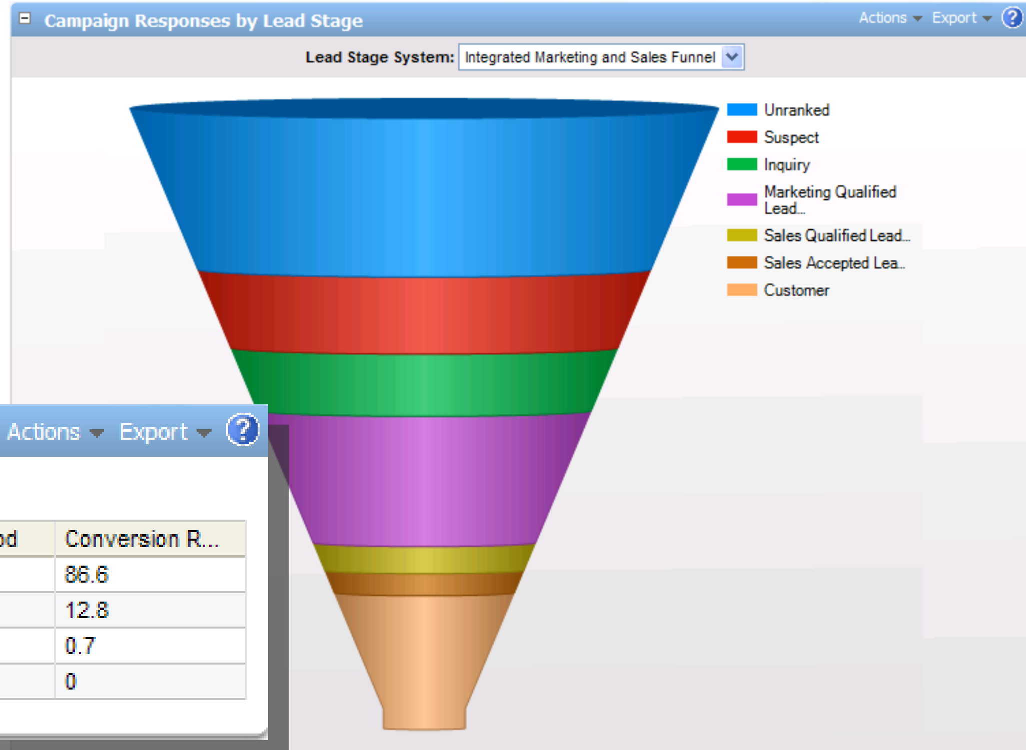


Metrics

Emails Sent	111	Hypersite Visits	0
Emails Opened	324	Print Mail Sends	0
Email Click Throughs	57	Event Registrations	0
Email Bouncebacks	0	Surveys Completed	2
Email Unsubscribes	0	Call Center Calls	59
Unique Email Visitors	30	Campaign Search Visits	0
Possible Email Forwards	10	Online Referral Visits	0
Forms Submitted	23		

Campaign Metrics Dashboard (cont'd):

Analyze Integrated Sales & Marketing Funnel



Inquiries Conversion

Actions Export

Lead Ranking System: Lead Ranking Systems

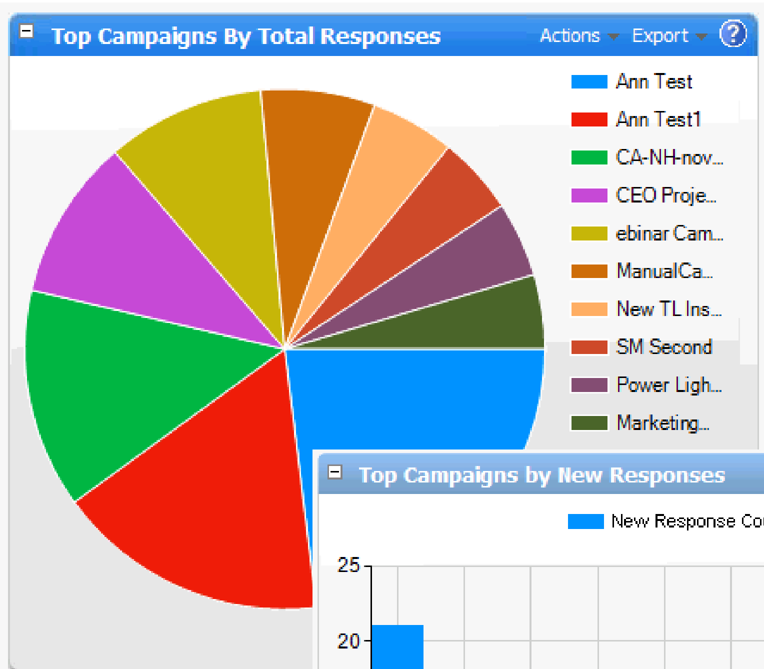
Lead Rank	Previous Period	Current Period	Conversion R...
Inquiry	2059	1782	86.6
Marketing Qualifie...	0	263	12.8
Sales Accepted L...	0	14	0.7
Sales Qualified Le...	0	0	0

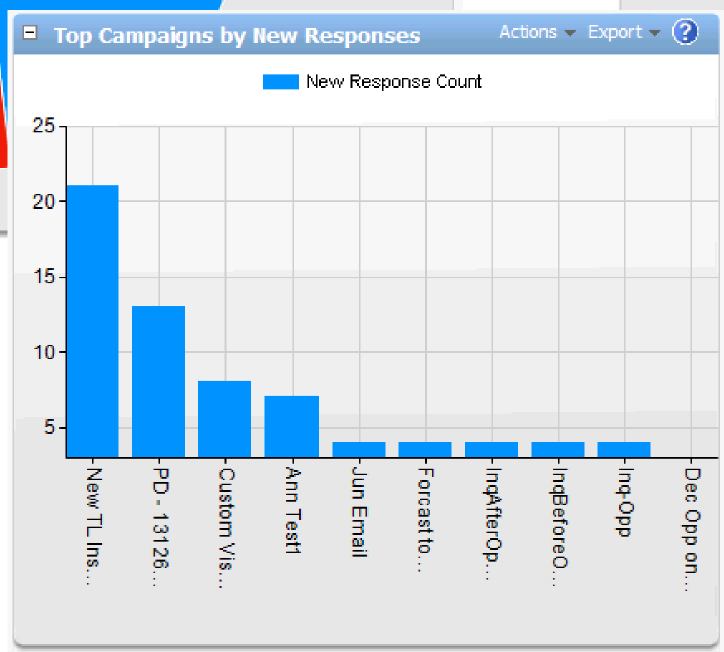
Inquiries by Stage

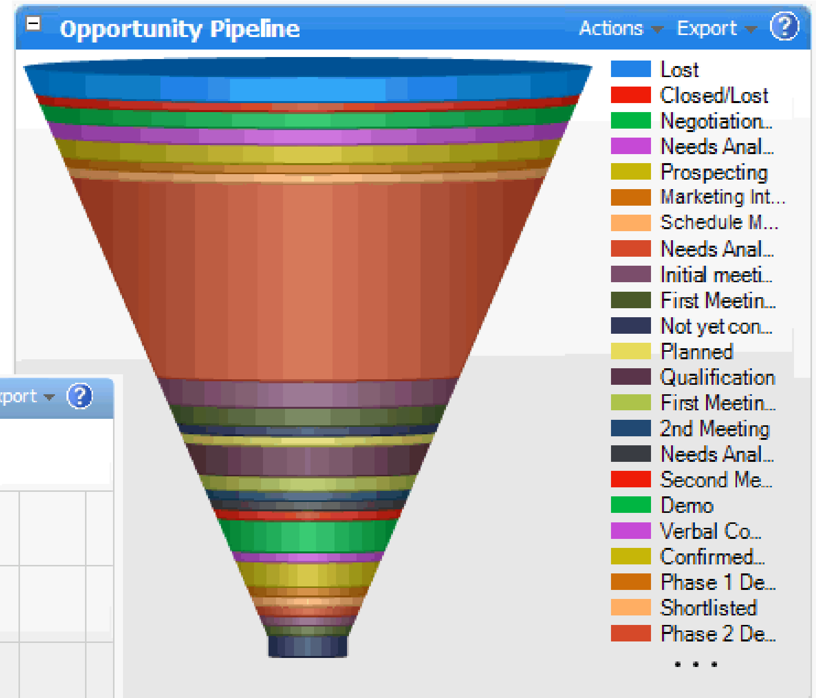
Actions Export

Lead Rank	Previous Count	Current Count	Delta
Inquiry	602	609	1.2
Marketing Qualifie...	2832	2841	0.3
Sales Accepted L...	14372	14478	0.7
Sales Qualified Le...	2609	2632	0.9

Campaign Overview Dashboard







Campaign Revenue Overview Dashboard :

Measure campaign ROI, value to opportunities

Attributed Revenue and ROI

Actions Export

Hierarchy Name	Attributed ROI	Attributed Revenue	Actual Cost
.Sam_2008 - updated July 22nd	0%	$0.00	$0
05_RH_Test Campaigns	0%	$0.00	$0
1 June 26 - Opps testing 5	-95%	$2773.35	$55000
1 May 8 level 5	0%	$0.00	$0
1a PD testing Opps - 5	-100%	$177.63	$40750
3 May 8 - Purpose 3 - level 5	0%	$0.00	$0
5 - testing uploads	0%	$0.00	$0
5th - Ann	0%	$0.00	$0
a form sharing April 15 - 5	0%	$0.00	$0
Ann - 5th Level	0%	$0.00	$0

Campaign Revenue, Cost and ROI

Actions

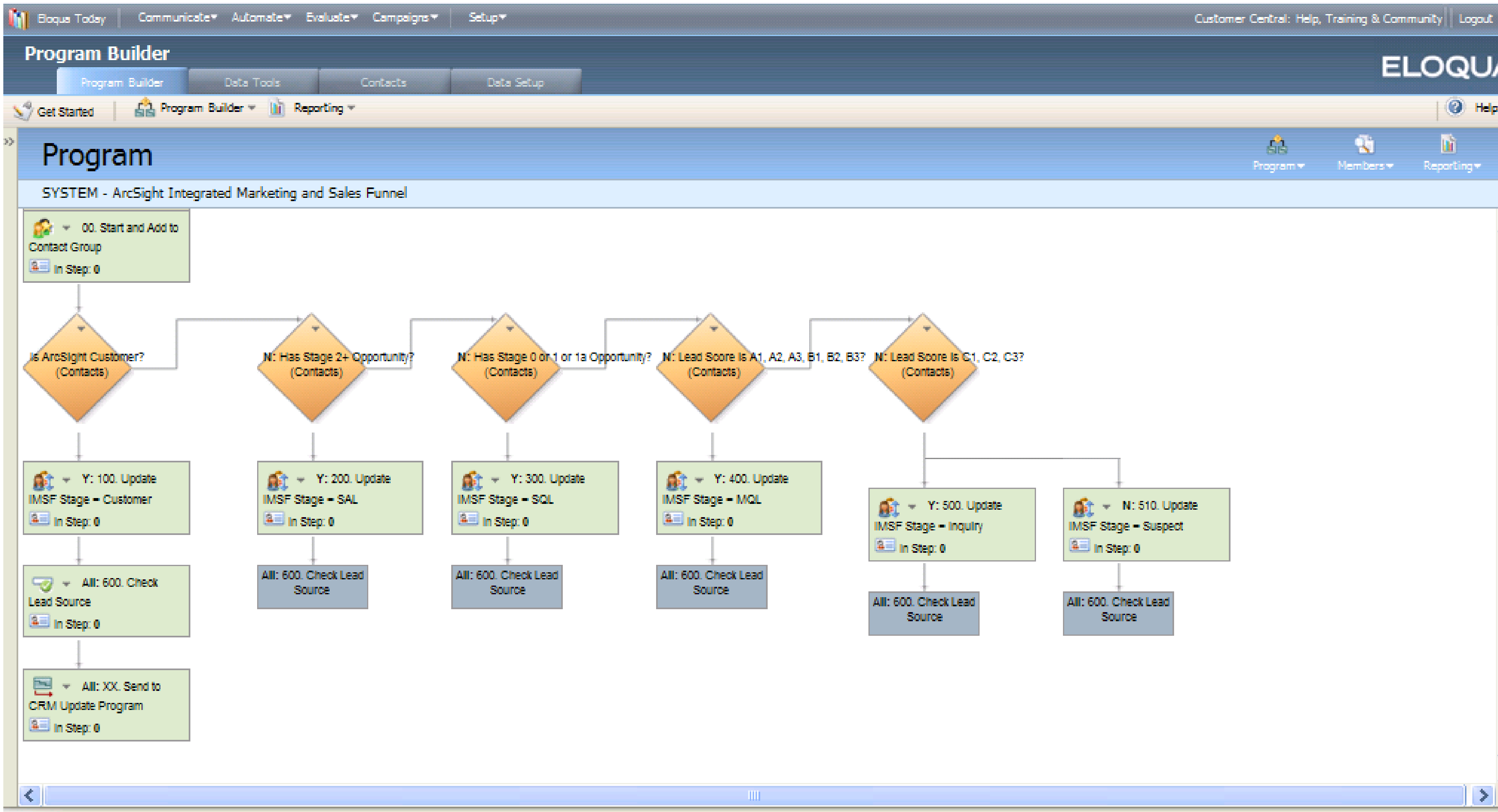
Metric	Value
Attributed ROI	144%
Attributed Revenue	$41487.25
Actual Cost	$17000
Average Opp Value	$5694.08
Influenced ROI	3216%
Influenced Revenue	$563713.81

Cost Metrics

Actions Export

Metric	Cost
Cost/Activity	$0.00
Cost/Inquiry	$25.30
Cost/New Inquiry	$33.46
Cost/Opportunity	$75.56
Cost/Opportunity Won	$708.33

Lead funnel stages added to Leads/Contacts in SF.com



Key Take-aways

- Market your marketing efforts
- Remove the quantity and quality complaint by giving visibility to your inside sales and sales team
  - Send daily territory reports on lead activity
- Implement the Campaigns module to track the health/success of your campaigns and address your ROI inquiries

"Marketing metrics will not make your job easier,

but it will help you do your job better."

Demos

- Creating daily reports
- Campaigns Module

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Appendix

How do I set up daily reports?

1. Create Conditions

   Automate menu -> Web profiling -> Segmentation tab -> New Condition

   - Build out all relevant conditions
   - ex. States in territory
     - Profile field: State/Province (from IP) -> Is Equal to -> California

2. Create Segment

   New Segment

   - Add all relevant conditions to segment
   - Include Visitors who meet **ANY** of the following Conditions
     - Ex. West Territory might include the following State conditions: California, Oregon, Arizona, Hawaii, etc.
   - But Exclude Visitors who meet **ANY** of the following Conditions
     - Ex. Comcast, Internet Services, Aggregated Email = *@eloqua.com, Aggregated Email = *@yourcompany.com, Aggregated company = Your Company

3. Create Report from Segment

   Evaluate menu -> Reporting -> Report Console tab -> Visitor Profiles tab -> Website Visitor Segmentation -> Segments -> Visitor by Segment -> select the segment you created in Segment dropdown -> Click on View Report button -> Change to Customer Info in dropdown -> Save -> Save this Report (give it a relevant name)

4. Add Report to Agent (person)

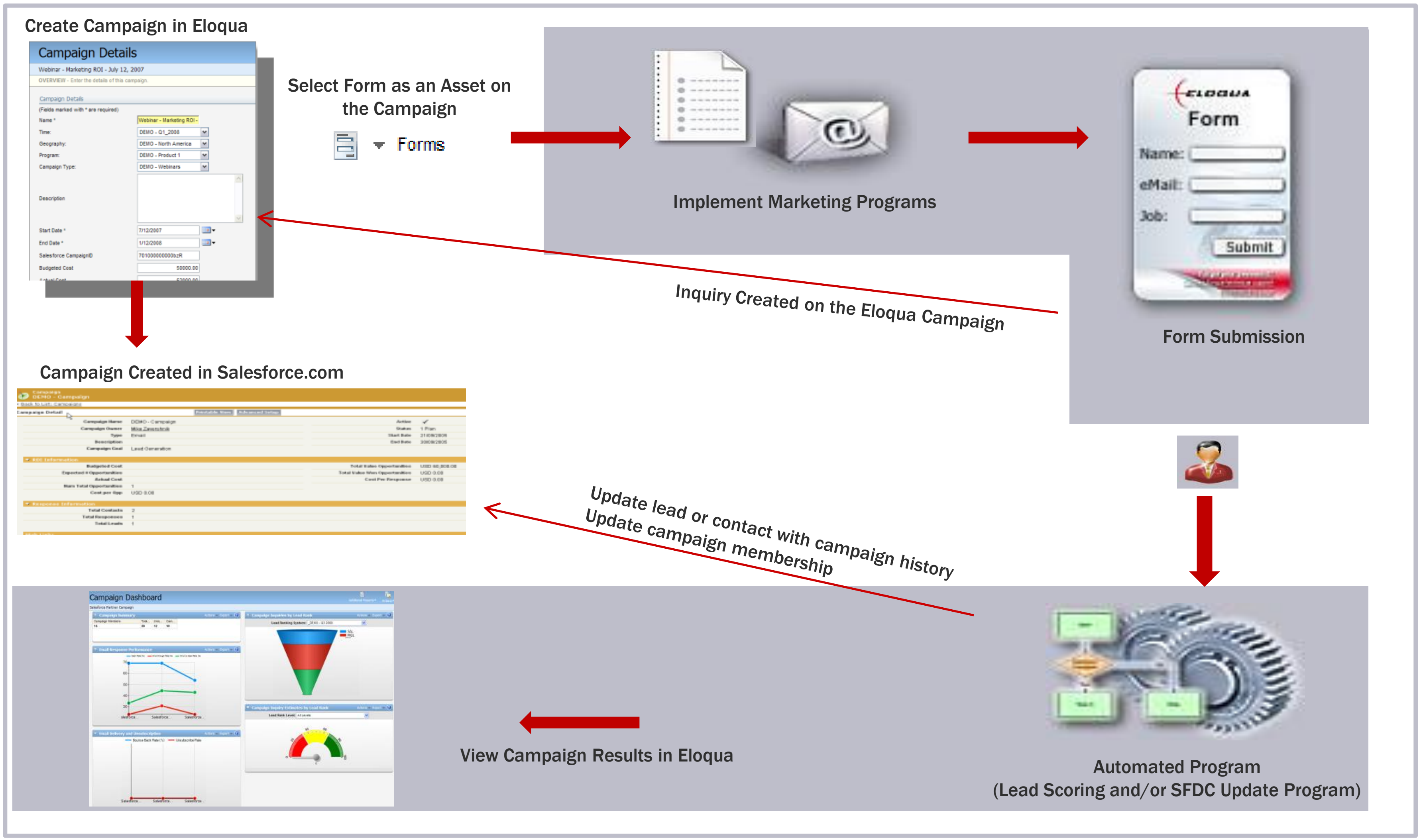
   Click on Report Admin tab -> Agents tab -> Click on the Agent (person) you want to add the report to -> Under Report List Section, click on Edit -> Click on Add Existing Saved Report (search for your saved report) -> Dropdown Select this Report -> Save and Close -> Close

Best practices on daily report settings to customize to your sales needs

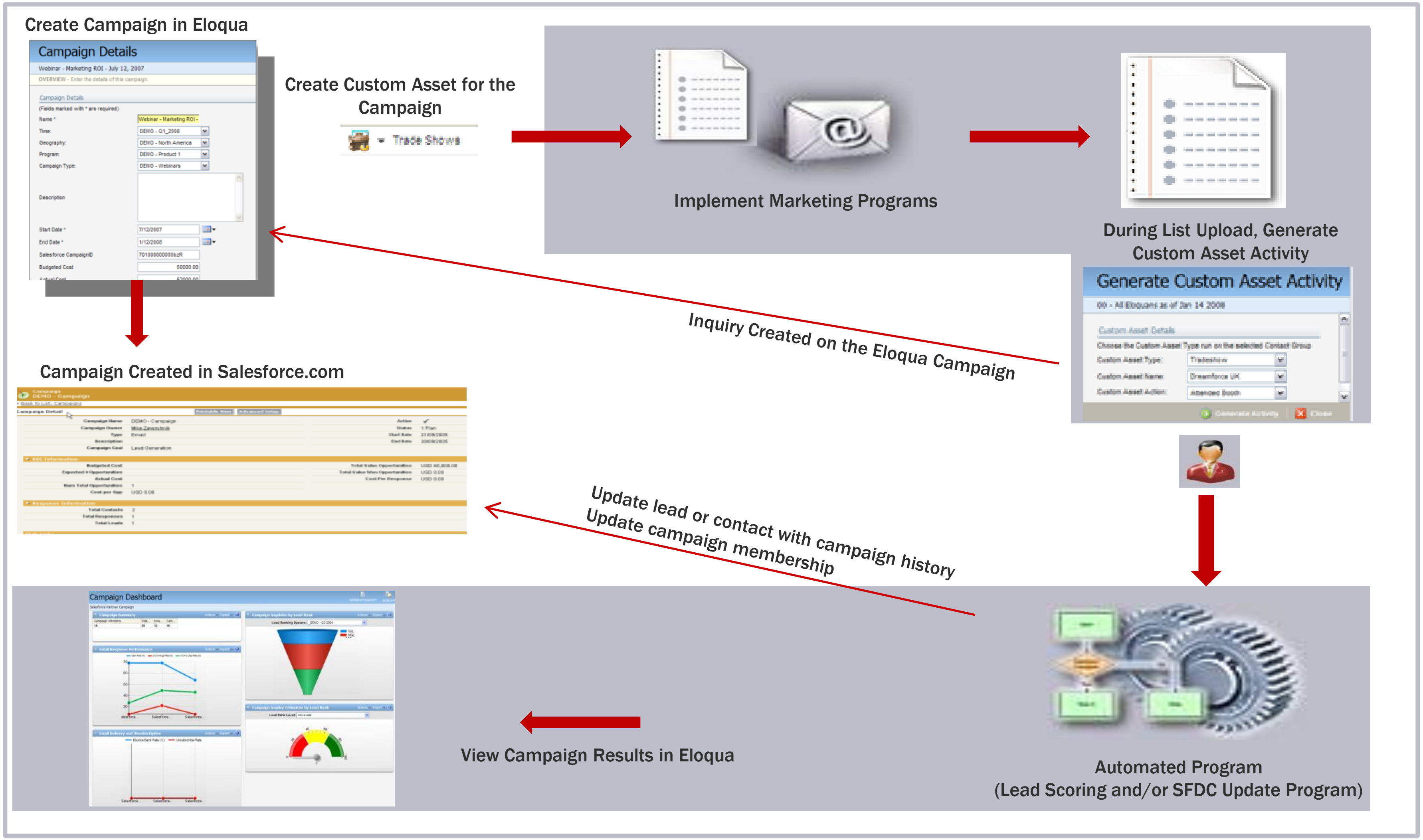
ArcSight

1. Deliver daily at 8 am in their time zone (default is EST)
2. Duration: Use relevant range – Last X Hours – 72
   - Past three days – otherwise too much data, but still gives them weekend info on Monday
   - Hours better than days, otherwise miss most recent
3. Profile View: Customer Info View (not Technical information)
4. Customize fields – for instance EMEA likes to see the countries, so we added country to report
5. Sort By: Last Visit, Descending – puts the most recent “warmest” visitors first
6. Conditions: by State, Country or both depending on territory; by email type
7. Must use exact spelling (salesrep and location)
8. Filter out the following:
   - ISPs
     - Aggregated company = Comcast, Verizon, etc. or Aggregated email = *@comcast.com
   - Your company and Eloqua
     - Aggregated email = *@eloqua.com and Aggregated company = Eloqua
9. Rename the report to something relevant
   - Condition Visitor (Time Span) means nothing to the field
   - Web visitors by State IP address is more informative
10. Handling Federal
    - Conditions (OR):
      - Email address contains .gov, .nav, .mil
      - State IP address = District of Columbia
      - Salesrep = Howard Ruskin

Campaign Workflow: Form Submissions



Campaign Workflow: List uploads



Campaign Revenue Overview Dashboard (cont'd):
Measure campaign ROI, opportunities - influenced and attributed

Opportunity Touches Actions Export

Hierarchy Name	Before Opp Creation	Between Opp Creation and Close
.Sam_2008 - updated July 22nd	0	0
05_RH_Test Campaigns	0	0
1 June 26 - Opps testing 5	2	2
1 May 8 level 5	0	0
1a PD testing Opps - 5	0	0
3 May 8 - Purpose 3 - level 5	0	0
5 - testing uploads	0	0
5th - Ann	0	0
a form sharing April 15 - 5	0	0
Ann - 5th Level	0	0

Definitions – Attributed Revenue

- **Attributed Revenue** - The Revenue assigned to a specific Campaign after applying a method for splitting the revenue derived from an Opportunity. For example, an Opportunity may provide $100,000 in Revenue, but that amount may be split up with segments attributed to different Campaigns that affect the sale.
  - Attributed ROI = [(Attributed Revenue - Actual Cost) / Actual Cost]
  - "1 June 26 - Opps testing 5" = [($2,773.35 - $55,000) / $55,000] = -95%
  - Because the cost of the campaign was high at $55,000 and the return on that investment in the form of Attributed Revenue was only $2,773.35, this was not a good investment or perhaps the investment hasn't fully matured. We show a negative ROI where costs exceed the attributed revenue associated with the campaign hierarchy.

Definitions

- **Influenced Revenue** - The full Revenue from all Opportunities associated with a Campaign. For example, if a Campaign is associated with an Opportunity worth $100,000, but none of that Revenue is attributed to the Campaign, the Influenced Revenue for that Opportunity is still $100,000, the full value of the Opportunity.
- **Weighted Revenue** - The Influenced Revenue multiplied by the Probability of Closing (%) given the stage that an Opportunity is currently in. Each stage in the sales cycle (for example, Demo, Verbal Agreement, or Closed/Won; these will vary for your company) is assigned a Probability of Closing. For instance, if we have an Opportunity worth $100,000, and it is in a Verbal Agreement stage in the sales cycle with a Probability of Closing of 65%, then the current Weighted Revenue is $65,000.
  - Think of Weighted Revenue as the Forecasted Revenue amount (Influenced Revenue multiplied by Probability % to close)
- **Attributed Revenue** - The Revenue assigned to a specific Campaign after applying a method for splitting the revenue derived from an Opportunity. For example, an Opportunity may provide $100,000 in Revenue, but that amount may be split up with segments attributed to different Campaigns that affect the sale.

Campaign module definitions

Term	Definition
Campaign	The lowest level in the hierarchy (i.e. level 1) and contains the assets that are executed as part of the Campaign.
Hierarchy	Campaign hierarchies are tree structures that allow you to organize your Campaigns and roll up (summarize) the Campaign reporting at each hierarchy level. The hierarchy would normally mirror your organizational structure or how you need to report your marketing success. In the system, hierarchies are levels 2 to 5.
Asset (or Marketing Asset)	The individual pieces of the Campaign (i.e. Email, Forms, etc.) Assets are grouped by Outbound Content, Activity Capture and Non-Eloqua Asset Types.
Activity	An inbound activity on a campaign (i.e. open, click-through, web visit, form submit, etc.).

Campaign module definitions (cont'd)

Response	The activity that has been defined by the user as an official lead response to a campaign.
Total Responses	All inbound responses associated to a Campaign.
Unique Responses	All inbound responses associated to a Campaign per individual (Contact, Prospect, Company).
Lead Stage System	The values you use to rate your Leads. In other words, categories (such as A, B, C, D, etc.) given to denote a Lead's worthiness to go into the selling process and provide priority in sales actions.
Lead Configuration	- (Eloqua) Lead - An individual that gets created as a lead because they have met a predefined level of qualification. In Eloqua®, this means that a Lead Stage Rule was run on the individual. Only individuals that are already leads in the Eloqua® system can be associated to a Campaign as a response.

Calculations

- Attributed ROI = [(Attributed Revenue - Actual Cost) / Actual Cost]
  - 144% = [($41,487.25 - $17,000) / $17,000]
- Influenced ROI = [(Influenced Revenue - Actual Cost) / Actual Cost]
  - 3216% = [($563,713.81 - $17,000) / $17,000]