



**Quick guide and Checklist to prepare campaign**

Look at Modern Mark, how happy and confident he is on the left picture and/vs how scared and desperate he looks on the right image. This is a summary of how your campaign might go depending on how well you prepared it offline before jumping onto Eloqua. So keep in mind: **if you do have a clear idea and structure of your campaign offline it would be much easier to implement it digitally in Eloqua**. Here is a checklist that Modern Mark put together for you to help in your campaign preparation. You'll find here some questions you have to wonder when preparing campaign and make sure you don't forget anything.



The key points/topics/areas you have to question yourself about are the following ones:

### **Purpose – Objective – Scope – Audience – Time**



# Purpose

The key question here is why I am doing this campaign? In other word what is the nature/reason of my campaign? :

- ☐ What is the nature/reason of my campaign?
  - Is it an informative campaign?
  - Is it Nurturing one?
  - Is it a promotion campaign for new product or service ?
  - Is it a lead generation campaign? If yes why?
- ☐ Why have I been tasked to do this campaign?

# Objective

Key question for this: what am I trying to achieve with this campaign? Once you have your goal/objective it's important to quantify it, specifying an amount you target to know where you want to go with this campaign.

- I am trying to generate for leads for a specific industry? If yes, how many?
- I am trying to get people registered for a specific event or webinar? If yes, how many?
- **Put clear, realistic and achievable numbers**

# Scope

Define the frame of your campaign:

- Is my campaign country focused, regional or global?
- Which stakeholders/people will need to be involved in my campaign creation and implementation? You will need to align with them to make sure the timeline is followed and achieved. If so, who owns what?
- Is my campaign only an email campaign? Or does that include something else, other channels (social media...)? If yes, how can I link/include it to my email campaign?

# Audience

The key question here is: Who is my audience for this campaign?

- I am targeting leads, contacts, prospects, clients or even members?
- Is my audience local/national, regional or global? In case of regional, shall I adapt the content by country to localise it even more or do a general one for the whole region?
- Which are the criteria which I based my audience choice on?
- Do I need to choose my audience based on a specific job title or specific vertical/industry criteria? If yes, which ones and why?

- Do I need to choose my audience based on interest they had in the past for another specific topic/campaign?

## Time

- Define the length of your campaign: will it be running during 1 week, 2 months...?
- Define start and end dates of your campaign
- Define milestones dates in your campaign: when will you send the reminder? When is the event/webinar happens if any?
- Identify the best days and times to deliver your message for your audience: is there a most efficient day/time that I know my audience will be more receptive to my message e.g. try to send the main emails on Tuesday/Thursdays in morning
- Fix a clear time zone you'll use for your campaign
- think in terms of feasibility (Is my timeline realistic based on how long I will need to create all the assets and get it ready?)

## Time to think in an Eloqua way



1. List the criteria of your audience to know how to create your segment, are you using people who take part of an existing shared list? Are you creating your segment based on filter criteria only? If yes which one(s)?

2. List the assets you will need and how many of each:

- Emails
- Landing pages
- Forms
- Shared lists
- Images and others files
- Links

3. Draw your flow on a paper. Draw it thinking which action you want to take for your audience (make them wait, add them to a specific list...) or which decisions you want them to take (submit a form, open or click an email...). Key question here to keep in mind is "What I am evaluation for this specific step?".

When you build it in Eloqua remember the following colours which might help you to find to correct actions/decisions steps:

- Green: Audience related (Mainly segment)
- Blue: Assets which means email, Landing pages and Forms. Note than only the email items can be linked to other elements in the flow. The form and landing pages icons are only here for reporting purposes and know which LP/form you are referring to in your canvas.
- Red: Decisions steps which means YOUR AUDIENCE DO SOMETHING (submit form, open email). THEY are the one DOING. Position yourself on your audience side/shoes.
- Purple: Actions steps which means YOU DO SOMETHING FOR YOUR AUDIENCE (make them wait...)

## One page checklist – Ready to Print

### 1. Answered the following questions:

- ☐ What is the nature/reason of my campaign? (I am trying to generate for leads for a specific industry? If yes, how many? I am trying to get people registered for a specific event or webinar? If yes, how many?)
- ☐ **Put clear, realistic and achievable numbers**
- ☐ Is my campaign country focused, regional or global?
- ☐ Which stakeholders/people will need to be involved in my campaign creation and implementation? You will need to align with them to make sure the timeline is followed and achieved. If so, who owns what?
- ☐ Is my campaign only an email campaign? Or does that include something else, other channels (social media...)? If yes, how can I link/include it to my email campaign?
- ☐ I am targeting leads, contacts, prospects, clients or even members?
- ☐ Is my audience local/national, regional or global? In case of regional, shall I adapt the content by country to localise it even more or do a general one for the whole region?
- ☐ Which are the criteria which I based my audience choice on? (Do I need to choose my audience based on a specific job title or specific vertical/industry criteria? If yes, which ones and why? Do I need to choose my audience based on interest they had in the past for another specific topic/campaign?)
- ☐ Define the length of your campaign (will it be running during 1 week, 2 months...? Define start and end dates of your campaign, Define milestones dates in your campaign: when will you send the reminder? When is the event/webinar happens if any?)
- ☐ Identify the best days and times to deliver your message for your audience: is there a most efficient day/time that I know my audience will be more receptive to my message e.g. try to send the main emails on Tuesday/Thursdays in morning
- ☐ Fix a clear time zone you'll use for your campaign
- ☐ Think in terms of feasibility (Is my timeline realistic based on how long I will need to create all the assets and get it ready?)

### 2. List the criteria of your audience to know how to create your segment, are you using people who take part of an existing shared list? Are you creating your segment based on filter criteria only? If yes which one(s)?

### 3. List the assets you will need and how many of each:

- ☐ Emails: .....
- ☐ Landing pages: .....
- ☐ Forms: .....
- ☐ Shared lists: .....

- ☐ Images and others files: .....
- ☐ Links: .....

4. Draw your flow on a paper. Draw it thinking which action you want to take for your audience (make them wait, add them to a specific list...) or which decisions you want them to take (submit a form, open or click an email...). Key question here to keep in mind is "What I am evaluation for this specific step?".
- 5.
6. Jump onto Eloqua to build all the above digitally