

Advanced Intelligence **PLAYBOOK**

A step-by-step guide to learn how leverage advanced intelligence (AI) to accelerate marketing performance and make better strategic decisions.



Advanced Intelligence Playbook

PHASE 1
***Audit & Build
Awareness***

PHASE 2
***Apply &
Measure***

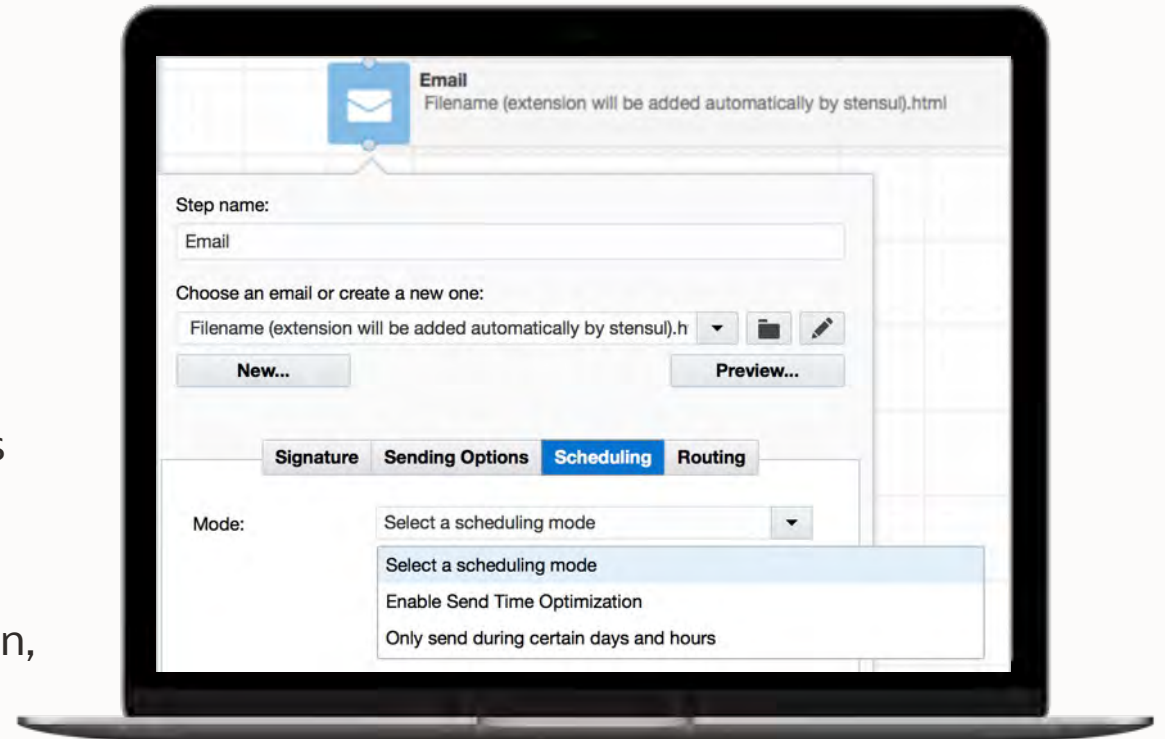
PHASE 3
***Optimize &
Refine***

1 The Advanced Intelligence Playbook

AUDIT & AWARENESS

Send Time Optimization

1. Identify what campaigns would be best suited for send time optimization
 - Best for nurturing programs, newsletters, etc., not appropriate for time sensitive communications like webinar invites or reminders
2. Determine your KPIs
3. Review key historical campaigns to determine benchmarks
4. Review historical data to get a sense of key open times for specific contacts of interest (if an existing customer)
5. Select 1-3 campaigns to send using send time optimization, and then measure against your previously identified benchmarks

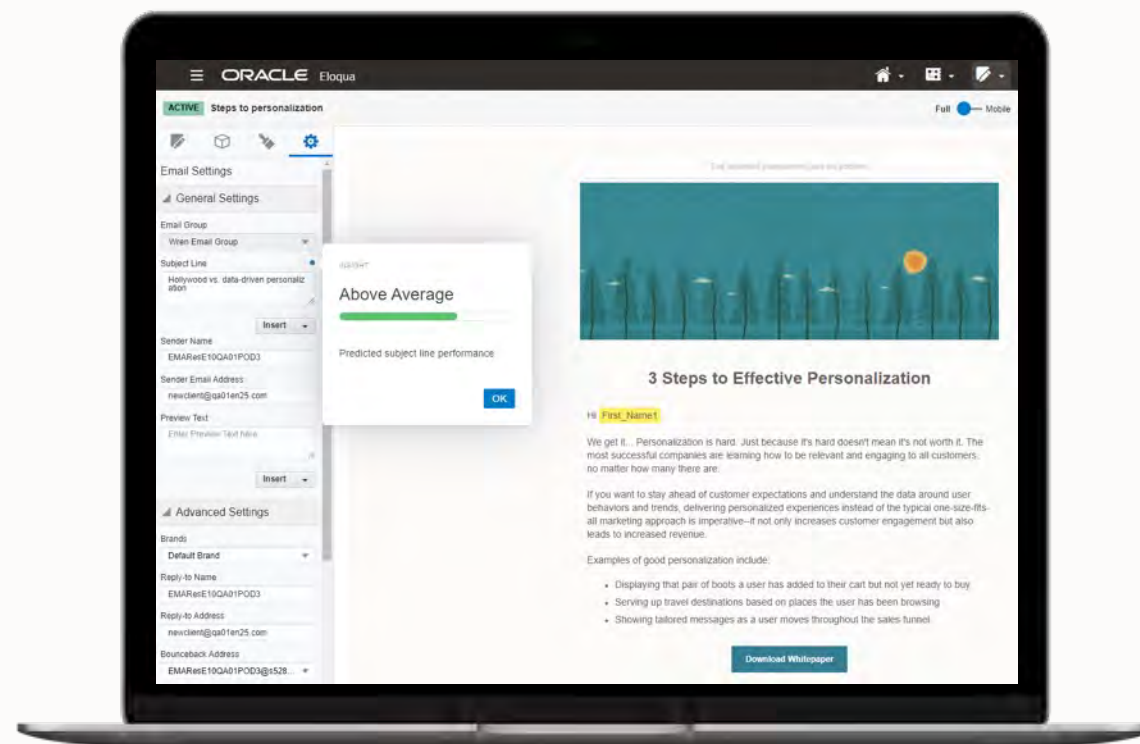


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AUDIT & BUILD AWARENESS

Subject Line Optimization

1. Get different subject line options from your creative team and use subject line optimization to determine the best subject line to use
2. Look at top past email campaigns and see how their subject lines are rated by the subject line optimization model.

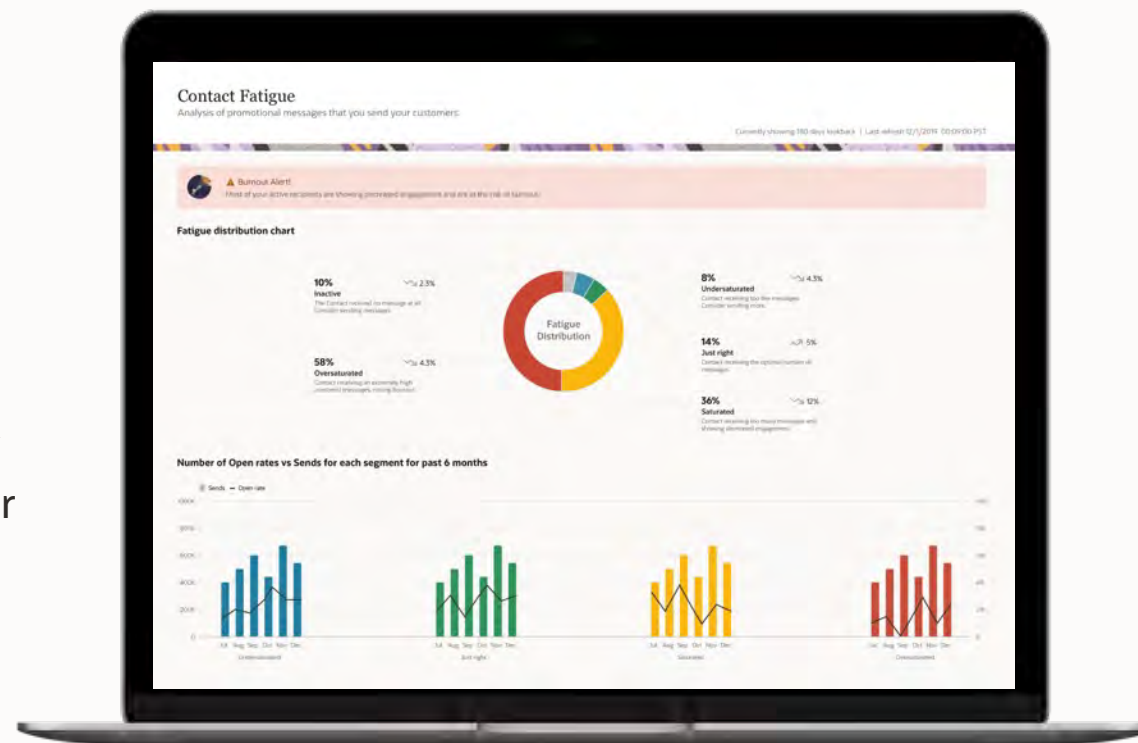


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AUDIT & BUILD AWARENESS

Fatigue Analysis

1. Get your bearings by reviewing the Fatigue Analysis Dashboard to see your instance breakdown by fatigue level.
2. Exclude oversaturated contacts from all non-essential segments
3. Looking at your workflows and set a high-level plan to reduce oversaturated contacts, increase just right/highly engaged contacts, and actively engage undersaturated or Inactive contacts.
4. Start tracking the fatigue breakdown of your instance month over month

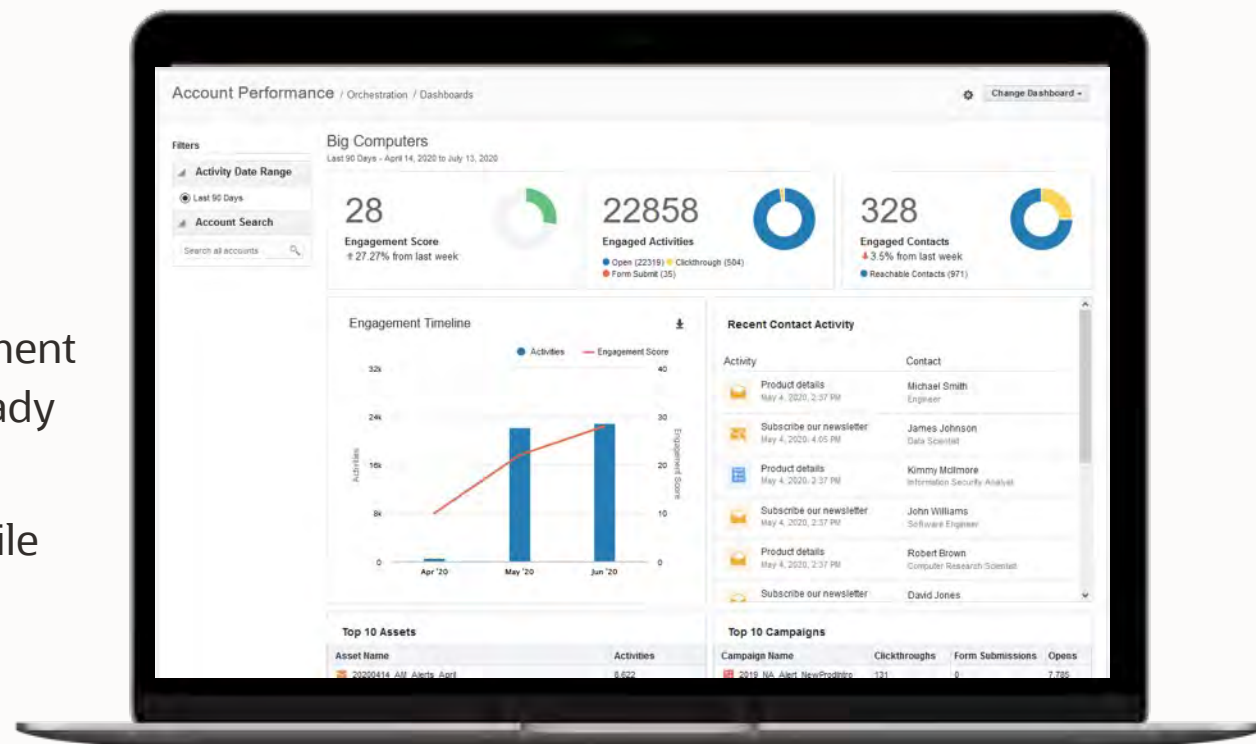


1 The Advanced Intelligence Playbook

AUDIT & BUILD AWARENESS

Account Intelligence

1. Data Hygiene and other considerations for account driven Eloqua implementation
2. Establish account to contact linkage, establish how account records will be updated
3. Use account-based reporting and Account Engagement dashboard to understand the accounts you are already marketing to
4. Work with sales to identify your ideal customer profile (ICP) and agree on the accounts to target




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APPLY & MEASURE

Send Time Optimization


1. Regularly send select campaigns using send time optimization
2. Perform real-time benchmarking to monitor campaign performance



Higher
clickthrough
rate



Higher
open rate




Reduced
spam
complaints

2 The Advanced Intelligence Playbook


APPLY & MEASURE

Subject Line Optimization


1. Experiment with different words and phrase combinations to see which words and phrases most impact performance, then document incorporate into future campaigns.



Higher
clickthrough
rate



Higher
open rate




Reduced
spam
complaints

2 The Advanced Intelligence Playbook


APPLY & MEASURE

Fatigue Analysis


1. Target undersaturated and just right/highly engaged contacts in segments and send them additional high value content to help accelerate their journey
2. Target inactive contacts that are a good target audience and add them into re-activation campaigns or nurture flows.
3. Use fatigue to personalize emails or landing pages (including subject lines and preview text) using dynamic content, such as showing additional content to highly engaged contacts.
4. Build custom insight reporting using fatigue level and other metrics your business cares about, like fatigue by account or email performance by fatigue level



Higher open
& click
engagement



Higher form
or web
conversion



Reduced
spam
complaints




Better
marketing
strategy &
planning

2 The Advanced Intelligence Playbook

AUDIT AND AWARENESS

Account Intelligence

1. Use account engagement score in segmentation along with your target account list and lead score to help drive personalization and campaign flow
2. Monitor account-based campaigns with Account Engagement and Account Performance dashboards
3. Discover what content is most effective within target accounts and identify key players on buying committee
4. Consider account enrichment (i.e., DataFox Data Management) for further segmentation, personalization, and account identification opportunities



Higher
engagement
with target
accounts




Improved
marketing
qualified
leads

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OPTIMIZE & REFINE

Send Time Optimization


1. A/B test using send time optimization and start to combine this testing with subject line optimization



Higher
clickthrough
rate




Higher
open rate



Reduced
spam
complaints



Increase in
engagement
& email
forwarding




Correlate
with activity
in Account
Intelligence

3 The Advanced Intelligence Playbook


OPTIMIZE & REFINE

Subject Line Optimization


1. Use subject line optimization to determine the top subject lines out of several options then deploy those in an A/B test or multivariate test.
2. Document subject line best practices for your Oracle Eloqua instance and share with key stakeholders (including your creative and operations teams!)



Higher
clickthrough
rate



Higher
open rate



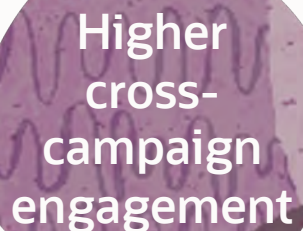
Reduced
spam
complaints

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OPTIMIZE & REFINE

Fatigue Analysis

1. Create a program listener that listens for fatigue level changes and routes the contact to a relevant program, campaign, or shared list
2. Use fatigue level to automatically cap and manage email send frequency to contacts through a combination of programs, segments, campaigns, and lists.
3. Send fatigue to your CRM, and in other ways share it with sales reps to help prioritize prospects
4. Add fatigue as criteria in Eloqua lead scoring or send it to externally managed lead scoring
5. Incorporate fatigue in data hygiene practices such as removing inactive contacts



Higher
cross-
campaign
engagement



Greater
lifecycle
value



Higher lead
conversion



Better
reputation
management
& data
hygiene

3 The Advanced Intelligence Playbook


OPTIMIZE & REFINE

Account Intelligence

1. Incorporate account score and fatigue status in campaigns, lead scoring etc.
2. Use the account score to uncover best opportunities and then leverage subject line and sent time optimization, along with fatigue analysis to optimize your marketing efforts
3. Use account engagement score and fatigue in sales reporting to help prioritize efforts and sales outreach



Higher
deal value



Pipeline
acceleration
within target
accounts



Better lead
conversion



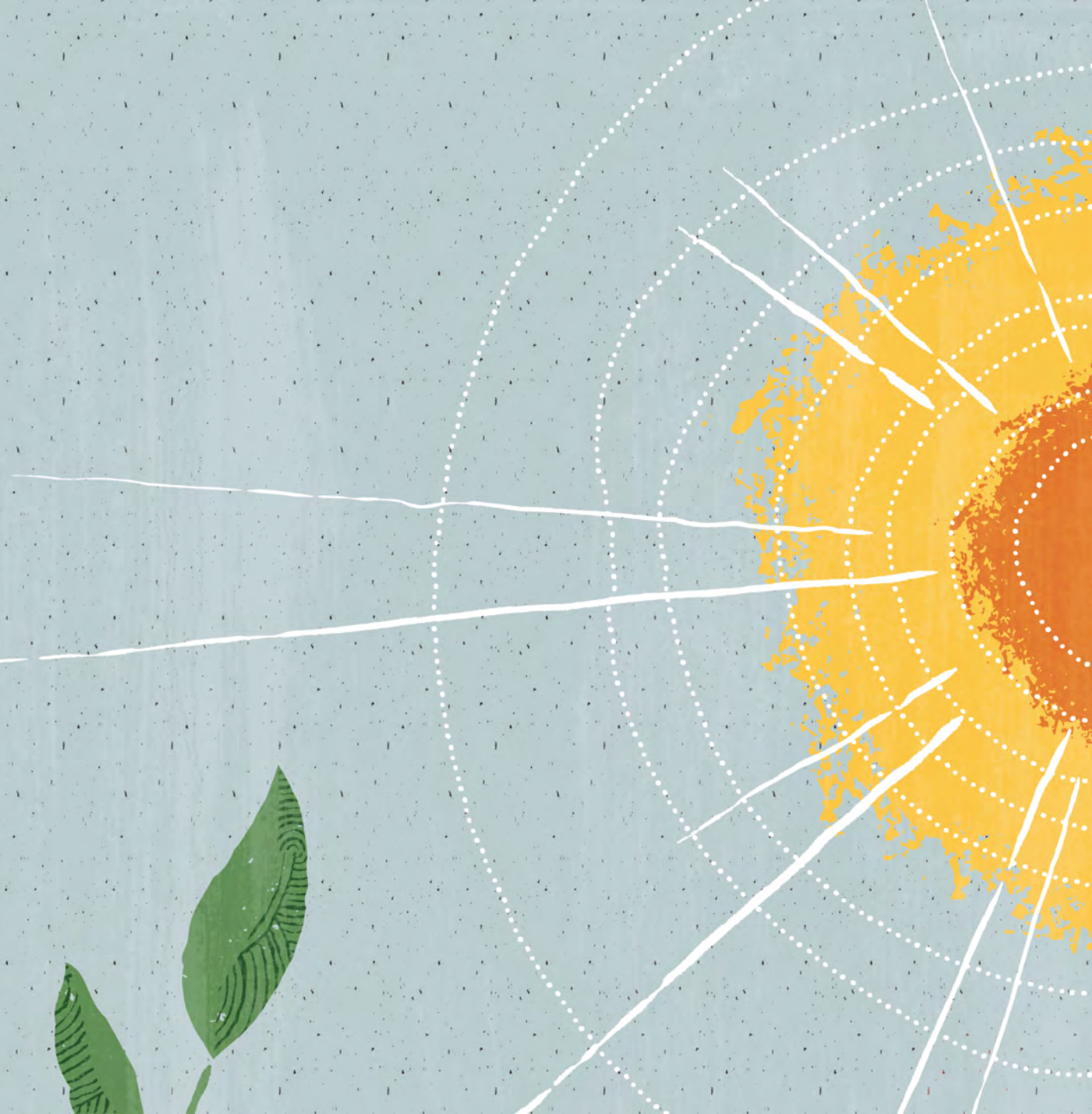
Improved
sales
alignment



Increased
deal velocity

Advanced Intelligence ROI EXERCISE

Map out your return on investment when applying advanced intelligence (AI) to your sales funnel.



Return on Advanced Intelligence

CURRENT SALE PRICE	<i>\$10,000</i>	
CURRENT CONVERSION RATE	<i>3%</i>	
TARGET CONVERISON RATE	<i>5%</i>	Applying Advanced Intelligence
LEADS	<i>20,000</i>	
REVENUE	<i>\$60,000,000</i>	
NEW REVENUE	<i>\$100,000,000</i>	
INCREMENTAL REVENUE	<i>\$40,000,000</i>	



Applying Advanced Intelligence: 7% Uplift in Open Rate

CAMPAIGN	CONTACTS	OPEN RATE	CTR	FORM CONVERSION	LEADS ROUTED	OPPORTUNITIES	INCREMENTAL RENVENUE
Re-Engagement	89,000	21%	3%	1%	526 (+87)	105 (+17)	+\$521,505
Core Nurture	28,000	18%	1%	1%	319	34 (+6)	+\$98,552
Welcome	15,549	53%	8%	6%	113	134 (+22)	+\$78,514

\$698, 571 in incremental revenue across 3 campaigns



Applying Advanced Intelligence



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CAMPAIGN	CONTACTS	OPEN RATE	CTR	FORM CONVERSION	LEADS ROUTED	OPPORTUNITIES	INCREMENTAL REVENUE

XXXXX

in incremental revenue across X campaigns