Checklist for Expanding Oracle Eloqua to New Business Units

For many large organizations, they implement Oracle Eloqua phases. Or they may acquire a company and eventually need to move them into [Eloqua](). When it's time to onboard a new business unit, a plan is essential to ensure everyone is on the same page. It's also an opportunity to address the organization's unique challenges and address potential issues early in the project.

One way to ensure a successful deployment is following a checklist to confirm you ask and answer all the relevant questions. In this article, we'll explore many of the planning steps and discuss the various tasks involved. An [Eloqua SmartStart]() from a qualified partner also covers many but not all of these steps.

Key Considerations

Depending on your Oracle Eloqua license, you may have the option of using an existing or creating a new Oracle Eloqua instance. There are many factors when making this decision, but the key is minimizing disruption to existing users and setting the new business unit up for success. The following are a series of questions that will uncover the best approach for your unique business case.

Contacts

• Are there overlapping contacts within the two business units?
• Does the new business unit share a large number of contacts with existing business units

Yes, share contacts – Having them use the existing instance will allow for better email frequency

monitoring to prevent [email fatigue](#). And your total contact count (which Oracle [Eloqua](#) uses to determine the cost) will not increase substantially. The contact count is performed across all Eloqua instances and counts the total number of contact records, regardless of duplication across all instances.

No, contacts do not overlap – Does access to contact records need to be restricted using Contact Level Security? If yes, and this is not already set up in the existing instance, consider this an additional piece to configure.

Subscription Management

- How is subscription management configured in the existing instance, and would it be different for the new business unit?

Same subscription management – use existing

Different – To use the existing instance, you may need to make modifications that allow each business unit to manage their subscriptions separately, i.e., create unique preference management pages. Contacts previously globally unsubscribed may need to be re-subscribed and preferences updated on the email group level, especially if contacts are shared mainly with the new business unit.

Integrations

- Are there additional integrations required by the new business unit, or can they leverage existing

integrations?

- Do they use the same CRM system, and if so, are the lead creation processes similar?

Yes — You eliminate the need to set up a new integration by using the existing instance.
No — evaluate how the existing CRM integration would need to be modified. If integrations require substantial changes, there may be no benefit to using the current instance. The level of effort to configure the integration may be the same as setting up a new instance and different integration.

Another consideration if using a different CRM system and overlapping contacts is how to implement Account Linkage.

Whether or not there are non-CRM integrations shouldn't impact the decision, as new integrations, whether it's a webinar platform or SFTP import, need to be set up in the existing in a new instance. There may even be existing non-CRM integrations that can be leveraged by the new business unit in the current instance.

Third-Party App

Are there any third-party apps in the existing instance that require licensing for a new instance? If so, consider the additional costs.

Campaign Responses

- Does the new business unit define campaign responses the same way as the existing business

units?

Yes – The same Instance

No – New instance. Response Rules in Eloqua apply for ALL activities in the instance, and you cannot modify them for each business unit. You may need to evaluate how campaign responses are currently sent to the CRM system and change the process if the new business unit has different definitions.

Branding

- Does the new business unit have specific branding requirements? For example, will they require separate subdomains to host landing pages, branding & deliverability, and out-of-the-box subscription management?

Yes – consider creating a new instance for a separately branded send, image, and apps domain.
No – existing instance

Additional Considerations
IP Warming

If leaning towards setting up a new instance, remember you must first warm up the new dedicated IPs before sending large volumes of emails, a process that can and should take up to 4 weeks.

Reporting

- Are the reporting requirements similar, or are they very different?

Many standard dashboards query the entire database, such as Campaign Analysis Overview. Some campaign dashboards display metrics based on a custom campaign field, such as Business Unit, to allow more granular reporting for each business unit. Most Insight reports are also configurable for specific asset metrics.

Asset Templates

- Are there asset templates (email/form/landing page/campaign) in the existing instance that can be leveraged by the new business unit?

Yes – save time recreating asset templates by using the existing inst
No – Similar level of effort is required to create new templates in the existing instance or new instance.

Data Quality and Processes

- Are your data standards such as country to region, job title to a job role, or level the same?

Yes – reduce effort by using existing lookup tables and automation without rebuilding them.

Conclusion

When adding new business units to your [Oracle Eloqua CX Marketing](#) platform, carefully consider your options when choosing to use an existing or creating a new Eloqua instance. Following a checklist can help ensure you ask and answer all the relevant questions during the decision-making process. While there are many factors, the choice is mainly dependent on how similar, or different the customer data and sales processes are between the respective business units

Get the Help you Need

Need help choosing the best path forward? 4Thought Marketing has deep experience helping companies consider their options carefully when adding a new business unit. [Contact us](#) to discuss your requirements with one of our specialists.

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