

# Keep Driving While Changing the Tires:

A Year of Transformation

April 11, 2018

**Bloomberg  
Law**

**Bloomberg  
Tax**

**Bloomberg  
Government**

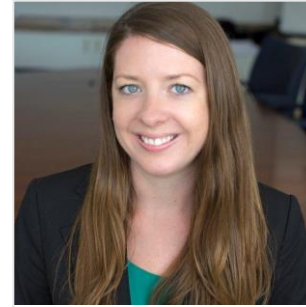
**Bloomberg  
Environment**



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# Bloomberg BNA

is an affiliate of Bloomberg L.P., the global business, financial information and news leader.

Our products provide legal, tax, compliance, government affairs and government contracting professionals with critical information, practical guidance and workflow solutions.

# Our Eloqua Timeline



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Law

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## 2015

Rolled out Eloqua  
and centralized  
campaign execution

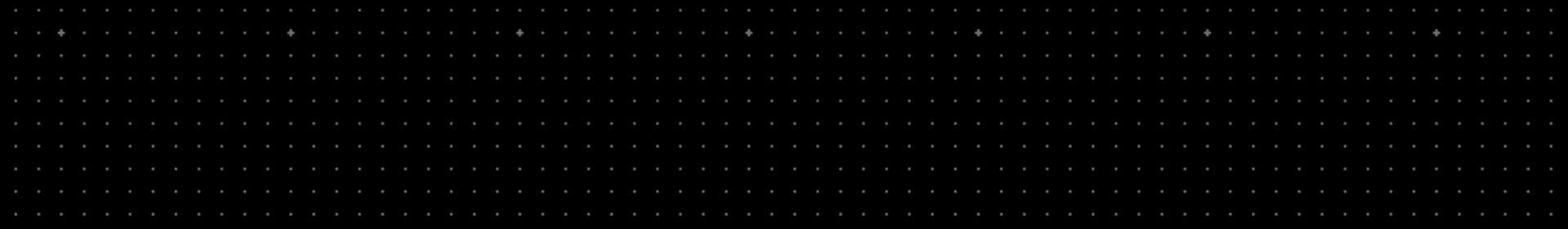
## 2016

Decentralized  
marketing

## 2017

Created plan to improve  
our Eloqua system.  
By March, we had a new  
focus and our plan had  
to be put to the side.

**Change  
is constant**



- Integration of Bloomberg Government into Bloomberg BNA
- Creative Redesign
- Formalize Campaign Process
- Client Product Migrations

# Integration of

**Bloomberg  
Government**



**Bloomberg  
BNA**

## Overview

- Midway through 2017 we learned that Bloomberg Government, an entity previously under our parent company, would fold into Bloomberg BNA.
- Since Bloomberg LP is also an Eloqua client, the migration of marketing technology sounded easy... at first.

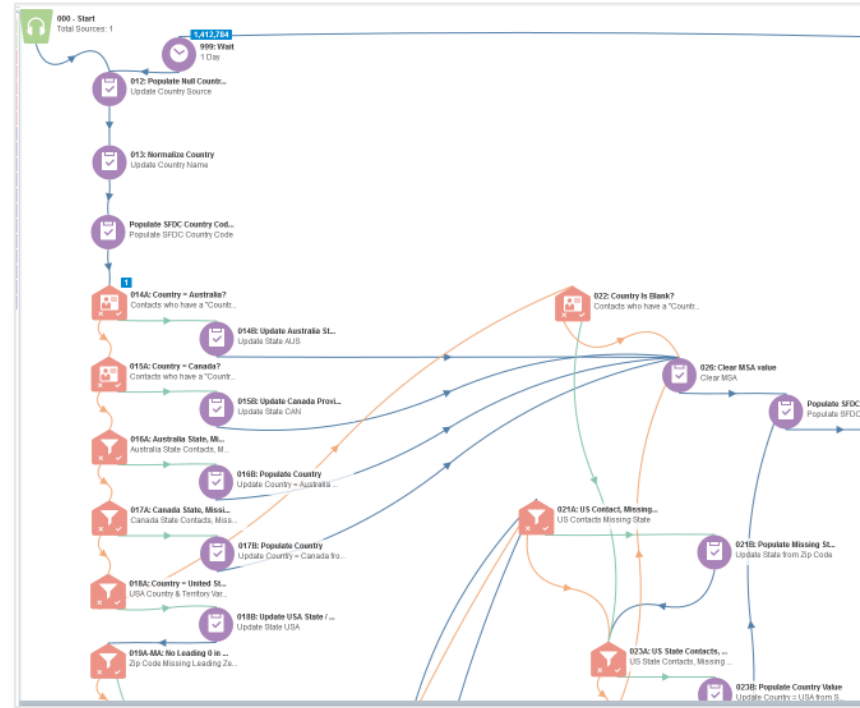


## Key Challenges

- Website on WordPress.
- LP uses proprietary CRM system with very tight information security rules.
- Different sales model.
- Email campaigns tended to be driven by list based selection rather than dynamic segments from Eloqua data.
- The migration was scheduled to complete by year end 2017, typically a rather slow time
  - Current events proved otherwise.
- Initial focus was on data hygiene and contact management
  - That was actually quite simple compared to ensuring the successful transfer of forms and website assets.

## Smartest Thing We Did

- Brought in a qualified Eloqua partner. They helped sort out the tasks and we were able to farm out the more complex items to them.
- Robust contact washing machine. This allowed us to introduce the Bloomberg Government data without reinventing all of our processes.



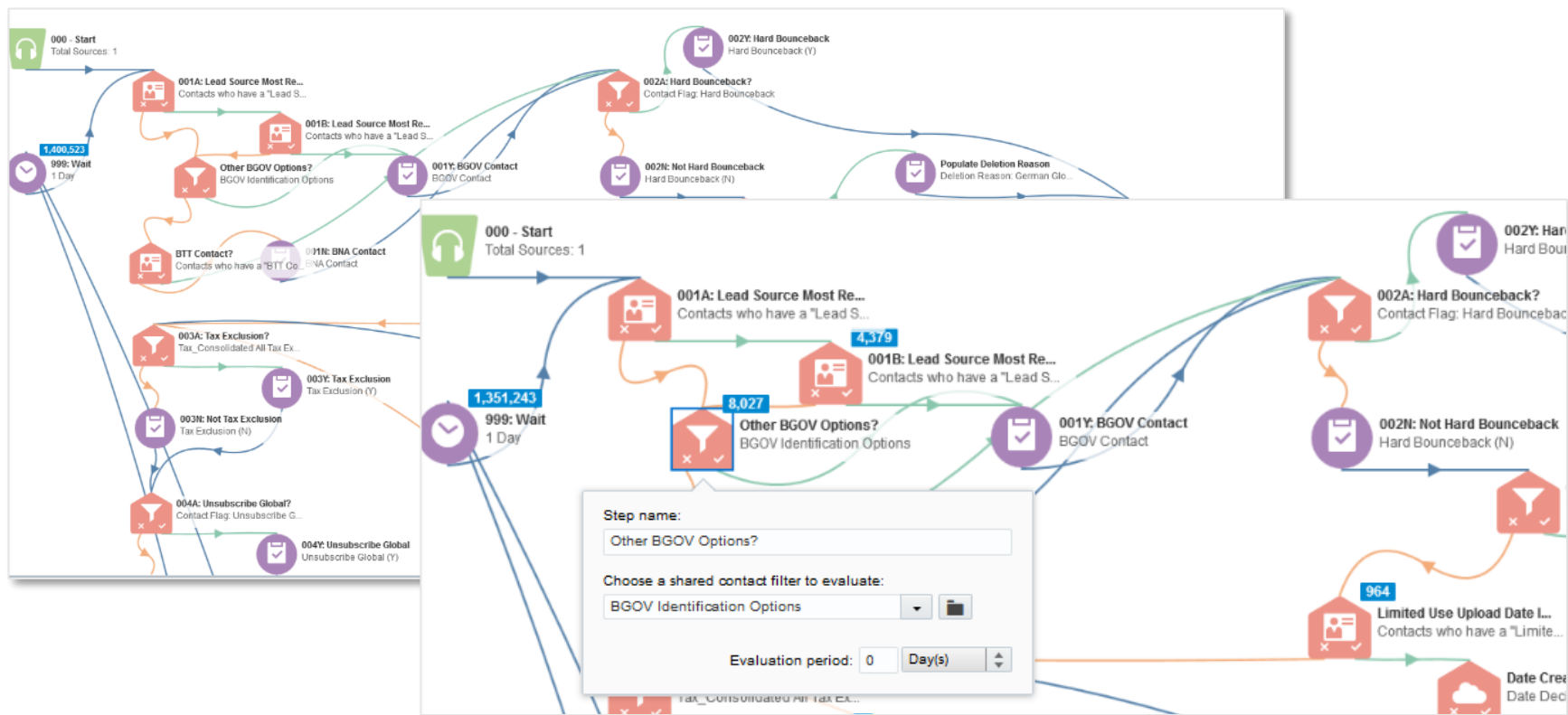
# Integration of Bloomberg Government into Bloomberg BNA

Bloomberg  
Law

Bloomberg  
Tax

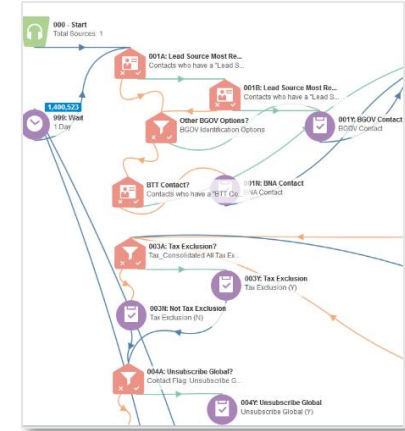
Bloomberg  
Government

Bloomberg  
Environment

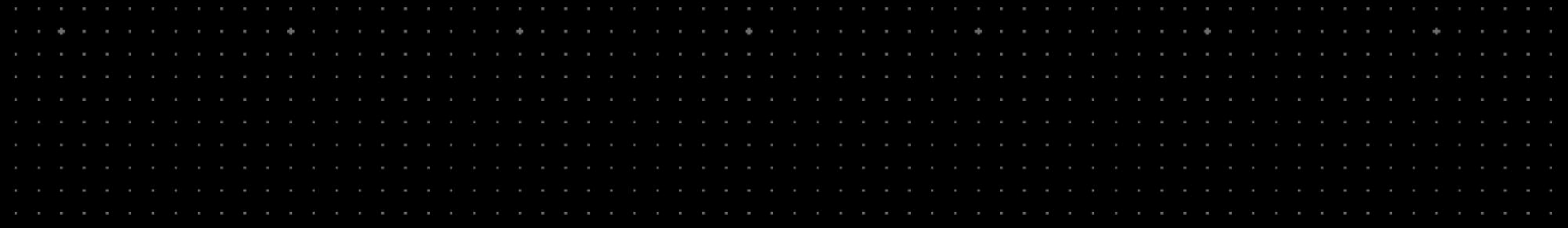


## What We Learned

- Product migrations are like mini deployments rather than a simple import of contacts and forms.
- The temptation is to simply move assets and contacts from A to B, but you actually need to address the business needs first.
- Pretend as if there was no automation and start there.
- Leverage the experience and expertise of your partner to help figure what to do.
- Get stakeholders to be comfortable with the idea of a staggered roll out rather than a formal structured pilot.



# Creative redesign



## Overview

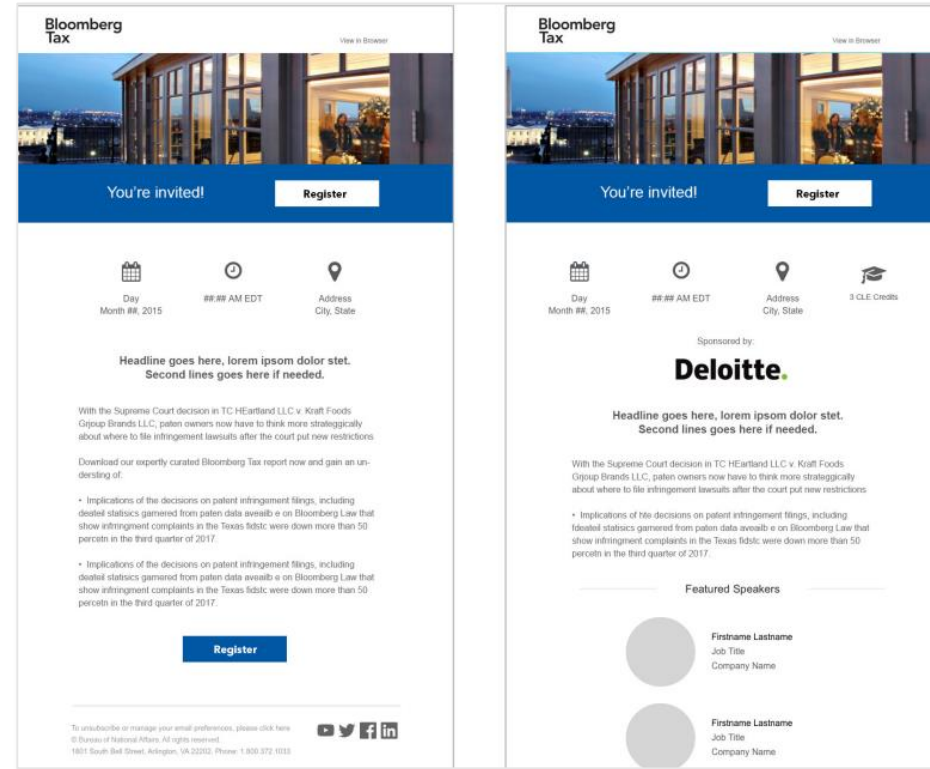
- **Early 2017**, a revamp of the look and feel of our main marketing website and digital assets was planned.
- **Mid 2017**, we found out we needed to support Bloomberg Government web operations but still maintain their separate site.
- **Fall of 2017**, the decision was made to focus on individual brand building for the four main products and start to decrease the use of Bloomberg BNA as a parent brand.

## Key Challenges

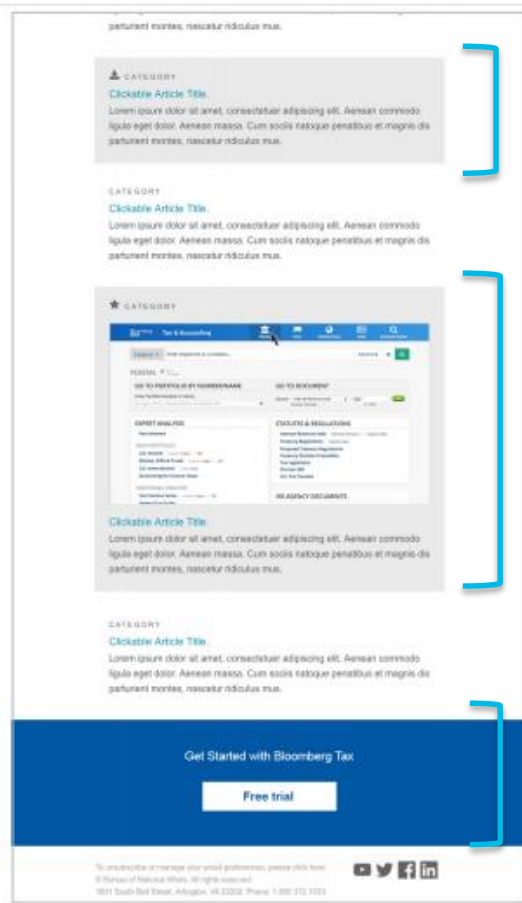
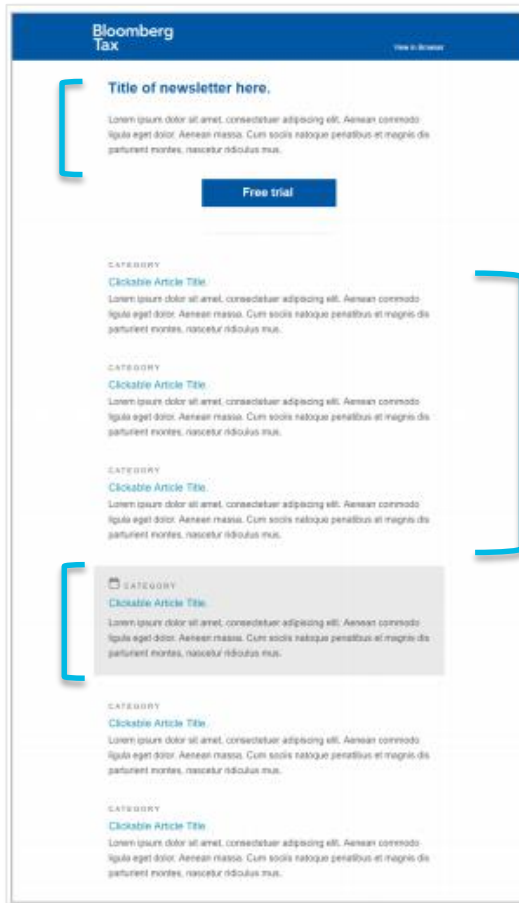
- Marketing Managers are used to a very customized approach for all aspects of their campaign.
- As we grew, we knew we needed to move towards a more templated approach but didn't want them to lose the customization.

## Smartest Thing We Did

- Created templates for emails and landing pages that were modular and allowed managers to have control of the design but stay within brand.
- Explain benefits of templates to our stakeholders and use test results to validate design decisions.





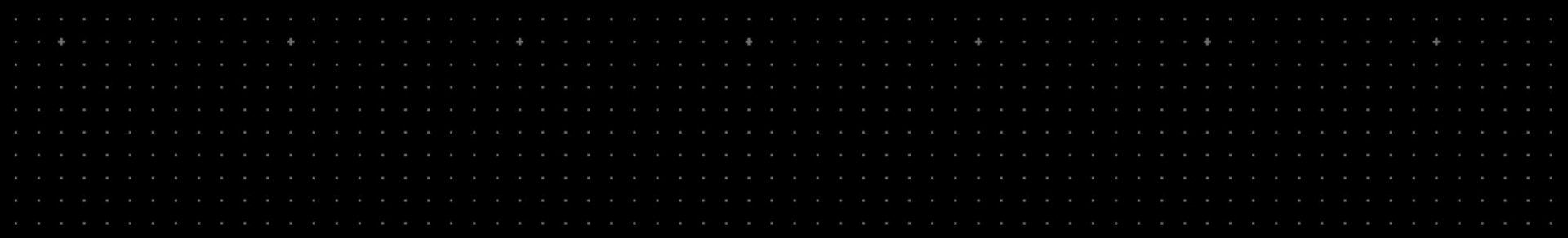


## What We Learned

- Get buy-in with a small group. Consensus gained early in smaller groups and over-communication saves time later.
- Roll out template-by-template where possible to only make mistakes once and minimize re-work as you adjust.

The image displays three overlapping screenshots of the Bloomberg Law website, illustrating a redesign process. The topmost screenshot is a 'Submission complete' confirmation page for Bloomberg Environment, featuring a green header and a 'Webinar' icon. The middle screenshot is a 'Download the complete free report' page for Bloomberg Law, with a teal header and a 'Download' button. The bottom screenshot is a registration page for Bloomberg Tax, featuring a city skyline header, a 'You're invited' banner, and a 'Register' button. The registration form includes fields for First Name, Last Name, Business Email, Job Title, Sector, and Role, along with a 'SUBMIT' button. The text on the registration page mentions a discussion on preventing the artificial avoidance of permanent establishment status, scheduled for November 3, 2017, from 2:00 PM to 3:00 PM. It also mentions a 3 CLE Credits and a 'COMPLETE FORM' link.

**Formalize  
campaign  
requests**



## Overview

- There were two different systems for Marketing Managers to enter campaign requests and nothing to tie them all together.
- Needed to create one portal for Marketing Managers to submit a request within Corporate Marketing Team.

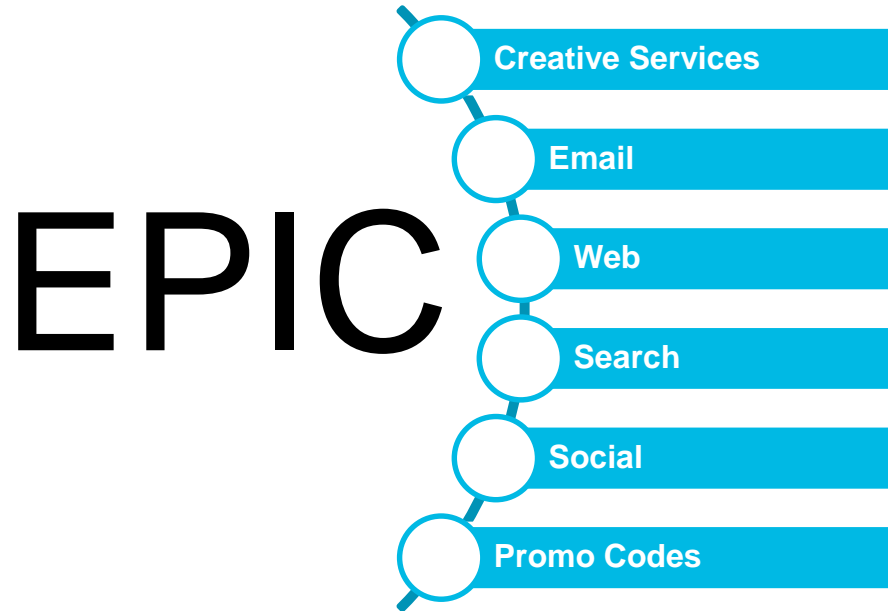
### Key Challenges

- Support five different business units with different needs and leadership. Trying to find one agreed upon approach takes time.
- Piecemeal requests were submitted and communicated back and forth via email to receive missing pieces.
- There was no insight into the status of requests when items were ready to move from the Creative team to the Eloqua team.

## Smartest Thing We Did

- Made the process as linear and transparent as possible.
- Repurposed existing technology (JIRA) that was nimble that could streamline and track efforts.

The screenshot displays a JIRA form for submitting campaign requests. On the left is a sidebar with navigation links: All, Creative Services, Eloqua Marketing (highlighted), General Help, Marketing Epic, Search & Social, Training & Access, Web Marketing, and Under Construction. The main content area has a search bar at the top and a list of request types below it: 'Request 1-2 Emails', 'Request 3-5+ Emails', 'Eloqua Landing Page' (two entries), 'Segment Pull', and 'Embedded Eloqua Form'. A modal form is open over the 'Request 1-2 Emails' item. This modal contains the following fields and options: 'Project Name' (text input), 'Campaign Type' (dropdown menu with 'None' selected), 'Requested Date for First Draft(s)' (calendar icon), 'Email Request Checklist (optional)' with checkboxes for 'Final Copy', 'Hyperlinks with promo codes (if applicable)', and 'All lists', 'Eloqua Uploaded Shared List Name (optional)' (text input), and 'Eloqua Segment Pickup Name (optional)' (text input).



An Epic in JIRA serves as an over-arching umbrella that links Corporate Marketing requests and assets to one central campaign.

## What We Learned

- All processes and approaches are organic. Keep improving.
- Stabilizing the day to day operations allows us to focus on other initiatives.

The screenshot shows a JIRA Service Desk form for formalizing campaign requests. The form includes several sections:

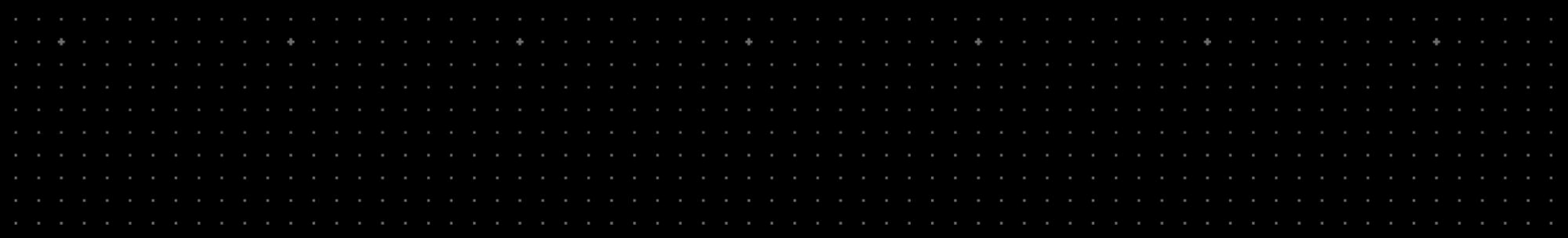
- Email 1: Send Date/Time**: A text input field with a calendar icon.
- Email 1: Subject Line 1**: A text input field.
- Pre-Header Text 1 (optional)**: A text input field.
- Email 1: Offer Type**: A dropdown menu with "None" selected.
- Email Template 1 (optional)**: A dropdown menu with "BGOV Event Invite" selected. The list of templates includes: None, BGOV Content Plus, BGOV Event Confirmation, BGOV Event Invite, BGOV Newsletter Template 1, BGOV Newsletter Template 2, and BGOV Webinar Invite.
- Attachment(s) (optional)**: A dashed box containing a "Drag and drop files, paste screenshots, or browse" instruction.
- Landing Page Template (optional)**: A dropdown menu with "None" selected. The list of templates includes: None, Whitepaper, Image, and Whitepaper, No Image.

The form is titled "JIRA Service Desk (3)".

You can find visuals of each template here:  
<https://confluence.bna.com/display/OMD/Resource+Library>



# Client product migrations



## Overview

Multiple messages around key initiatives to communicate simultaneously.

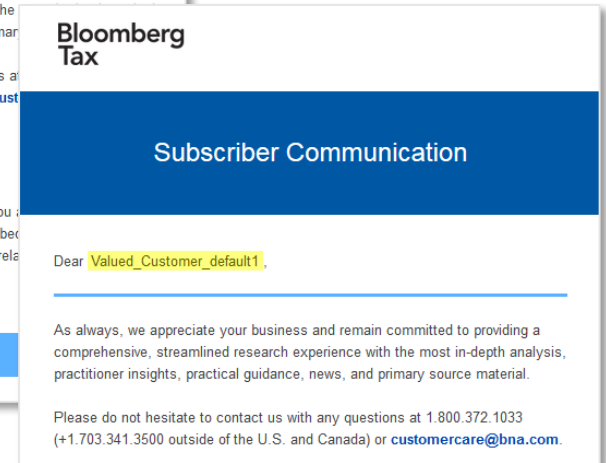
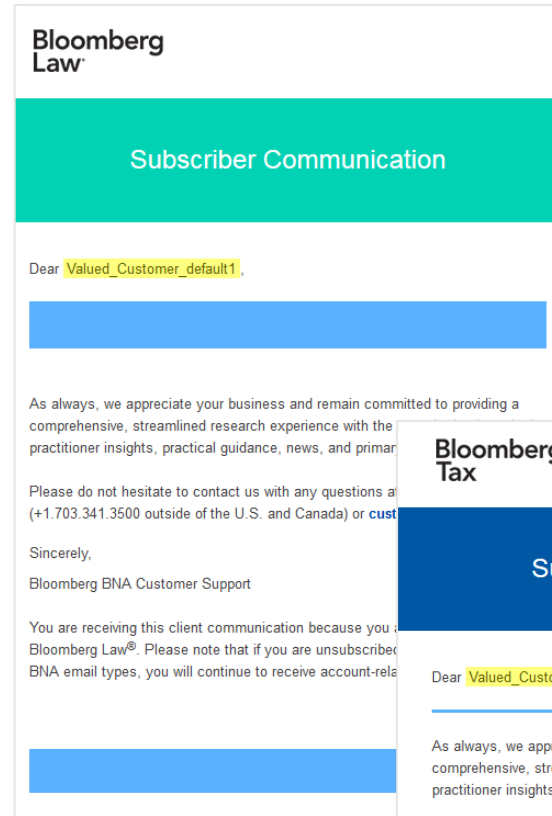
- New interface and ways to interact with content.
- Platform migration to centralized product.
- Shift to digital asset delivery/print retirement.

## Key Challenges

- Customers have a variety of offerings that could span multiple products. Needed to balance generic messaging with critical information.
- The restructuring went across every business unit and involved many senior leaders with different approaches.
- Our Eloqua database was designed as a Marketing tool and did not contain all of our contacts in the system. To get all subscriber data for each communication, a manual list upload was needed.

## Smartest Thing We Did

- Took a step back in the beginning to brainstorm how to make this scalable.
- Use of dynamic content and CDOs to cut down email creation from **72 to 7 per month.**

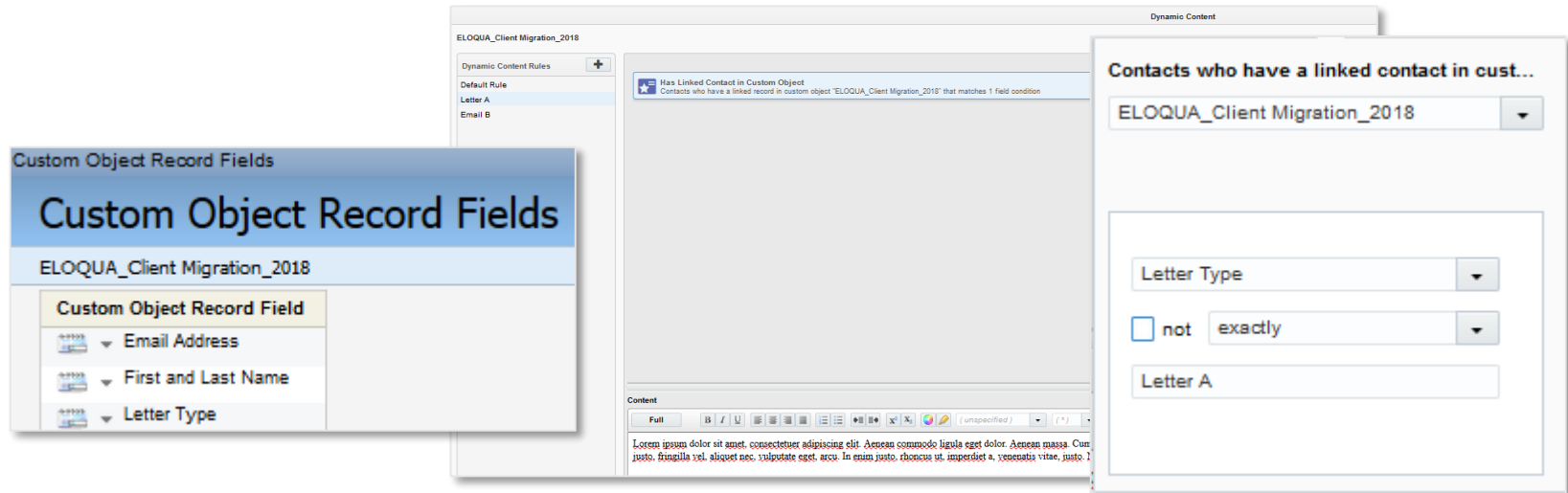


## What are Custom Data Objects?

- A container that stores data that you don't want in your contact field but can be used in your campaign.

## What is Dynamic Content?

- Uses data (in this case CDO data) to determine the output of the content.



Bloomberg  
Law

## Subscriber Communication

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Sincerely,



Bloomberg  
Law

## Subscriber Communication

Dear Lindsay,

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, aliquet nec, vulputate eget, arcu. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis eu pede mollis pretium. Integer tincidunt.

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Sincerely,

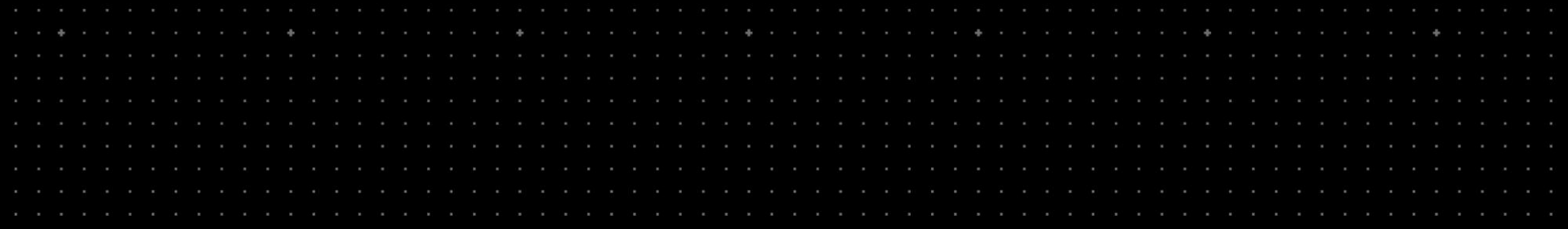
The screenshot displays the ELOQUA Client Migration\_2018 interface. On the left, a sidebar titled "Custom Object Record Fields" lists fields for ELOQUA\_Client Migration\_2018: Email Address, First and Last Name, Letter Type, Old Product Area, New Product Name, Account Name, Expiration Date, and Closed. The main area, titled "Dynamic Content", shows a rule "Has Linked Contact in Custom Object" with the condition "Contacts who have a linked record in custom object 'ELOQUA\_Client Migration\_2018' that matches 1 field condition". A tooltip for this rule shows a dropdown for "ELOQUA\_Client Migration\_2018", a "Letter Type" dropdown, a checkbox for "not" and a dropdown for "exactly", and a text input field containing "Letter B". Below the rule, the "Content" section shows a text editor with a "Full" button and various formatting options. The text in the editor is "Lorem ipsum dolor Legal\_Migrations\_Old\_Product\_Area1 sit amet, c voluptua. At vero eos et accusam et Legal\_Migrations\_New\_Product\_Name1 justo duo dolores et ea rebum. Stet clita k amet. Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dol".

## What We Learned

- Leverage automation and invest time now to test options that will pay off later.
- Standardize but refine as you go along the way.
- Identify where a centralized model can support consistency and where product-specific tweaks are appropriate.



# Key Takeaways



## Constant focus on data management

- Identify key components of segmentation needs then build them
- A contact washing machine is nothing more than series of look up tables and update rules all connected by a program canvas
- Once the initial program is set, you can add modules for new business units

## Standardization enables flexibility

- Create templates for emails and landing pages that are modular.
- Use CDOs and dynamic content to minimize the number of emails to be created.
- Repurpose tools like JIRA to create one portal for all campaign requests.

1

Don't get  
**distracted**

2

There is no  
master plan,  
there is a  
**road map.**

3

**Leverage the  
technology**  
to efficient  
execution of  
solid strategy.

# Questions?

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