# To Migrate, or not to migrate?
This is the question!

We get it

You are running your marketing operations from your Oracle Eloqua instance, and you are all happy and fuzzy about it.
It is your little baby, all wonderfully configured, customized to your liking, and working well. Basically, you know all the ins and the outs, and you're finally getting used to that login and password, when suddenly management announce:

"It's time to migrate to a new instance!".
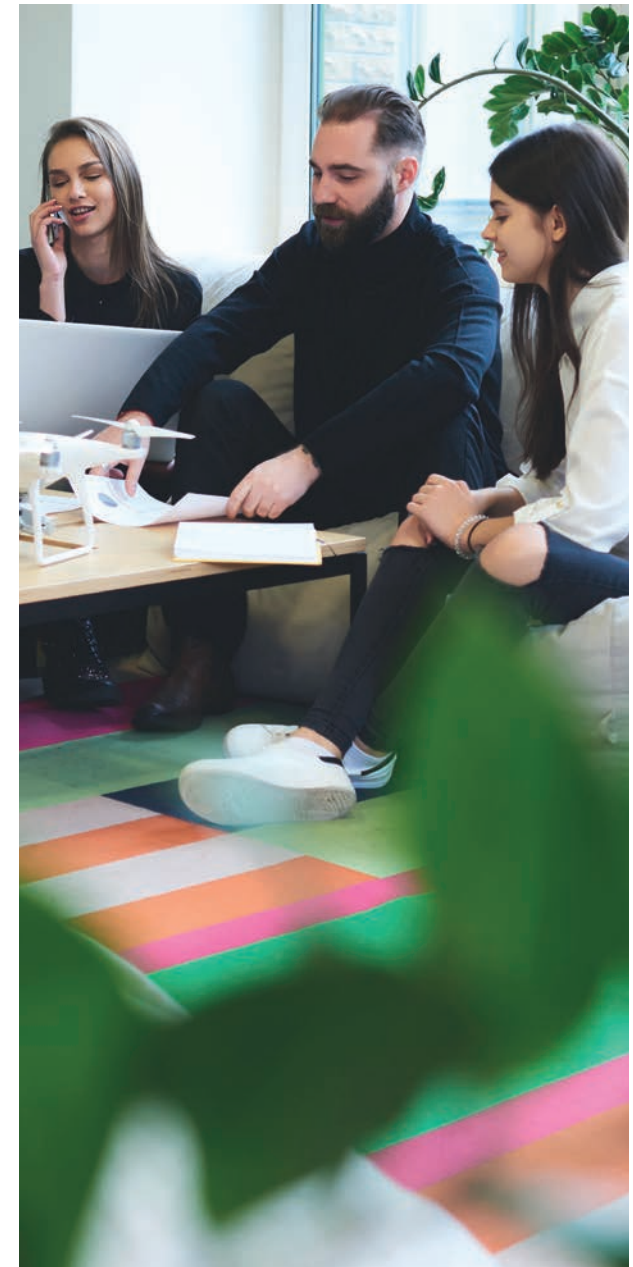
Relax

Early adopters of Oracle Eloqua may have experienced their first migration during the E9>E10 upgrade, the company I worked for at the time was one of them. So, helping customers with migration projects sparks up some memories from those times, like how we saw it as a nuisance too. However, the benefits that came from using a fresh system, with new technology, and a clean set of assets, made all the difference when it came to adoption, and improved usage of the platform.

Humans are creatures of habit and don't like change, but change is the only constant! Consequently, with so many valid reasons to get a new instance, even if you think this can't happen to you, read further, because it can. Relax, this is not a painful exercise – you will see!

First of all, do you need to migrate?

Indicators for a new Eloqua instance

Company mergers, acquisitions, etc. – organizational restructure with integration of multiple Oracle Eloqua contracts

Multiple instances across Oracle Eloqua landscape – benefit from single governance, contact policy, etc.

Data Storage Regulation Compliance (e.g. data needs to be in Europe and your POD is not located there)

Long term Oracle Eloqua usage - fresh start beneficial

Upgrade Proof of Concept (PoC) to fully functional environment.

If any of the indicators above are highlighted in your company, then you are likely in need of a migration!

If you prefer to talk to us please contact your Account Manager, or Team Lead at Engagement Factory.

8 Super tips for a successful migration

So, you need to migrate a running instance, full of content that you don't want to lose! But, how do you ensure this transition is successful, and a positive experience for everyone involved?

Here are 8 of the most helpful tips based on my previous experience of helping customers to migrate successfully:

The project team

- Technical & Business Profiles represented with strong knowledge of Oracle Eloqua within organization (current setup; future requirements)

- Full project duration resource availability, may include post project work

- Decision-making power/authority-to-act and/or access to people in other areas of your company, should the need arise

- Project manager on client and agency side, to ensure role alignment and short communication lines. This helps to ensure project will run smoothly, to schedule, and both sides can action items to make the transition progress adequately.

Who are you,
and what do you do?

Identify key steps for the migration and assign Roles and Responsibilities to each resource – DO THIS EARLY ON!

In some cases, internal processes can take time and having key people briefed up front will help reduce these delays. Knowing exactly who can change the DNS, or who decides what information to migrate for a specific business unit can save valuable project time. However, effectiveness is dependent on keeping them informed on project timing and knowing when you need their help.

I need you first

In order for these types of projects to progress, you need to achieve certain key milestones. Therefore, the first thing you need to do is identify dependency items.

For example, to send emails you must meet two requirements in separate areas: Implementation of the correct DNS settings on your IT side, and validation of your Oracle Eloqua B&D workbooks, to ensure correct configuration on the Oracle side.

Chat, chat, share ... repeat!

It is vital to communicate with your team frequently and clearly. The project team should meet weekly to verify progress, identify bottlenecks, and proactively find ways to approach any challenge that could come up. The periodic meetings serve as a touch point to inform, educate, and quickly solve matters that might take longer if left to email exchanges. Some meetings will take you an hour, or more; but you may have weeks with no changes, or everything is just running as it should, and you are finished in 15 minutes.

Make sure you have minutes of each meeting and share them with the Project team, so that there's clarity on all agreements made at each end. Make sure that information passes on to anyone else in the organization affected by the project, so they are also aware of the decisions made in the Project Team and can monitor planning and actions.
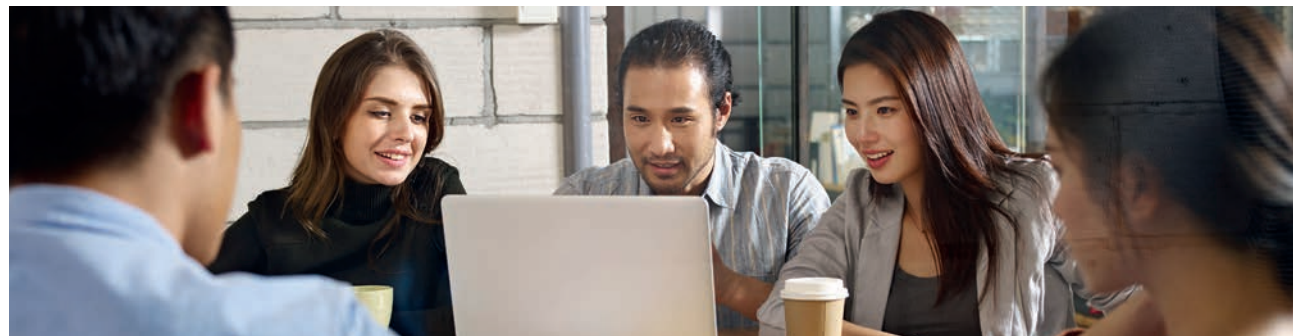
Hey! What about us?

Don't forget the Marketing team! They are the users of the platform, so make sure they are not forgotten, or worse, informed at the end. They must understand what will happen during the migration process. Basically, they need to know what to expect, and when they will get access to the new instance. This vital step can avoid huge frustration when users start to use the new system and prepare them to test the new instance performs as required, another important part of the project plan.

Let's cook –
gently warm the IP

The key here is planning and preparing everyone! After all, IP Warming means that for a certain period, communications out of the platform are extremely scrutinized. Content should be highly engaging, required data segments must be clean and delivery should go out in small batches. Bounce backs and unsubscribes require close monitoring, and action taken.

By now the pressure is on to start sending "normal" campaigns as soon as possible. However, patience is a virtue and a good IP Warming process can avoid future problems. To ensure everyone aligns with this vision, you must convey all the above information to both the project, and marketing teams.

Be pragmatic, sometimes less is more!!

Do you really need to migrate all emails since the beginning of time, or is just last year enough?

- Focus on very complex, and/or highly successful assets

- Transfer all templates, they form the basis of your next campaigns

- Make sure any integrated items (e.g. external forms, campaigns that trigger CRM processes, etc.) are listed for migration, and are given priority to avoid loss of leads while transitioning;

- Ignore emails using old templates and branding – this saves valuable project time and resources. (If you really want to save the messaging, send yourself a test.)

Opportunity for improvement

In some cases, migrating "as is" is the right approach and will help avoid a more complex project. However, some little changes and improvements may be possible along the way! For example, you could easily fix a field incorrectly mapped to your CRM to improve your lead quality. At the very least, make sure you have a list of any items not quite functioning as they should, and create a plan to improve them post migration.

To conclude, I share some words that helped my customers and I through many of these projects:

"Keep calm and migrate on!"

Remember

Remember, the migration period will eventually come to pass, and the rewards of your hard work will show. Of course, the biggest reward is that your new instance will be sparkling clean and quickly flowing with lead generating campaigns.

Please feel free to contact me to discuss migration projects, regardless of where you are at, we can help you migrate successfully and get you up and running quickly.

As the largest Oracle Eloqua partner in EMEA, we have over 50 trained Eloqua consultants dedicated to helping customers to be successful with Modern Marketing. We enable organisations to realise the potential of marketing automation by delivering the full mix of technical expertise, digital marketing, project management, creative design and content marketing skills. Our main objectives are to improve and consolidate content and lead management, create valuable campaigns with compelling stories, and optimise demand generation to drive measurable revenue performance.