

Ability to use Segments in Insight

It would be great if Insight would support segments and filters while creating custom reports. Insight currently does not allow users to create custom reports using Eloqua segments. There is a 'Segments' option available Attribute on Insight, but using that in Insight does not create accurate results and instead causes confusion and wrong expectations for clients. To highlight this, here is how my client would like to use this option and how it can help them and other Eloqua clients.

Background:

Organization's sales team wants to follow-up on weekly contact and prospect activity. For that purpose, we have created the segment with these filters - clicked any email OR opened any email OR visited any website OR visited any landing pages OR submitted any form in last 7 days. Now, we want to analyze this segment with other attributes like center ID (We have 100 + franchises and Center ID is associate with each franchise) and lead scoring model through making custom reports. These weekly reports reach out to sales every Monday morning to see who and what numbers of leads did any kind of above-mentioned activity to follow up accordingly. These reports are very important for sales people who do not have excess to Eloqua, however, can receive the excel file automatically by means of subscription option.

Current workaround:

1. We are as of now following a manual and tedious method of creating a segment with all activities filters, lead scoring model and center ID (there are 100+ center ID's) every week. Then, export the heavy segment and manually sort them based on center ID and sent across to respective sales people every Monday morning. This week after week undertaking is exceptionally tedious and require lots of efforts to keep track of every report and sales team.
2. Moreover, there is one more work around is proposed- Create segment for each center ID and schedule for weekly export via import/export tab. Again, this requires heavy time consumption and efforts for such a large number of segments, also, this demands Eloqua access which sales user do not have. In addition to that, providing Eloqua access to sales people and educating them require extra time and efforts.

Proposed feature:

Include segments as a working Attribute in Insight. By allowing this, the customer would add the following attributes and metrics in Insight to create this report:

- Profile Score
- Engagement Score
- Center ID
- Email Address

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- First Name
- Last Name
- Title
- Company
- Phone
- Industry
- Type – (Customer/Prospect/Dormant)

These reports would then be scheduled to be sent to the Sales team on a weekly basis. This eliminates the need to manually run the 100 + segments manually, export to excel, and then email them separately to our 100 + sales team on a weekly basis. Also, reports are in excel format easily accessible by non-Eloqua users.

Thanks
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