

# Eloqua / Salesforce.com Integration Transition Sample Action Plan



**PEDOWITZ**  
GROUP



# Project Risks

| No. | Risk  | Owner | Mitigation Plan |
|-----|---|-------|-----------------|
| 1   | Missing Feb 2021 Deadline                                 |       |                 |
| 2   | Not enough resources to transition on marketing team      |       |                 |
| 3   | Not enough resources to transition on Salesforce.com team |       |                 |
| 4   | Code Freeze end of year in Salesforce.com                 |       |                 |
| 5   |   |       |                 |



# Project Tasks

| No. | Description  | Responsibility | Accountable | Consult | Inform |
|-----|--|----------------|-------------|---------|--------|
| 1   | Document Current Integration Design  |                |             |         |        |
| 2   | Determine which transition works best: <ul style="list-style-type: none"> <li>• Lift &amp; Shift</li> <li>• Include some enhancements</li> <li>• Completely re-design integration</li> </ul> |                |             |         |        |
| 3   | Identify current sync issues and prioritize what will be included in this transition project   |                |             |         |        |
| 4   | Understand what changes will be required from your SFDC team and start conversations around their sprint cycles and timelines  |                |             |         |        |
| 5   | Build your timeline  |                |             |         |        |
| 6   | Design Integration and associated SYSTEM programs  |                |             |         |        |



# Project Tasks cont.

| No. | Description  | Responsibility | Accountable | Consult | Inform |
|-----|--|----------------|-------------|---------|--------|
| 7   | Document all test use cases  |                |             |         |        |
| 8   | Build out integration Eloqua Prod → SFDC Sandbox                                 |                |             |         |        |
| 9   | Test Eloqua Prod → SFDC Sandbox  |                |             |         |        |
| 10  | Build out integration Eloqua Prod → SFDC Prod                                    |                |             |         |        |
| 11  | Test Eloqua Prod → SFDC Prod   |                |             |         |        |
| 12  | Enable Cloud App Integration while native integration is active for XX timeframe |                |             |         |        |
| 13  | Monitor both integrations  |                |             |         |        |
| 14  | Turn off Native Integration  |                |             |         |        |



# Change Management Plan

| No. | Task  | Owner | Audience |
|-----|---|-------|----------|
| 1   | Identify changes for Marketing users and develop communication plan |       |          |
| 2   | Identify changes for Sales users and develop communication plan     |       |          |
| 3   | Identify Training for Marketing users and develop required training |       |          |
| 4   | Identify Training for Sales users and develop required training     |       |          |
| 5   |   |       |          |



# Proposed Schedule

| Tasks   | SEP | OCT | NOV | DEC |
|---|-----|-----|-----|-----|
| Document Current Integration & Decide Transition Plan |     |     |     |     |
| Brief in user stories with Salesforce.com team        |     |     |     |     |
| Design Integration Programs & Test Cases              |     |     |     |     |
| Build and Test Eloqua Prod → SFDC Sandbox             |     |     |     |     |
| Build and Test Eloqua Prod → SFDC Prod                |     |     |     |     |
| Enable Cloud App Integration & Monitor                |     |     |     |     |
| Training and Change Communications                    |     |     |     |     |
| Switch off Native Integration                         |     |     |     |     |
|   |     |     |     |     |



# Thank you!

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