Understanding Salesforce Campaigns for Marketing ROI

Third Sector IT

Housekeeping

- Fire Alarm procedure
- Facilities
- Audio and Video (loud and large?)
- Questions during and after
- Workshop based approach
- Course length
- Feedback forms

Third Sector IT

About Us

- We provide Salesforce implementation, training and support
- Seats on our training courses are available individually, as part or a support contract, or as a bulk discount

Third Sector IT

Two Salesforce Orgs

- Log into the Training Org
  - Shows TrainingUser on upper right
- Optionally, log into your Own Sandbox as well
  - Use a different web browser! Firefox, Chrome, IE, etc.
  - Shows your name in upper right (and black box if Sandbox)
  - If sandbox, you are safe. If production org, don't break anything – we aren't responsible!

Salesforce Permissions

Salesforce Requirements for Campaigns

- Marketing User checked in User record
  - Only these users can create, edit and delete campaigns, and configure Advanced Campaign Setup
- Profile Level: Import Leads is checked and Campaign object set to Edit
  - Can import leads and run Campaign Import Wizard

Third Sector IT

Introduction

- Please introduce yourself
  - Name / Organisation
  - Actively using Salesforce Campaigns?
  - Goal for today?

Third Sector IT

Course Goals

- Understand Salesforce Campaigns as per flow of Revenue
- Understand how Salesforce Campaigns connect to Opportunities
- Understand how Salesforce Campaigns connect to Campaign Members, which in turn connect to Leads and Contacts
- Understand Campaign Influence

Third Sector IT

Applicability

- 98% of what you learn today will be relevant to your unique customisations
- Non-Profits: Opportunities = Donations/Grants
- If you can drive a car in England, you can probably handle driving in France

Third Sector IT

Definitions

- Marketing vs. Sales
  - Marketing is conducted en masse, without knowing either the audience and/or the end goal
    - Bus Ad, Radio Ad, Email Blast, Tweet, Brochure, Magazine Ad, Telethon, Free Event, Conference
  - Sales usually involves a specific person with a specific goal
    - Sell Bob 20 Widgets
    - Get Sally to donate £100

Third Sector IT

Understanding Revenue

- Think of Revenue as Water, flowing into and out of your organisation
- You want more flowing in than out
- Think of your organisation like a Damn – you want a large amount of water at hand

Third Sector IT

Outgoing Spending

- Possible to control your Outgoings
- Limited to:
  - Plugging leaks (wasteful spending)
  - Reducing vital spending (hurts your organisation)
- Can’t reduce Outgoing spending indefinitely – eventually can’t cut anymore

Third Sector IT

Incoming Revenue

- No limit on Incoming Revenue
- You might as well get as much of it as you can
- Ultimately based on decisions of people outside your organisation
- You want to influence their decisions
- You want to understand what efforts result in a positive decision

Third Sector IT

Visualisation of Flow

(drawn on whiteboard)

Third
Sector IT

Marketing Budgets

- Your marketing budget is made up of time and money, and is allocated to communication with individuals to influence a positive outcome
- Your marketing budget is limited, so your goal is to get the most out of it
- Generally, people allocate a small amount to understand the ROI of their marketing

Third Sector IT

Applying this to Salesforce

- Leads – people we are having conversations with en masse, in order they might consider our positive outcome. Think of as a Business Card.
- Opportunity – the positive outcome we are trying to influence. Think of as an Invoice.
  - Closed Won, Closed Lost, Open
- Contacts – people we are having direct conversations with (and may have moved from Marketing to Sales)

Third Sector IT

Salesforce Campaigns

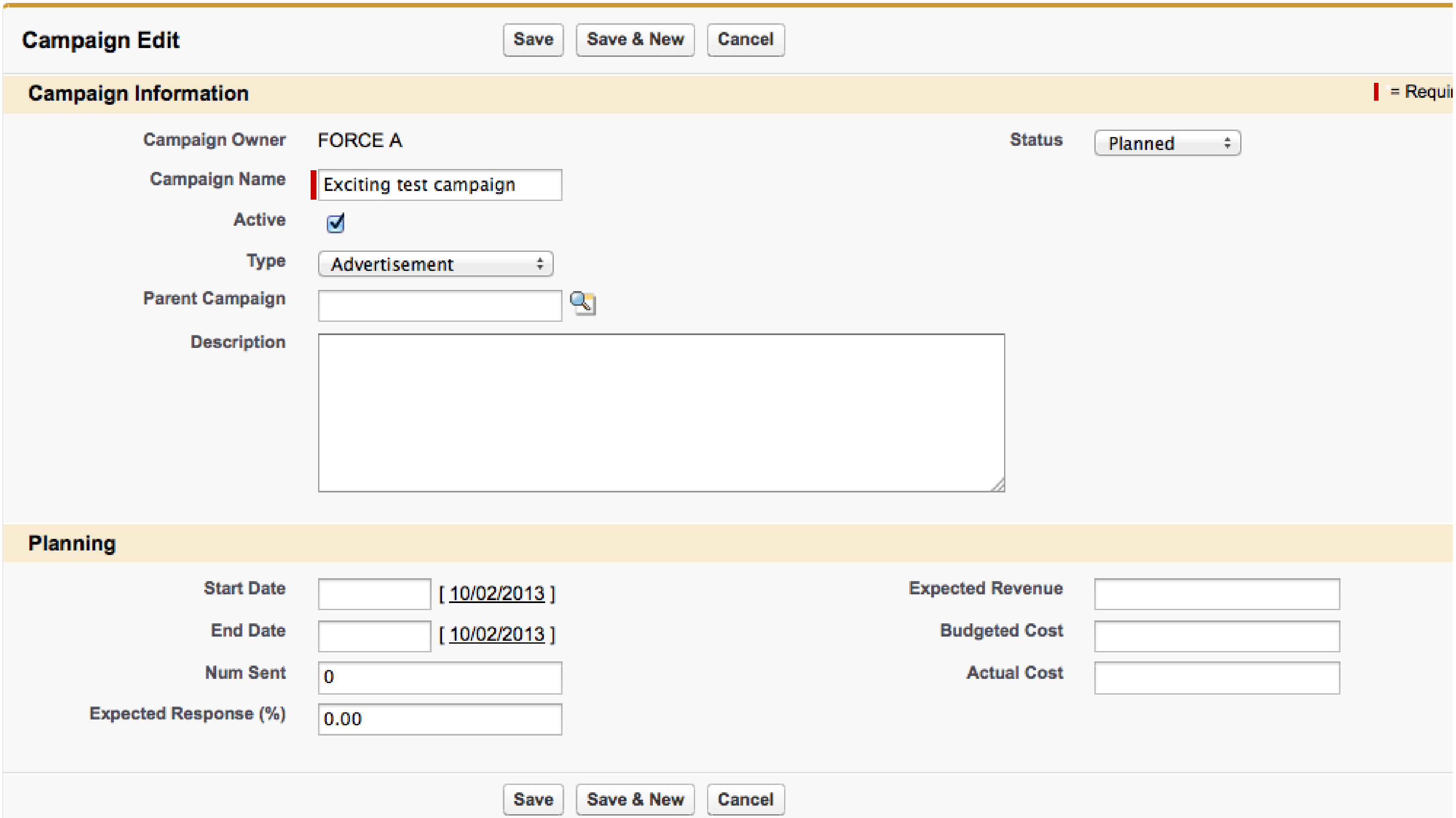
- Represents any marketing activity en-masse
- Does not include individual meetings, phone calls, or one-to-one emails
- Examples from the class?

Third Sector IT

Campaign Creation

- Create a new Campaign
  - Two important fields, Name and Active
  - Type picklist can be specific to your organisation
  - Be aware of Parent Campaign
  - Notice Budgeted and Actual Cost, and Expected Revenue. Where is the Actual Revenue field?

Third Sector IT



Campaign Edit

Save | Save & New | Cancel

Campaign Information

= Requi

Campaign Owner	FORCE A
Campaign Name	Exciting test campaign
Active	☑
Type	Advertisement
Parent Campaign	
Description	
Status	Planned

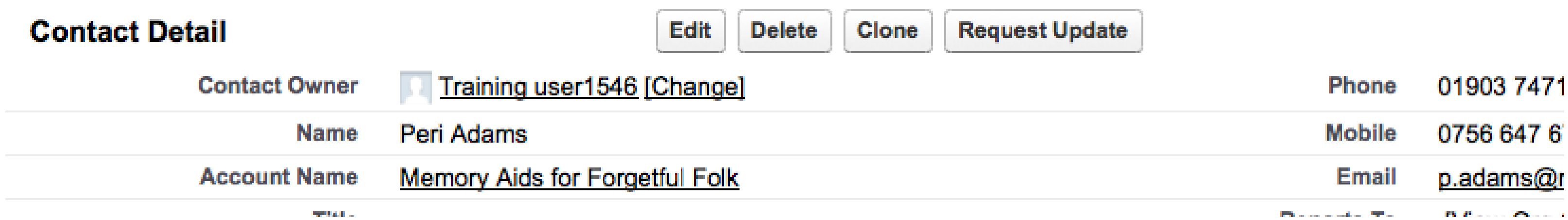
Planning

Start Date	[10/02/2013]	Expected Revenue	
End Date	[10/02/2013]	Budgeted Cost	
Num Sent	0	Actual Cost	
Expected Response (%)	0.00		

Save | Save & New | Cancel

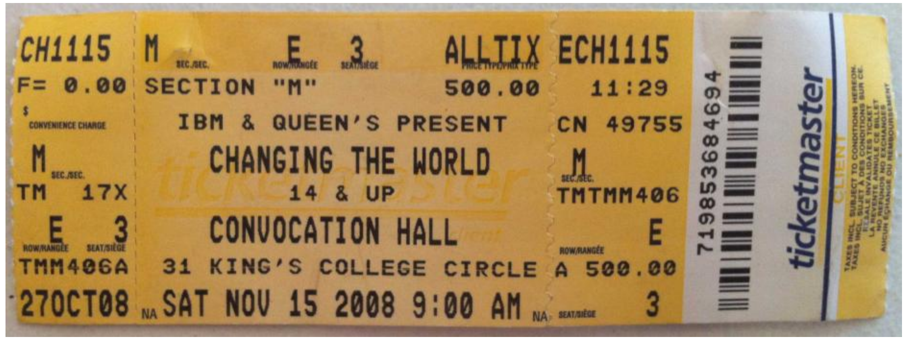
Trick Questions

- You can list the Account name on a Contact record



- So can you list the Campaign name on a Lead? Or the Lead name on the Campaign?
- And, if the lead attended an event, where do you record that attendance? On the Lead or Campaign?

Campaign Member



- Think of it like a Ticket
- An event can have multiple tickets and a person can also hold multiple tickets
- Info specific to that person AND event is on the ticket

Third Sector IT

Campaign Member

- Technically called a Junction Object
- Connects two other objects together, in this case, Campaigns on one side, and Leads/Contacts on the other
- Found in the related list on both Campaign and Leads/Contacts (you may have to add this to your home org page layout)

Third Sector IT

Creating Campaign Members

- From the Lead or Contact record page, click “Add to Campaign” in the Related List
- From the Campaign record page, click Manage Members, and the the relevant option.
  – For now, let’s Add Members - Search

Third Sector IT

Convert Lead to an Opportunity

- Convert a Lead
  - First, take a look at the Campaigns
  - Convert that Lead into an Account/Contact/Opportunity
  - Review the Contact's Campaigns
  - Review the Opportunity's Primary Campaign

Third Sector IT

Create Opportunity from Contact

- Create an Opportunity from within a Contact page
  - Make sure the Contact has at least one Campaign
  - Click “New Opportunity” on the Contact page
  - Notice the Primary Opportunity is pre-filled

Create Opportunity

- Create an Opportunity
- Fill in the Primary Opportunity Field as well as required fields

Quick Review

- Campaigns are connected to Leads and Contacts through Campaign Members
- Leads keep their Campaigns when converted into a Contact
- Opportunities are prepopulated with Primary Campaign info if possible when created from the Contact record, or from a Lead conversion

Campaign Roll-Up Summaries

- Remember the Campaign fields Expected Revenue? What about Actual Revenue?
- Campaign Statistics include this information as Value and Value Won
- Combined with Budgeted/Actual Cost, you can determine Campaign ROI

Third Sector IT

Campaign Influence

- Requires Contact Roles connecting Contact to Opportunity
- Shows every Campaign that Contacts associated with an Opportunity have been engaged with
- Reports can also show which Campaigns influenced which Opportunities

Third Sector IT

Additional Info

Third
Sector IT

Adding People to a Campaign

- Already covered
  - Manually, per Lead/Contact
  - Through the Campaign
- Creating a Contact or Lead View
- Creating a Contact or Lead Report

Integrating with your Website

- Web-to-Lead forms on your website allow ‘Contact Us’ forms that populate Leads
- Campaign field can be populated through hidden fields in the Web-to-Lead form

Third Sector IT

Duplicate Leads

- Duplicate Leads checked and matched through “Find Duplicates” on Lead record
- Checks user specified values in database for matching data

Thank You!

- Please fill in the course feedback survey
- Stick around to ask any follow up questions

Third Sector IT