

Understanding Salesforce Campaigns for Marketing ROI

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Housekeeping

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

About Us

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

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

Introduction

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

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

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

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

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 Dam – you want a large amount of water at hand



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

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

Visualisation of Flow

(drawn on whiteboard)

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

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)

Salesforce Campaigns

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


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?

Campaign Edit

Campaign Information

| = Required


Campaign Owner	FORCE A	Status	<input type="text" value="Planned"/>
Campaign Name	<input type="text" value="Exciting test campaign"/>		
Active	<input checked="" type="checkbox"/>		
Type	<input type="text" value="Advertisement"/>		
Parent Campaign	<input type="text"/> 		
Description	<input type="text"/>		

Planning

Start Date	<input type="text" value="10/02/2013"/> [10/02/2013]	Expected Revenue	<input type="text"/>
End Date	<input type="text" value="10/02/2013"/> [10/02/2013]	Budgeted Cost	<input type="text"/>
Num Sent	<input type="text" value="0"/>	Actual Cost	<input type="text"/>
Expected Response (%)	<input type="text" value="0.00"/>		

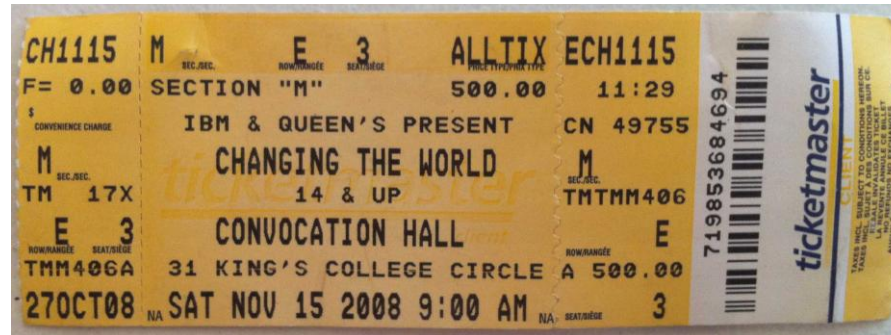
Trick Questions

- You can list the Account name on a Contact record

Contact Detail		Edit	Delete	Clone	Request Update
Contact Owner	 Training user1546 [Change]	Phone	01903 7471		
Name	Peri Adams	Mobile	0756 647 6		
Account Name	Memory Aids for Forgetful Folk	Email	p.adams@r		

- 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

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)

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

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

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

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

Additional Info

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

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